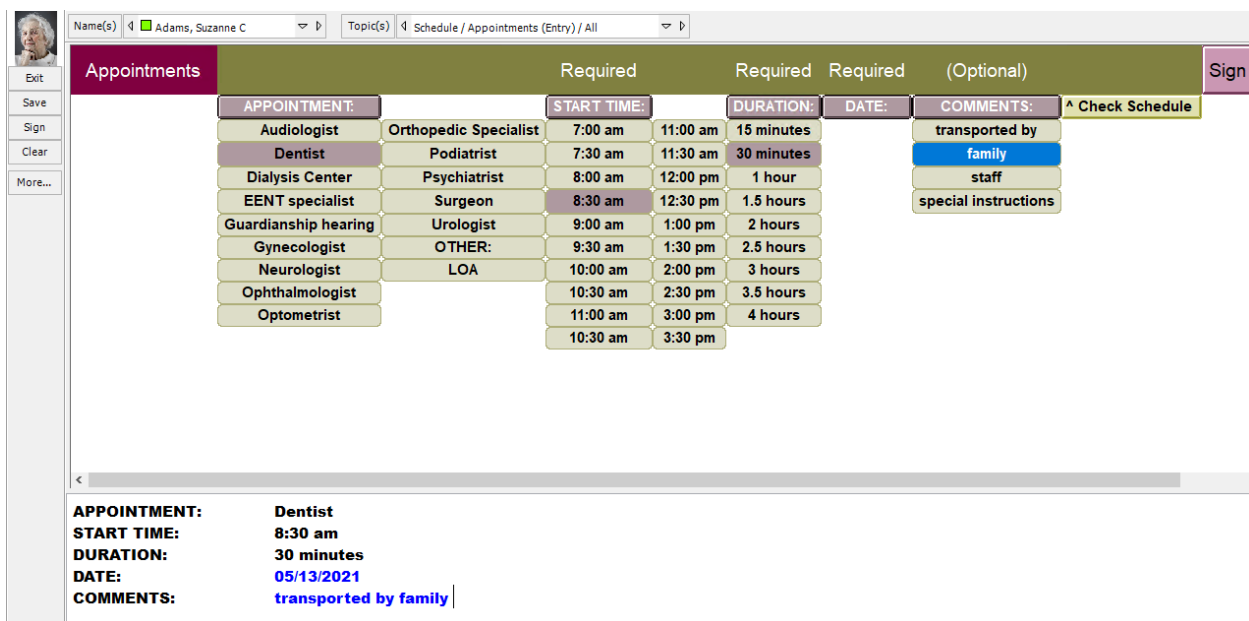# Using the Scheduler [By Entry]

Adding Appointments to the Schedule

This option will be utilized to add new appointments onto the schedule. Only one-time appointments may be added, not recurring events. Dependent on your facility's setups, you may be able to schedule care conferences, beauty shop appointments, out of facility consult appointments, etc.

1. Click onto the button utilized to access the Schedule topic. This may be titled "Schedule" or "Schedule Appointments" or "Add to Schedule."
2. Once in this screen, work from left to right clicking onto each relevant item (appointment type, start time, duration, date, additional comments). Only the free typed comments entered behind the **COMMENTS** word will display on the scheduler, so be sure only to free type information behind this word.
3. Click **Save** or **Sign** to add this onto the schedule.


View Appointments on the Schedule

There are two ways to view appointments entered in the above topic.

- Via the Scheduler
- Via a General Report

Follow the steps below to view the appointments <u>via the scheduler</u>:

1. Click onto the button utilized to view the Schedule topic. This may be titled "Schedule" or "View Scheduled Appointments" or "View Schedule."
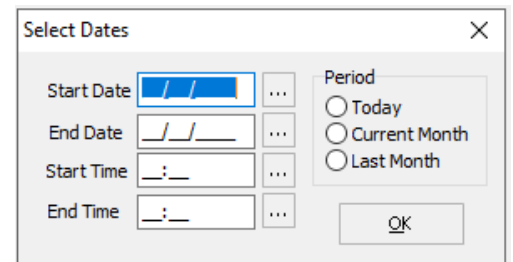
2. The screen will load, defaulted to today's date. All items scheduled for today will display.
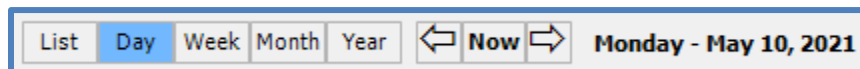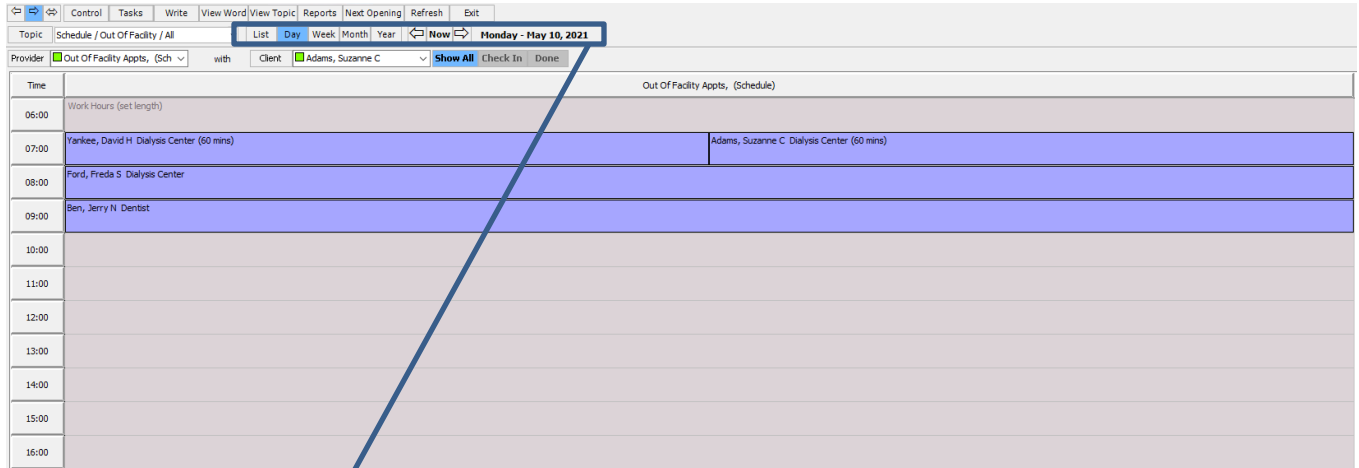
3. Utilize the **Day/Week/Month/Year** buttons to switch the view of the appointments being displayed. Or click the arrows to the left or right of **Now** to move one day at a time.
4. Click **Now** to be brought back to today's date.
5. Click **Exit** to return to the prior screen.

Follow the steps below to view the appointments via a general report:
1. Click onto the button utilized to view the Schedule topic. This may be titled "View Appointments Report" or "View Schedule."
2. You will be presented with a **Select Dates** screen.
3. Enter in a **Start/End Date** or select a **Period**.
4. Click **OK** to run the report.
5. All scheduled entries during the selected time frame will display.

Removing Appointments from the Schedule
1. Click onto the button utilized to access the Schedule topic. This may be titled "Schedule" or "Schedule Appointments" or "Add to Schedule."
2. Once in this screen, look in the defined review portion of the screen and find the appointment which needs to be removed.
3. Highlight the appointment to remove and click onto **Edit** > **Discontinue.** If needing to remove several entries at one time, highlight them all and select **Edit** > **Discontinue All**.
4. Click **Exit** to return to the prior screen.