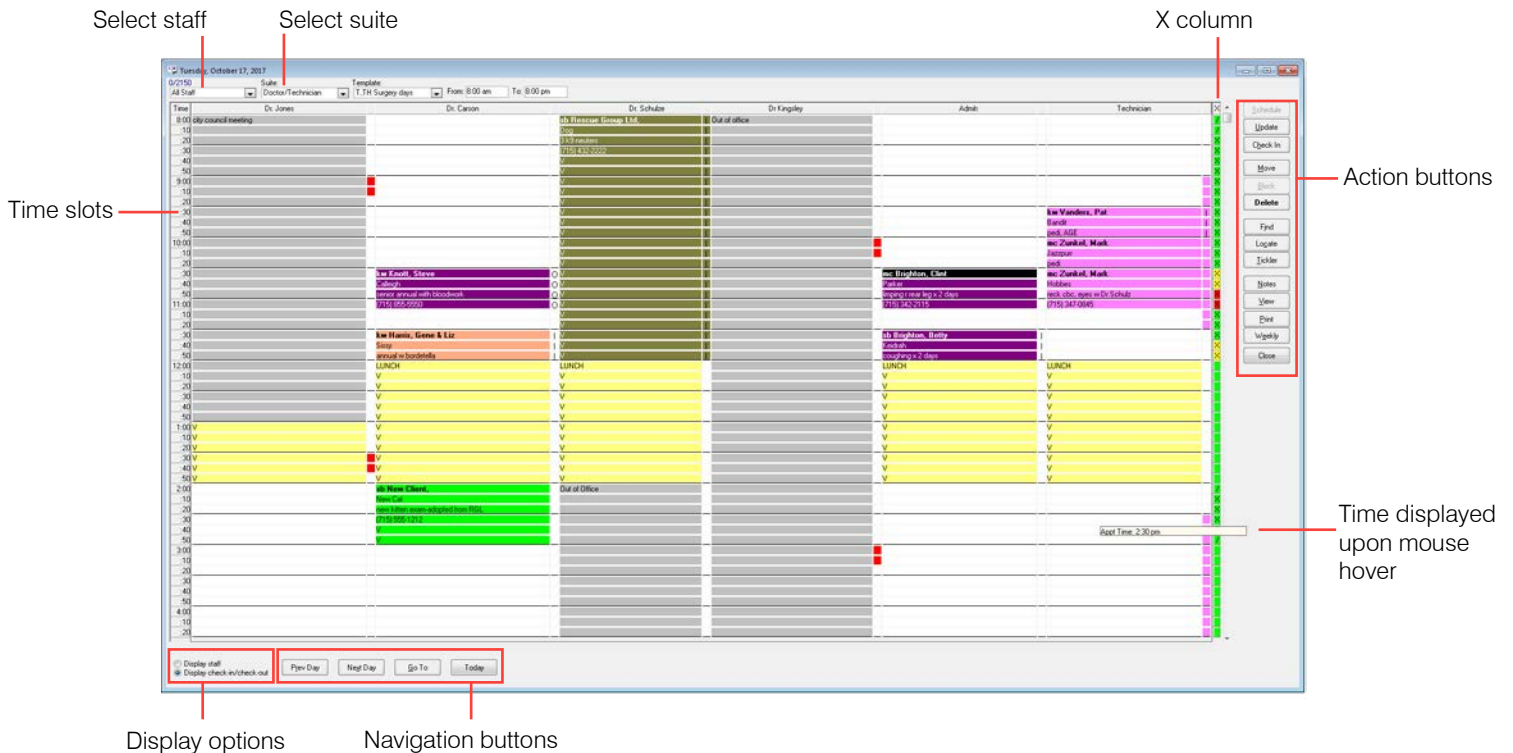


Appointment Scheduler

The Schedule for Today window lets you schedule and track appointments for the current day. The rooms run along the top and the times along the left. Each box represents one time unit.





Schedule for Today window overview

- Select the staff member, suite, template, and time period using the options at the top of the window.
Note: In the appointment grid, times allocated for lunch are yellow, and other unavailable periods are gray.
- Use the action buttons on the right to perform scheduling tasks.
- Use the navigation buttons at the bottom to view the previous/next day, go to a specific day, or return to today.
- Use the options at the bottom left to control what displays in the column to the right of each time slot.
Display staff: X = One or more staff members is scheduled. / = No staff member scheduled.
Display check-in/checkout: I = Patient checked in. O = Patient checked out.
- Use the **X column** to view how staff members are booked for each time slot:
X = One or more staff scheduled. **Yellow** = One or more staff double-booked. **Red** = One or more staff triple-booked.
/ = No staff scheduled.

Open the Schedule for Today window

You can access the Schedule for Today window in the following ways:

- **Toolbar**—Click the **Schedule for Today** button .
- **Patient Clipboard***—In the **Client information** area or **Patient information** area, click the **Scheduled Appointments** tab , right-click within the tab, and select **New** or **Update**.
- **Client Invoice window**—Click **Make Appt.**

Schedule an appointment

1. On the Schedule for Today window, double-click in the time slot you want to schedule. The New Appointment window opens.
2. In the **Client ID** and **Patient ID** boxes, type each ID or press F2 to search.
3. From the **Primary** drop-down list, select the primary reason for the visit. If prompted, add notes in the **Notes** area. You can also add a secondary reason.
4. In the **Staff** box, type the staff ID for the appointment or press F2 to search.
5. In the **Time units** box, confirm the number of units for the appointment, and edit if necessary. If the practice overbooks, indicate the time units in which the staff member must be with the patient by selecting each **Staff time** check box.
6. Enter your initials in the prefix field, if required.
7. Use the **Appointment items** area to add any invoice items to perform during the appointment or any items to invoice.
8. Click **OK** to add the appointment to the schedule.

Other appointment actions

To...	Right-click the appointment and...
Update or confirm	Select Update . Make any changes to the appointment. To confirm the appointment, type the date in the Confirmed on box. If your practice uses Pet Health Network* PRO, clients may confirm an appointment themselves via the Petly* website, email, or text message.
Move	Select Move . Click the new appointment time in the grid, and click Yes when prompted.
Copy	Select Copy . Navigate to the next needed appointment slot, right-click, and select Paste . Repeat the paste step as needed for all needed occurrences.
Cancel	Select Delete . Update the Delete Appointment dialog box to show why you canceled the appointment. You can add the appointment to the tickler file for rescheduling.
Check in	Select Check-In . Update the Patient Check-in/out dialog box as needed and continue check in. Tip: For patients not frequently seen, select Patient Clipboard from the right-click menu; verify and update the client information first; and then check in the patient from the Patient Clipboard patient menu. This ensures the Check In report will display the correct information.

Keyboard shortcuts

F1	Display onscreen Help for the current window.
F2	Look up values for a list, such as with ID fields.
Tab	Move the cursor to the next field.
Shift+Tab	Move the cursor to the previous field.
Ctrl+D	Delete the selected record.
Ctrl+U	Update the selected record.
Ctrl+C/Ctrl+V	Copy and paste the selected item.
Ctrl+Enter	Move cursor to the next line in note areas.


Right-click menus

Use right-click menus for quick access to many scheduling tools. Right-click options are different for unscheduled and scheduled time blocks.

Tips:

Double-click in ID fields to search for an item.
Double-click in an available time slot to open the New/Edit Appointment window.

For more information

For setup and detailed instructions, see the Appointment Scheduler section of the Cornerstone Help .

Go to idexxlearningcenter.com to view snippet videos about the Appointment Scheduler and other Cornerstone features.

Find this document at idexx.com/cornerstoneresources