

iScheduler Overview and Screens

Last Modified on 09/04/2025 2:17 pm EDT

iScheduler Overview

On the main navigation bar there is an option to launch iScheduler. Clicking will open the default view of iScheduler for the user. The user will then need to select the resource and day to view the schedule.

iScheduler is a fully developed scheduler that will allow the user to:

- Navigate/View the Schedule
- Add a New Patient
- Schedule New Appointments
- Modify Existing Appointments
- Cancel Existing Appointments
- Check Patients In and Out
- View Comments and Alerts

- and much more!!!!

Training Videos

[iScheduler Overview.](#)

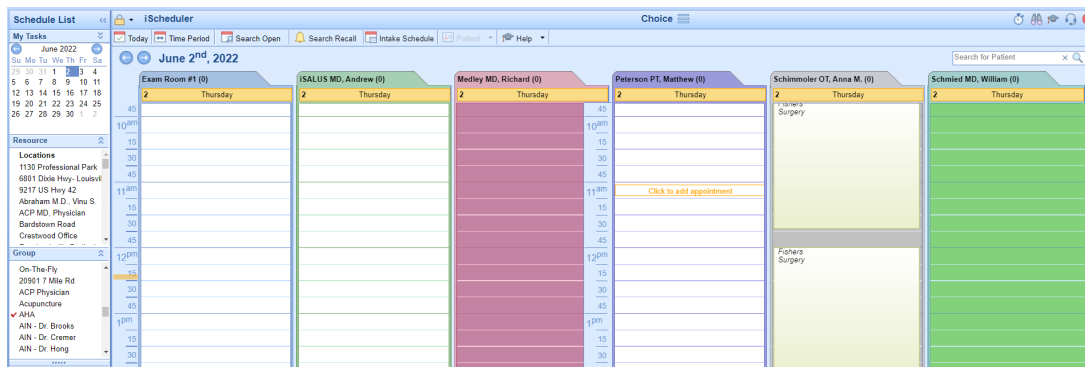
[Schedule an Appointment.](#)

[Cancel an Appointment.](#)

[Confirm an Appointment.](#)

iScheduler Screen

iScheduler Screen

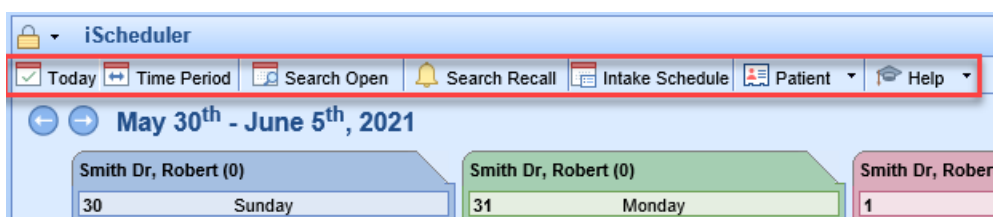



The iScheduler screen can be found on the left navigation pane.

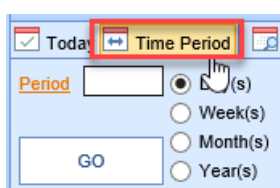
- **Calendar:** Use arrows to navigate between months/years. Click on a specific date to bring that date onto iScheduler.
- **Resource vs Group:** Controls schedule visibility by Locations, Machines/Devices, Nurse, Personnel or Groups. Customizable with On-The-Fly.
- **iScheduler Toolbar:** Lock icon dropdown, Today, Time Period, Search Open, Search recall, Intake Schedule, Patient, Help.
- **Patient Search:** Search for Patient with additional dropdown options as well as adding a new patient to the database.
- **Appointments:** Open scheduler vs templated slots.

iScheduler Toolbar

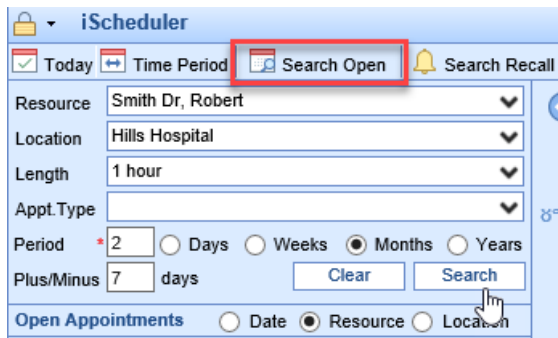
The iScheduler Toolbar is located in the iScheduler portal, at the top left of the screen.



