


## Appointment Scheduling via the Scheduling Calendar

Open the Scheduling Calendar.

1. In the small calendar box, select the day of the appointment.
2. In the large calendar, right-click on the date and start time of the appointment, in the white (available) area, and select Add Appointment.
3. The Add New Appointment form displays.
4. The Appointment Site, Date, Duration, Start Time, End Time, and Practitioner fields automatically populate from the selections made in the Scheduling Calendar. Appointments with an unspecified End Time are automatically assigned 30 minute increments. Edit as necessary.
5. Enter the Service Code Name, and select the appropriate service code from the list of matches:

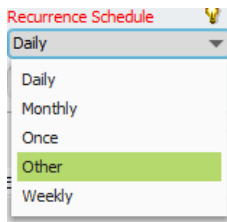
Ex. INTAKESW, PSYCHTHERA, PSYTHFAMWP, PSYTHFAM, CRISIS

6. Leave the Appointment Status as Scheduled.



A screenshot of a dropdown menu titled "Appointment Status" in red text. The menu is open, showing a single option "Scheduled" with a downward-pointing arrow on the right side.

7. Select the Recurrence Schedule from the drop-down list.



A screenshot of a dropdown menu titled "Recurrence Schedule" in red text. The menu is open, showing a list of options: "Daily", "Monthly", "Once", "Other", and "Weekly". The "Other" option is highlighted with a green background.

8. Choosing **Other** in this field allows to set a customized schedule for how often this appointment will occur. If **Other** is chosen, in the Every X Days field, enter the frequency of recurrence.

In the Recurrence End By field:

- a. Select End After to set a limit on the number of appointments created.
- b. Select No End to have this appointment recur for a year.
- c. In the # of Sessions field, enter the number of sessions desired for this recurring appointment.

9. For Individual Appointments:

- Enter the Client Name or ID#, and select the client from the list of matches.
- Select an open episode for the client from the Episode Number drop-down list.

10. For Group Appointments:

- Enter the Group Name or ID#, and select the group from the list of matches.

(The group members are only visible after the appointment is scheduled on the calendar—right-click on the appointment and choose Add/Remove Group Members).

11. Select the appropriate Program from the drop-down list.

12. The location will default to **Office** (in few cases, the location might be changed to Home or other option).

13. Click Submit.

Tip: Click and drag appointments to change time or duration, and also between practitioners.