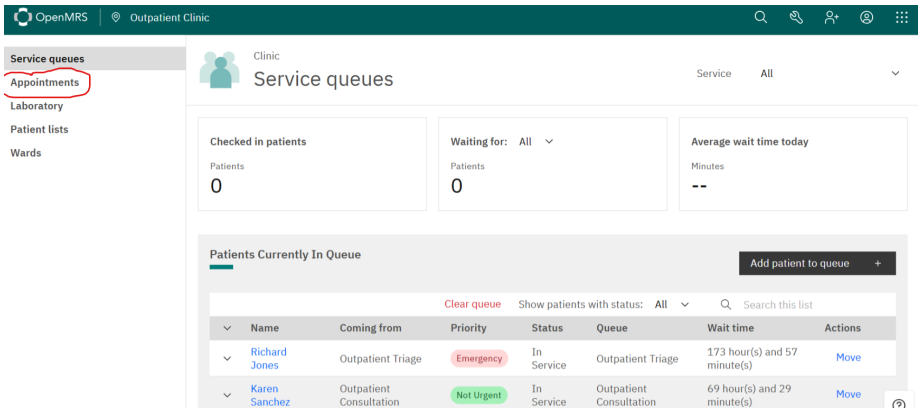
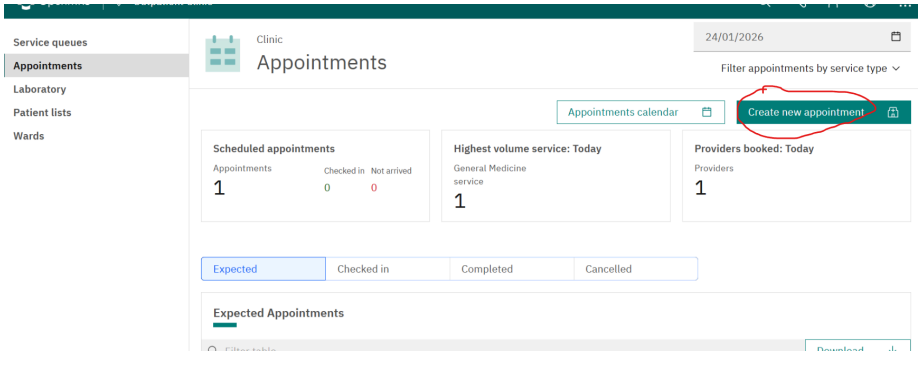
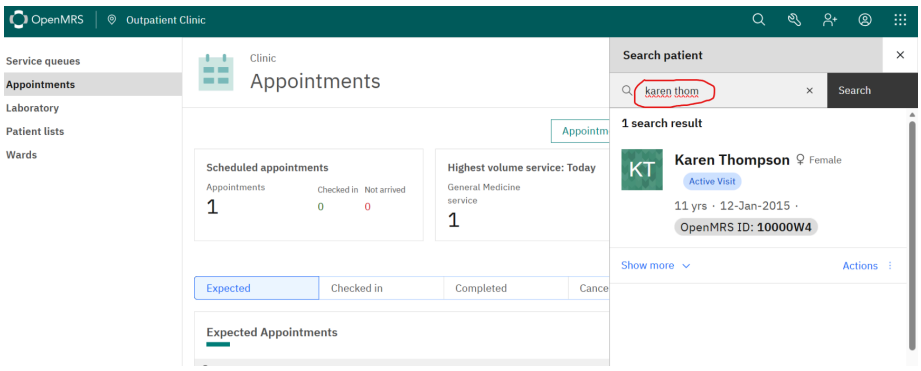
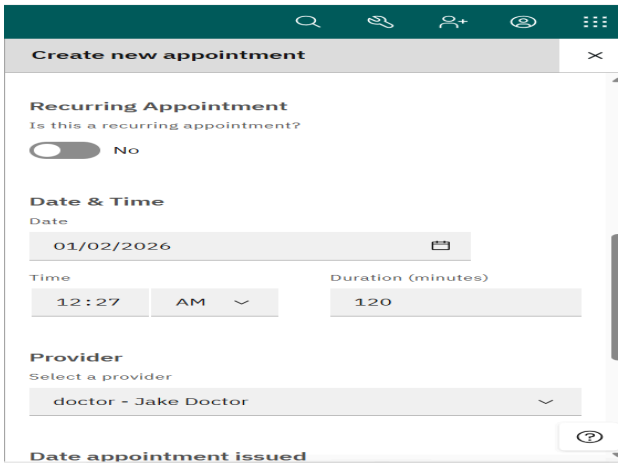
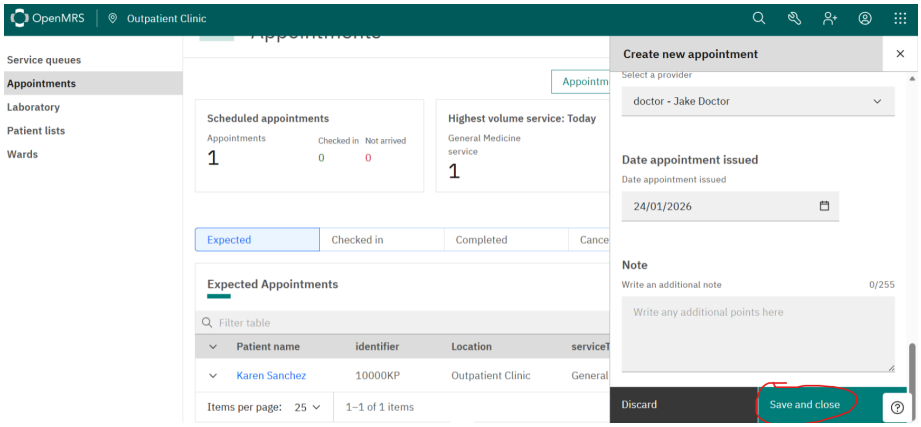
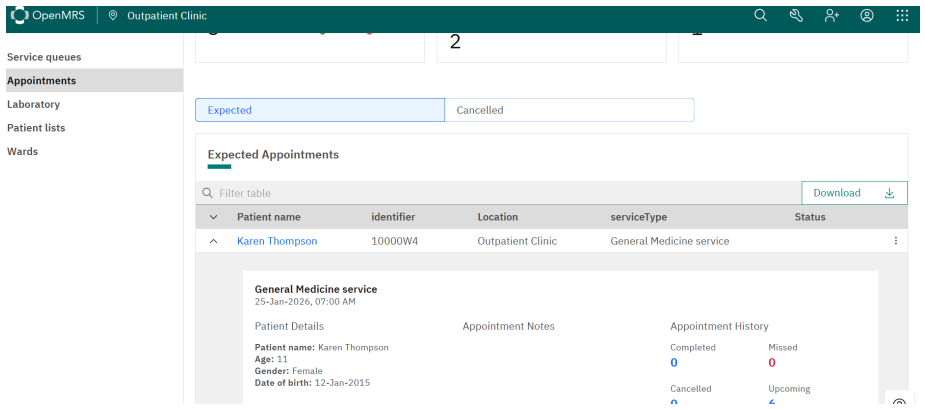
Tasks:	Appointment Scheduling & Calendar Management
Objective:	To ensure appointments are properly scheduled, viewed, modified, and tracked in OpenMRS to support efficient clinic operations and patient flow.
Who:	Receptionists / Nurses / Clinicians / Scheduling Staff
Required Materials:	Patient record
Version:	
Authors:	Liya Girum
Last Updated:	January 24,2026

