

Appointment Scheduling Guide for Clinical and Clerical Staff

Cerner Revenue Cycle Ambulatory EDUCATION

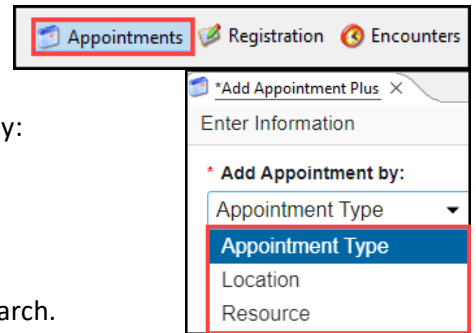
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Adding an Appointment

Note: Settings must be updated to access Add Appointment Plus. Refer to the *Clerical or Clinical Staff Personalization* documents on the [Clinical EHR Education](#) website.

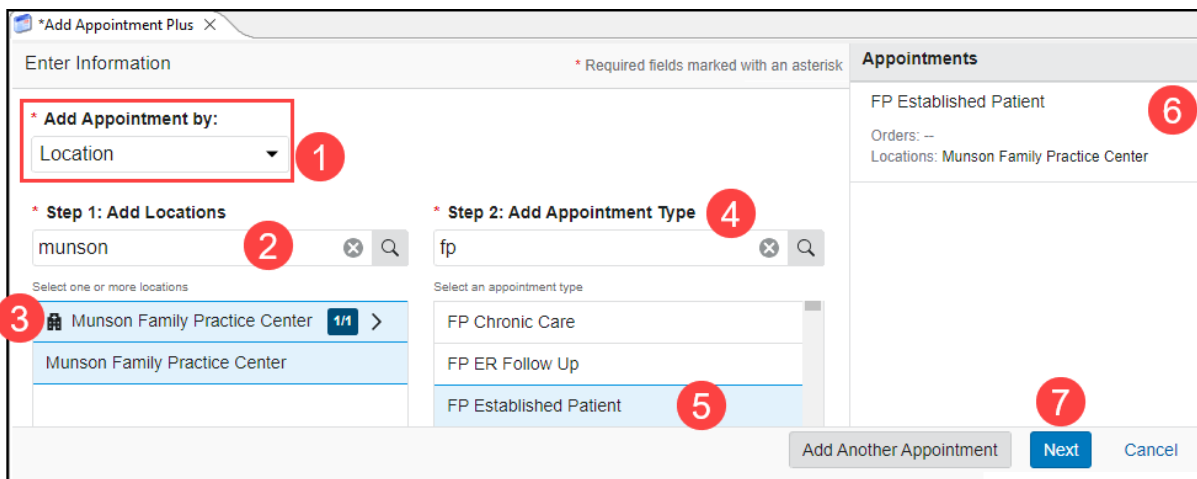
Within a patient’s Revenue Cycle Chart, navigate to the **Appointments** patient perspective.



Select from the Add Appointment by dropdown menu to add an appointment by: Appointment Type, Location, or Resource.

A. Schedule an appointment using: **Location** path:

1. Add Appointment by: select **Location** from the drop-down list.
2. Add Locations: type the clinic name and click the magnifying glass to search.
3. Select one or more locations from the available options.
4. Add Appointment Type: enter the appointment abbreviation and click the magnifying glass to search or click the magnifying glass to view a list of all available Appointment Types for the selected location.
5. Select an appointment type from the available options.
6. Review the **Appointments** information.
7. Click **Next**.



Note: Add Another Appointment allows scheduling multiple appointments for a single patient at the same time. For more information, refer to the *Add Another Appointment* document on the [Clinical EHR Education](#) website.

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B. Schedule an appointment using **Appointment Type**:

1. Add Appointment by: Select **Appointment Type** from the drop-down list.
2. Add Appointment Type: enter the appointment abbreviation and click the magnifying glass to search.
3. Select the correct appointment type from the available options.
4. Select one or more locations from the available options.
 - a. To Search, type in the Search Locations field, and click the magnifying glass.
5. Review the **Appointments** information.
6. Click **Next**.

