

Office Appointments

Appointments can be easily added from Office Appointments or Patient Information.

- Office Appointments can be set up for all different types of Providers, Nursing, Rooms and Equipment.
- An E-Superbill is created for every Office Appointment and is viewable in Chart Central.
- Doctors and Locations can be defaulted for each user.

Schedule an Appointment

There are several ways to schedule an appointment.

Via Chart Central

- Main Menu > Chart Central > Off Appt (bottom button)
- Main Menu > Chart Central > Pat Info (bottom button) > Lookup Patient > Appointments (bottom button)

		My Triage	My Todo	My Doc	My Email	My Lab	My Order	My Diagnostic Imaging	My Therapy	My Referral	My Per Cal	My eRx Msg	
Pat Info	Off Appt	A/R Tasks	Walk in Purchases	Triage Options	Todo Options	Doc Options	Email Options	Lab Options	Diagnostic Imaging Options	Order Options	Script	»»	



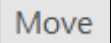


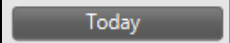
Via Appointments

- Main Menu > Appointments > Office Appointments

In the Office Appointments screen:

- **Loc:** Select Location(s) or All Locations, if applicable
- **Dr:** Select Doctor's Schedule
- **SelfPat:** Select Patient
 - Search by Partial Name Lookup (e.g. Test, Comm) or Date of Birth
 - Select the patient from the list of names that returns
 - Click the patient's name or the **Select** button at top of screen

✓	Opt	SelfPat	Loc	Dr	Mo	Wk	Avail	Compare	↺	Wait	Surgical	PerCal	»»
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- View previous and future appointments in the patient's Appointment History screen. Click **Continue** (at top of screen) or hit Enter.
- Click Move  to open a calendar widget
 - Click the left/right arrows   to select the Year
 - Click on the appropriate Month and select the date
 - Click **Today**  to return to current date
- Click an appointment slot to schedule the appointment. The selected slot will be outlined in orange.
- Insurance: If requested, select WC, NF or the appropriate insurance for the appointment.
- Referrals: If the insurance requires a referral, a referral screen will pop up. Click the checkbox to the left of the appropriate referral to attach it to the appointment.

In the Appointment Booking screen:

- Click **Type** to choose the Appointment Type
 - The default length of the appointment will pull into the Length field. Click **Length** to change this.
- ESB Note: Free text the Reason for Visit. This is viewable in Chart Central.
- Click to book the appointment.

Appointment					
Type	NEW	New Patient		Length	30
ESB Note		Dx	Remark	Triage	
new patient					
Initials	SMT	Available	N	Chart#	

Scheduling Options


In Office Appointments, left or right click the patient's name to see additional scheduling options. You can also click **Opt** (top of screen) to view the options.

Office Appointment Options		
1) Select Patient	9) Delete Slot/Appt	H) E-Superbill
2) Patient Re-Schedule	A) Change Slot(s)	I) Lookup Patient Appts
3) Practice Re-Schedule	B) Patient Information	J) Book Another Appt
4) Move Appt (No Record)	C) Charges and Payments	K) Book Multiple Appts
5) Patient Cancel	D) Print Superbill	L) Delete Slot(s)
6) Practice Cancel	E) Patient Recalls	M) Prac RSchd Lv Slit Avl
7) Patient No-Show	F) Patient Arrival	N) Prac Cancel Lv Slit Avl
8) Add Slot(s)	G) Prac ReSched (Block)	

Enter Office Appointment Options

Follow-up Appointments

These may be scheduled from the E-Superbill during Check Out.

- Chart Central > ESB button  > **OffAppt** (top of screen)
- Patient Appointment History: View previous and future appointments. Click **Continue** or hit Enter.
- Click Move and select the date of the future appointment.
- Click an appointment slot. The selected slot will be outlined in orange.
- Click **Type** to select the Appointment Type.
- ESB Note: Click button to pull provider's instructions from the E-Superbill.

Add Appointment Alert

- Chart Central > Pat Info (bottom button line) > Lookup Patient > Select Patient > Appointments (bottom of screen) > **Appt Alert** (top of screen)
- Click **Add Alert**.

Cancel an Appointment

There are multiple ways to cancel an appointment. Start from the patient's Appointment History screen.

- Right click on the appointment.
- Left click one of three options:
 - a. Patient Cancel Appt
 - b. Practice Cancel Appt
 - c. Prac Cancel Leave Slot Avail
- "Are you sure that you want to Cancel this Appointment"
Click **Yes** to cancel.
- ESB Note: Free text reason for cancellation. This is viewable in Chart Central and Appointment History.

Note: Some practices may have a popup to provide a reason for cancelling. Select the reason from a list of pre-built selections.

Reschedule an Appointment

There are multiple ways to reschedule an appointment. Start from the patient's Appointment History screen.

- Right click on the appointment.
- Left click one of three options:
 - a. Patient Reschedule
 - b. Practice Reschedule
 - c. Prac Reschedule Leave Slot Avail
- Click Move and choose the date you want to reschedule to.
- Click an appointment slot.
- Insurance: If requested, select WC, NF or appropriate insurance.
- Click **Type** if you need to change the type of appointment.
- Edit the ESB Note, if needed.

