Module 2: Appointment Scheduling

2.1 Computer Competency

Schedule Two Appointments for Established Patients Using MOSS

Description of Simulation: You are assigned to the appointment desk on November 3, 2009. You are to schedule office appointments for patients calling on the telephone.

Patient 1: Kramer, Stanley

Step 1: Open MOSS and logon with your student identification.

Step 2: At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments.

Step 3: Patient Stanley Kramer has been transferred by telephone to you for appointment scheduling. Study the following dialogue (or practice out loud with a study partner), and perform the tasks as indicated:

Medical Assistant: Good Morning, this is [your name]; may I help you with an appointment?
Mr. Kramer: This is Stanley Kramer, I’d like to make an appointment to see Dr. Schwartz.
Medical Assistant: Have you visited our office before?
Mr. Kramer: Dr. Schwartz treated me in the hospital recently. I was told to make a follow up appointment when I was discharged.
Medical Assistant: So that I can schedule the appropriate amount of time, for what reason were you in the hospital, Mr. Kramer?
Mr. Kramer: I had pneumonia. I’m still coughing and am using a couple of inhalers that are almost used up. I’ll need refills, but I don’t know if I should be taking more antibiotics.
Medical Assistant: I’m sorry that you are not feeling well. Is there a day and time that is more convenient for you to visit the doctor?
Mr. Kramer: I was told to come in about one week after discharge. I was hoping to get November 9 in the morning sometime. I’m off that day, so any time would be good.
Step 4: On the appointment scheduler screen, click on the small calendar on the upper right to November 9, 2009 and check Dr. Schwartz’s schedule for the morning. (Hint: Click on the +M button to advance to the month of November, if needed).

Step 5: Continue the dialogue:

Medical Assistant: I’m sorry, Mr. Kramer. Dr. Schwartz is in surgery on Monday mornings. [Click to check the next day, November 10, 2009]. I do have openings on November 10.

Mr. Kramer: I guess I could come in on my lunch hour. What is the latest appointment you can give me in the middle of the day?

Medical Assistant: We close at noon for lunch. I can schedule you at 11:00 am. Expect to be here for about 45 minutes to one hour for a follow-up visit after a hospitalization.

Mr. Kramer: I think I can do that. I’ll take that appointment.

Medical Assistant: OK, Mr. Kramer. I have you down for 11:00 am on November 10 with Dr. Schwartz. Is there anything else I can help you with today?

Mr. Kramer: No, thank you. I’ll see you then.

Medical Assistant: Have a good day. Good-bye.

Step 6: To schedule the appointment using MOSS, click in the space for 11:00 am under the column labeled Schwartz, and then View/Create Appointment. (Note: You may also double click in the 11:00 am slot). The Appointment Scheduling patient list will open.

Step 7: Select Stanley Kramer from the patient list by single clicking on his name, and then click on the Add button. This will open the Patient Appointment Form, as shown in Figure 2-1.
Step 8: In Field 2, click on the magnifying glass icon to drop down the list of physicians. Select Dr. Schwartz. Next, drop down the list for Field 5 and select 45 minutes for the visit duration. Last, drop down the list for Field 6 and select V2 (Office Visit) for the reason.

Step 9: Under Field 9, there is a box labeled Note. Type the following: Hospital follow-up, pneumonia. Check your work with Figure 2-2.
Step 10: Click on the *Save Appointment* button when finished. You will receive a confirmation that the appointment was posted, click *OK*. Close the form when finished.

Step 11: When you look at the appointment schedule for November 10, 2009, you will see Kramer at 11:00 am under the column for Dr. Schwartz. There are 3 lines with his name on it, indicating a 45 minute visit (each line represents 15 minutes).

Step 12: To view the Appointment details, *single click* on the name Kramer on the schedule. Field 1 will display details about the appointment. To reopen the *Patient Appointment Form*, *DOUBLE click* on the name Kramer. Check your work with Figure 2-3.
**Patient 2: Gordon, Eric**

**Step 1:** Open MOSS and logon with your student identification.

**Step 2:** At the *Main Menu*, click on the *Appointment Scheduling* button so that you are prepared to start scheduling appointments.