C. Schedule an appointment using **Resource**:

1. Add Appointment by: Select **Resource** from the drop-down list.
2. Add Resources: free text, then click the magnifying glass.
3. Select one or more resources.
4. Add Appointment Type: free text the appointment abbreviation and click the magnifying glass.
5. Select an appointment type from the available options.
6. Add Locations.
7. Click **Next**.

Upon clicking **Next** from any scheduling path, enter the Details:

1. Select the Insurance Profile type. **Note: Only select Client Billing if using the appointment type Client Billing.**
2. Select an appointment reminder option from the drop-down list.
3. Select the Patient Language from the drop-down.
4. Free text to enter the Reason For Visit.
5. Add the Referring Physician (if needed):
 - a) Type the referring provider's name.
 - b) Click the magnifying glass.
 - c) Select the Provider, then click Select.

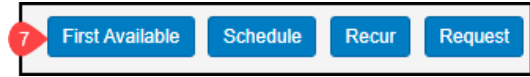
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Note: Best practice is always to ask the patient how they would like to be reminded for their appointment. **Selecting SMS Text will send the patient a text reminder that includes the Tonic e-registration link.** If SMS Text is selected and the patient does not have a textable line, the patient will receive a phone call reminder.

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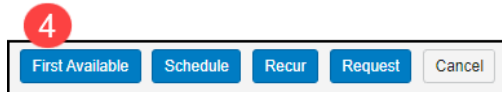
7. Select an appointment date and time using First Available, Schedule, Recur, or Request as described in the following sections.



Using the First Available Function to Schedule an Appointment

First Available can be used to identify the earliest available appointment.

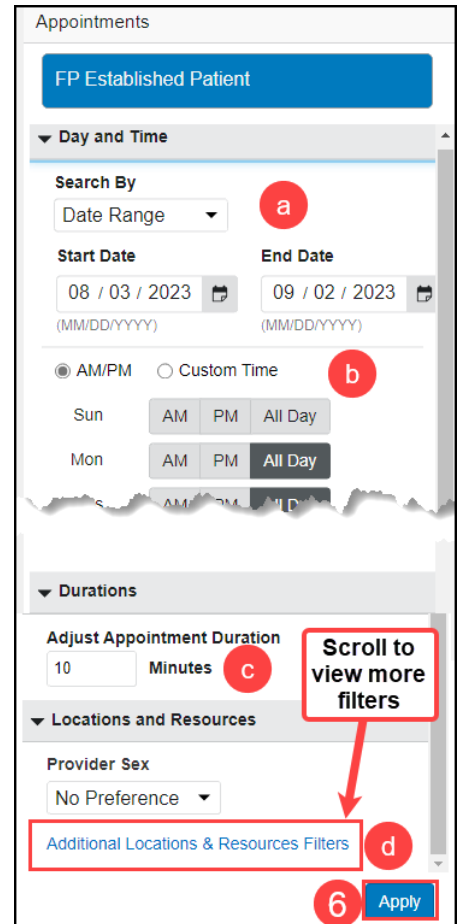
1. Search for the patient.
2. Navigate to **Appointments** within the patient perspectives toolbar.
3. Fill in all required fields in the Add Appointment section (see Adding an Appointment above).
4. Select **First Available**.



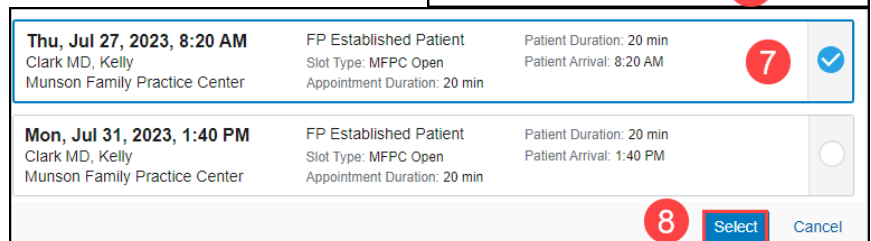
5. Refine your search criteria to narrow the results.
 - a. Search by Date Range or Schedule In i.e., 1 month.
 - b. Use time ranges and/or day exceptions to remove days of the week that the patient may be unavailable by deselecting the AM/PM/All Day for the selected day.
 - c. Adjust Appointment Duration.
 - d. Change or add Location and/or Resource filters by clicking on Additional Locations & Resources Filters.

