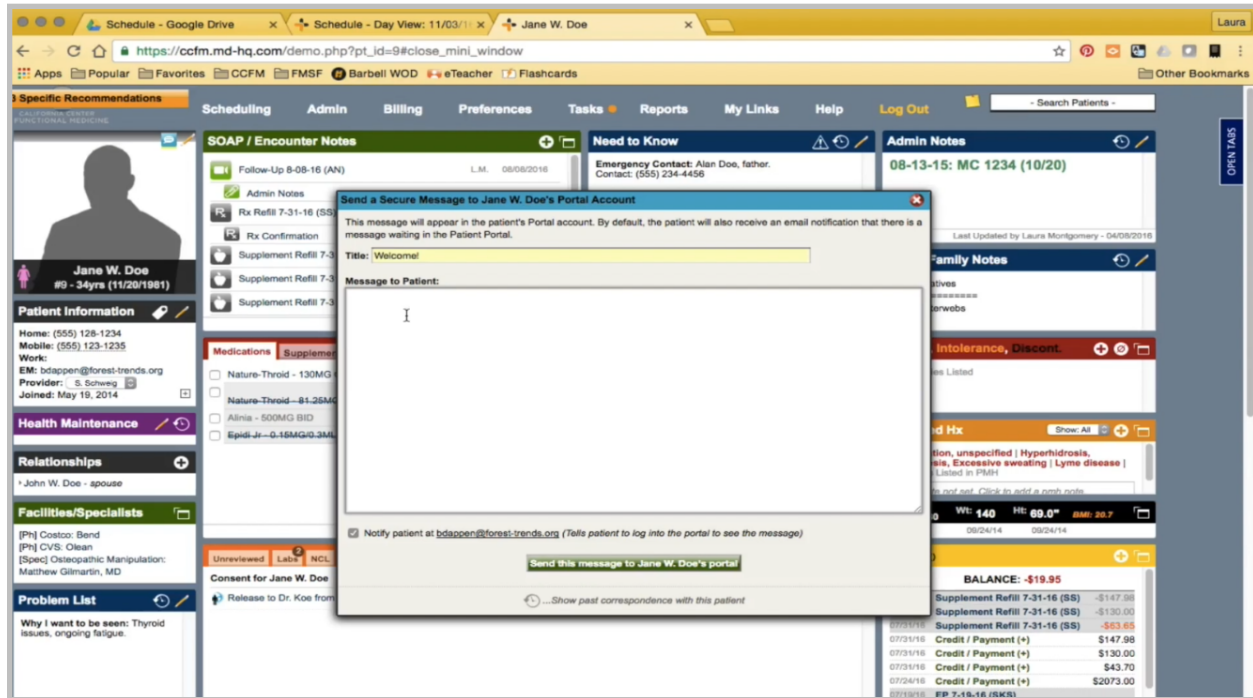
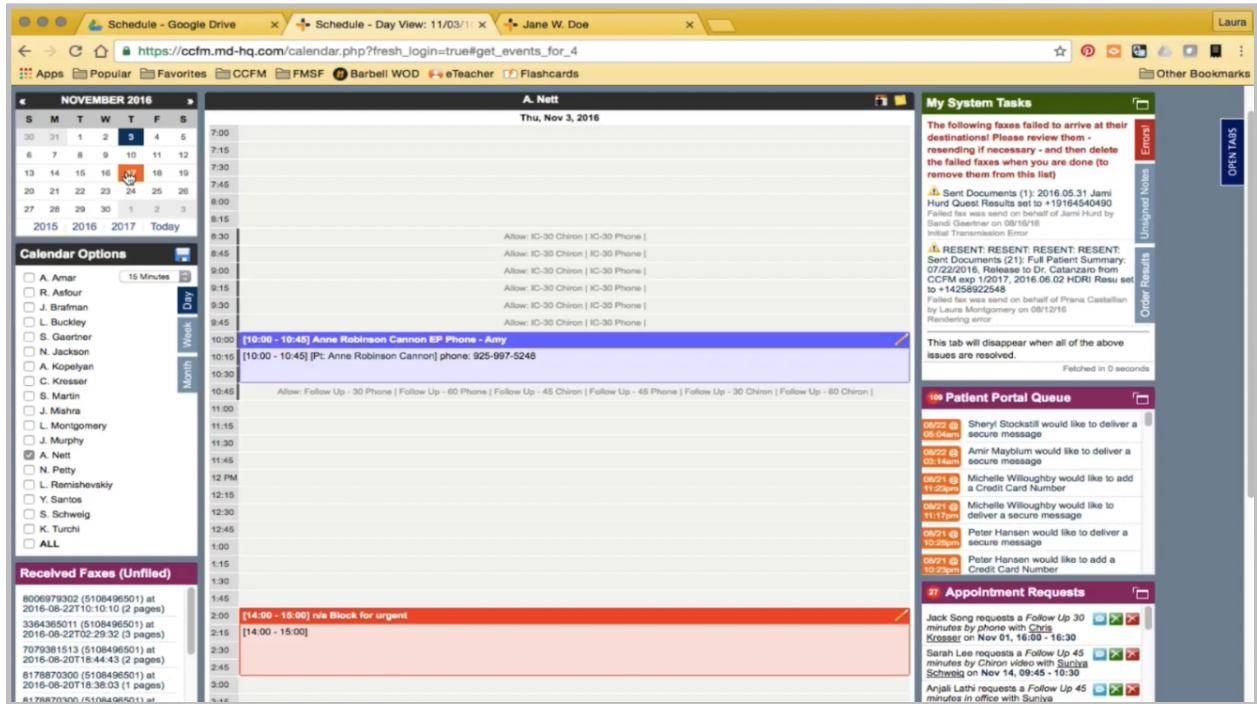


