Follow Up Scheduler Module

The Follow Up Scheduler allows users to create a pre-defined schedule of appointments with a particular client. A user can then complete these follow up's as they occur with the client.

Creating a New Follow Up Schedule

1. To access the Follow Up Scheduler, refer to page 50 above for how to locate the desired client.
2. Once the client has been located and the chart opened, navigate to the **Follow Up Scheduler** as seen in Figure 382.

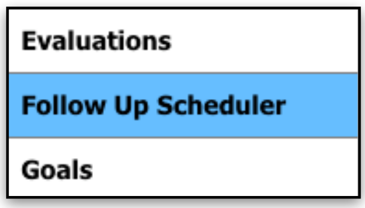

Figure 382 - Follow Up Scheduler

3. The Follow Up Scheduler will then appear on screen as demonstrated in Figure 383.

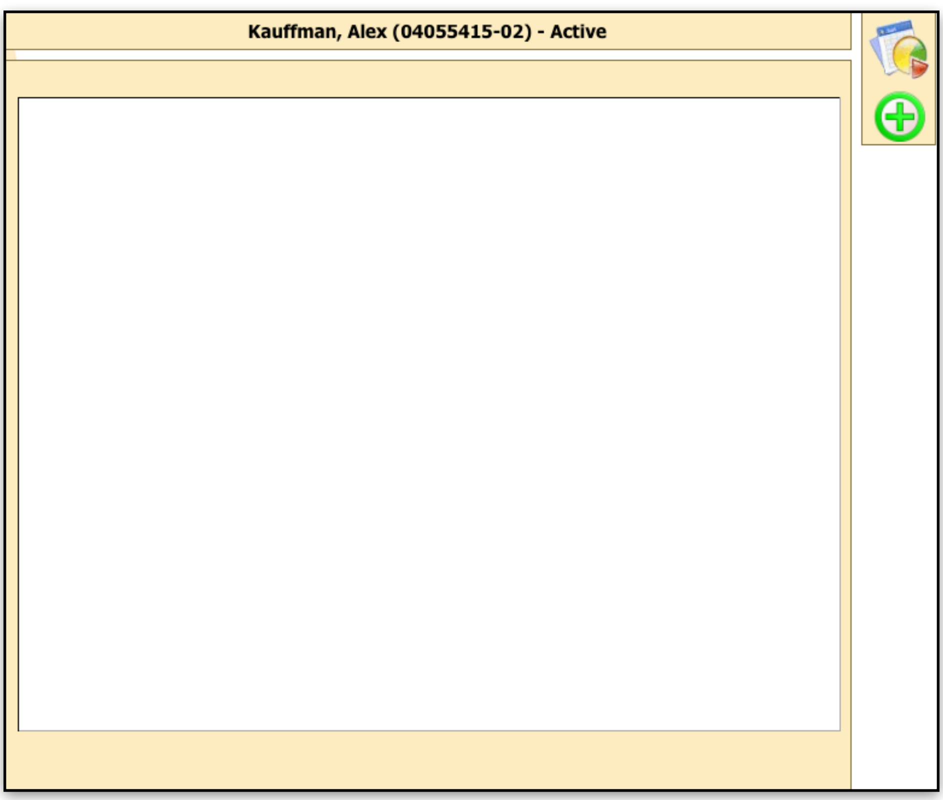

Figure 383 - Follow Up Scheduler

4. To create a new follow up schedule for the click on the **green "+"** as identified in Figure 384.

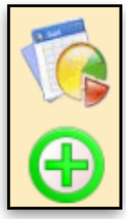

Figure 384 - Creating a New Follow Up Scheduler

5. The Follow Up Scheduler Dialog will then appear on screen as shown in Figure 385.

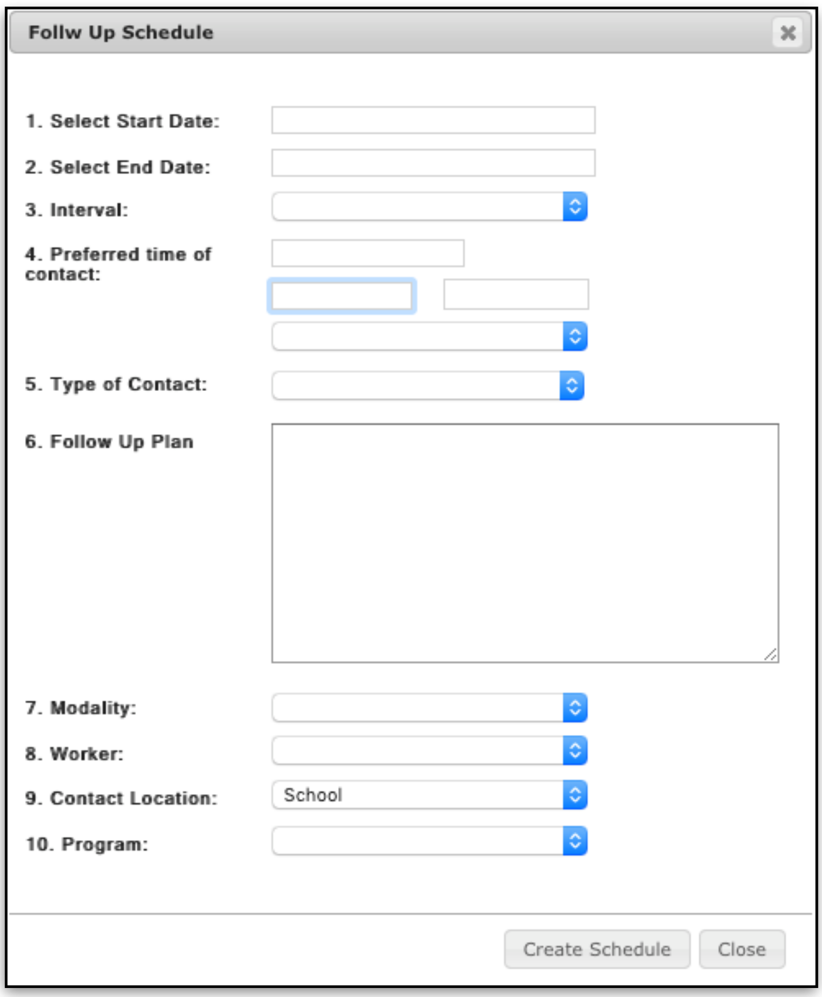

Figure 385 - Follow Up Schedule Dialog

6. Fill out the necessary fields to generate the follow up schedule. As can be seen on the following page in Figure 386, a user has filled out the Follow Up Schedule.