Note: Scroll to view more search filters.

6. Click **Apply** to view appointments that fulfill the search criteria.



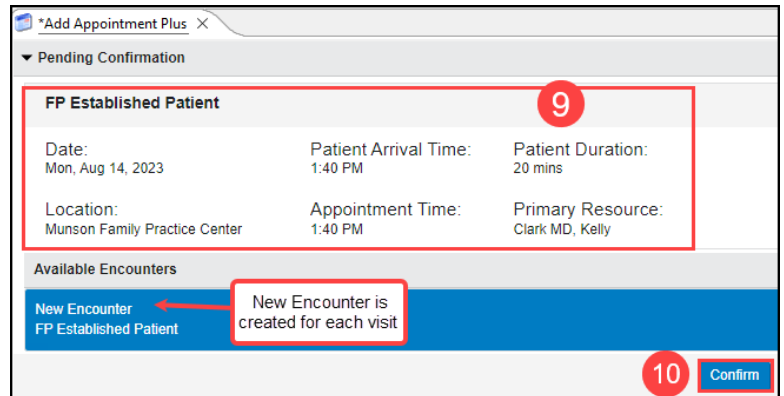
7. Select an appointment by clicking the radio button next to the desired appointment.
8. Click Select.



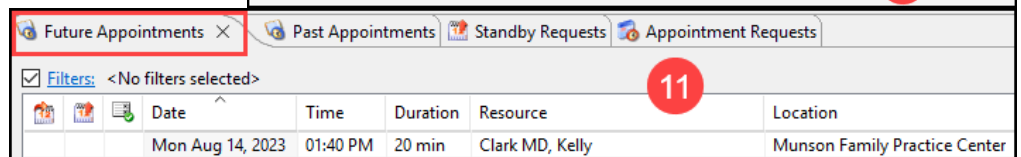
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9. Review appointment details.
Note: A New Encounter is created.
10. Click **Confirm**.

