Appointments should always be made from the Resource Schedule. Although it is possible to make an appointment from the Hub and from the practice schedule, all the necessary information is not consistently pulled into the appointment if it is not generated from the Resource Schedule.

If the side panel is hidden, click on the 3 parallel lines at the top left of the screen (eCW calls this a hamburger). Then choose “Practice”, then choose “Resource Scheduling”.

Click on the provider with whom the appointment is to be scheduled, and then double click on the time chosen for the appointment.
Select the patient for whom the visit is being made. Filters for this search include name, DOB, phone number, plus a few other choices.

There is an option for a secondary filter if needed.

Once the patient is chosen, an alert screen pops up. In most cases, just click on “OK” or “Cancel” - but if there is a pertinent alert, address it.
Select the type of visit from the dropdown menu.

A reason does not need to be entered, but it does provide anyone viewing the appointment schedule in the future with useful information about the upcoming visit.

Note that the Hub, the Info screen, and Encounters can be accessed easily from the appointment screen. A billing note or general note can be added in this screen as well.
Once the appointment is saved, the billing information on the right opens when the appointment is accessed again. The little red arrow at the top right opens and closes the right panel.

At the bottom of the screen are links to the referrals screen and orders screen, as well as a log of changes made to this appointment. In the blue band at the very bottom of the screen are a few more links.

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