1. **Today:** You have the ability to move to a future or past date in the iScheduler. Click  to navigate back to the current date.
2. **Time Period :** Select to navigate to a future date based on days, weeks, months or years.

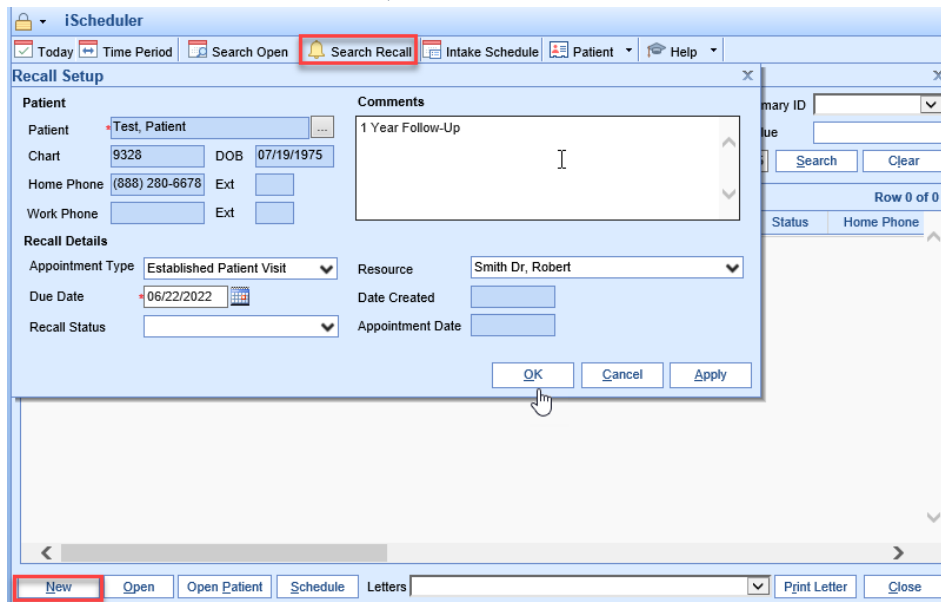


3. **Search Open:** Select to search for open appointments based any combination of Resource, Location, Length, Appt Type within designated time period. To filter by Appt Type, resource needs to be associated with that Appt Type in Resource set-up. Click Search to display results.



4. **Search Recall:** You can add a new Recall or search Recalls from the Search Recall screen.

- **Add New Recall:** A new recall can be added for future appointments you aren't ready to schedule. Click on New and enter the details, then select OK



- **Search Recall:** You can search for a previously added Recall by clicking Search Recall and entering your criteria, i.e. Resource, Begin and End Date, then select Search

Recall List

Chart # Last Name Begin Date Primary ID

Status First Name End Date 06/30/2022 Value

Resource Max Rows 25 **Search**

Search Results Row 0 of 4

	Sel	Appointment Date	Patient Chart	Last Name	First Name	Resource Name	Due Date	Status	Home Phone
1	<input type="checkbox"/>		9388	T3st	Colby	Howard, Carole L.	03/31/2021	Cancelled	(333) 444-5433
2	<input type="checkbox"/>		9392	Lion	C		04/10/2020	Recall	(865) 655-6565
3	<input type="checkbox"/>		9336	T3st	Staci		06/18/2020	Recall	(205) 555-9999
4	<input type="checkbox"/>		9328	Test	Patient	Seals, Danielle	12/02/2020	Recall	(888) 280-6678

Letters

- **Open:** Select Open to view the recall created for that patient

- **Open Patient:** Select Open Patient to open Patient Setup for selected patient

- **Schedule:** Takes you to iScheduler to schedule selected patient from list.

