Module 1: Scheduling an Appointment

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Recap What You Know

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Sally the Scheduler

Scheduling an Appointment in PrimeSUITE

Three Ways to Schedule Appointments

Scheduling an Appointment in PrimeSUITE

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Templates and Settings

Mary Ford, New Patient

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Steps in PrimeSUITE

First, let's log into PrimeSUITE and go to **Appointment Scheduling** on the **Scheduling** menu.

Steps in PrimeSUITE

To schedule an appointment for a **new** patient, you perform these main steps in PrimeSUITE:

1. Search for the Patient in the PrimeSUITE database.
2. Click **Add New** to add the patient.
3. Navigate to Schedule > Appointment Scheduling.
4. Select the appropriate Appointment Type, Location, and Resources and click **View Schedules**.
5. Drag and drop the appointment type into an available time slot.

Check for Duplicate Patient Information

Even though Mary is a new patient, we will check to see if she is already in the PrimeSUITE database because we want to avoid duplicate patient information.

Steps in PrimeSUITE

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PrimeSUITE Desktop

(1) Click **Search for Patient** .

Patient Search

(2) Enter the patient's **Last Name**, **First Name**, and **Date of Birth**. Then, click Search.

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Search Confirmation

(2) The message "No matches found" means Mary Ford is not yet in the database.

Click OK.

Add New

(4) Enter the patient's **Home Phone** and **Work Phone**, then click Add New.

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Missing SSN Warning

	If the SSN field is left blank, PrimeSUITE displays a warning message like the one shown. You may click **Yes** to continue and then add the information later during patient check in.

(5) Click

.

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Active Patient in Page Header

The patient name and system-assigned ID number appear in the page header or "buffer."

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Appointment Scheduling Page Selection

(6) Click Appointment Scheduling.

Appointment Request and Recall Alert

(7) The **Appointment Request and Recall Alert** dialog box appears so you make an appointment for any outstanding requests, if applicable. Since our patient is new; the box is empty. Click **Close** X.

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Appointment Filtering Criteria

(8) On the Appointment Scheduling screen (seen here) you will select the type of **Appointment** you want to schedule, the **Resouces** needed for the visit, and the **Location** of the appointment. Then, click View Schedules.

Schedule View

(9) Click the **+** to expand the list of Office Visit types available.

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	Based on the Rules and Schedule settings for the selected Appointment type, a green **R** indicates an available time slot; a red **R** indicates a restricted time slot. Rule Labels, such as ***New Patients***, for example, indicate the type of appointments available for this slot. These settings are defined in Rules and Schedule Administration.

Appointment Type Selection

(10) Click for **New Patient.**

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Drag and Drop Appointment Scheduling

(11) Drag and Drop New Patients appointment type into the **9:00 am** time slot.

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Schedule Confirmation

The **Schedule** window shows the details of the appointment.

Complete the **Chief Complaint** and **Comments** per your office protocol.

For this demo, enter ***Sinus*** as the **Chief Complaint** and ***also followed by Dr. Parker*** as a Comment.

(12) Click Save.

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Patient Instructions

(13) Read the **Patient Instructions** stored in the database for the Appointment Type. Then, click OK.

Appointment Summary

(14) Click Patient Information.

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The new appointment now appears in the chosen time slot. Details appear on the **Appointment Summary** tab.

Patient Information

The **Patient Information** tab contains all demographic information gathered up to this point.

If you need to add more information, you can use the **Registration Information** icon to access the patient **Information** page.

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Open Registration Menu

(15) Now you want to note the patient's referring provider. Click **Registration**.

Referral Management Page Selection

(16) Click **Referral Management** (or use the **Alt+R** keyboard shortcut.)

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Referral Management (ALT+R)

(17) When the Referral Management page displays, click the Providers tab.

Referring Provider

(18) Click Referring Provider.

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Referring Provider Search

When the provider **Search** box opens, type in the partial name or whole name, such as ***Parker,*** and click **Search**.

NOTE: *Only providers saved via the* ***Care Provider*** *page or entered and marked as* ***Referring*** *(as shown in this demonstration) will appear in the provider search results.*

(19) Click Roy A. Parker MD .

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Enter Comments Field

	You can store information about this provider as it relates to the patient in the **Comments** field. Here, we enter ***monitors Arthritis***.

(20) Click **Save** .

(21) Click **Close** .

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Appointment Scheduled

This completes the demonstration of how to use the Schedule Dashboard to schedule a patient appointment.

Module 1 Key Points

Scheduling an Appointment: Key Points

- There are three different ways to schedule an appointment in PrimeSUITE: Appointment Wizard, Schedule Dashboard, and Quick Search
- Availability of appointment times is based on templates and settings established for your practice in PrimeSUITE.
- In this module, you learned how to follow these steps to schedule an appointment for a new patient using the Schedule Dashboard:

1. Search for the Patient in the PrimeSUITE database.
2. Click **Add New** to add the patient.
3. Navigate to Schedule > **Appointment Scheduling**.
4. Select the appropriate Appointment Type, Location, and Resources and click **View Schedules**.
5. Drag and drop the appointment type into an available time slot.

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End of Module 1

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