- Click to save the rescheduled appointment.

Note: Some practices may have a popup to provide a reason for rescheduling. Select the reason from a list of pre-built selections.

Move Appointment

If an appointment was scheduled incorrectly, it may be moved without displaying on Appointment History. Start from the patient's Appointment History screen.

- Right click the appointment.
- Left click Move Appointment.
- Click an appointment slot to move the appointment.
- Insurance: If requested, select WC, NF or appropriate insurance.
- Click **Type** if you need to change the type of appointment.
- Edit the ESB Note, if needed.
- Click to save the rescheduled appointment.

Delete Appointment

If an appointment is scheduled on the wrong patient, Delete Appointment removes the appointment from the Appointment History.

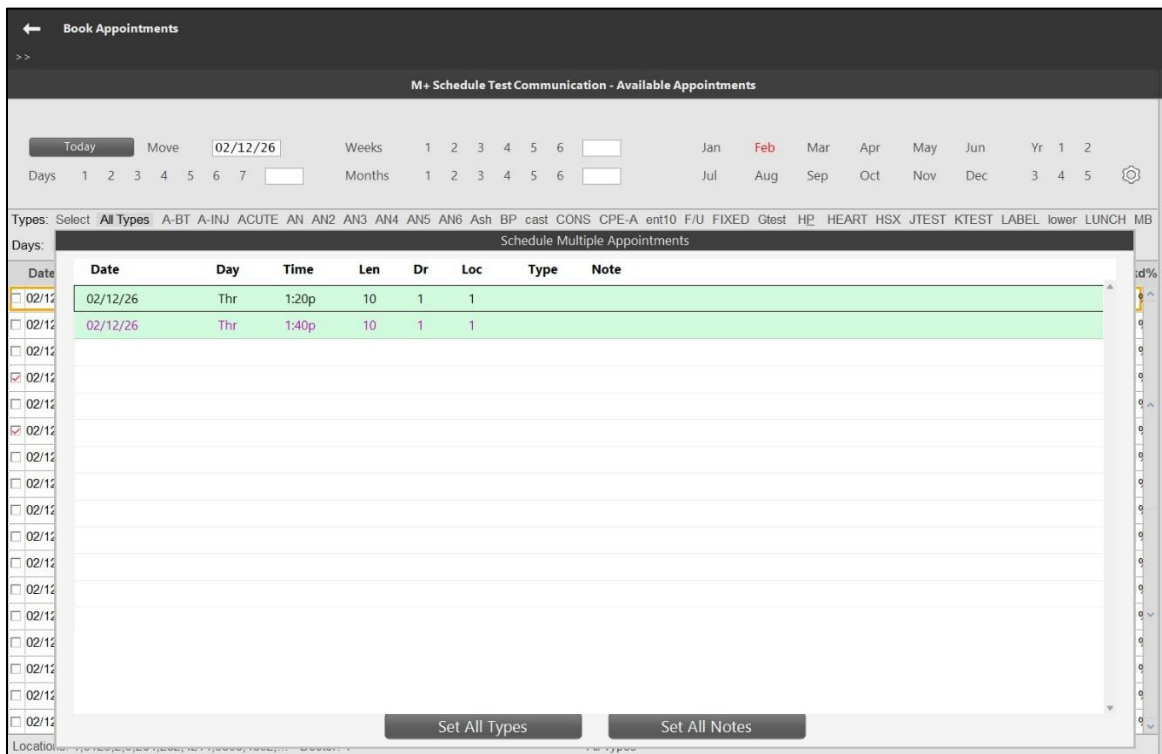
From the Office Appointment screen:

- Navigate to the correct date to find the patient's scheduled appointment that you would like to delete.
- Right click on the patient's name.
- Left click Delete Appointment.
- "Are you sure that you want to Delete this Appointment?"
Click **Yes** to delete.

Add Multiple Appointments

From the Office Appointments screen:

- **Loc:** Select Location(s) or All Locations, if applicable
- **Dr:** Select Doctor's Schedule
- **SelfPat:** Select Patient
 - Search by Partial Name Lookup (e.g. Test, Comm) or Date of Birth
 - Select the patient from the list of names that returns
 - Click the patient's name or the **Select** button at top of screen
- View previous and future appointments in the patient's Appointment History screen. Click **Multi Appt** (top of screen).
- Click the check boxes on the left side of the screen to select applicable appointments.
- Click **Book** (top of screen).
 - Appointment may be individually edited or **Set All Types** or **Set All Notes**.
- Click **Book Appointments** (top of screen).



No Show Appointment

An appointment can be marked as No Show from Chart Central or Office Appointments.

Chart Central

- Click **Status**.
- Select No Show from the drop down.

Office Appointments

- Chart Central > **Off Appt** (bottom button line)
- **Loc:** Select Location(s) or All Locations.
- **Dr:** Select, if applicable.
- Right click on patient appointment.
- Left click Patient No Show.