- **Print Recall List:** To print a list of the recalls for your search criteria, select the drop down next to the Search Results menu, then click Select All. You can then select print to print or export the list of patients

Recall List

Chart # Last Name Begin Date Primary ID

Status First Name End Date 06/30/2022 Value

Resource Max Rows 25 **Search**

Search Results Row 0 of 4

CTRL + p

	Sel	Appointment Date	Patient Chart	Last Name	First Name	Resource Name	Due Date	Status	Home Phone
	<input type="checkbox"/>			T3st	Colby	Howard, Carole L.	03/31/2021	Cancelled	(333) 444-5433
	<input type="checkbox"/>			Lion	C		04/10/2020	Recall	(865) 655-6565
	<input type="checkbox"/>			T3st	Staci		06/18/2020	Recall	(205) 555-9999
	<input type="checkbox"/>			Test	Patient	Seals, Danielle	12/02/2020	Recall	(888) 280-6678

- **Print Recall Letters:** To print letters for patients from your search criteria, select the letter template you want to print for all patients selected on the list, then click Print Letter (this brings individual letters for all patients on the list in a viewer where you can print all letters).

Recall List

Chart # Last Name Begin Date Primary ID

Status First Name End Date Value

Resource Max Rows

Search Results Row 0 of 4

	Sel	Appointment Date	Patient Chart	Last Name	First Name	Resource Name	Due Date	Status	Home Phone
1	<input checked="" type="checkbox"/>		9388	T3st	Colby	Howard, Carole L.	03/31/2021	Cancelled	(333) 444-5433
2	<input checked="" type="checkbox"/>		9392	Lion	C		04/10/2020	Recall	(865) 655-6565
3	<input checked="" type="checkbox"/>		9336	T3st	Staci		06/18/2020	Recall	(205) 555-9999
4	<input checked="" type="checkbox"/>		9328	Test	Patient	Seals, Danielle	12/02/2020	Recall	(888) 280-6678

Consent
 Basic Procedure Consent
 Excuse
 Return to Work/School w/ limit
 MyMedicalLocker
 MML Welcome Letter
 New MyMedicalLocker Print Instructions
 New MyMedicalLocker Welcome Letter
 Patient
 Patient Generic Letter
 Referring
 Follow up Letter to Referring
 Follow-up Letter to Referring
 Initial Letter to Referring
 Referral to Specialist

5. **Intake Schedule:** Select Intake Schedule to view scheduled patients intake assignments. By default, the Intake Schedule opens to Today; however, you can use the search criteria to search by Schedule date, Resource Group or Resource. From here you can assign an intake, merge completed forms and view completed forms

iScheduler Choice Tr

Intake Schedule - Internet Explorer

Schedule: 06/03/2021 Resource Group Resource(s) Smith Dr, Robert

Appointment (3)		Forms to Merge (0)		Completed (0)							
Action	Office	Time	Patient	Device	Resource	Intake Name	Intake	Required	CoPay	Paid	Elig.
Connect		6:00 PM	Lion, C 10/01/1960(60y) Male		Smith Dr, Robert				\$0.00	\$0.00	
Connect		7:15 PM	Test, Patient 07/19/1975(45y) Female		Smith Dr, Robert				\$0.00	\$0.00	
Connect		8:30 PM	Tester, Jenny 04/01/1942(79y) Female		Smith Dr, Robert	Established Patient			\$0.00	\$0.00	

6. **Patient:** Select the Patient icon for Patient Setup or drop down options
- Opens Patient Setup for selected patient

Patient Setup -- Webpage Dialog

Patient Setup

New Save Train More

Tester, Jenny Born 01-Apr-1942(79y) Gender Female

Chart 9375

555 Center Point Road
Knoxville, TN 37923 USA

Home Work: Other (555) 888-2525

PCP SSN Marital Language

Employer Ethnicity Race

Blue Shield - Indiana --- Anthem

Commercial Copay \$0.00

Start date Member ID # 123456789

Sig. On File GroupPolicy # 01/27/2020

Jenny Tester

555 Center Point Road
Knoxville, TN 37923 USA

Home Work: Other (555) 888-2525

Past 3 Visits

Visit Date	Visit Time	Physician	Choice Training	Scheduled	Checked-In	Established Patient Visit
06/03/2021	8:30PM (15m)	Smith Dr. Robert	Choice Training	Scheduled	Checked-In	Established Patient Visit
09/14/2020	11:45AM (15m)	Smith, Tals	Greensboro Office	Scheduled	Checked-In	Post-Op
04/21/2020	10:45AM (15m)	Howard, Carole L.	Choice Training	Scheduled	Checked-In	Post-Op

