## **Appointment Scheduling**

## **Appointment Link**

Appointment link functionality allows you to manually tie two unrelated appointments together for a particular patient situation. Like with Protocols or Recurring appointments, the system will recognize these appointments are linked and warn the user if any action is performed on one of the linked appointments. You have two options for linking appointments: 1) Link to an existing (previously confirmed) appointment or 2) Link to a new appointment.

- 1. Schedule two different appointments for any patient using one of the previously described methods from above.
- 2. Find one appointment which you have just scheduled, highlight, right click, go to Actions, then Link. At this point you will see your two options for linking appointments.
- 3. Choose to link to an existing appointment.



- 4. The Link window will display. You will notice the Future Patient Appointments section. This section should list the other appointment that you scheduled for this patient. Highlight this appointment and press the Select button. A red checkmark will display.
- 5. In the Link Reason dropdown, select one of the reasons and press the OK button.

👸 Link						?	x
Name	: Test, J	lo	Age: 28 Yo	ears MR <sub>Perso</sub>	N: 000-106;0	DOB: 12/24/1970 Gender: Female	6
<ul> <li>Existin</li> <li>New a</li> <li>Appointment</li> </ul>	g appointment o oppointment nts and Reques	or request	Orders				
Future pati	ent requests: Request Action Review Review	n Appointment Typ Mammo Screen CT Abdomen	e Location I	Diders T Abdomen w	/o Contract	Surgeon 1 Earli	
Future pati	ent appointmen Current State Confirmed	ts: Appointment Type New Visit	Location BE Card Clinic	Resource Harris, Sarah	Orders Su MD	urgeon 1 Begin Date/ 5/31/2005 Letter Select Unselect	7 - -
*Link rea Patient Re Comments	ison: equested						- - -
						OK Cancel	

- 6. The two appointments are now linked.
- 7. Highlight the first appointment again, right click, choose Action, Link. This time choose New Appointment.

Link 🕨 🕨	Existing Appointment or Request
Unlink	New Appointment

8. The Link window will display. In the Link Reason dropdown, select one of the options and press the OK button.

👸 Link			? ×
Name: Test Jo	Age: 28 Years	MRN: 000-106;0	DOB: 12/24/1976
		Person Gom ments: 🛜	Gender: Female
${f C}$ Existing appointment or request			
New appointment			
Appointments and Requests Event Details	s Orders		
*Link <u>r</u> eason:			
Patient Requested			
C <u>o</u> mments:			
			<u>^</u>
			*
1			
			UK Cancel

- 9. You will be brought back to the Appointment tab to select a new appointment type. The Person name is already defaulted with your patient's name. Select an Appointment Type, Appointment Location and fill out the remaining accept format fields.
- 10. Press the MOVE button and finish scheduling the appointment just as if you would any other appointment.

Books Appointment	
Person Name:	Move 🕨
Test, Jo	Ne <u>x</u> t
*Appointment Location:	<u>C</u> lear
Appointment Tupe:	ANR
)	

- 11. The appointments are now linked.
- 12. If you perform an action on any of the linked appointment types, you will receive a warning.

🕅 Linked Appointments	? ×				
This is a linked appointment. Do you want to open this occurrence, multiple occurrences, or all occurrences?					
Open one or more occurrences					
C Open all occurrences					
<ul> <li>□ CT Pelvis (Tuesday, 5/31/2005, CONFIRMED)</li> <li>☑ MRI Knees (Tuesday, 5/31/2005, CONFIRMED)</li> </ul>					
	OK Cancel				

13. This warning serves as a reminder that the appointment you are performing an action on is linked to other appointments. You can choose to perform the action only on the appointment you currently have selected, or to perform the action on all the linked appointments.