

# Tracking External Appointments

Once logged in, click the External Services tab in the expandable menu on the left. Here is where you will track all of your kids' appointments such as the dentist, doctor, external therapy, etc. Choose a name in the **Client** drop down and click **New** in the top right corner.

Client External Services

Search Criteria

Client: Duck,Donald

Service Reminder Status: Active

Service Type:

Service Frequency:

Logout Refresh New

Edit	Client	Status	Service Type	Start Date	End Date	Frequency	Last Appointment	Next/Followup Due Date	Notes
------	--------	--------	--------------	------------	----------	-----------	------------------	------------------------	-------

Set the **Service Status**, the **Start Date** of the service, the **Frequency**, and the **Type**. You can also enter an end date and the date of the last appointment, if you've had an appointment prior to entering the service into Welligent. Click **Save** and then **Close**.

External Services Setup Details

Appointment Setup Additional Info

Service Status: Active

Start Date: 19-APR-2024

Service Frequency: Weekly (Every 7 Days)

Service With (Person):

Service Type: Therapy Session

End Date:

Last Appointment (Not in Welligent):

Service With (Agency/Practice):

Logout Other > Close Save

Appointment Tracking

Edit	Date	Type	Status	Purpose	Rescheduled	Followup Date	Diagnoses
------	------	------	--------	---------	-------------	---------------	-----------

Once you've created your services, you'll see them listed here. Click the **Orange pencil** next to the service to add each appointment you have for each service.

Client External Services

Logout Refresh New

Edit	Client	Status	Service Type	Start Date	End Date	Frequency	Last Appointment	Next/Followup Due Date	Note
	Duck,Donald	Inactive	Physical Therapy	01-Feb-2024	01-Feb-2024	One Time Visit	01-Feb-2024		
	Duck,Donald	Active	Bi-Annual Dental	01-Apr-2024		Every Six Months			
	Duck,Donald	Active	Therapy Session	19-Apr-2024		Weekly (Every 7 Days)			
	Duck,Donald	Active	Annual Medical	01-Mar-2024		Yearly			

Once in the service, click **New Appointment**.

External Services Setup Details

Appointment Setup Additional Info

Service Status: Active Service Type: Bi-Annual Dental

Start Date: 01-APR-2024 End Date:

Service Frequency: Every Six Months Last Appointment (Not in Welligent):

Service With (Person): Service With (Agency/Practice):

Appointment Tracking

Edit	Date	Type	Status	Purpose	Rescheduled	Followup Date	Diagnoses

New Appointment Refresh

Enter the **Appointment Date**, **Appointment Time**, **Appointment Status**, and in **Who Seen**, the name of the Doctor or Company. You can also enter the type, reschedule information, follow-up information, diagnosis information, etc. Click **Save**.

Appointment Details

External Appointment Details - Bi-Annual Dental

Record Vitals Save

Appointment Date: 01-APR-2024

Appointment Time: 10:00am

Appointment Type: Routine

Appointment Status: Completed

Who Seen: Dr. Spock

Appt Purpose:

Diagnosis Description:

Appt Rescheduled Date: Time:

Appt Rescheduled Reason:

Follow Required:

Followup Date:

Appointment Details

Appt Purpose:

Diagnosis Description:

Appt Rescheduled Date: Time:

Appt Rescheduled Reason:

Follow Required:

Followup Date: Time:

Recommendations:

Followup Completed Date:

Summary of Visit:

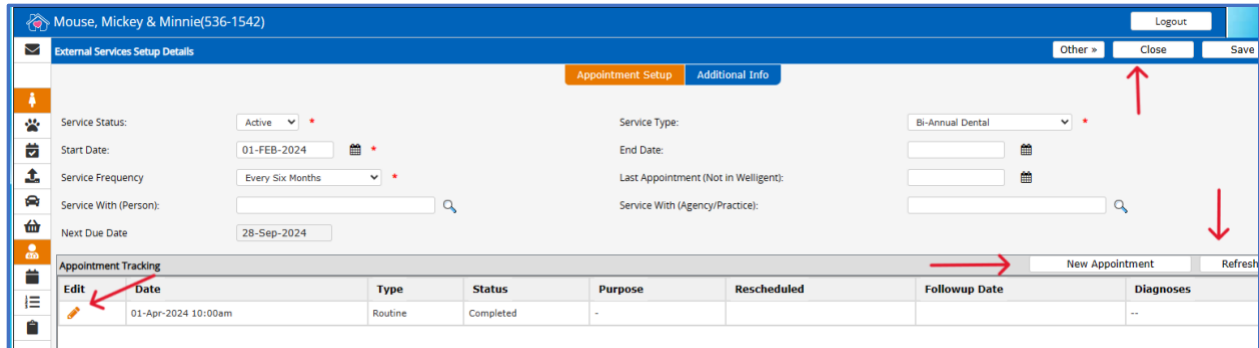
Follow-Up/Additional Comments:

Diagnosis #1: Chronic:  Diagnosis Desc:

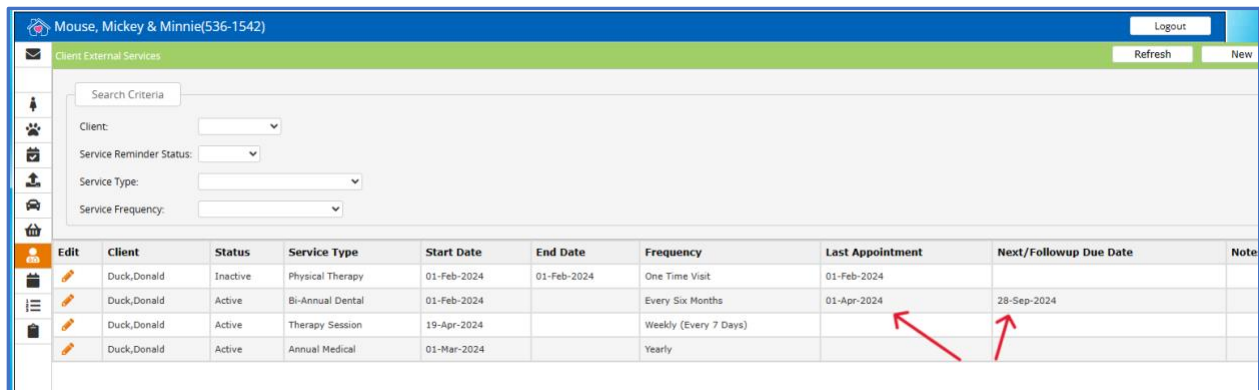
Diagnosis #2: Chronic:  Diagnosis Desc:

Diagnosis #3: Chronic:  Diagnosis Desc:

Hit **Refresh** on the right of the Appointment Tracking to see your newly added appointment. You can click the orange pencil next to the appointment to make any changes needed. Click new appointment if you need to add another appointment. Click **Close** to return to the Services Listing.



If you've added an appointment to the service, you should see the appointment date listed under **Last Appointment**. If you've added a follow-up appointment date to the last appointment, you'll see that date listed under **Next/Follow-up Due Date**. If you've added a frequency to the service and at least one appointment, you'll also see a date in Next/Follow-up Due Date whether you added a follow-up date to the appointment or not.



Try to keep appointments grouped into services, instead of creating new services for new doctors or companies.