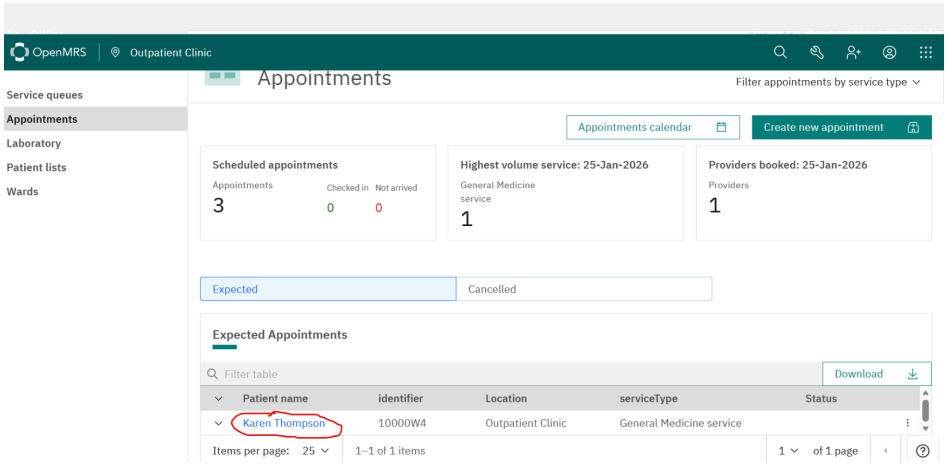
1. Scheduling Appointments

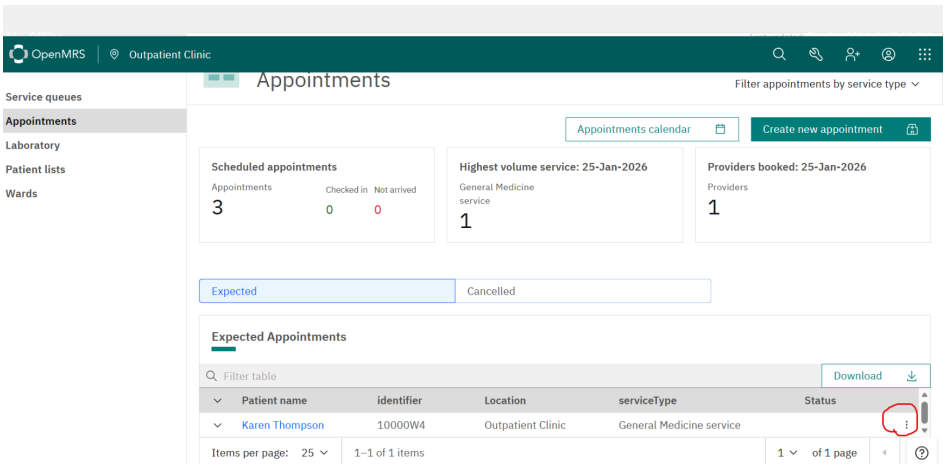
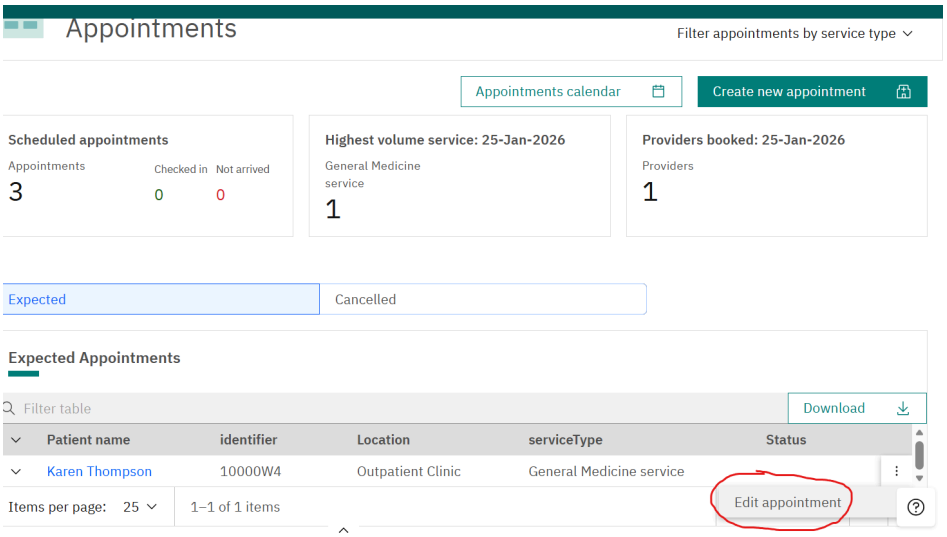
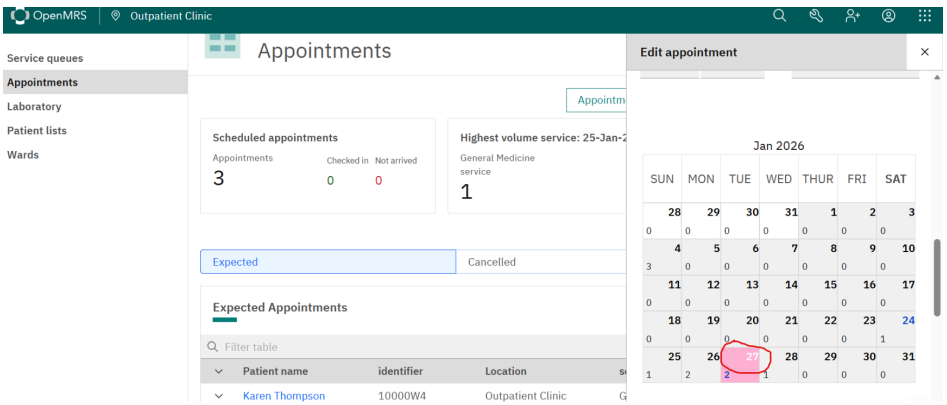
Step	Action	Screen Shots
Access Appointments Dashboard	click Appointments from the left menu.	
Start New Appointment	Click Create new appointment on the Appointments dashboard.	