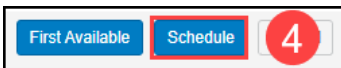


11. The visit will now appear in the Future Appointments tab.

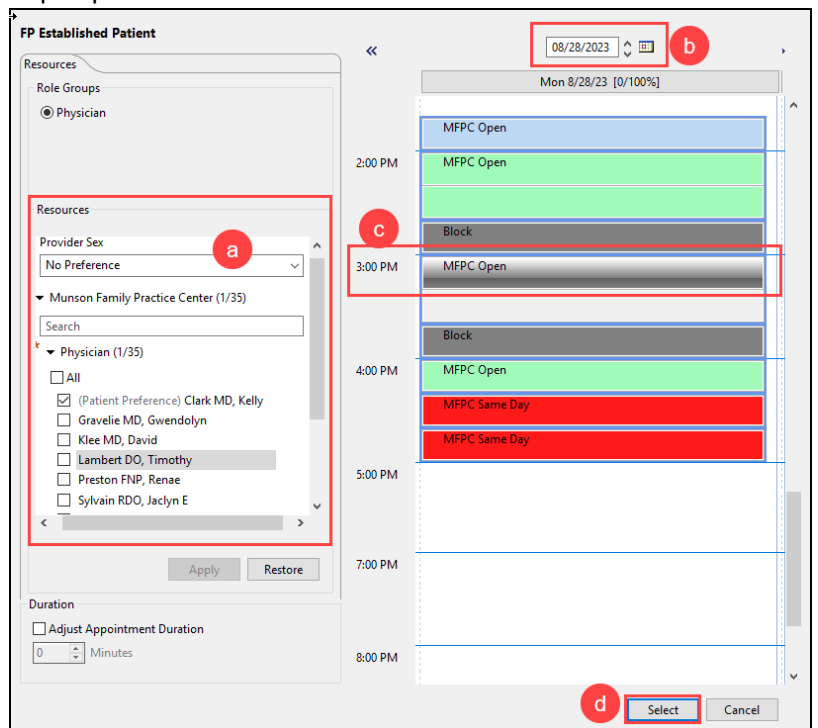


Using the Schedule Function to Schedule an Appointment

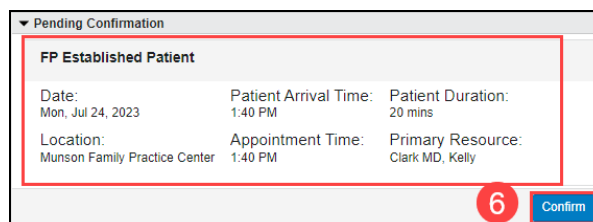
1. Search for the patient.
2. Navigate to **Appointments** within the patient perspectives toolbar.
3. Fill in all required fields in the Add Appointment section (see Adding an Appointment above).
4. Click **Schedule**.



5. Resource Schedule Navigation:
 - a. If needed, select a Resource(s).
 - b. Navigate to the desired date by using the calendar.
 - c. Click on the desired timeslot within the schedule to highlight.
 - d. Click **Select**.



6. Verify the appointment information and click **Confirm**.

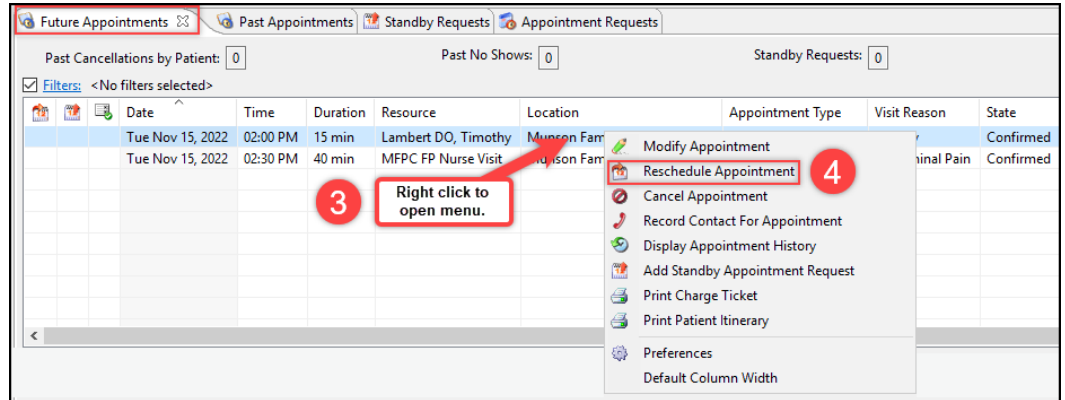


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Rescheduling an Appointment

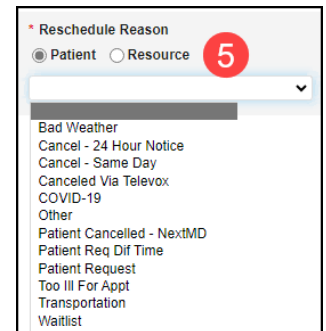
1. Search for the patient.
2. Navigate to **Appointments** within the patient perspectives toolbar.
3. In the Future Appointments tab, right click on the appointment date and time to be rescheduled.
4. Select **Reschedule Appointment** to open the appointment scheduling screen.



NOTE: Select **Modify Appointment** to change the visit reason or to add a comment.

