Scheduling and Appointment Book Overview

Enter the Appointment Book by clicking on the Appointment Book drawer in the ICANotes Chart Room:

Alternately, you can access the Appointment book by clicking the button from a patient’s Chart Face.

The screenshot below shows what you will see upon entering the Appointment Book.

Each clinician in your practice will have his or her own column on the calendar, and you can use the filters (see below) to control your view.

Configuring the Appointment Book

The button on the left column is used to change the appointment calendar settings. Note: Only Group Administrators have access to the Settings tab.

Once you’ve entered the Appt. Book, there are three tabs in Settings: Clinician, Appt Type, and Times, etc.
From the Clinician tab, you can select which clinicians are viewable on the calendar, change clinician credentials or names, and assign clinicians to a group for filtering appointment views.

Clicking the green add clinician button allows you to add a clinician to the calendar for scheduling, while Clicking the red X by a clinician’s name deletes them from the Appt. Book ONLY. Note: deleting a clinician doesn’t delete the clinician from the patient’s appointment history. Therefore, if you ever need to add the clinician back to the calendar, the name must be entered exactly as it was originally. The blue change button allows you to change the clinician’s display name or you can add the clinician to a group for filtering.

When adding a clinician to the calendar, it is optional yet recommended that you tie them to an actual user in ICANotes. This will improve your tracking and record-keeping in the system.

From the Appt Type tab, you can customize appointment types (categories) specific to your practice. You can delete an appointment type by clicking the red X to the left of the listing.

Using add type allows you to create a new appointment type. Note: be sure not to use one of the restricted characters noted on the Appointment Type Options window in the Type Title or the color will not change on the calendar. You can edit the title, the default length, and the assigned color of an existing type by clicking the change button. To set a default appointment type for your practice, click the default checkbox next to the desired default type.

The Times Etc. tab (seen to the right) lets administrators set the default time increment for the calendar, the default appointment duration, and the day beginning and day end times (Start Day At and End Day At fields) to define the hours during which the Seek feature will look for available appointment slots. We highly encourage you to setup this feature.

Under this tab, there is also a series of checkboxes which allow you to customize the appointment book. We also recommend that you review these settings to see if you want to apply any of them to your default appointment book.
Scheduling an Appointment

There are two ways to schedule an appointment in ICANotes. The first is to hold down the **Shift** key on your keyboard and click your cursor on an open time in the Appt. Book grid.

This will open an **Event Details Window**.

Using this method will auto-populate the appointment date and time and the clinician’s name. You can change any of these entries by editing them on the **Event Details** window (seen on the left). The appointment book will also auto-populate the patient’s name, depending on which patient you have listed in the upper-left-hand corner of the main Appointment Book.

If you are scheduling a follow-up appointment for a patient, you can print out a reminder for them using the **Print Reminder** button.

You can also choose to schedule a recurring appointment using the **Repeat This Event** button.

After all information for the appointment appears correctly on the Event Details window, you should click on **Save** to push the appointment to the actual calendar.

The second way to schedule an appointment is using the **Seek** feature. Clicking the **Seek** button (found on the upper-left of the Appointment Book) enables you to search for open appointment slots.
Using the Seek feature, you can search for an open appointment slot based on appointment length, a specific clinician, day(s) of the week, or a range of dates. After you enter your desired criteria in the search window, the program will generate a list of open slots on the right. If you click the checkbox labeled “show Appt slots for this length,” all available individual appointment slots will be displayed in the circled column. To schedule an appointment, simply click on the desired appointment slot on the right, and an Event Details Window will open.

Printing an Appointment List

To print out a list of appointments for a specific date, first click the button on the left gray panel (on left), then select the desired date on the calendar.

Next, press the button located in the upper-right corner of the screen (see right).

A large gray Print Style Options pop-up window will appear offering you two choices. You can choose to print the appointments in a grid format or in a list format:

- If you select GRID, you will print the appointments in a grid as they appear on your screen.
- If you select LIST, the Event Print Options pop-up window will appear (see below).

This window allows you to select the appointment types you want included on your printed list as well as how much patient information should be printed.

If you select LIST and pick FULL patient information, your printed list will include appointment information and basic patient demographics including: name, chart ID, DOB, contact phone numbers, number preferred by patient, insurance information, any calendar note that has been set up for this patient under the Notes column, and the number of patients being seen by the clinician for this day. If you choose LESS patient information, insurance information and notes will not be printed. Here you’ll also be able to include patient diagnosis on each event that’s printed, or print a certain number of copies for each clinician assigned to an event.

Select to continue.
Exporting an Appointment List

If you want to export information from the scheduler to use an Appointment Reminder Service, or simply to get the data to an Excel Spreadsheet, first select the day using the button as outlined above, then press the button (circled in red below) located in the upper right corner of the screen.

Once the button is clicked, an Export Details window will appear with a variety of options for you to customize the data that you’re exporting. Make sure to review these before continuing.

An **Export Completed** pop-up window will appear with the following instructions:

“The export has been compiled and copied to your computer’s clipboard. Please open an Excel document, put your cursor in cell A1 and use the Paste command (or CTRL V) to fill the spreadsheet.”