Managing Tentative Appointments

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The purpose of this document is to describe the steps for a clinic to manage Tentative Appointments.

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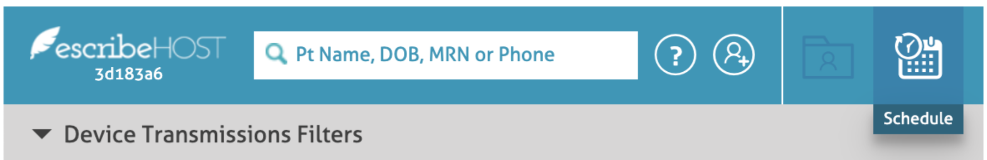
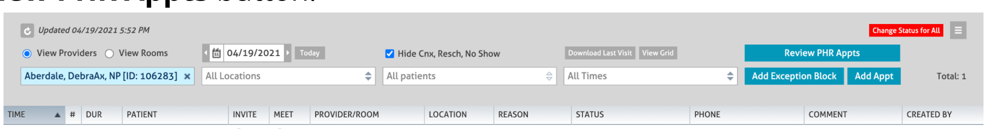
Review and manage tentative appointments requested by patients using the Patient Facing Appointment Selection.

NOTE: APPOINTMENTS_MANAGE permission is required to manage this feature.

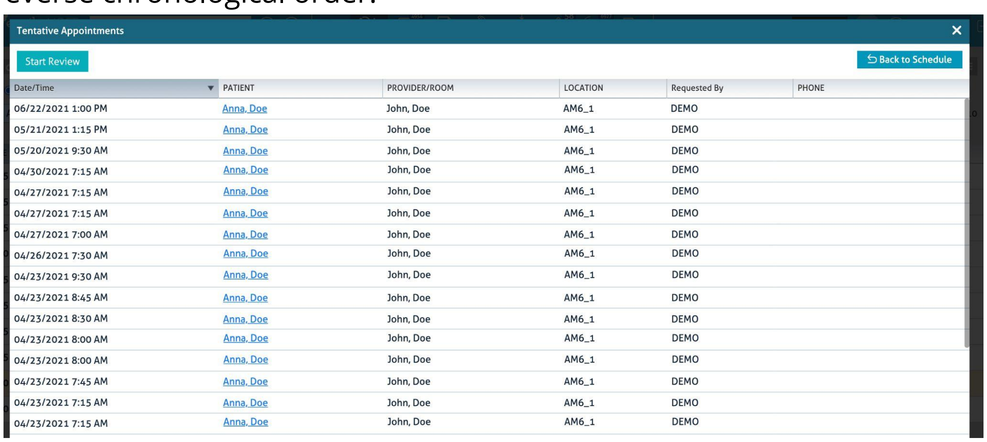
Navigate to the Schedule module.



Click the **Review PHR Appts** button.



A popup displays with the list of unreviewed Tentative Appointments. By default, the list is displayed in reverse chronological order.

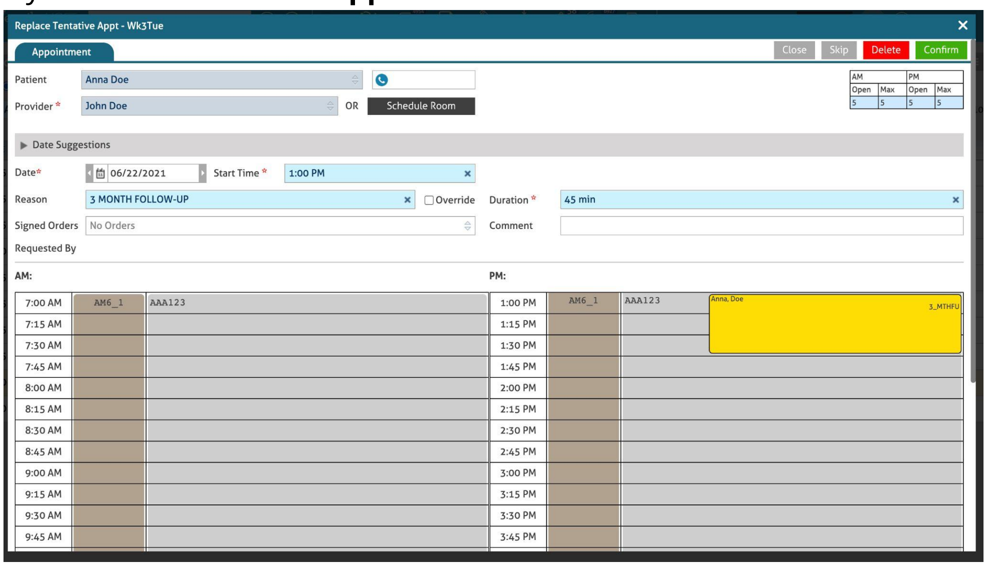


Click the **Start Review** button to begin reviewing the entire queue.

To review a specific appointment, click that row.

NOTE: Clicking the patient link will navigate the user to that Patient's chart, and the tentative appointment popup will be closed.

A popup displays with the **Tentative Appt** details.



Confirm the appointment as is, or edit the appointment before confirming.

At the top right of the popup you can decide to:

- **Close** the Tentative Appointment queue. If you click this button, you go back to the daily schedule and no action is taken on this appointment.
- **Skip** the Tentative Appointment. If you click this button, you skip this appointment and move to the next one in the queue. No action is taken on this appointment.
- **Delete** the Tentative Appointment.
- **Confirm** the Appointment to create a permanent appointment in place of the tentative appointment.