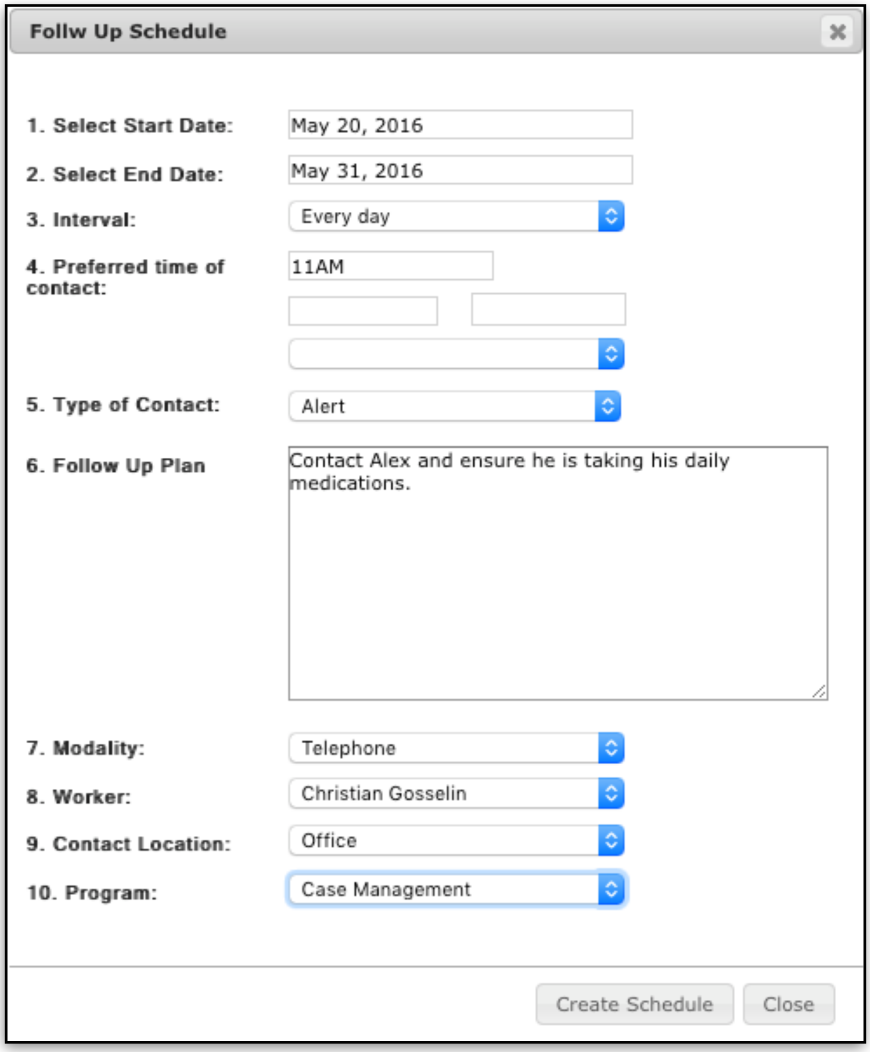

Figure 386 - Generating Follow Up Schedule

7. When satisfied with the inputted Follow Up Schedule information, click **Create Schedule** as demonstrated in Figure 387.