**Step 3:** The telephone rings at your appointment desk. Study the following the dialogue, and perform the tasks where indicated:

- **Medical Assistant:** Good Morning, this is [your name]; may I help you with an appointment?
- **Caller:** Yes, I’d like to make an appointment to see the doctor.
- **Medical Assistant:** I can help you with that. May I have your name, please?
- **Caller:** Yes, this is Eric Gordon.
Medical Assistant: Thank you, Mr. Gordon. Have you visited our office before, or are you a new patient?

Mr. Gordon: I was in to see Dr. Schwartz a couple of weeks back, and I’m not getting any better. I’d like to come in and have him look at me again.

Medical Assistant: What type of problem are you having?

Mr. Gordon: I’m having a really bad time with bronchitis. I don’t seem to be able to breathe comfortably, and it’s interfering with my work. I have to speak at some training sessions, and I’m coughing and irritated just talking.

Medical Assistant: I understand. Is there a date and time that is most convenient for you?

Mr. Gordon: I’d like an afternoon appointment, but early enough that I’m out before rush hour. Do you have anything today?

Step 4: On the appointment scheduler screen, click on the small calendar on the upper right to November 3, 2009.

Step 5: Continue the dialogue:

Medical Assistant: I can schedule you for right after lunch today. Would you be able to come in at 1 o’clock?

Mr. Gordon: That would be great – yes, I can make it.

Medical Assistant: I have scheduled you for 1:00 pm later today. Is there anything else I can do for you, Mr. Gordon?

Mr. Gordon: No, that was all I needed. Thanks for getting me in today.

Medical Assistant: You are welcome. We’ll see you later, then.

Mr. Gordon: Thank you very much. Good-bye.

Medical Assistant: Thank you. Good-bye.

Step 6: To schedule the appointment using MOSS, click in the space for 1:00 pm on November 3, 2009, under the column labeled Schwartz. Next, click on View/Create Appointment. (Note: You may also double click in the 1:00 pm slot). The Appointment Scheduling patient list will open.

Step 7: Select Eric Gordon from the patient list by single clicking on his name, and then click on the Add button. This will open the Patient Appointment Form.

Step 8: In Field 2, click on the magnifying glass icon to drop down the list of physicians. Select Dr. Schwartz. Next, drop down the list for Field 5 and select 15 minutes for the visit duration. Last, drop
Step 9: Under Field 9, there is a box labeled Note. Type the following: Follow-up, Bronchitis. Check your work with Figure 2-4.

Step 10: Click on the Save Appointment button when finished. You will receive a confirmation that the appointment was posted, click OK, and then close the window.

Step 11: When you look at the appointment schedule for November 3, you will see patient Gordon at 1:00 pm under the column for Dr. Schwartz. There is one line with his name on it, indicating a 15 minute visit (each line represents 15 minutes).

Step 12: To view the Appointment details, SINGLE click on the name Gordon on the schedule. Field 1 will display details about the appointment. To reopen the Patient Appointment Form, DOUBLE click on the name Gordon. Check your work with Figure 2-5.
Step 13: The appointment has been successfully scheduled for patient Gordon. Click on the Close button at the bottom right of the scheduler, and return to the Main Menu for MOSS.

2.2 Computer Competency

Schedule Five Appointments for New Patients Using MOSS

Description of Simulation: You are assigned to the appointment desk on November 3, 2009. You are to schedule office appointments for patients calling on the telephone. HINT: Be sure that Feedback Mode is OFF before proceeding with the exercises that follow.

NOTE: When using MOSS to schedule appointments for new patients, a partial patient registration will be necessary. This will include the full name, address, daytime phone number, date of birth, social security number, name of insurance coverage (primary and secondary), and insurance ID number. In general, all new patients are asked to bring in their insurance eligibility cards so they can be copied (or scanned). In an actual office environment, there are several ways new patients on the telephone can be
handled in terms of their personal registration information. You will follow the office policy of your employer. Here are some examples:

- As mentioned above, the staff member scheduling the appointment will take partial information from the patient and request that he/she bring in their insurance eligibility cards and arrive 15-30 minutes early to complete forms and obtain signatures.

