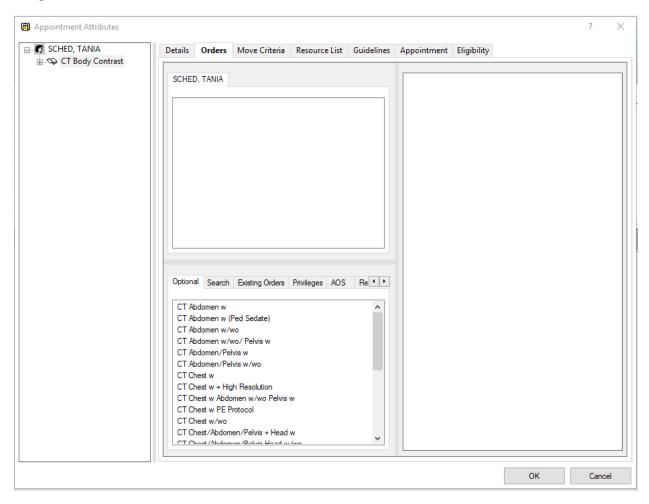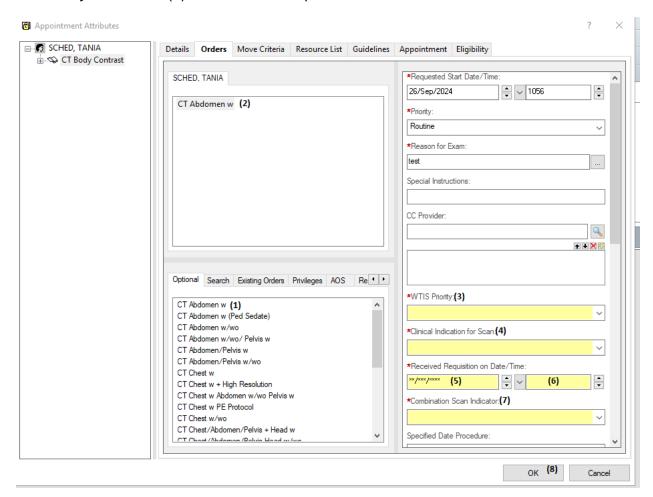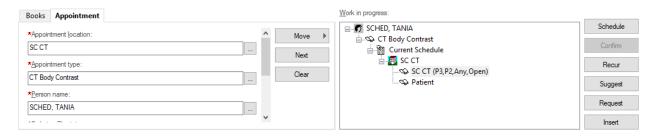**Tip Sheet – Scheduling to Orders**

Complete the accept formats under the Appointment Tab. Fill in the Appointment Location (1), Appointment Type (2), and Person Name (3) field. Additional accept formats may appear depending on the appointment type that is being scheduled. Complete any additional accept formats if necessary. Click **'Move'** to move appointment to the Work In Progress box.

Tip Sheet – Scheduling to Orders

Appointment Attributes window will appear. In the box on the lower half of the window, find the order (1) that is tied to the appointment type that is being scheduled. Once the order has been located, double click to move Order (2) to the box on the upper half of the window. Once the order has been selected, required accept formats (3,4,5,6,7) may need to be filled out depending on the order that was selected. Fill in any accept formats if necessary. Click **'OK'** (8) when this is complete. Window will close.
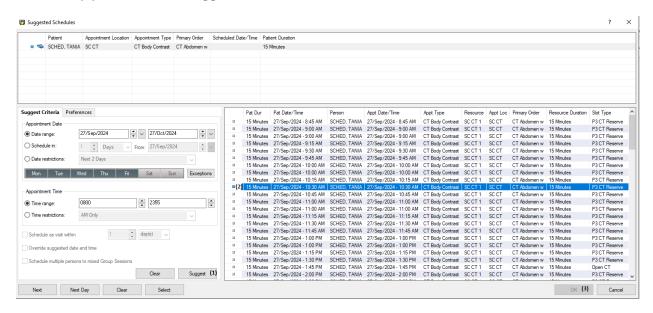

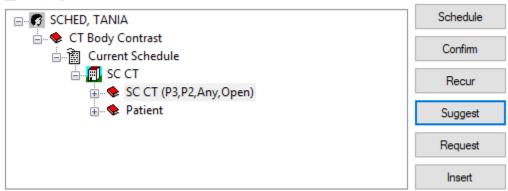From the Scheduling Appointment Book, the Work in Progress box will be populated.

Click the **'Suggest'** button to the right of the Work in Progress box to look for the first available appointment time. Suggested Schedules window will appear. Click Suggest (1) to

Tip Sheet – Scheduling to Orders

view available appointment types. Highlight the appointment (2) that works for the patient. Click OK (3) to close the Suggested Schedules window.
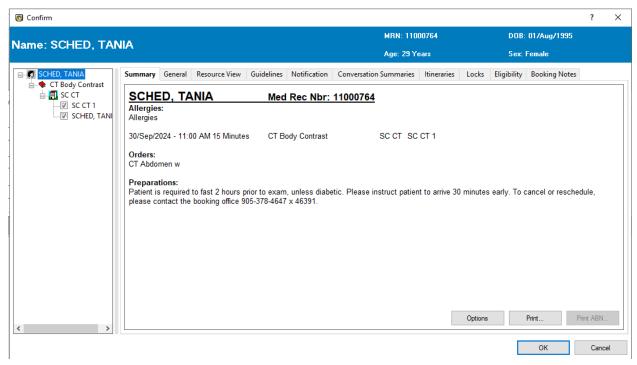

Books will be red in the Work In Progress window. Click the '**Confirm'** button to confirm the appointment.

The confirmation window will appear. Review appointment details to ensure they are correct. Click **'OK'**, and an encounter selection window will appear.

Tip Sheet – Scheduling to Orders

Encounter Selection Window will appear. Click 'Add Enc' to add a new encounter. A PreReg window will appear. Fill out any required fields. (Note: all required fields will appear in yellow). Click 'OK' when finished.