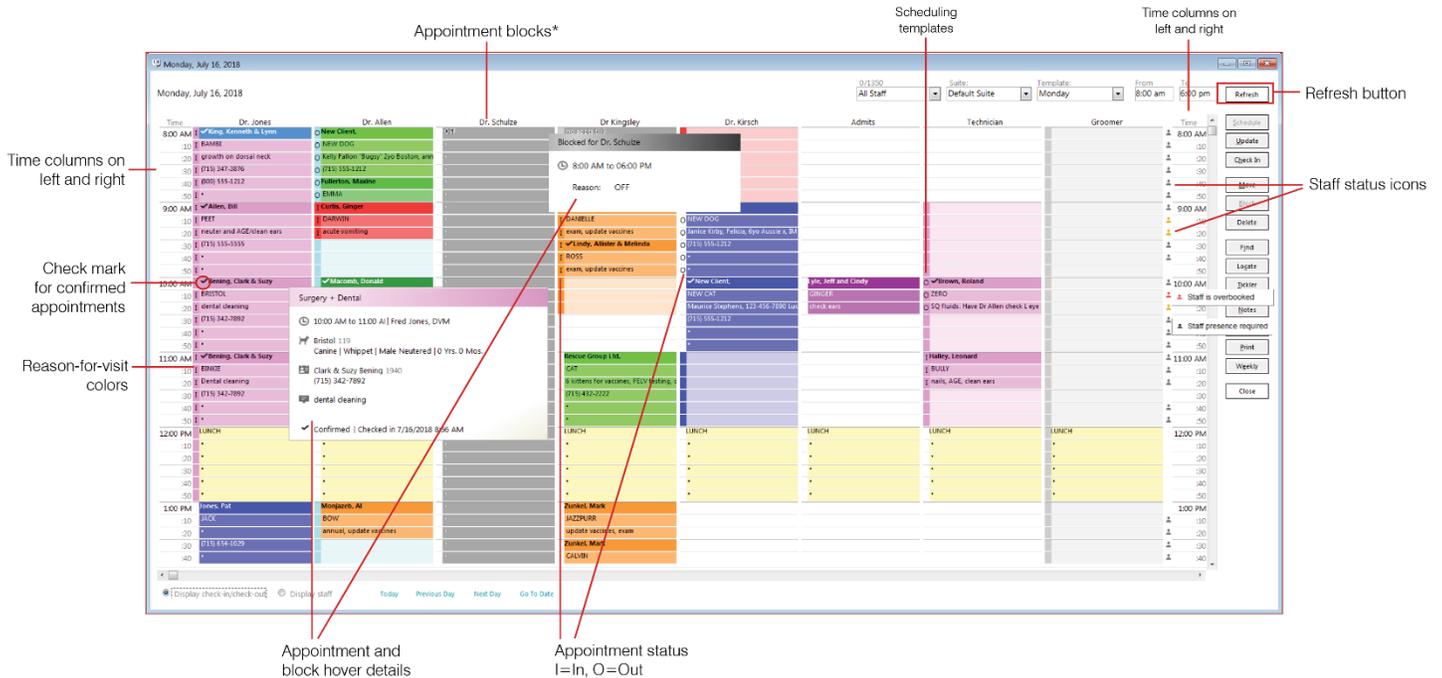


Appointment Scheduler

The Schedule for Today window lets you schedule and track appointments for the current day. Rooms run along the top and times along the left and right of the window. Each box represents one time unit. Colors can be adjusted in default settings.



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 links 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 left of each time slot.
 - Display staff:** = One or more staff members is scheduled.
 - Display check-in/checkout:** **I**=Patient checked in. **O**=Patient checked out.
- Use the **Staff** column on the far right to view how staff members are booked for each time slot:
 - Black**=One or more staff scheduled. **Yellow**=One or more staff double-booked. **Red**=One or more staff triple-booked. **Blank**=No staff scheduled.

Open the Schedule for Today window

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

- Toolbar >
- Client/Patient Search > Right-click patient
- Patient Clipboard > Right-click patient
- Check-in/out > Click **Make Appt**
- Invoice > Click **Make Appt**, or click **Yes** at **Next Appointment Reminder**.

Schedule an appointment

1. On the Schedule for Today window, double-click in the time slot you want. The New Appointment window opens.
2. When prompted to use the selected client and patient, click **Yes**, or click **No** and then enter either a client or patient ID, or press **F2** to search for and select a client or patient.
3. From the **Primary** drop-down list, select the primary reason for the visit. You can also add a secondary reason.
4. If the field is not populated by default: in the **Staff** box, type the staff ID for the appointment or press **F2** to search.
5. (Optional) To see staff availability and to be warned of potential overbooking: in the **Time** units box, confirm or edit the number of time units the staff must be with the patient.
6. Enter your initials in the prefix field, if required.
7. Add any appointment notes in the **Notes** area. These notes will appear on the Check-in/out window and will be available as a document bookmark. **Tip:** Use **Ctrl+Enter** to move the cursor to the next line.
8. Use the **Appointment items** area to add any invoice items to perform during the appointment or to add to the PVL at time of check-in.
9. 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. Click Confirm to manually confirm the appointment. 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 indicate 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 click Check-in .

Keyboard shortcuts

F1	Display on-screen Help for the current window.
F2	Look up values for a list, such as 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/cornerstonehelp.