- The staff member scheduling the appointment will take partial information from the patient and mail paperwork to the patient (such as the registration form and/or medical history forms) and ask the patient to bring or mail these back to the office at the time of their appointment.

- The staff member scheduling the appointment will take complete registration information and input it directly to the practice management software. If further medical history is needed, forms can be mailed to the patient, or the patient is asked to come in early for the appointment to complete the medical history. Medical offices that opt for this method usually have a staff member dedicated to this task, and other routine telephone duties are covered by someone else.

- If the practice has a website that provides an online registration form which the patient can fill in themselves and submit, this is another option for receiving patient information. Some provide online forms for the patient to provide their own medical and surgical history as well.

**Patient 1: Oliver, Daniel**

**Step 1:** Open Delmar’s Medical Office Simulation Software and logon with your student identification.

**Step 2:** At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments.

**Step 3:** A telephone call from Daniel Oliver has been transferred to you for appointment scheduling. Study the following dialogue (or practice out loud with a study partner), and perform the tasks where indicated:

- **Medical Assistant:** Good Morning, this is [your name]; may I help you with an appointment?
- **Caller:** This is Daniel Oliver; I need to make an appointment to see Dr. Schwartz.
- **Medical Assistant:** Have you visited our office before?
- **Mr. Oliver:** No, I just found Dr. Schwartz on the network list for my insurance. He does take Signal HMO, right?
- **Medical Assistant:** Yes, he does. Mr. Oliver, so that I may schedule an appointment time, what is the nature of your visit with the doctor?
- **Mr. Oliver:** I fell from a ladder and seemed to be okay, but I have a sore spot in my neck that doesn’t seem to go away.
Medical Assistant: When did you fall?

Mr. Oliver: Over this past weekend.

Medical Assistant: Did this injury happen at work?

Mr. Oliver: No, I was at home patching a leak in the roof. In fact, I have a business trip I have to leave for tomorrow, and I won’t be able to come in until next week.

Medical Assistant: Let me see what is available next week.

Step 4: On the appointment scheduler screen, click on the small calendar on the upper right to November 9, 2009 and check Dr. Schwartz’s schedule for the first available appointment that week.

Step 5: Continue the dialogue:

Medical Assistant: Mr. Oliver, the first appointment I can give you would be Tuesday morning, November 10.

Mr. Oliver: As early as I can get there the better. Medical Assistant: I can schedule you first thing at 9:00 am. You should arrive at least 20 minutes early so you can complete the patient registration form and other paperwork.

Mr. Oliver: How long do you think the visit will take?

Medical Assistant: We usually schedule new patients for 60 minutes. But, if the doctor requires other tests, your appointment might take longer. Do you want me to schedule this time for you?

Mr. Oliver: Yes, thank you.

Medical Assistant: Very well, I will need to get some information from you.

Step 6: To schedule the appointment using MOSS, single click in the space for 9:00 am on November 10 under the column labeled Schwartz, and then View/Create Appointment. (Note: You may also double click in the 9:00 am slot). The Appointment Scheduling patient list will open.

Step 7: Next, click on Add New Patient. This will open the Patient Registration Form, as shown in Figure 2-6.
**Step 8:** While the patient is on the telephone, you will ask for partial information to start the record and schedule the appointment. When the patient comes in for the visit, he will complete a patient registration form, and the rest of the information will be input at that time.

On the patient registration field, fill in the following data as given by the patient:

- **Physician Field:** Change to Schwartz
- **Field 1:** Oliver
- **Field 2:** Daniel
- **Field 3:** M.
- **Field 4:** 999-57-9844
- **Field 5:** Male
- **Field 7:** 01/13/1980
- **Field 8:** 10075 Princess Circle
- **Field 9:** Douglasville
- **Field 10:** NY
- **Field 11:** 01234
- **Field 12:** (123) 457-6600

When you have completed the above data entry, click on the **Save** button. Check your work with Figure 2-7.
Step 9: Next, click on the Primary Insurance tab. The patient has informed you that he has Signal HMO. You have verified that the doctor is an in-network physician.

