Redesigned Table on Scheduling Page to Improve Consistency and Efficiency

What is it?

The list of scheduled visits on the Scheduling page is being redesigned to use a new table layout for managing appointments. This new layout will be available on mobile devices as well. This update will be available to all customers automatically.

Why is it useful?

This new table layout improves consistency and clinical efficiency. Providers, MAs, and schedulers can manage and create appointments quickly and with ease.

When should I use it?

- To find information about upcoming appointments
- To schedule a new appointment
- To edit or reschedule an appointment
- To cancel an appointment

Before & After

BEFORE

AFTER

How does it work?

Managing Upcoming Appointments

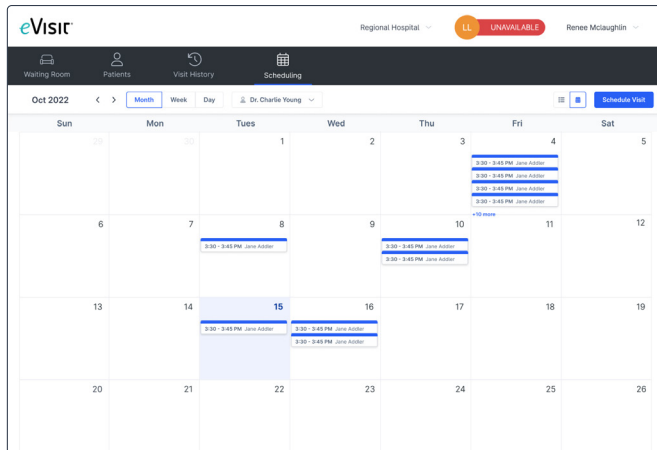**1** In the main navigation menu, click the **Scheduling** tab.

2 Use the filters to narrow in on a subset of appointments: filter by data, by appointment status (Checked-In vs Scheduled), by provider. Or, use the search bar to find an appointment by keyword.

3 The new table layout shows key visit information, including updated Status. Instead of Confirmed/ Unconfirmed, the status column (and filter) now lists Scheduled/Checked-In. This was updated to add clarity and transparency around the patient experience. Patients can only check-in 24 hours before their appointment time and this check-in is the only method of confirming an appointment.

On the right of the table, use the actions (left to right) to edit/reschedule, cancel, or get more information (opens the sidebar).

4 Appointments can also be visualized with the calendar view (this visualization only allows viewers to see one provider's schedule at a time).

Creating a New Appointment

1 Click on the Schedule Visit button in the top right and fill out the form.

2 Under the provider drop-down, providers with scheduled availability will be shown at the top and providers with only On-Demand available or with no availability will be listed at the bottom in a disabled state.