How to Schedule with Expert

This document outlines how to schedule for the Pre Doc Clinics using the expert.

**Topics Covered:**
- Scheduling a Planned Appointment
- Scheduling an Emergency Appointment
- Scheduling a Screening Appointment

**Scheduling a Planned Appointment:**
- Navigate to the Scheduler Module
- Click on the Rolodex icon
- Search for the patient and double click on the patient's name
- This will open the Family Appointments Window

- In the Family Appointments Window, all unscheduled planned appointments will list
- Select the appointment to be scheduled
- Click on Schedule with Expert
• The Appointment Expert Window will come up

• Confirm the Provider’s name, the patient’s name, clinic and appointment code is correct

• Click on Search

• 10 results come up, highlight the idea appointment

---

![Appointment Expert Window](image)

---

⚠️ NOTE: Because the Provider has filled out the Provider field, patient's name, appointment code and clinic from the Planned Appointment, the Expert will automatically will pull this into the corresponding fields
• Click on the Make Appointment button

• The appointment has been made in the clinic’s book
Scheduling an Emergency Appointment

- Navigate to the Scheduler Module
- Click on the Rolodex icon

- Search for the patient and double click on the patient’s name
- This will open the Family Appointments Window
• Verify that the patient does not have an existing Emergency Appointment
• Do not highlight any items
• Click on Schedule with Expert button

The Schedule Expert will come up
• Ensure that the patient’s name, provider, clinic and appointment code is entered
• Click on Search
NOTE: If nothing is populating after you have clicked search, make sure that the “Based on the Appt book” is unchecked AND make sure that the “Search on Available Chairs” button is on.

- Select the Appointment that will be scheduled by selecting the appointment
- Click on the “Make Appt” button
The appointment has been scheduled.

Scheduling a Patient Intake Appointment

- Navigate to the Scheduler Module
- Click on the Rolodex icon
• Search for the patient and double click on the patient’s name
• This will open the Family Appointments Window

• Verify that the patient does not already have a Screening Appointment
• Do not highlight any items
• Click on Schedule with Expert button
• The Schedule Expert Window will come up
• Ensure that the patient’s name, provider, clinic and the appointment code of PI (Patient Intake) is entered
• Click on Search

• Select the Appointment that will be scheduled by selecting the appointment
• Click on the “Make Appts…” button
• The appointment has been booked