How to Schedule with Expert

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

Topics Covered:
- Scheduling a Planned Appointment

Scheduling a Planned Appointment:
- Navigate to the Scheduler Module
- Click on the Rolodex icon
  
  ![Scheduler Module Image]

- Search for the patient and double click on the patient’s name
- This will open the Family Appointments Window
  
  ![Rolodex Select Patient Image]
• 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

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
- Select the Appointment of choice
- Click on the ‘Make Appts…” button

NOTE: If nothing is populating after you have clicked search, make sure that the “Based on Appt Book” is unchecked AND make sure that the “Search on Reserved Chairs” button is on.