On the primary insurance screen for Patient Oliver, fill in the following data as given by the patient:

Field 1: Drop down the list and select Signal HMO

Field 8: 999-610023-02

When you have completed the above data entry, click on the Save button. Check your work with Figure 2-8, and then close the window. This will take you back to the appointment scheduler.
**Step 10:** Double click on the 9:00 am slot under Dr. Schwartz (Nov 10) and this time, search for Daniel Oliver from the patient list and click on the Add button in order to add his appointment to the schedule.

**Step 11:** On the Patient Appointment Form, you should see Daniel Oliver’s name in Field 1, and November 10 in Field 3. Next, drop down the list of physicians in Field 2 and select Dr. Schwartz.

**Step 12:** Complete each field indicated below by inputting the information as given:
- **Field 5:** Drop down the box and select 60 minutes
- **Field 6:** Drop down the box and select V1 (New patient)
- **Field 9:** Click in the Note box and type: Neck Pain, post fall

When you have finished, check your work with Figure 2-9. Click on the Save Appointment button, and click OK when prompted. Close the window.

![Patient Appointment Form](image)

**Step 13:** The appointment has been successfully scheduled for patient Oliver. You should now see four lines (reserving 1 hour in four 15 minute slots) on the schedule at 9:00 am on November 10 with Dr. Schwartz.
Step 14: Continue the dialogue with Patient Oliver:

Medical Assistant: Mr. Oliver, I have scheduled you for a visit at 9:00 am on November 10 with Dr. Schwartz. Please remember to arrive 20 minutes early and bring your insurance card and your co-payment, which is payable at the time of service. Is there anything else I can assist you with today? Do you need directions to our office?

Mr. Oliver: No, I know how to get there. Thanks for your help.

Medical Assistant: Thank you. Have a good day. Good-bye.

Mr. Oliver: Good-bye.

Patient 2: Jacobi, Carla

Step 1: Open MOSS and logon with your student identification.

Step 2: At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments.

Step 3: A telephone call from Carla Jacobi has been transferred to you for appointment scheduling. Using the skills previously learned for scheduling appointments for new patients, make an appointment for the patient using the data provided in the steps that follow.

Step 4: Open the appointment scheduler to November 10, 2009. The patient will be scheduled for a one hour new patient visit at 1 pm with Dr. Schwartz. Double click in the 1 pm slot in the Dr. Schwartz column, and then click on Add New Patient.

Step 5: Register the patient with following partial information, obtained during your telephone conversation with the patient:

Physician Field: Schwartz
Field 1: Jacobi
Field 2: Carla
Field 3: Blank (no middle name)
Field 4: 999-57-8163
Field 5: Female
Field 7: 08/27/1955
Field 8: 10021 Hazel St.
Field 9: Douglasville
Field 10: NY
Field 11: 01234
Field 12: (123) 457-8163

When you have completed the above data entry, click on the Save button. Check your work with Figure 2-10.

Figure 2-10

**Step 6:** Next, click on the *Primary Insurance* tab. The patient has informed you that she has ConsumerOne HRA. On the primary insurance screen for patient Jacobi, fill in the following data as given by the patient:

- Field 1: Drop down the list and select *ConsumerOne HRA*
- Field 8: 99558163

When you have completed the above data entry, click on the Save button. Check your work with Figure 2-11, and then close the window. This will take you back to the appointment scheduler.
Step 7: Double click on the 1:00 pm slot under Dr. Schwartz (Nov 10) and this time, search for Carla Jacobi from the patient list and click on the Add button in order to add her appointment to the schedule.

Step 8: On the Patient Appointment Form, you should see Carla Jacobi’s name in Field 1, and November 10 in Field 3. Next, drop down the list of physicians in Field 2 and select Dr. Schwartz.

Step 9: Complete each field indicated below by inputting the data shown:

   Field 5: Drop down the box and select 60 minutes

   Field 6: Drop down the box and select V1 (New patient)

   Field 9: Click in the Note box and type: Heartburn

When you have finished, check your work with Figure 2-12. Click on the Save Appointment button, and click OK when prompted. Close the window.
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Figure 2-12

Step 10: The appointment has been successfully scheduled for Patient Jacobi. You should now see four lines (reserving 1 hour as four 15 minute slots) on the schedule at 1:00 pm on November 10 with Dr. Schwartz.