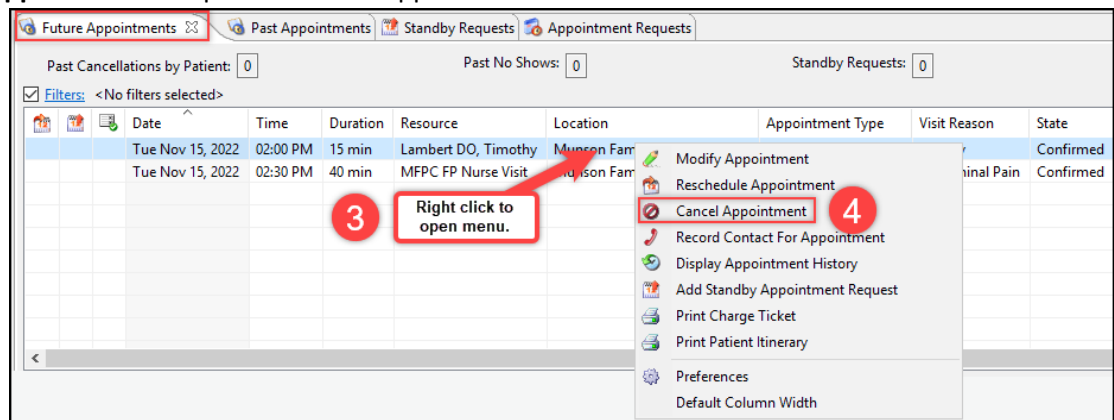
To change the appointment type or insurance profile, select **Cancel Appointment** and schedule a new appointment.

5. Select Patient or Resource and the **Reschedule Reason** from the drop-down menu.
6. Schedule an appointment using either First Available or Schedule (see above for more details).
7. Once the new appointment has been selected, the appointment scheduling screen will reappear.
8. Click **Confirm**.



Cancelling an Appointment

1. Search for the patient.
2. Navigate to **Appointments** within the patient perspectives toolbar.
3. In the Future Appointments tab, right click on the appointment date and time to be cancelled.
4. Select **Cancel Appointment** to open the cancel appointment screen.



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5. Select Patient or Resource and the **Cancel appointment reason** from the drop-down list.

*Cancel appointment reason

Patient Resource Select

- COVID-19
- Cancel - Same Day
- Patient Req Dif Time
- Patient Request
- Too Ill For Appt

*Cancel appointment reason

Patient Resource Select

- Arrived Too Late
- DO NOT RESCHEDULE
- Delivery OB
- Labs/testing incomplete
- No Show - No Notice
- Not Fasting/Had Caffeine
- PCP Canceled
- Patient In Hospital
- Provider Called To Hospital
- Provider Delay
- Provider Request
- Provider Unavailable
- Recall Event Update
- Rescheduled / Duplicate Appt
- Schedule Change
- Supplies Unavailable

6. Enter a comment if necessary.
7. Click **Confirm Cancellation**.
8. The Appointment State will show as Canceled.

*Cancel appointment reason

Patient Resource Patient Request

Cancel appointment comment

Patient seeking care at another location

Confirm Cancellation (1) Cancel

Adding Appointment Requests

Appointment requests may be used similarly to a wait list, to use if a provider is not currently accepting new patients or does not have any availability.

Request will add an appointment to the Appointment Requests Queue.

1. Search for the patient.
2. Navigate to **Appointments** within the patient perspectives toolbar.
3. Fill in all required fields in the Add Appointment section.
4. Click **Request**.

Details

* Select the billing option.

Insurance Profile

Health Professional

FP Established Patient

* Do you want a reminder for this appointment?