Manually Confirm Office Appointments

Many practices use Automated Appointment Reminders, Text Messages or Emails. While this is ideal, some offices prefer to do this manually. This option may update the Appointment with Confirmation Information.

- Chart Central > **Off Appt** (bottom button line)
- **Loc:** Select Location(s) or All Locations, if applicable.
- **Dr:** Select doctor.
- Select the appointment you want to confirm. Click in the Note column to enter the appointment information.
- Click **Confirmed** in the Confirmed Div and select the Confirmation Status (e.g. Patient, Machine, Other).
- Free text an optional Confirmation Message.
- Click to save.

Add Appointment Status to Chart Central


Appointment Confirmation is viewable from Chart Central.

- Click the gear icon  in the upper right corner above the list of patients.
- Click **Appointment Status** in the Available list on the left to add it to the Selected list on the right. Note: The option will gray out in the Available list when it has been selected.
- Click  to save.

Note: There are many Office Appointment Reports you can run.

Main Menu > Appointments > Office Appointment Reports

Add Slots to Schedule

- Chart Central > Off Appt
- **Loc:** Select Location(s) or All Locations, if applicable.
- **Dr:** Select Doctor.
- Click **Opt** at the top of the screen.
- Select **8) Add Slot(s)** to add slots to the selected provider's schedule.
- Enter the first and last slot.
- Select [Location](#), [Sched Type](#), [Length](#), [From Date](#), [Thru Date](#) and whether appointment slots should be marked as [Available](#).
- Add any specific note to these time slots (e.g. New Patient Only).
- Click  to save.

Add Slot(s)

First Slot	<input type="text" value="4:10 pm"/>	Last Slot	<input type="text" value="4:10 pm"/>
Location	<input type="text"/>		<input type="text"/>
Sched Type	<input type="text"/>	Length	<input type="text" value=""/>
From Date	<input type="text" value="05/20/26"/>	Thru Date	<input type="text" value="05/20/26"/>
Available	<input type="text" value="Yes"/>		
Note:	<div style="border: 1px solid gray; width: 100%; height: 100%;"></div>		

Enter First Appointment Time

Change/Edit Time Slots

- Chart Central > Off Appt
- **Loc:** Select Location(s) or All Locations, if applicable.
- **Dr:** Select Doctor.
- Click **Opt** at the top of the screen.
- Click **A) Change Slot(s)**
- Enter first and last slot you want to change.
- Select [Location](#), [Sched Type](#), [Length](#), [From Date](#), [Thru Date](#) and whether appointment slots should be marked as [Available](#).
- Add any specific note to these time slots (e.g. New Patient Only).
- Click to save.

Practice Reschedule Blocks

- Chart Central > Off Appt
- **Loc:** Select Location(s) or All Locations, if applicable.
- **Dr:** Select Doctor.
- Click **Opt** at the top of the screen.
- Click **G) Prac Resched (Block)**. This makes rescheduled blocks unavailable.
- Set [Re-Schedule day's Appts from](#) and [to](#).
- [Doctor to move to:](#) Select a provider to move appointments to.
- [Supervising/On Behalf of Dr:](#) Select a Supervising Doctor or a Schedule on Behalf of Doctor.
- [Reschedule all locations:](#) Yes – all locations / No – select which location(s) you are rescheduling to.
- Set [Date to move Appointments to](#).
- [Reason for Reschedule:](#) Choose from pre-built selections or free text.
- Click **OK** to run the utility. A verification screen will display to make sure you are satisfied with your settings.

Delete Slots from Schedule

This option allows deleting booked appointments. The Appointment History would be removed.

- Chart Central > Off Appt
- **Loc:** Select Location(s) or All Locations, if applicable.
- **Dr:** Select Doctor.
- Click **Opt** at the top of the screen.
- Click **L) Delete Slot(s)**. This will delete the appointment slots from the doctor's schedule.
- "This feature deletes time slots by time range on the day's schedule you are currently on. Do you want to do this?" Select **Yes** from the dropdown.
- Enter the Time Range you want to delete slots. Click **OK**.
- A confirmation screen will provide you with the time range of slots that have been selected and ask if you are sure you want to delete this block of time slots. Click **Yes** to proceed.
- "There are _ un-booked time slots that will be deleted. There are _ slots with booked appointments. Delete just the un-booked time slots?"
Select **Yes**.
 - If **No** is selected, the un-booked and booked appointments will be removed.

Resources:

medent manual:

www.medent.com/htmlmanual/html/v237/scheduleanappointmentoa.html

medent videos:

www.medent.com/tutorials_mp4/Day%20View%20Schedule%20a%20New%20Patient.mp4

www.medent.com/tutorials_mp4/Day%20View%20Schedule%20Existing%20Patient.mp4

www.medent.com/tutorials_mp4/Day%20View%20Canceling%20an%20Appointment.mp4

www.medent.com/tutorials_mp4/Day%20View%20Reschedule%20Appointment.mp4