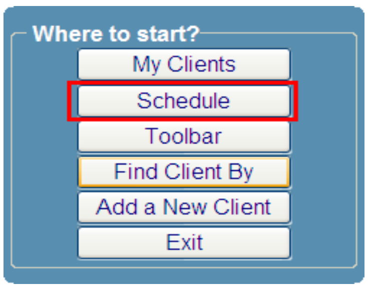
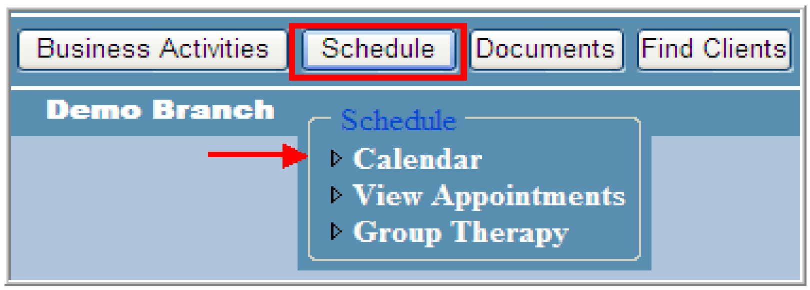
Creating Appointments

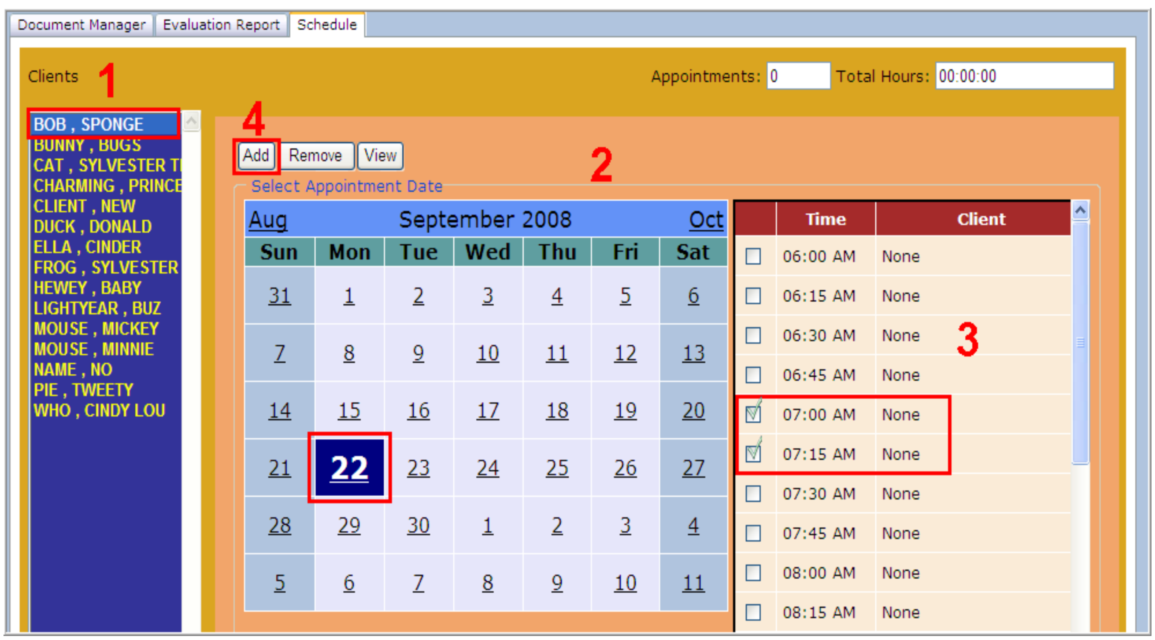
Scheduling Appointments

STEP 1: OPEN THE SCHEDULER/CALENDAR- Select 'Schedule' on the Homepage OR 'Schedule' <Calendar> from the toolbar.





STEP 2: SPECIFY APPOINTMENT INFORMATION- 1) Select the client, 2) Select the date of service, 3) Select the time of service, and 4) Add the appointment.

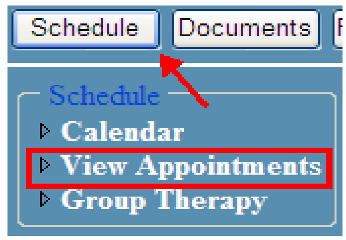


STEP 3: Repeat step 2 to add all appointments.

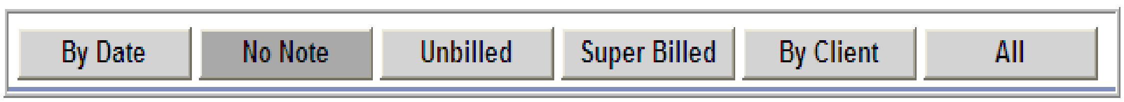
Creating Appointments
Page 2

Viewing Appointments

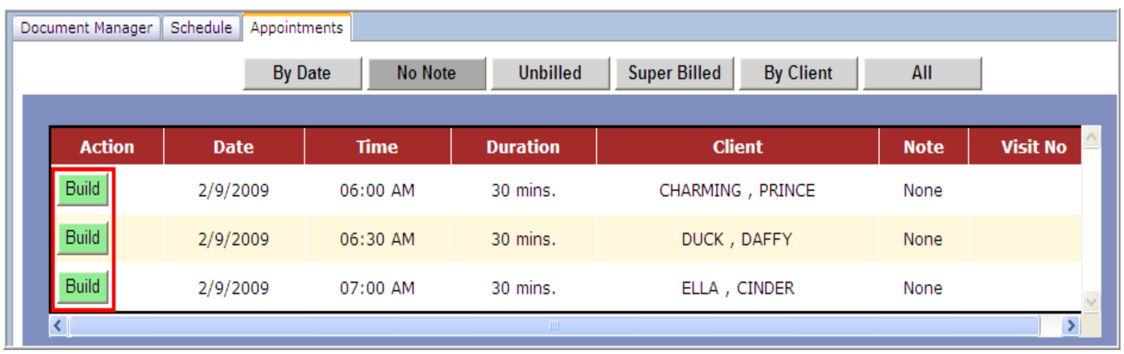
STEP 1: Select 'View' from the Calendar or from the Schdule tab of the toolbar.



STEP 2: Click on the appropriate category to view appointment information.



STEP 3: CREATE TREATMENT NOTES by selecting Build from the Action box of the Appointments View.



Action	Date	Time	Duration	Client	Note	Visit No
Build	2/9/2009	06:00 AM	30 mins.	CHARMING , PRINCE	None	
Build	2/9/2009	06:30 AM	30 mins.	DUCK , DAFFY	None	
Build	2/9/2009	07:00 AM	30 mins.	ELLA , CINDER	None	

Step 4. Return to the Scheduling Calendar to create more appointments.

Removing Appointments

STEP 1: SPECIFY APPOINTMENT INFORMATION ON THE CALENDAR- 1) Select the client, 2) Select the date of service, 3) Select the time of service to be removed, and 4) Select Remove. YOU MAY ONLY REMOVE APPOINTMENTS, NOT APPOINTMENTS WITH NOTES.

Group Appointments

STEP 1: SPECIFY APPOINTMENT INFORMATION ON THE CALENDAR- 1) Select the client, 2) Select the date of service, 3) Select the time of service, and 4) Select Add. Repeat steps 1 - 4 and select the appointment time again for each new group member.

More helpful information about creating daily notes is located in the Online Help and in the Treat*Write* Manual located on the Help Menu of the toolbar.