Patient 3: Snider, Christopher

Step 1: Open MOSS and logon with your student identification.

Step 2: At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments.

Step 3: Your have received a telephone call from Christopher Snider at the appointment desk. Using the skills previously learned for scheduling appointments for new patients, make an appointment for the patient using the data provided in the steps that follow.

Step 4: Open the appointment scheduler to November 10, 2009. The patient will be scheduled for a 45 minute new patient visit at 2 pm with Dr. Heath. Double click in the 2 pm slot in the Dr. Heath column,
and then click on *Add New Patient*.

**Step 5:** Register the patient with following partial information, obtained during your telephone conversation with the patient:

- **Field 1:** Snider
- **Field 2:** Christopher
- **Field 3:** A.
- **Field 4:** 999-21-0863
- **Field 5:** Male
- **Field 7:** 10/20/1972
- **Field 8:** 4517 King Place, Apt 104
- **Field 9:** Douglasville
- **Field 10:** NY
- **Field 11:** 01234
- **Field 12:** (123) 457-3316

When you have completed the above data entry, click on the *Save* button. Check your work with Figure 2-13.

![Patient Registration](image)

**Step 6:** Next, click on the *Primary Insurance* tab. The patient has informed you that he has FlexiHealth PPO In-Network. On the primary insurance screen for Patient Snider, fill in the following data as given by the patient:
Field 1: Drop down the list and select *FlexiHealth PPO In-Network* (Dr. Heath is a participating in-network provider).

Field 8: 999210863

When you have completed the above data entry, click on the *Save* button. Check your work with Figure 2-14, and then close the window. This will take you back to the appointment scheduler.

![Patient Registration](image)

**Figure 2-14**

**Step 7:** Double click on the 2:00 pm slot under Dr. Heath (Nov 10) and this time, search for Christopher Snider from the patient list and click on the *Add* button in order to add his appointment to the schedule.

**Step 8:** On the *Patient Appointment Form*, you should see Christopher Snider’s name in Field 1, and November 10 in Field 3. Next, drop down the list of physicians in Field 2 and select Dr. Heath.

**Step 9:** Complete each field indicated below by inputting the data shown:

- Field 5: Drop down the box and select 45 minutes
- Field 6: Drop down the box and select V1 (New patient)
- Field 9: Click in the *Note* box and type: Depression

When you have finished, check your work with Figure 2-15. Click on the *Save Appointment* button, and click *OK* when prompted. Close the window.
Step 10: The appointment has been successfully scheduled for Patient Snider. You should now see three lines (reserving 45 minutes with 3 slots) on the schedule at 2:00 pm on November 10 with Dr. Heath.

Patient 4: Carvajal, Maria

Step 1: Open MOSS and logon with your student identification.

Step 2: At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments.

Step 3: A telephone call from Maria Carvajal has been transferred to you for appointment scheduling. Using the skills previously learned for scheduling appointments for new patients, make an appointment for the patient using the data provided in the steps that follow.

Step 4: Open the appointment scheduler to November 10, 2009. The patient will be scheduled for a one hour new patient visit at 1 pm with Dr. Heath. Double click in the 1 pm slot in the Dr. Heath column,
and then click on *Add New Patient*.

**Step 5:** Register the patient with following partial information, obtained during your telephone conversation with the patient:

- Field 1: Carvajal
- Field 2: Maria
- Field 3: L.
- Field 4: 999-68-1551
- Field 5: Female
- Field 7: 03/05/1933
- Field 8: 325 Prince Court Apt. 101
- Field 9: Douglasville
- Field 10: NY
- Field 11: 01234
- Field 12: (123) 457-2325

When you have completed the above data entry, click on the *Save* button. Check your work with Figure 2-16.

![Figure 2-16](image)

**Step 6:** Next, click on the *Primary Insurance* tab. The patient has informed you that she has Medicare. On the primary insurance screen for Patient Carvajal, fill in the following data as given by the patient:

- Field 1: Drop down the list and select *Medicare (Statewide Corp.)*
Field 8: 999681551A

When you have completed the above data entry, click on the **Save** button. Check your work with Figure 2-17. Note: Keep the patient registration window open.