Balance: \$0.00

Current	31 - 60	61 - 90	91 - 180	181+ Days
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Summary

Demographics

Insurance

Responsible Party

Emergency Contact

Comments

Patient Extension

Miscellaneous

Referral Tracking

- Dropdown options

Patient

Primary Insurance Card

Secondary Insurance Card

Patient Photograph

Send Communication

Patient Setup

Patient History

Patient Communications

Patient Comments

Patient Appointments

Open Patient in EMR

Open Patient in eDocuments

Open Patient in Billing

Extension

Eligibility

Add to Recall List

MyMedicalLocker Admin

Intake Assignment

Appointment Audit

Print / Fax Queue

Print Superbill

Patient Setup -- Webpage Dialog

Patient Setup

Tester, Jenny Born 01-Apr-1942(79y) Gender Female

Chart 9375

555 Center Point Road
Knoxville, TN 37923 USA

Home (555) 888-2525
Work
Other

PCP
SSN
Marital
Language

Employer
Ethnicity
Race

Blue Shield - Indiana -- Anthem
Commercial
Copoly \$0.00

Start date
Member ID # 123456789

Sig. On File
GroupPolicy # 01/27/2020

Jenny Tester

555 Center Point Road
Knoxville, TN 37923 USA

Home (555) 888-2525
Work
Other

Past 3 Visits

Visit Date	Visit Time	Physician	Choice Training	Scheduled	Established Patient Visit
06/03/2021	8:30PM (15m)	Smith Dr. Robert	Choice Training	Checked-In	Post-Op
09/14/2020	11:45AM (15m)	Smith, Tals	Greensboro Office	Scheduled	Post-Op
04/21/2020	10:45AM (15m)	Howard, Carole L.	Choice Training	Scheduled	Post-Op

Balance: \$0.00

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\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Summary

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Emergency Contact

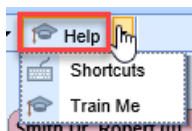
Comments

Patient Extension

Miscellaneous

Referral Tracking

7. **Help:** Select the Help icon to view shortcuts or the iSalus University



- Shortcuts – view Alt Key and Control Key tips

Keyboard Shortcuts

Alt Keys

Alt+0	Patient Index Card
Alt+1	Primary Insurance Cards
Alt+2	Secondary Insurance Cards
Alt+3	Patient Photographs
Alt+4	Communications
Alt+5	Patient Setup
Alt+6	Patient History
Alt+7	Patient Communication History
Alt+8	Patient Comments
Alt+9	Patient Appointments History
Alt+.	Extension
Alt+s	Set focus to the patient search text box
Alt+q	Quick Key (this window)

Control Keys

Ctrl+?	Search Open Placeholders
Ctrl+q	Appointment Quick View
Ctrl+s	Appointment Search window
Ctrl+z	Refresh the schedule
Ctrl+[RMC]	Move Appointment (RMC=Right Mouse Click)
Esc	Cancel move appointment

iScheduler Toolbar video

Appointment Details Screen

Appointment Details screen displays the following:

Edit Appointment

Patient * T3st, Danielle

Sched. With Cliff's House

Sched. On 02/07/2023 1:00PM To 1:15PM

Appt. Type * Procedure

Location * Choice - Main Office

Chief Complaint Default

Comment Default

Ins. Profile Work Comp

Ins. Primary Fund Office

Ins. Secondary Aetna

Ins. Tertiary

Referring Referring

Prior Auth. #

Assign Auth.