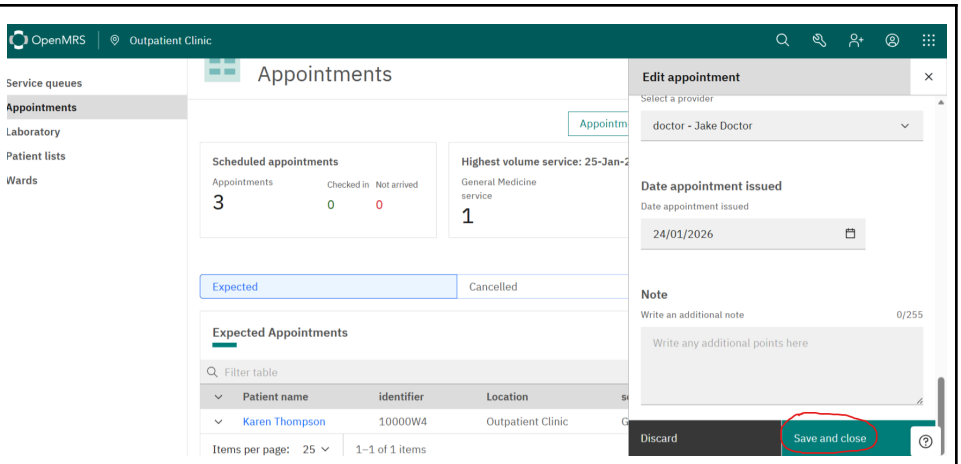
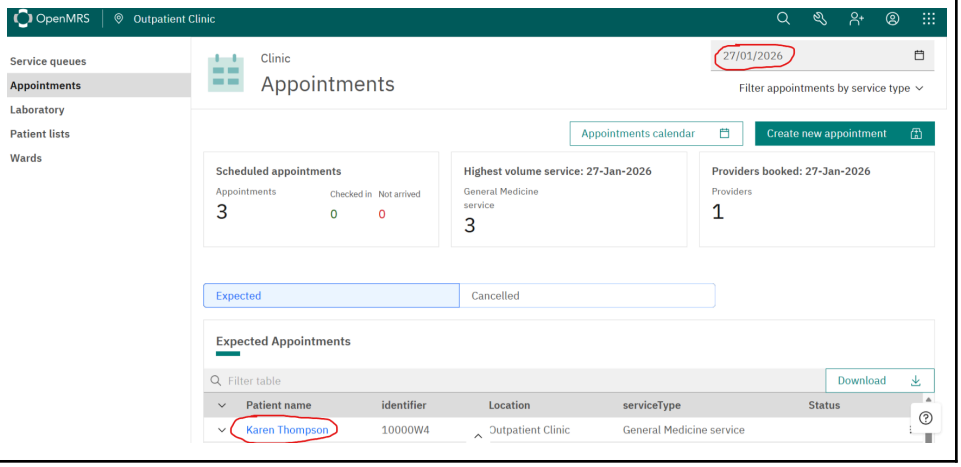
Select Patient	Search for the patient by name or ID and confirm patient details.	
Define Appointment Details	Select Location, Service Type, Provider, Date, and Time.	
Save Appointment	Confirm details and save the appointment. The status is set to Scheduled.	

Verify Scheduled Appointment	Confirm the appointment appears under Expected Appointments.	