# Scheduling - Part One - Initial Consults



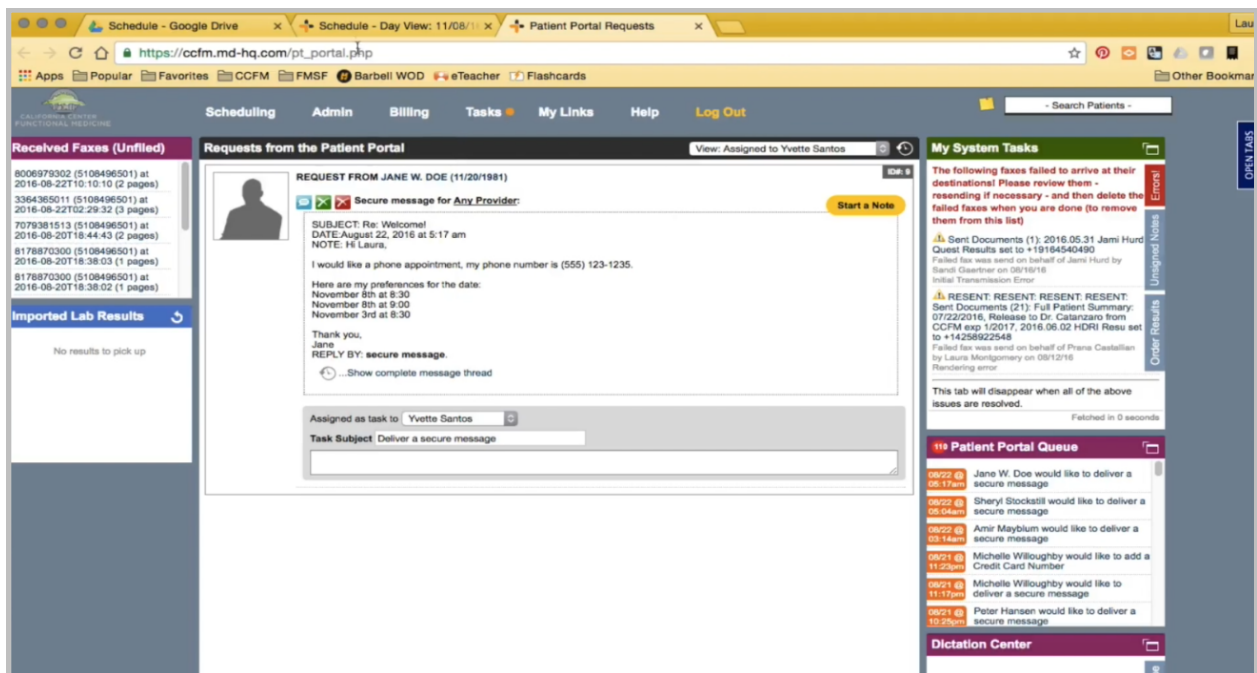
Once admin staff receives the patient's registration form, he or she will go into the patient's chart and click the blue bubble to send the message.



The screenshot shows a web-based scheduling interface. At the top, there's a navigation bar with tabs for 'Schedule - Google Drive', 'Schedule - Day View: 11/03/16', and 'Jane W. Doe'. Below this is a calendar for November 2016. The calendar is for Dr. A. Nett and shows a busy schedule with various appointments and follow-ups. On the right, there are sections for 'My System Tasks' and 'Patient Portal Queue'.