OK Cancel

- Patient Name
- Sched. With - Resource appointment is scheduled under
- Sched. On - Date of appointment as well as begin and end time of appointment
- Appt. Type - lists the type of appointment
- Location - location of the appointment
- Chief Complaint - the reason for the appointment
- Comment - comment for the appointment
- Ins Profile - Insurance Profile to be used for this particular appointment
- Ins Primary - Primary Insurance listed under the Insurance Profile selected
- Ins Secondary - Secondary Insurance listed under the Insurance Profile selected
- Ins Tertiary - Tertiary Insurance listed under the Insurance Profile selected
- Referring - Referring Provider
- Prior Auth. # - Prior authorization for this appointment
- Assign Auth. - Authorization assigned for this appointment

Appointment Hover Tooltip

The Appointment Hover Tooltip allows quick access to information about the patient and appointment. This also gives the user the ability to edit items as needed.

Edit	06/13/2022	9:00AM - 9:30AM
Move		
Patient Setup	Patient Name:	T3st, Danielle
Patient History	Chart #:	26166
Send Comm.	Primary Ins.:	Anthem Blue Cross
Extension/Vital	Type:	Headaches
Audit	Recurring:	No
Eligibility	Last Modified By:	Danielle Seals
	Scheduled By:	Danielle Seals
	Eligibility:	Eligibility has not been run.
	Chief Complaint:	Headaches

When a user hovers over the appointment in the iScheduler, the Appointment Hover Tooltip will display. The following details can be **viewed**:

- Appointment date
- Appointment time
- Patient Full Name
- Chart#
- Primary Insurance Name
- Type - Appointment Type
- Recurring- Whether the appointment is recurring or not
- Last Modified by - User that last modified the appointment
- Scheduled by - User that scheduled the appointment
- Eligibility - Status of eligibility
- Chief Complaint

Items may be **viewed** and **edited**:

- Edit - opens the Appointment details to allow for edits and to view more information
- Move - allows users to quickly move the appointment to a new day and/or time without opening the appointment



- Patient Setup - Opens Patient Setup screen to view/edit details about patient
- Patient History- Opens Patient Transaction History screen to view claim balances and payments
- Send Comm. - For sending a patient or office communication
- Extension/Vital - Link to Encounter templates
- Audit - List of users with times and dates of modifications to appointments
- Eligibility - Quick access to view and run eligibility

Patient Tooltip

The Patient Tooltip allows a user to very quickly access critical demographics about a patient without having to leave their place in the chart. The Patient Tooltip can be found in the EMR, iScheduler, and eDocuments portal once a patient has been selected. Simply hovering over the patient name will reveal the available demographic data.

The screenshot shows a software interface with a blue header bar. On the left, there are partial labels for 'ns' and 'sages'. The main area displays a patient tooltip for 'Head, Blake A. Born 20-Mar-1989(31y) Gender Male'. The tooltip is divided into two main sections: 'Care Team Members' and 'Patient' details. The 'Care Team Members' section lists two members: Davis MD, Angela (Cardiologist) and Forest T Jones (PT). The 'Patient' section lists various details including birth date, gender, insurance, referring provider, PCP, and contact information. At the bottom right, there is a 'Chart Tabs' panel with options: Summary, Problem List, History, and Allergies.

Care Team Members		Patient	
Name	Davis MD, Angela	Patient	Head, Blake A.
Type	Cardiologist	Born	20-Mar-1989(31y)
Address	1234 Test Street Smithville, MS 38870	Gender	Male
Name	Forest T Jones	Primary Ins.	Admiral Life Ins. Co. Of America
Type	PT	Secondary Ins.	Medicaid - Mississippi
Company	Forest T Jones	Referring	Blake, CHERRYL
Address	1234 Test Street Kansas City, MO 64111	Phone	(555) 337-2278
		Fax	(317) 275-3947
		Doctor	Heinlein PA-C, Matthew L.
		Phone	(555) 337-2278
		Fax	(555) 505-5005
		PCP	Anderson MD, Lan
		Phone	(555) 337-2278 x1234
		Fax	(341) 233-3332 x1234
		Phone Home	(317) 555-5555
		Phone Work	(317) 888-8888
		Phone Other	(317) 777-7777
		Chart #	92900

