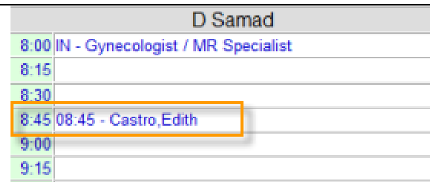
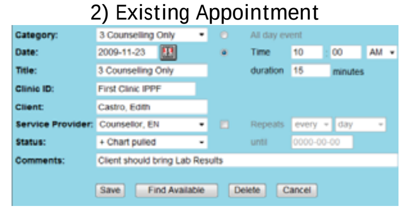
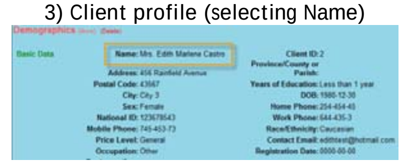
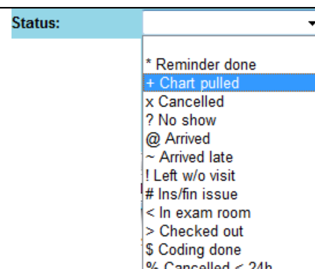
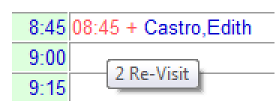
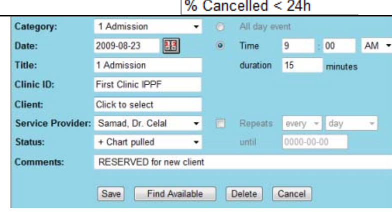
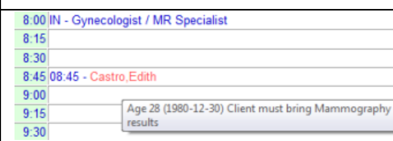
PROCESS DESCRIPTION – VERSION 4.0 (JUNE 2010)

POSSIBLE ROLES: RECEPTIONIST/CASHIER /CLINIC ASSIST.	PROCESS 3.3.0: COMPLETING CLIENT APPOINTMENTS

#	Step	Observations	Menu options or screen information
0	From the previous process (Creating Client Appointments), a new appointment for the selected client will be already created.		
1	**Links from Appointment schedule** For every appointment you will notice three relevant links: 1) Time Schedule: eg 8:45 in leftmost column 2) Appointment time: eg 8:45 before client's name 3) Client's name	These links do the following different actions: 1) Opens a new Appointment blank form for the selected time (i.e. you can assign more than one appointment to the same hour) 2) Opens the **existing** Appointment for the Client whose name appears next 3) Opens the client profile (select Visit > Calendar to return to Appt page)	1) New Appointment  2) Existing Appointment  3) Client profile (selecting Name) 
2	**Additional information:** Status You can select different status from a standard drop-down menu. Please note the symbol, as it will be displayed next to the Appointment time		The + sign indicates that this client's chart has been pulled  Passing the cursor over the Appt time shows the Visit Category
3	**Additional information:** Comments You can add relevant comments in the Appointment form. These comments will be displayed by passing the cursor over the client's name		 Passing the cursor over the client's name shows Age, DOB and Comments
4	**Deleting an Appointment** An appointment can be easily deleted by selecting the Delete button located at the bottom of the Appointment form