

CS R4+

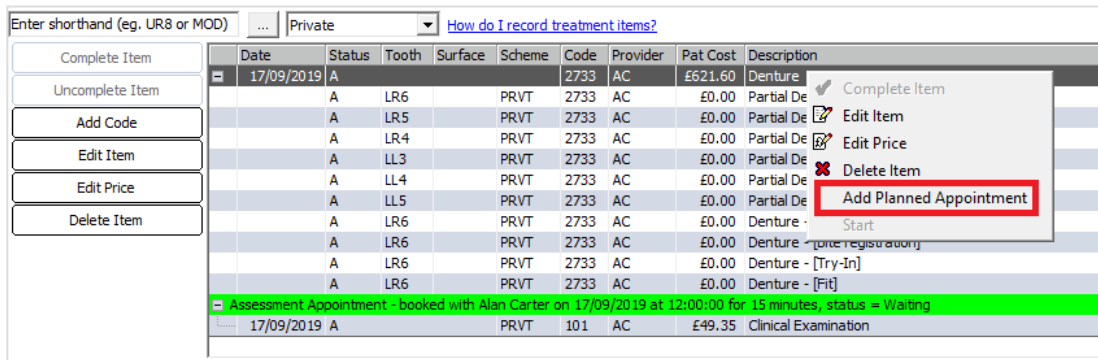
Adding Planned Appointments

This guide is intended for all clinical team members and covers how to add planned appointments to a treatment plan in CS R4+ practice management software.

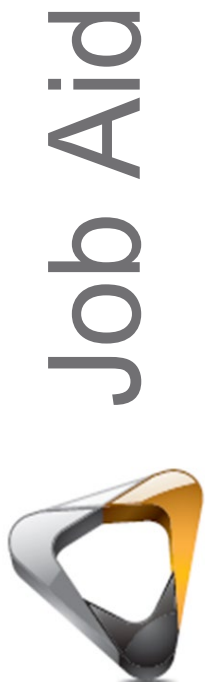
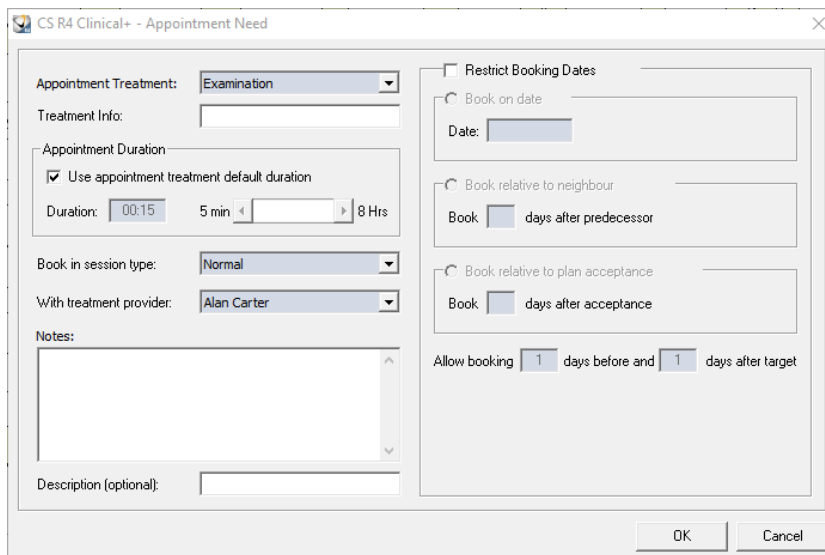
Adding Planned Appointments

It is possible in CS R4+ to add planned appointments to a treatment plan which can then be used to create a series of appointments for a patient.

On the treatment plan, right-click in the treatment grid and select **Add Planned Appointment**. The **Appointment Need** window is displayed.



From here it is possible to configure details of the appointment that is required, such as who with and when.



- Appointment Treatment – Use the drop-down list to select the appointment that is needed.
- Treatment Info – Additional information can be entered here which will be displayed alongside the appointment.
- Appointment Duration – The duration of the appointment can be changed here if the default duration is not suitable.
- Book in session type – Select the session type that the appointment is to be booked in.
- With treatment provider – Select the provider who the appointment is to be booked with. In addition to listing all the providers, there is also an option to select Any Dentist, Any Hygienist or Any Treatment Provider.
- Notes – Notes can be entered here which will be recorded in the Appointment Details in the Planner.
- Description (optional) – Enter a description of the appointment here which will then be displayed in the Treatment Plan.
- Restrict Booking Dates – There are three different options here:
 - Book on date – If a date is entered here then CS R4+ will go to that date when the appointment is booked. The user who is booking the appointment can override this and chose another date if necessary.
 - Book relative to neighbour – This can be used to specify how many days to leave between this appointment and the previous planned appointment. This is useful when a set time must be left between appointments, such as when lab work is required.
 - Book relative to plan acceptance – This can be used to specify how many days to leave between this appointment and the date that the treatment plan was accepted.
- Allow booking 1 days before and 1 days after – Either or both numbers can be altered to take into account the working pattern of the provider or how busy the diary is.



Note: You can print a copy of the plan from **File => Print Appointment Plan**