![Patient Registration Window](image)

**Figure 2-17**

**Step 7:** Patient Carvajal has informed you that she also has a secondary insurance, which is Medicaid. Continuing on the *Patient Registration* screen, click on the **Secondary Insurance** tab. On the secondary insurance screen for Patient Carvajal, fill in the following data as given by the patient:

- **Field 1:** Drop down the list and select *Medicaid*
- **Field 8:** 99155312

When you have completed the above data entry, click on the **Save** button. Check your work with Figure 2-18, and then close the window. This will take you back to the appointment scheduler.
Step 8: Double click on the 1:00 pm slot under Dr. Heath (Nov 10) and this time, search for Maria Carvajal from the patient list and click on the Add button in order to add her appointment to the schedule.

Step 9: On the Patient Appointment Form, you should see Maria Carvajal’s name in Field 1, and November 10 in Field 3. Next, drop down the list of physicians in Field 2 and select Dr. Heath.

Step 10: Complete each field indicated below by inputting the data shown:

Field 5: Drop down the box and select 60 minutes
Field 6: Drop down the box and select V1 (New patient)
Field 9: Click in the Note box and type: Fatigue and headache.

When you have finished, check your work with Figure 2-19. Click on the Save Appointment button, and click OK when prompted. Close the window.
Step 11: The appointment has been successfully scheduled for Patient Carvajal. You should now see four lines (reserving 1 hour in four 15 minute slots) on the schedule at 1:00 pm on November 10 with Dr. Heath.

Patient 5: Rahman, Naseem

Step 1: Open Delmar’s Medical Office Simulation Software and logon with your student identification.

Step 2: At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments.

Step 3: A telephone call from Naseem Rahman has been transferred to you for appointment scheduling. Using the skills previously learned for scheduling appointments for new patients, make an appointment for the patient using the data provided in the steps that follow.

Step 4: Open the appointment scheduler to November 10, 2009. The patient will be scheduled for a one hour new patient visit at 3:30 pm with Dr. Heath. Double click in the 3:30 pm slot in the Dr. Heath
column, and then click on *Add New Patient*.

**Step 5:** Register the patient with the following partial information, obtained during your telephone conversation with the patient:

- **Field 1:** Rahman
- **Field 2:** Naseem
- **Field 3:** Blank (no middle name)
- **Field 4:** 999-13-6121
- **Field 5:** Male
- **Field 7:** 10/10/1941
- **Field 8:** 9902 Granite Place
- **Field 9:** Douglasville
- **Field 10:** NY
- **Field 11:** 01233
- **Field 12:** (123) 466-1145
- **Field 20:** Patient says he was referred by Dr. Joseph Reed on Midway

When you have completed the above data entry, click on the *Save* button. Check your work with Figure 2-20.
**Step 6:** Next, click on the *Primary Insurance* tab. The patient has informed you that he has Medicare. On the primary insurance screen for Patient Rahman, fill in the following data as given by the patient:

- **Field 1:** Drop down the list and select *Medicare (Statewide Corp.)*
- **Field 8:** 999136121A

When you have completed the above data entry, click on the *Save* button. Check your work with Figure 2-21. Note: Leave the Patient Registration window open.

![Figure 2-21](image)

**Step 7:** Patient Rahman has informed you that he also has a secondary insurance, which is Century SeniorGap (a Medigap insurance). Continuing on the *Patient Registration* screen, click on the *Secondary Insurance* tab. On the secondary insurance screen for Patient Rahman, fill in the following data as given by the patient:

- **Field 1:** Drop down the list and select *Century SeniorGap*
- **Field 8:** 999136121

When you have completed the above data entry, click on the *Save* button. Check your work with Figure 2-22, and then close the window. This will take you back to the appointment scheduler.
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Step 8: Double click on the 3:30 pm slot under Dr. Heath (Nov 10) and this time, search for Naseem Rahman from the patient list and click on the Add button in order to add his appointment to the schedule.

Step 9: On the Patient Appointment Form, you should see Naseem Rahman’s name in Field 1, and November 10 in Field 3. Next, drop down the list of physicians in Field 2 and select Dr. Heath.

Step 10: Complete each field indicated below by inputting the data shown:

  Field 5: Drop down the box and select 60 minutes
  Field 6: Drop down the box and select V1 (New patient)
  Field 9: Click in the Note box and type: Diabetes management.

