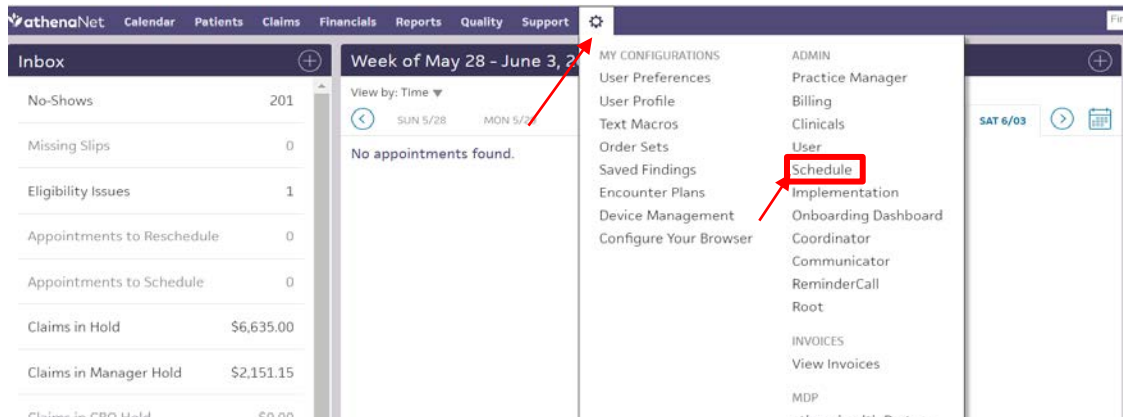


Overview

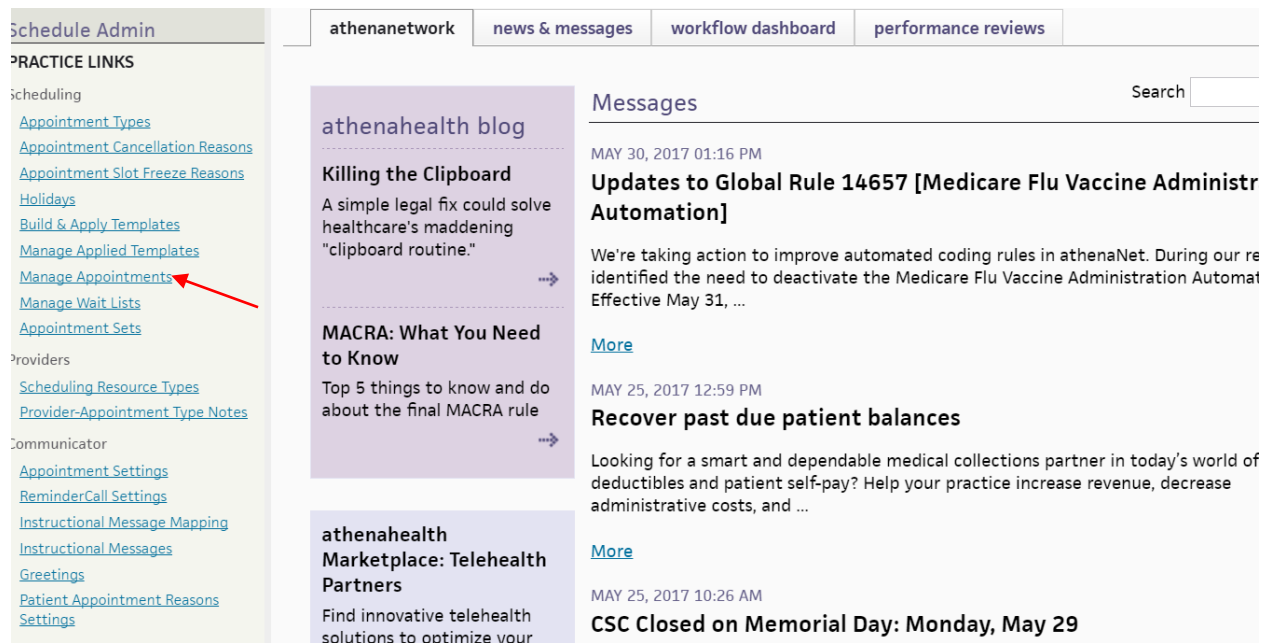
This document outlines the steps to freeze and unfreeze appointment slots.

