

# INSTRUCTIONS

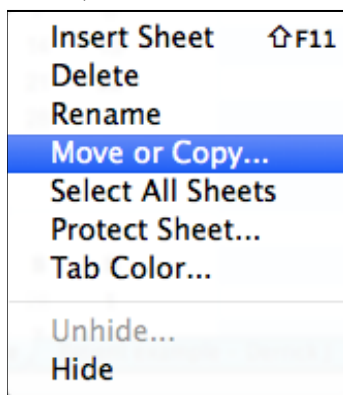
You can use this scheduling tool to help you keep track of a patient's past and upcoming appointments. The calendar on the left includes automatic color coding to indicate patient's attendance records and upcoming appointments. This may be useful to print and review with the patient or other staff members.

## **Create a new copy of this Patient template sheet for each patient**

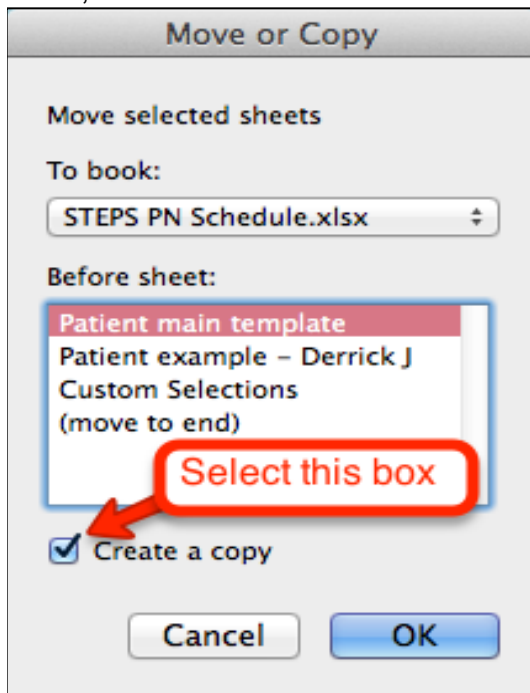
To do this, right-click on the Patient main template sheet tab at the bottom of the page:



Next, select "Move or Copy" in the resulting menu:



Next, select the checkbox for "Create a copy" in the resulting window, and click "OK":



**Using the template:**

On each page, fill out the patient information (name, ID, and patient track, if applicable). Use the the "Appointments" table to record the date, time, and details of each appointment that the patient is scheduled for. The meeting date on the calendars on the left will be highlighted on the calendars on the left in blue for To track patient attendance, use the Drop-down menu in the "Patient attended?" column to indicate whether the patient attended, was late, or did not attend the appointment. The calendar will automatically highlight the meeting date in red for meetings that the patient did not attend, and green for meetings that the patient For an example of how you might use this sheet, see the next tab, "Patient example - Derrick J". When you are finished using these instructions, delete this the instructions by selecting it and pressing DELETE. To delete the example sheet, right-click on the "Patient example - Derrick J" sheet at the bottom









# CUSTOM SELECTIONS

Customize the items in each table as needed for your organization. The drop down list selection choices on each Patient page will automatically update.

This table provides options for the patient's attendance

Patient attended?
Yes - on time
Yes - late
No

This table describes the type of appointment that your patient may have

Categories
Medical
Dental
Patient Navigation
Career Services
Housing Assistance