Chart Tabs

- Summary
- Problem List
- History
- Allergies

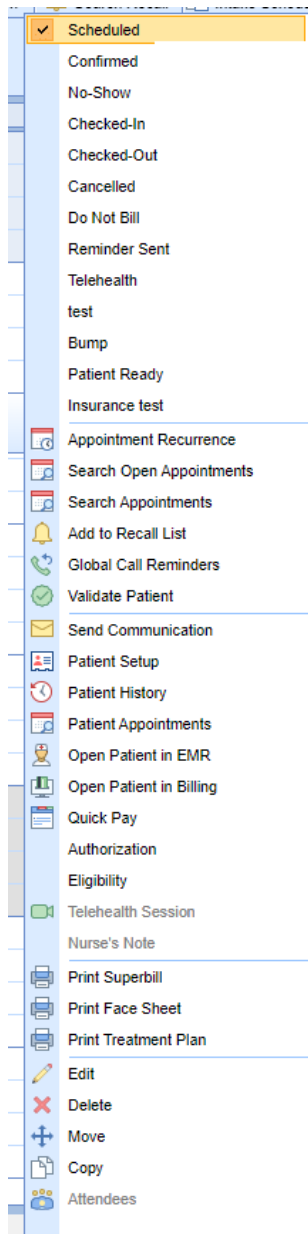
When a user hovers over the patient name in the EMR, iScheduler, or eDocuments, the Patient Tooltip will display. The following details can be found if they are present in the chart.

- Care Team: All members of the patient care team are available.
 - Name
 - Type
 - Company
 - Address
 - Phone
 - Fax
- Patient Full Name
- Patient DOB
- Patient Gender
- Primary Insurance Name
- Secondary Insurance Name
- Tertiary Insurance Name
- Referring Provider
 - Name
 - Phone
 - Fax

- Primary Care Physician (PCP)
 - Name
 - Phone
 - Fax
- Patient Phone Numbers
 - Home
 - Work
 - Other
- Patient Chart Number

Appointment Menu Screen

Additional options are available by right-clicking over an appointment.



- **Appointment statuses** These are at listed first and setup by the practice so they will vary. You can change a status by selecting it.
- **Appointment options:**
 - **Appointment Recurrence** - To set an appointment to be repeated in the future
 - **Search Open Appointments** - Search for open appointment slots
 - **Search Appointments** - Opens appointment search screen
 - **Add to Recall List** - Adds patient to a list to schedule a future appointment
 - **Global Call Reminders** - Displays Global Call Reminder history for this appointment
 - **Validate Patient** - Runs validation
- **Other quick links:**
 - **Send Communication** - To send a communication to patient or inside the office
 - **Patient Setup** - Quick access to Patient Setup screen
 - **Patient History** - Opens Patient Transaction list

- **Patient Appointments** - To view patient's appointments
- **Open Patient in EMR** - Opens patient in EMR
- **Open Patient in Billing** - Opens patient in Billing module
- **Quick Pay** - To take payment, print and Reverse receipt along with other options
- **Authorization** - Opens Authorization screen to add, edit and attach authorizations
- **Eligibility** - Opens Eligibility screen to run and view eligibility
- **Telehealth session** - Starts Telehealth visit if available to practice
- **Nurse's note** -
- **Print Options:**
 - **Print Superbill**
 - **Print Face Sheet**
 - **Print Treatment Plan**
- **Changes to this specific Appointment:**
 - **Edit** - To make edits to the appointment details
 - **Delete** -Deletes the appointment
 - **Move** - To move this appointment
 - **Copy** - Copies this appointment
 - **Attendees** - Typically used for group therapy sessions to schedule multiple patients for a single appointment

Patient Appointment List

The Patient Appointment List provides a complete view of a patient's past, current, and future appointments. Use this screen to review appointment history, check statuses, and take action on upcoming visits.