Patient Opt Out

FP Established Patient

Patient Language

English

FP Established Patient

Reason For Visit

Chest Pain

FP Established Patient

Referring Physician

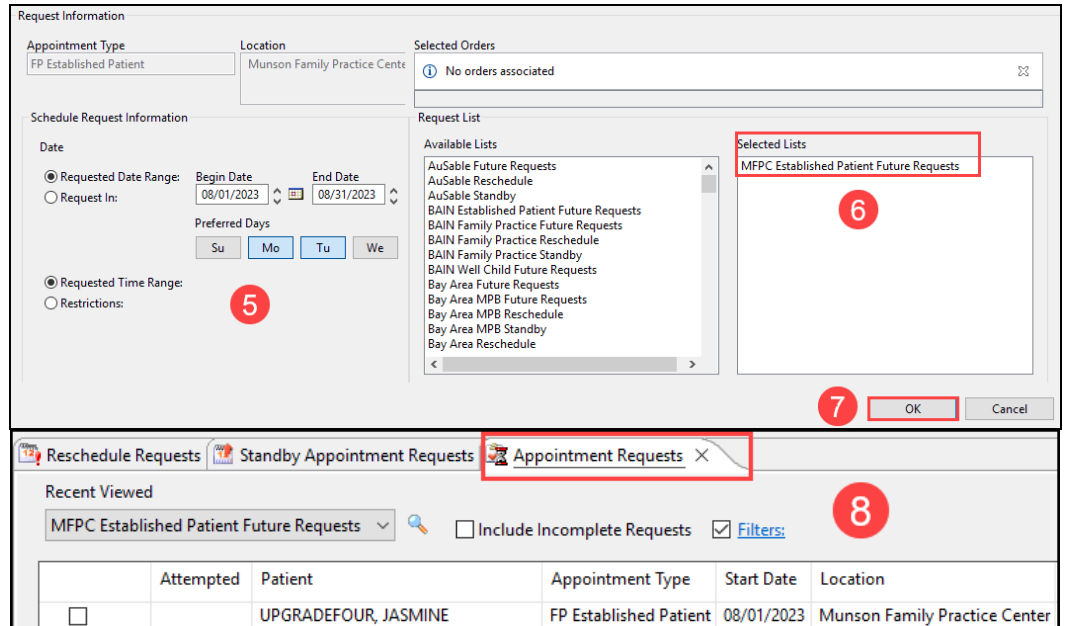
FP Established Patient

First Available Request

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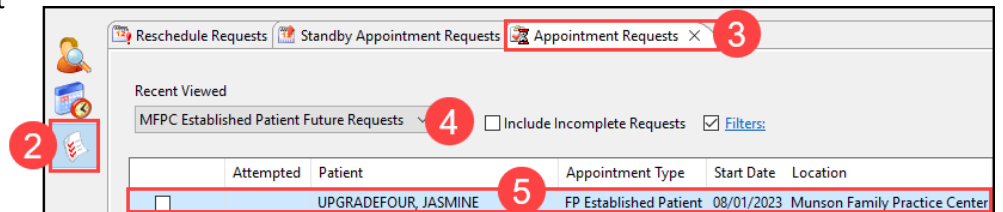
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5. Refine the Schedule Request Information as needed.
6. Select the Request List that will contain the appointment request in the Selected Lists window.
7. Click **OK**.
8. Review the request on the Appointment Requests tab.



To see the requested appointment on the Appointment Requests work queue:

1. Navigate to the non-patient perspectives.
2. Click on the Queues icon.
3. Select the Appointment Requests queue.
4. Select the Future Requests list.
5. Review the patient appointment request.

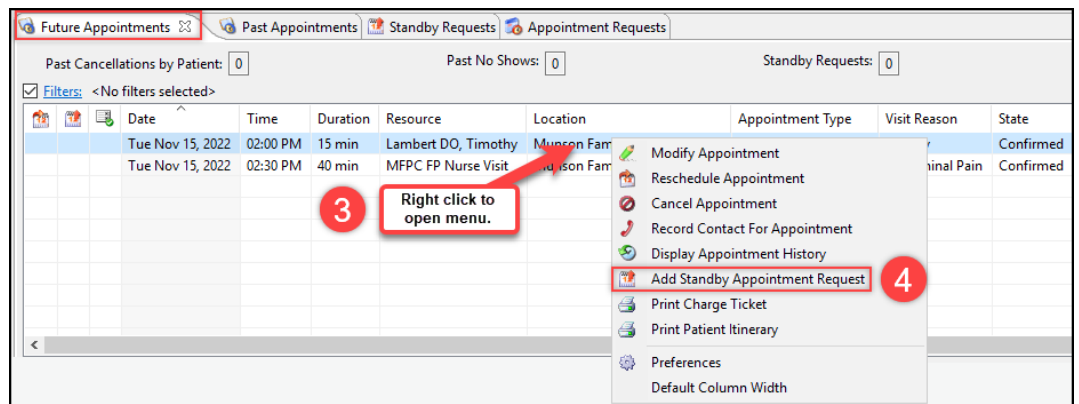


Adding a Standby Appointment Request

Standby appointment requests may be used when a patient has an appointment scheduled but needs or wants a sooner appointment.