When you have finished, check your work with Figure 2-23. Click on the Save Appointment button, and click OK when prompted. Close the window.
Step 11: The appointment has been successfully scheduled for Patient Rahman. You should now see four lines (reserving 1 hour in four 15 minute slots) on the schedule at 3:30 pm on November 10 with Dr. Heath.

2.3 Computer Competency

Reschedule Two Patient Appointments Using MOSS

Description of Simulation: You are assigned to the appointment desk on October 26, 2009 to assist callers with their scheduling needs.

Patient 1: Stanley Kramer

Step 1: Open MOSS and logon with your student identification.

Step 2: At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments. Be sure to single click on October 26, 2009 to start.
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Step 3: You answer a call from Stanley Kramer. He has informed you that the visit he scheduled for November 10, 2009 with Dr. Schwartz is no longer convenient due to a business trip he must make. He would like to reschedule it for his return, preferably November 17.

Step 4: Click on November 17 and look at Dr. Schwartz’s schedule. Mr. Gordon has selected the 11:15 visit on November 17 so that he may come during his lunch hour.

Step 5: Next, reschedule the appointment by going back to November 10, 2009, and locating Mr. Kramer. Double click on his name to open the Patient Appointment Form, as shown on Figure 2-24.

![Patient Appointment Form]

Step 6: On the Patient Appointment Form, be sure that the date in Field 3 reads November 10, 2009, as this is the appointment you are moving to another date. Go to Field 9 and click in the box in front of Rescheduled. Drop down the box for the field Reason/Date and select R6 Needs Different Date.

Step 7: Next, click on the calendar icon to the right of the reschedule field (Bubble caption reads: View Practice Reschedule). This will open the scheduler so that you can go to the new date and time on November 17. Double click in the 11:15 am slot and then close the window.
Step 8: At the Patient Appointment Form, you should now see the new date, 11/17/2009 in the Rescheduled field. See Figure 2-25 to check your work.

![Figure 2-25](image)

Step 9: Next, click on Save Appointment button. A window that reads Appointment Information Posted displays, and will show the appointment rescheduled on November 17. If you go back and click on November 10, you will see that Mr. Kramer’s appointment is no longer displaying on that date.

Step 10: Close the appointment scheduler and return to the Main Menu of MOSS.

Patient 2: Christopher Snider

Step 1: Open MOSS and logon with your student identification.

Step 2: At the Main Menu, click on the Appointment Scheduling button so that you are prepared to start scheduling appointments. Be sure to single click on October 26, 2009 to start.

Step 3: You answer a call from Christopher Snider. He has informed you that the visit he scheduled for November 10, 2009 with Dr. Heath conflicts with another appointment on his schedule. He would like to reschedule it for November 17 around 3:00 pm, if possible.
Step 4: Click on November 17 and look at Dr. Heath’s schedule at 3:00 pm. Is the doctor available?

Step 5: Proceed with rescheduling the appointment. Go back to the appointment on November 10, 2009, and locate Mr. Snider. Double click on his name to open the Patient Appointment Form, as previously learned.

Step 6: On the Patient Appointment Form, be sure that the date in Field 3 reads November 10, 2009, as this is the appointment you are moving to another date. Go to Field 9 and click in the box in front of Rescheduled. Drop down the box for the field Reason/Date and select R6 Needs Different Date.

Step 7: Next, click on the calendar icon to the right of the reschedule field (Bubble caption reads: View Practice Reschedule). This will open the scheduler so that you can go to the new date and time on November 17. Double click in the 3:00 pm slot and then close the window.

Step 8: At the Patient Appointment Form, you should now see the new date, 11/17/2009 in the Rescheduled field. See Figure 2-26 to check your work.

Figure 2-26
**Step 9:** Next, click on *Save Appointment* button. A window that reads *Appointment Information Posted* displays, and will show the appointment rescheduled on November 17. If you go back and click on November 10, you will see that Mr. Snider’s appointment is no longer displaying on that date.

**Step 10:** Close the appointment scheduler and return to the *Main Menu* of MOSS.

Module 2 is complete.