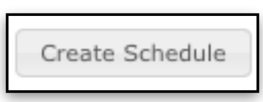

Figure 387 - Creating Schedule

8. A message box will appear confirming the process was successful.

Figure 388 - Successfully Generated Follow Up Schedule

9. The Follow Up Module will then refresh, and the schedule will appear on screen as demonstrated in Figure 389.

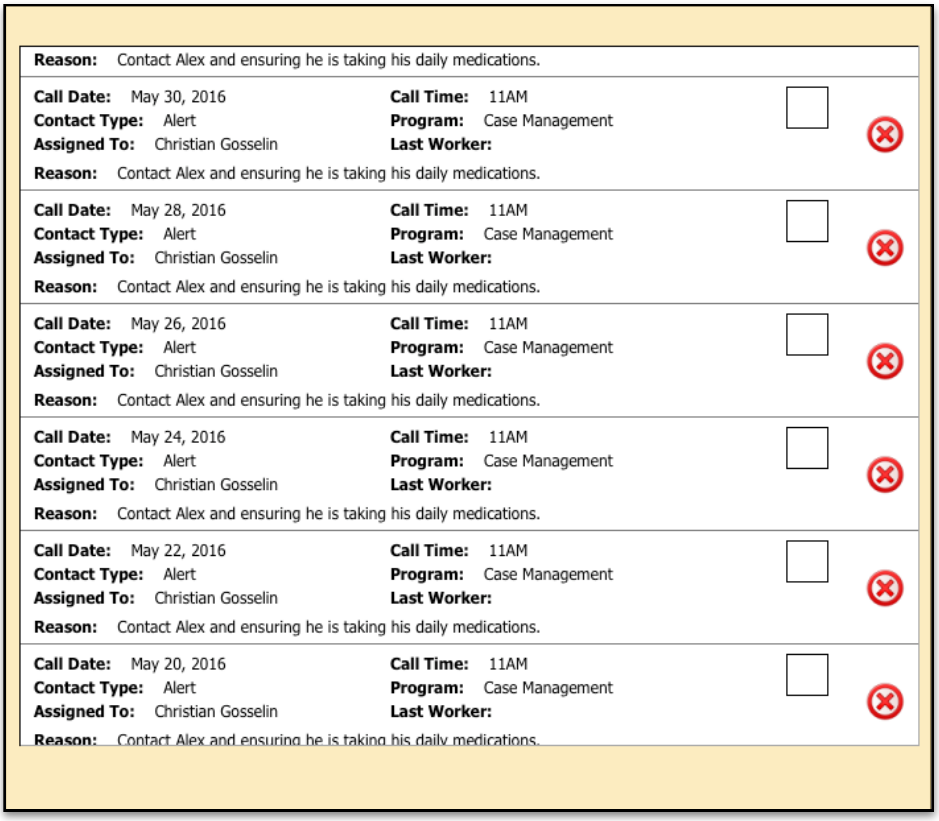

Figure 389 - Reviewing Follow Up Schedule

Modifying an Existing Follow Up Item

It maybe necessary for a user to modify or update a pre-existing Follow Up Item.

1. Refer to page 174 above for how to access the Follow Up Scheduler.
2. Locate the Follow Up Item which requires modification.
3. **Click** on the Follow Up Item to load it on screen as shown in Figure 390. (see following page).

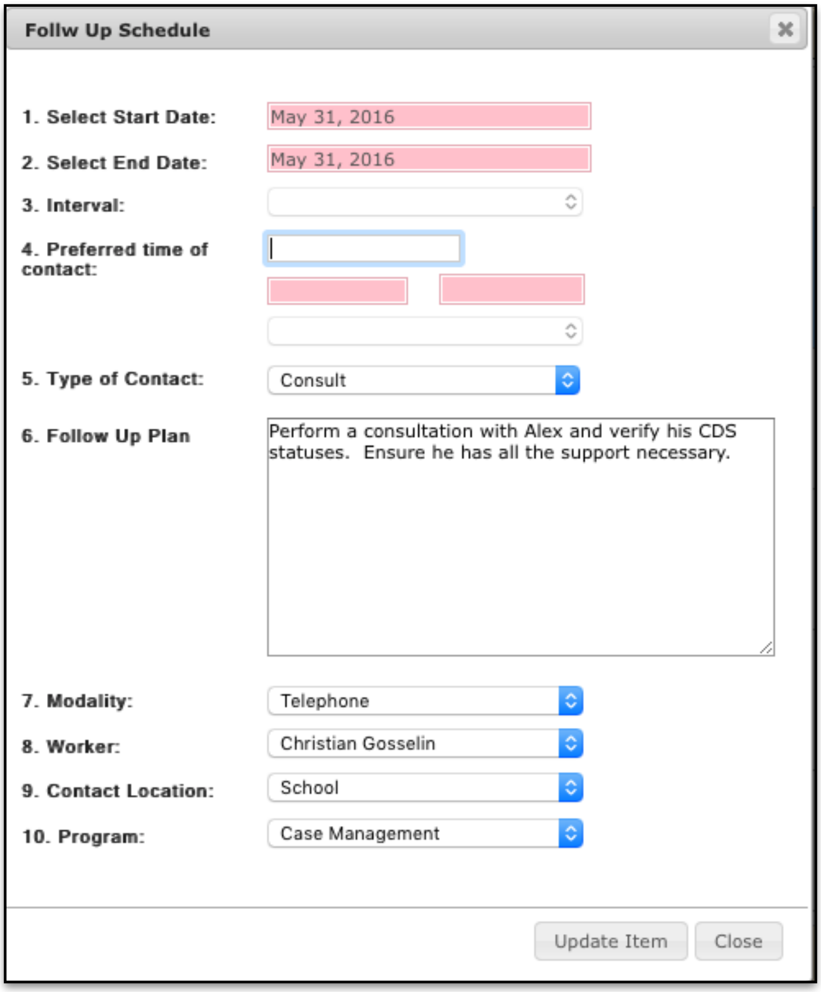

Figure 390 - Modifying an Existing Follow Up Item

4. Modify the fields as necessary - note that the “pink” fields indicate they are locked.
5. Once satisfied with the changes, click **Update Item** as seen below.

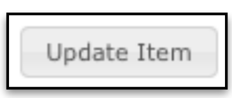

Figure 391 - Updating Follow Up Item