PROCESS DESCRIPTION VERSION 4.0 (JUNE 2010)

POSSIBLE ROLES: RECEPTIONIST/CASHIER /CLINIC ASSIST.	PROCESS 3.2.0: CREATING CLIENT APPOINTMENTS
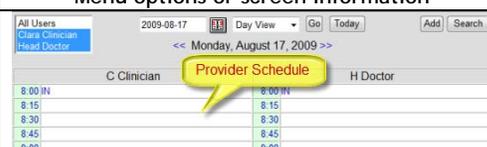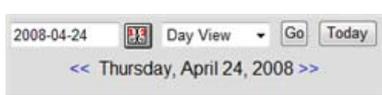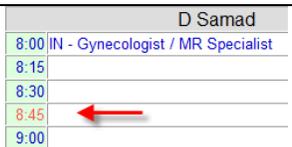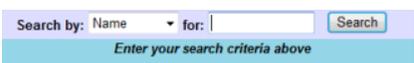
#	Step	Observations	Menu options or screen information
0	**Preliminary steps:** A service provider schedule has to be properly created in advance	Refer to Clinic Manager or CMS Manager if the relevant provider schedule is not available or properly configured	
1	Display Appointment control screen by selecting the following menu options: Client > Visit > Calendar	The appointment page is the default top screen when you enter OpenEMR. If this screen has changed select **Calendar**	
2	Once the appointment data has been obtained locate the screen in the appropriate DAY	To locate the appropriate date in Appointment screen: • Enter date and press Go, or • Move backwards or forward with arrow heads (<< or >>) • Press Today button for today's date	
3	Select the appropriate service provider and time	Example: Select the appropriate service provider: Dr. C. Samad, Select appropriate time by clicking on the time link: 8:45 am	
4	Fill out appointment form • Select appropriate Visit Category • Verify date, time, provider, duration • Find client clicking on Client field ("Click to select"). A search engine window will be displayed as follows (use the same search rules as with the Search Engine in main menu) 	Visit Category: • Select appropriate visit category from drop-down menu: • Complete remaining fields (if in doubt see Section 2.1.6 Managing appointments in User's Manual)	
5	**Scenario 1:** If client **already exists** in system, simply select her/his name in the client list displayed **Hint**: For a quick search, enter the 3 initial letters of the client last name, or enter a comma (,) in the '**for**' field for a complete list.	Example: Search criteria: c Client: Edith Castro	
6	**Scenario 2:** If client **is not registered but already has a physical client record**, you will need to go to Client > Client management > New **Note**: create this as a new client (see specific process Creating a new OpenEMR record), entering all fields required. Be careful to specify the **original** data; in particular the Registration Date, as indicated by the first visit in the physical file.	**Hint:** If you do not have enough time to create the client record, you can create a RESERVED appointment (without defining the client). Later you can create the client record and update the appointment with the client's name	Example of Reserved appointment at 9:00 am: Resulting reserved appointment:
7	**Scenario 3:** If client **is new to the clinic**, enter his/her data, enter today's date as Registration date and assign a Client Number	See Process Guideline: "Creating a new OpenEMR record" or the corresponding chapter in the User's Manual	