Instructions

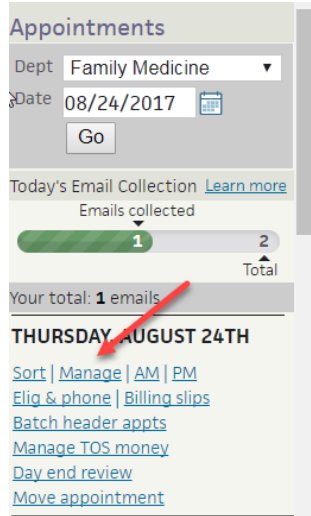
From the Main Menu Bar navigate to the Gear Icon → Schedule (under Admin)



On the right-side pane, choose Manage Appointments



You can also access Manage Appointments by navigating to Calendar (Main Menu Bar) → Today's Appointment and clicking the 'Manage' link.



Appointments

Dept: Family Medicine

Date: 08/24/2017

Go

Today's Email Collection [Learn more](#)

Emails collected

1 2

Total

Your total: 1 emails

THURSDAY, AUGUST 24TH

[Sort](#) | [Manage](#) | [AM](#) | [PM](#)

[Elig & phone](#) | [Billing slips](#)

[Batch header appts](#)

[Manage TOS money](#)

[Day end review](#)

[Move appointment](#)

Use the filters to narrow down your appointment search (by Department, Provider, Date range, Start time range, etc). Click 'Filter appointments'.



Manage Appointments

Filter Appointments

Department: -Show All-

Provider: -Show All-

Date range: From 06/01/2017 to 06/30/2017

Start time range: From To (must be of the form hh:mm AM, e.g. 8:30AM or 4:00PM)

Appointment type: -Show All-
Follow up (15 min)
3 Month Revisit (15 min)
6 Month Revisit (15 min)
Kingel TEST (30 min)
ANP (30 min)
NPE (45 min)

Day of week: -Show All-
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Frozen: -Show All-

Deleted appointments: ☐ Show deleted appointments

Audit history: ☐ Show audit history

Filter Appointments

Appointments meeting the filter criteria will display. Select the appointment/appointments that you would like to adjust by clicking the checkboxes on

the left. If all appointments need to be adjusted, click the ‘Check all slots for all providers’ checkbox.

Appointment Slots

☐ Check all slots for all providers?

McLoughlin_T

All?	Status	Date	Time	Type	Provider	Department	Patient	Notes
☐	2	Thu, 08/24/2017	08:00 AM (30 min)	New Patient 30	McLoughlin_T	Family Medicine	TEST TEST #24 H: (617) 402-1000	• Back Pain
☒	o	Thu, 08/24/2017	08:30 AM (30 min)	New Patient 30	McLoughlin_T	Family Medicine		
☒	o	Thu, 08/24/2017	09:00 AM (30 min)	Procedure Visit 30	McLoughlin_T	Family Medicine		
☐	o	Thu, 08/24/2017	09:30 AM (15 min)	Established Patient 15	McLoughlin_T	Family Medicine		
☐	o	Thu, 08/24/2017	09:45 AM (15 min)	Established Patient 15	McLoughlin_T	Family Medicine		
☐	o	Thu, 08/24/2017	10:00 AM (30 min)	Procedure Visit 30	McLoughlin_T	Family Medicine		

Scroll to the bottom of the page to take the desired action on the selected slots.

In addition to freezing or unfreezing a slot, you can move appointments to another department, to another provider, change the slot type, or delete.

Change department

Warning: Changing the department does not check against the provider's availability in that department; it may therefore cause double-bookings or destroy appointment information if misused.

Change provider

Warning: Changing the provider does not check against the target provider's availability; it may therefore cause double-bookings or destroy appointment information if misused.

Change slot type

This will only change the slot type for open slots. Filled slots will be ignored.

Delete slots ☐

Checking this box will delete unscheduled slots, and will freeze booked slots and mark those slots as requiring cancellation and rescheduling. This cancel/reschedule list may then be accessed from the Workflow Dashboard under Appts to Resched.

Freeze slots ☒ Freeze ☐ Unfreeze

Frozen slots cannot have patients scheduled into them and cannot be double-booked; they are invisible when scheduling appointments.

[Change Checked Appointments](#)

Click “Change Checked Appointments” to apply changes.