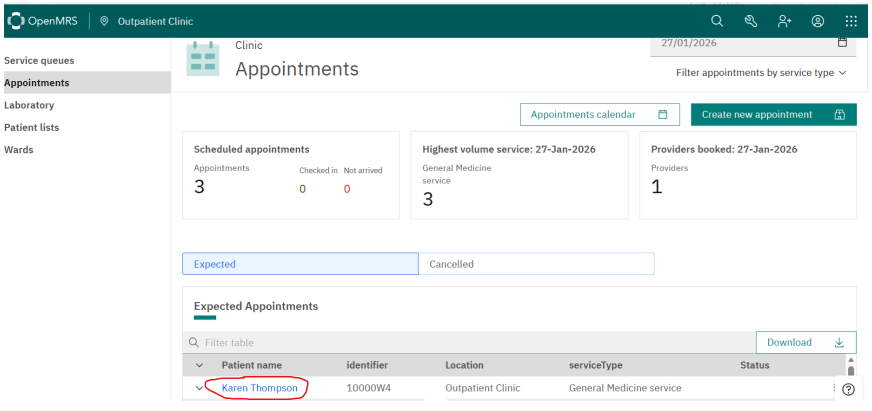
2. Rescheduling Appointments

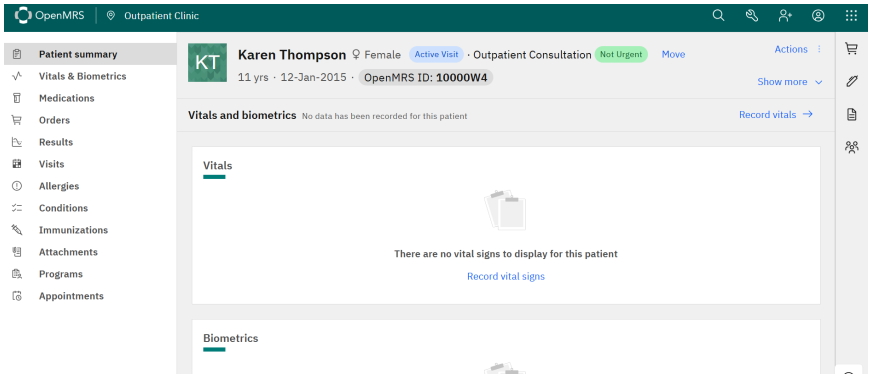
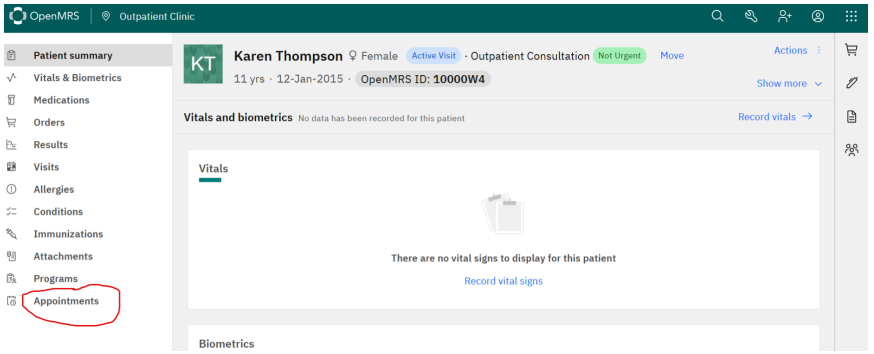
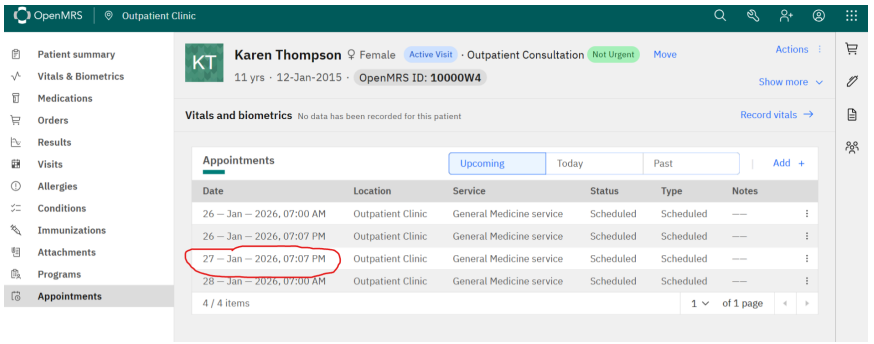
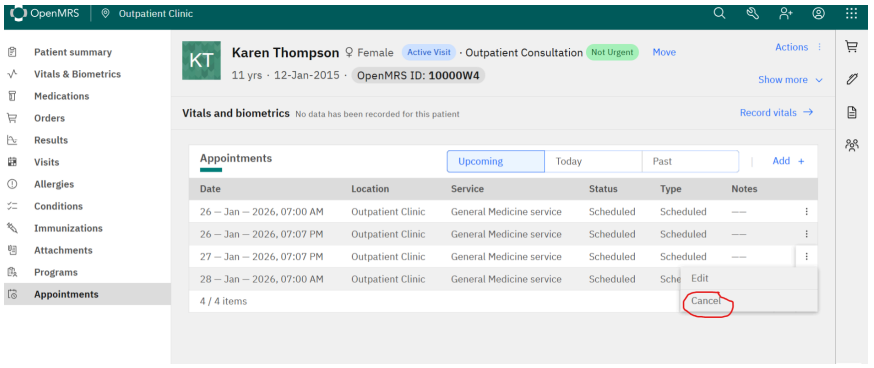
Step	Action	Screen Shots
Locate Scheduled Appointment	From the Appointments dashboard, find the patient under Expected Appointments.	

