

Using Appointments Tab

Last Modified on 12/22/2018 1:19 pm EST

Summary

Click on the [Appointments tab](#) to view past, present or future appointments as found in your practice management system (PMS).

Select any specific day by using the calendar. You may also select a range of dates. A table of appointments will appear below. We call this the *Schedule Breakdown*. You can click on any header link, for instance **Patient Name** to sort the schedule breakdown.

The screenshot displays the 'PATIENTCOMMUNICATOR' interface. At the top, there are navigation tabs: Home, Appointments (selected), Patients, Communication Center, Settings, and History. Below the navigation is a calendar for May 2018. A callout points to the calendar with the text: 'Review other appointments using any combination of Calendar, Date Range and Filters'. To the right of the calendar is the 'Schedule Breakdown' section. It includes a 'DATE RANGE' filter with 'Start Date' and 'End Date' fields set to 5/15/2018, and a 'GO' button. Below that is a 'FILTER' section with 'All Providers Selected' and 'All Appointment Types ...' dropdowns, and a 'FILTER' button. A 'SEND MESSAGE TO ALL PATIENTS BELOW' button is also present. The main table, titled 'Schedule Breakdown', lists appointments for May 15, 2018. The table has columns: Contact, Status, Patient Name, ApptDate, AppType, Provider, and ApptID. The first row shows an 'Unconfirmed' appointment for Joe Goliger at 8:00 AM. A callout points to the 'Unconfirmed' status with the text: 'Confirmation Status & Method'. The second row shows a 'Confirmed via' appointment for Donald Duck at 8:30 AM. A callout points to the 'Confirmed via' status with the text: 'Click to message patient'. The third row shows a 'Confirmed via' appointment for William Grant at 8:30 AM. A callout points to the 'Confirmed via' status with the text: 'Click to review Patient Details'. The fourth row shows a 'Confirmed via' appointment for Paige Davis at 9:00 AM. A callout points to the 'Confirmed via' status with the text: 'Contact a large group of patients by filtering and then clicking here'. The fifth row shows a 'Confirmed via' appointment for Joe Goliger at 9:30 AM. The sixth row shows a 'Confirmed via' appointment for Dalton Bergout at 9:30 AM. The table footer shows 'Schedule Breakdown' and '12 Appointments'.

| Contact | Status | Patient Name | ApptDate | AppType | Provider | ApptID |
|---------|---------------|--------------------------------|-----------------|--------------------|-----------------|--------|
| @ | Unconfirmed | Joe Goliger | 5/15/18 8:00 AM | Comprehensive Exam | Janice Hausfeld | 415 |
| @ | Confirmed via | Donald Duck | 5/15/18 8:30 AM | Existing Patient | Leonard Varna | 414 |
| @ | Confirmed via | William Grant | 5/15/18 8:30 AM | New Patient | Janice Hausfeld | 416 |
| @ | Confirmed via | Paige Davis | 5/15/18 9:00 AM | Urgent Visit | David Arquette | 412 |
| @ | Confirmed via | Joe Goliger | 5/15/18 9:30 AM | Routine Check Up | Leonard Varna | 424 |
| @ | Confirmed via | Dalton Bergout | 5/15/18 9:30 AM | Routine Check Up | Leonard Varna | 406 |

- Click an icon in the left hand column to message your patient
- View current *confirmation status* and, if confirmed, how the patient's appointment was confirmed.
- Manually confirm your patient by hovering your mouse on *Unconfirmed*. A popup will appear. Click **Confirm Now** to confirm the appointment both in Patient Communicator and (if available for your PMS) within your PMS.
- To review *Patient Details*, click on an underlined patient's name. The Patient Details window opens in a new tab. See [Patient Details](#) article for more details.

- View relevant appointment information such as appointment time and *date, appointment type, provider, and patient ID*.
- View appointment details for other dates using any combination of the calendar, the date range box, and filtering by provider and appointment type.
- You may print or save results to Excel by clicking the icons.
- Easily contact a large group by using the Schedule Breakdown filters. For instance, if a provider is sick you could filter on that provider, and a specific appointment type, and send a message to all patients that would be affected by clicking **SEND MESSAGE TO ALL PATIENTS BELOW**.