Patient Appointments - Profile 1 - Microsoft Edge

https://qatest.isalushealthcare.com/OfficeMd/App/Schedule/PatientAppointments/297641

93858 | Knievel, Evel (Text) | 01-Dec-1951 (73y) | M

Available Filters

Start Date: End Date:

All No Show 2 Cancelled 12 Checked Out 6

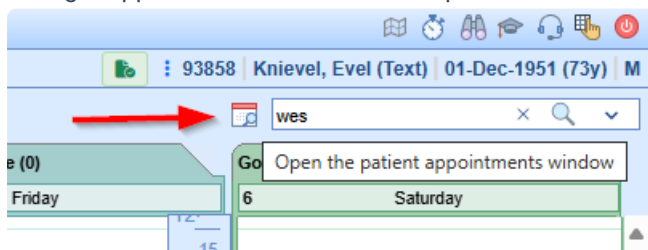
Status: Type: Resource: Location: [Reset Filters](#)

Appointments

Start	End	Scheduled	Location	Status	Type	Chief / Comment	Cancel Comment	Action
Future								
09/08/25 3:00:00 AM	09/08/25 3:30:00 AM	Goldsmith, Clarence	AAOE 1	Scheduled	Appointment Remin...			View Cancel
Today								
09/04/25 1:00:00 PM	09/04/25 1:30:00 PM	Goldsmith, Clarence	AAOE 1	Scheduled	Appointment Remin...			View Cancel
Yesterday								
09/03/25 1:00:00 PM	09/03/25 1:30:00 PM	Goldsmith, Clarence	AAOE 1	Scheduled	Appointment Remin...			View Cancel
Last two weeks								
09/02/25 12:30:00 PM	09/02/25 1:00:00 PM	Goldsmith, Clarence	AAOE 1	Confirmed	Appointment Remin...			View Cancel
Last 30 days								
08/14/25 1:00:00 PM	08/14/25 1:30:00 PM	Goldsmith, Clarence	AAOE 1	Confirmed	Appointment Remin...			View Cancel
Older								
07/16/25 6:30:00 PM	07/16/25 7:00:00 PM	Goldsmith, Clarence	AAOE 1	Reminde...	Appointment Remin...	[Chief] text / [Comm...		View Cancel
07/03/25 4:00:00 PM	07/03/25 4:30:00 PM	Goldsmith, Clarence	AAOE 1	Confirmed	Appointment Remin...	[Chief] test / [Comm...		View Cancel
06/05/25 7:00:00 PM	06/05/25 7:30:00 PM	Goldsmith, Clarence	AAOE 1	Scheduled	Appointment Remin...			View Cancel
201 records								

The Patient Appointment List screen can be accessed from several areas within the database. Primarily it can be accessed from the iScheduler allowing users to provide and confirm appointment details for patients.

To access the Patient Appointment List screen from the iScheduler you will want to click the calendar icon on the right upper corner to the left of the patient search text area.



*By default when the Patient Appointment List screen is opened it will display all appointments for the patient grouped by appointment dates.

Screen Layout

Patient Information (Top-Right)

- Displays patient details: **Patient Flags, ID, Name, Date of Birth (Age), Gender**

Available Filters

- **Date Range:** Filter appointments by start and end date.
- **Status:** View appointments by status (e.g., Scheduled, Confirmed, Cancelled).
- **Type:** Select by appointment type.
- **Resource:** Filter by provider/staff.
- **Location:** Narrow results to a specific clinic or site.
- **Quick Filters:**
 - **All** – shows all appointments
 - **No Show** – missed appointments
 - **Cancelled** – cancelled visits
 - **Checked Out** – completed visits
- **Reset Filters:** Clears all filters.

Appointments List

Appointments are grouped by timeframe:

- Future
- Today
- Yesterday
- Last Two Weeks
- Last 30 days
- Older

Columns displayed:

- **Start / End** – Date and time of appointment
- **Scheduled** – Resource the appointment is scheduled with
- **Location** – Service location the appointment is scheduled at
- **Status** – Appointment status
- **Type** – Type of appointment
- **Chief / Comment** – Chief complaint or comment for the appointment
- **Cancel Comment** – Appointment cancelation comment
- **Action** – Options to **View** or **Cancel** the appointment

Footer

- Displays the total number of appointment records being displayed.