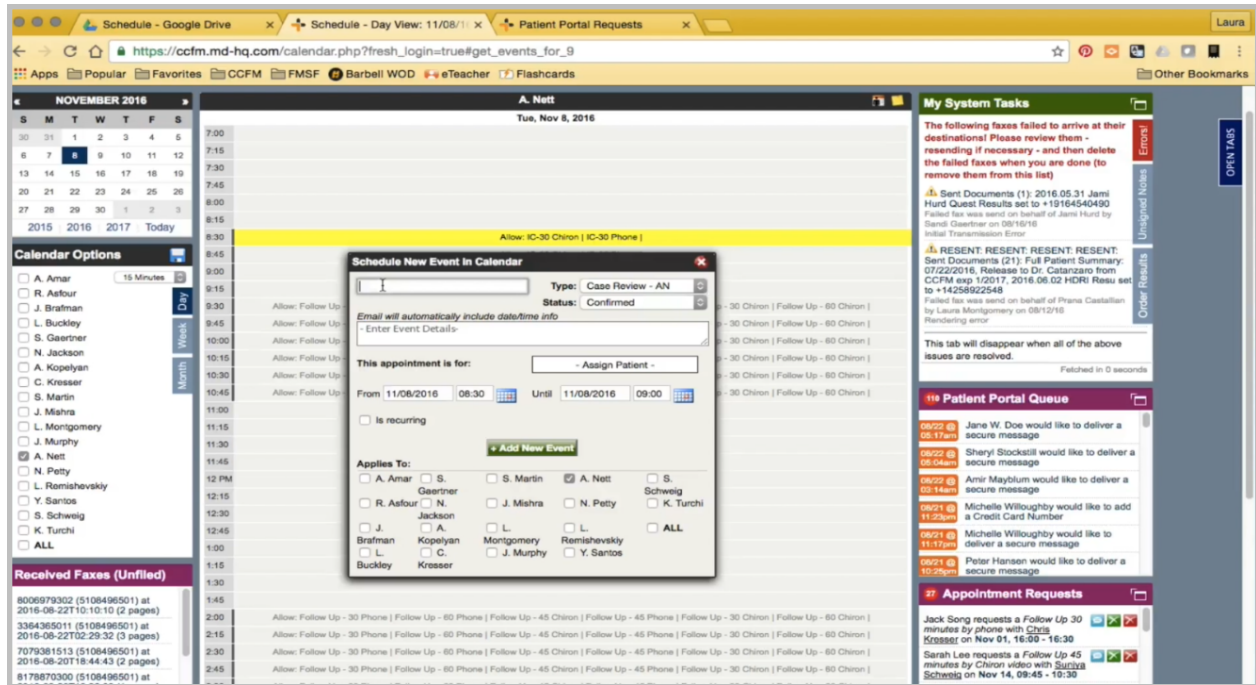
From the schedule, you should just click around to the different days that allow a new patient appointment. Find several appointment options. It's good to give the patient at least three options, but five to six options are preferred.

Send the message, and wait for the patient's response.

