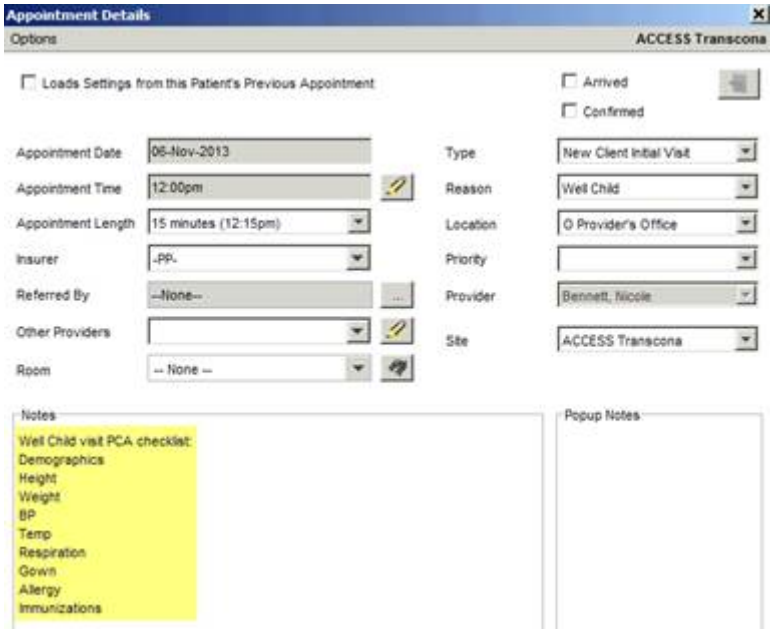
APPENDIX C – EMR Appointment Booking

EMR Appointment Details in the Notes Section for the Rooming Criteria Guide

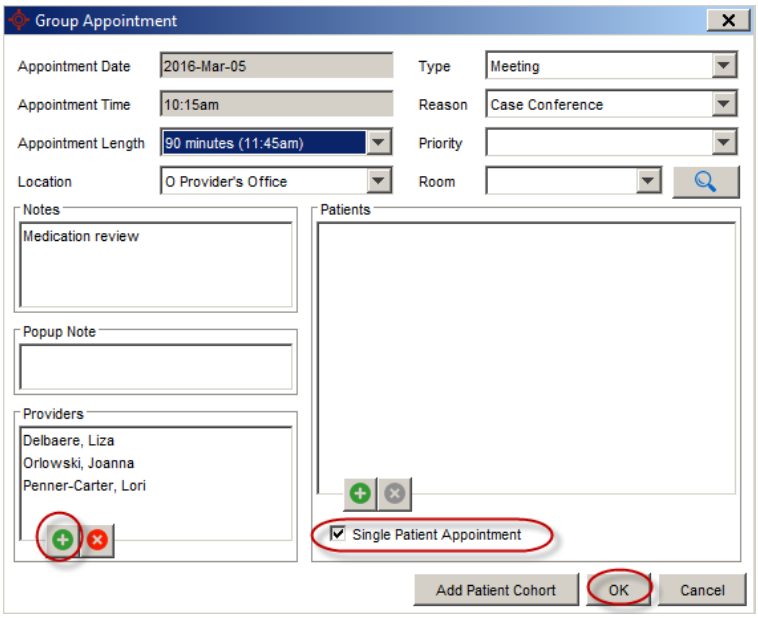
The Rooming Criteria Guide could be embedded into the Appointment Details (Notes) as it relates to specific appointment type/reasons (See Appendix D Rooming Criteria Guide) which could be inserted via macro(s).

For example, Well Child as an appointment Reason could trigger staff to insert ('apptwellchild' ctrl-enter, or right-click 'Find macro'):



Create a Case Conference Goup Appointment:

1. **Click** (and drag if necessary) on the desired timeslot(s) **> Right-Click > Create Group Appointment.**

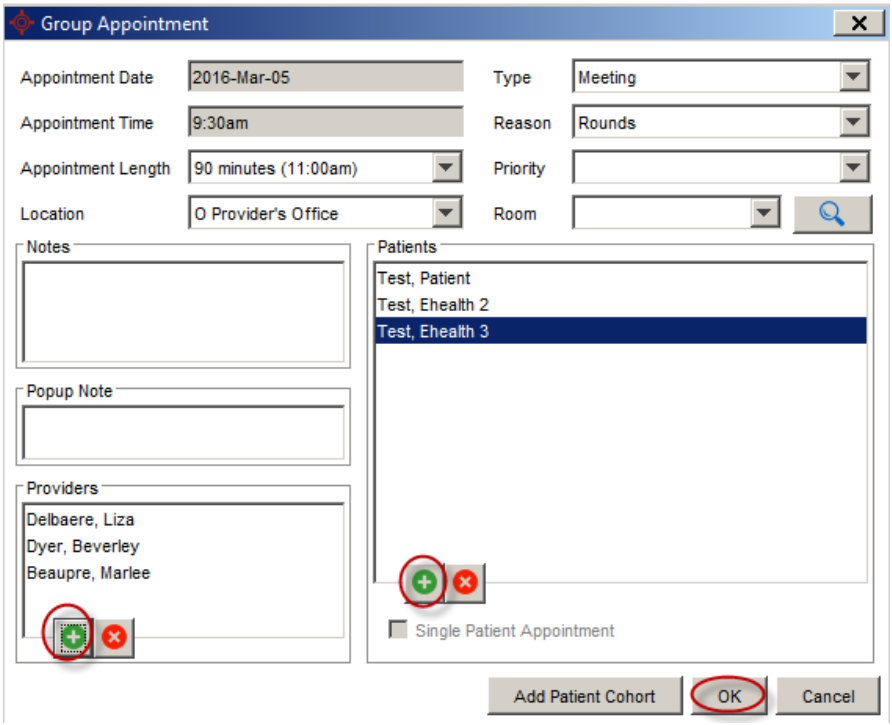


2. **Confirm** appointment date, time, length and location.
3. **Complete** Type, Reason and Priority.
4. **Add** any trigger notes.
5. Click on the **PLUS** sign to add additional **Providers**.
6. Click the checkbox to indicate this is a single patient appointment
7. Click on **OK**. The group appointment is now visible in applicable providers' schedule.

Create A Rounds Group Appointment:

Once a group appointment is created patients can be added in real time or retroactively once the appointment or "rounds" has taken place and patients are added based on the discussion that occurred during rounds.

1. **Click** (and drag if necessary) on the desired timeslot(s) **> Right-Click > Create Group Appointment.**



2. **Confirm** appointment date, time, length and location.
3. **Complete** Type, Reason and Priority.
4. **Add** any trigger notes.
5. Click on the **PLUS** sign to add additional **Providers**.
6. Click on the **PLUS** sign to add additional **Patients.**
7. Click on **OK**. The group appointment is now visible in the applicable providers' schedules.

8. If the “Rounds” appointment is a reoccurring appointment **Right-Click** on the group appointment > Copy **Appointment.**
9. **Locate** the applicable date and timeslot(s) **> Right-Click > Paste Appointment.** The appointment will paste into all applicable providers’ schedules as noted within the appointment.

Note: *Group appointments are reflected in the clients F4 appointment history.*

	Appt Date	Appt Time	Type
	2013-Jun-11	8:40am	Long Appointment

Note: *Group Appointments appear in the provider’s day sheet. Each group appointment member is identified with a group icon.*

Time		
8:40am		Smith,
8:40am		Smith,
8:40am		Smith,