Linked to an existing appointment:

1. Search for the patient.
2. Navigate to **Appointments** within the patient perspectives toolbar.
3. In the Future Appointments tab, right click on the appointment date and time that needs a standby request added.
4. Select **Add Standby Appointment Request**.



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- Verify the information is correct or make changes as needed. Click **OK**.


- The standby appointment icon will appear next to the appointment in the Future Appointments tab.

NOTE: The standby appointment will also appear in the Standby Requests tab and the Standby Appointment Requests Work Queue.

Without linking to an existing appointment:

- Search for the patient.
- Navigate to **Appointments** within the patient perspectives toolbar.
- In the Standby Requests tab, right click in the white space of the appointment grid.
- Select **Add New Request**.
- Complete the required information within the Standby Appointment Request screen and click **OK**.
- The Standby Appointment Request will now appear in the Standby Requests tab and the Standby Appointment Requests Work Queue.

Recurring Appointment Scheduling

- Search for the patient.
- Navigate to **Appointments** within the patient perspectives toolbar.
- Fill in all required fields in the Add Appointment screen.
- Click **Recur**. 
- Enter the appointment Search Criteria (scroll for more filters) and click **Apply**.

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6. Select View Entire Series to view the detailed appointment information for each appointment and adjust information as needed.
 - a. **Note:** if a series appointment is unavailable, the appointment time will not display and Add to Requests Queue will be selected.
7. Select the appropriate appointment recurrence series by clicking the radio button to the right of the appointment series.
8. Click **Select**.

The screenshot shows the appointment series view. At the top, it displays '9:00 AM' and 'MFPC FP Care Manage...'. Below this, the 'Location' is set to 'Munson Family Practice Center'. A 'View Entire Series' button is highlighted with a red circle '6'. A table lists two appointments: one on 08/07/2023 at 10:00 AM and another on 08/08/2023 at 9:00 AM. A red arrow points from a radio button in the top right corner (circled '7') to a 'Select' button at the bottom right (circled '8').

9. Verify each recurring appointment detail.
10. Verify the correct encounter is selected.
 - a. **Note:** A new encounter will automatically be created for each appointment if there is not an existing encounter.
11. Click **Confirm and Next**.

The screenshot shows the 'Pending Confirmation' dialog box. It contains an information icon and the text 'Encounters have been found. Choose an encounter or select Create New Encounter.' Below this, the appointment details are shown: 'FP Care Coordination', 'Date: Mon, Aug 07, 2023', 'Patient Arrival Time: 10:00 AM', 'Patient Duration: 60 mins', 'Location: Munson Family Practice Center', 'Appointment Time: 10:00 AM', and 'Primary Resource: MFPC FP Care Management - Cherie'. A red circle '9' is placed over the appointment title. Below the details, there is a section for 'Available Encounters' with a table. The table has columns for Date, Encounter, Encounter Type, Insurance Profile, Appointment Location, and Place Of Service. One encounter is listed: 'Mon, Aug 07, 2023', 'AM0057097288', 'Clinic', 'Health Professional', 'Munson Family Practice Center', and '-'. A red circle '10' is placed over the 'Available Encounters' header. At the bottom, there is a '+ Create New Encounter' button, a red circle '11' over the text 'Appointment 1 of 4', and a 'Confirm and Next' button.

12. Confirm all appointments. When the last appointment in the series has been verified, select **Confirm**.

Note: All scheduled recurring appointments will appear in the Future Appointments tab.