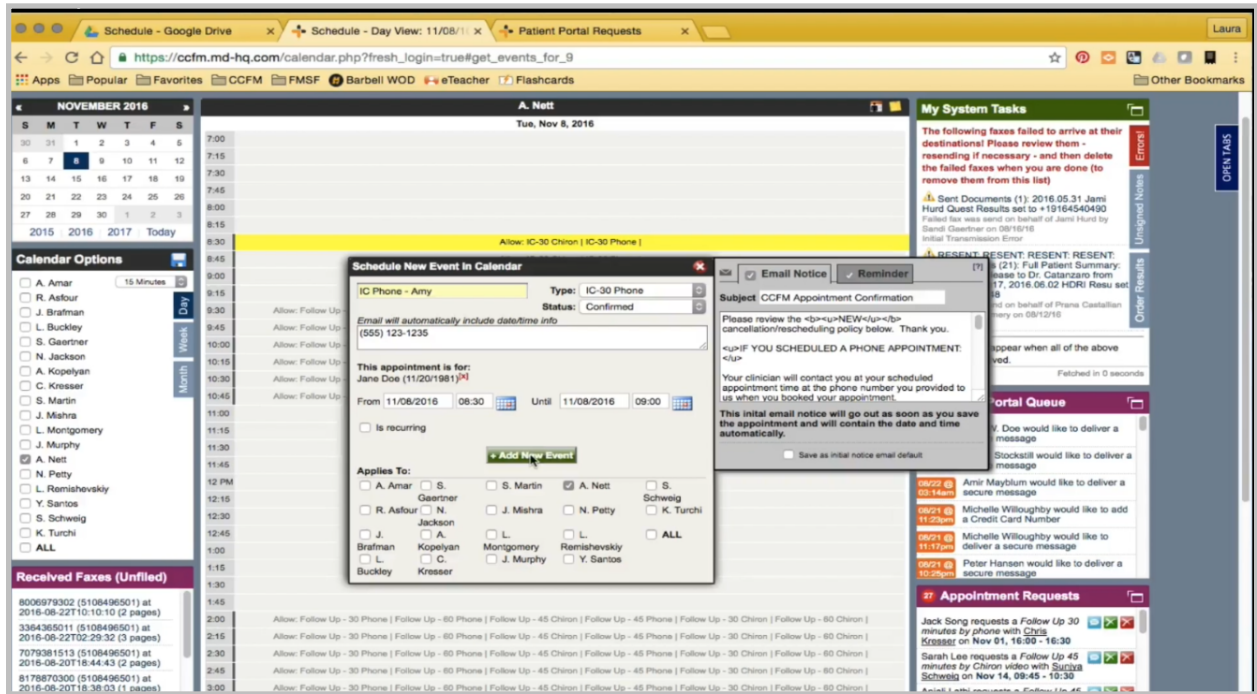


The screenshot shows a web-based patient portal interface. At the top, there's a navigation bar with tabs for 'Schedule - Google Drive', 'Schedule - Day View: 11/03/16', and 'Patient Portal Requests'. Below this is a section for 'REQUEST FROM JANE W. DOE (11/20/1981)'. The request details include a subject line 'Secure message for Any Provider', a date 'August 22, 2016 at 5:17 am', and a note 'Hi Laura, I would like a phone appointment, my phone number is (555) 123-1235. Here are my preferences for the date: November 8th at 8:30, November 8th at 9:00, November 3rd at 8:30. Thank you, Jane'. Below the request details, there's a section for 'Assigned as task to Yvette Santos' and a 'Task Subject' field. On the right, there are sections for 'My System Tasks' and 'Patient Portal Queue'.

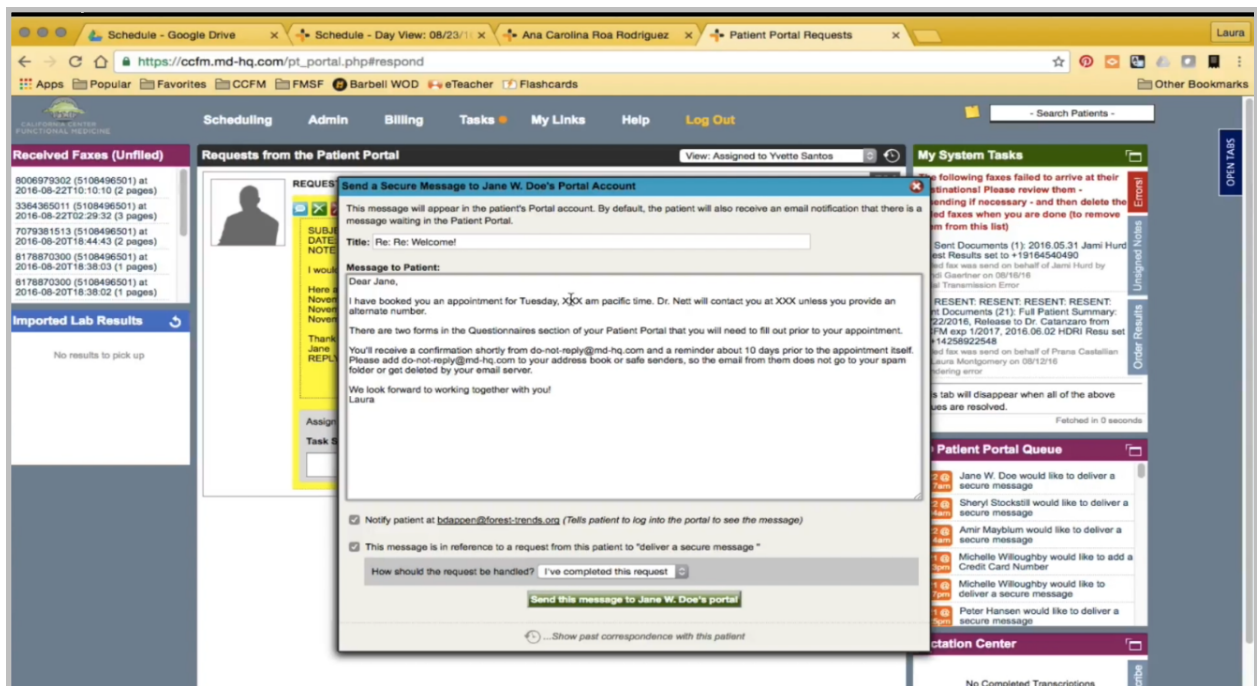
Once the patient sends a response back with his or her appointment preferences, the admin staff should go to those dates, look to see what is available, and go in order of preference of the patient's first choice, second choice, and third choice.



November 8th at 8:30 is still available, so I'll go here. Click to Add New Event. You want to make sure to get the patient's phone number.



Paste the phone number into the event details. Assign the patient, and Add New Event.



The final step will be to reply to the patient in the PPQ, and it's all finished.