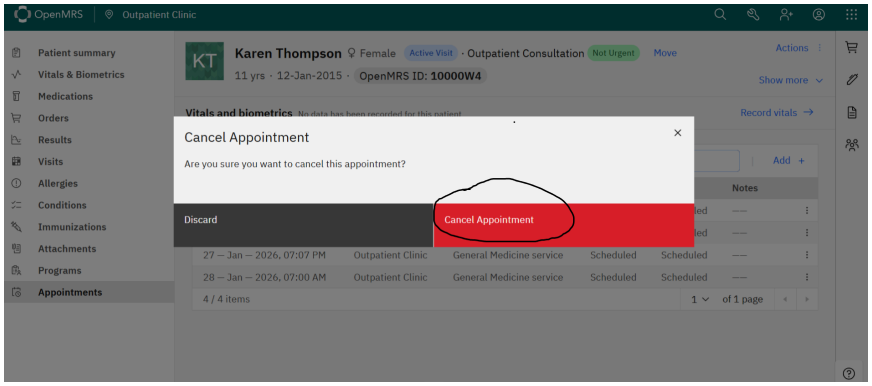
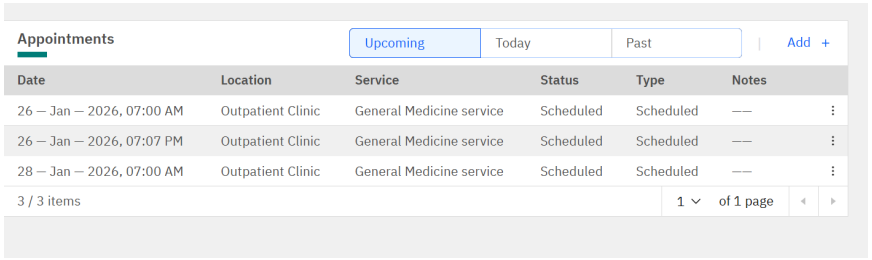
Open Appointment Actions	Click the three-dot menu next to the appointment.	
Edit Appointment	Select Edit appointment from the action menu.	
Update Appointment Details	Modify the date, time, provider, or service as required.	

Save Changes	Save the updated appointment details.	
Confirm Reschedule	Verify the updated date/time is reflected in the appointment list.	

3. Canceling Appointments

Step	Action	Screen Shots
Locate Scheduled Appointment	From the Appointments dashboard, find the scheduled appointment under Expected Appointments.	

Open Patient Record	Click the patient name to open the patient chart.	
Access Patient Appointments	From the left menu, click Appointments in the patient record.	
Select Appointment	Identify the appointment to be canceled under Upcoming or Today.	
Cancel Appointment	Click the three-dot menu next to the appointment and select Cancel appointment.	

Confirm Cancellation	Confirm the cancellation (and enter a reason if required).	
Verify Cancellation Status	Ensure the appointment status changes to Cancelled and appears under the Cancelled tab.