



Schedule And Manage Patient Appointments In Clinica360

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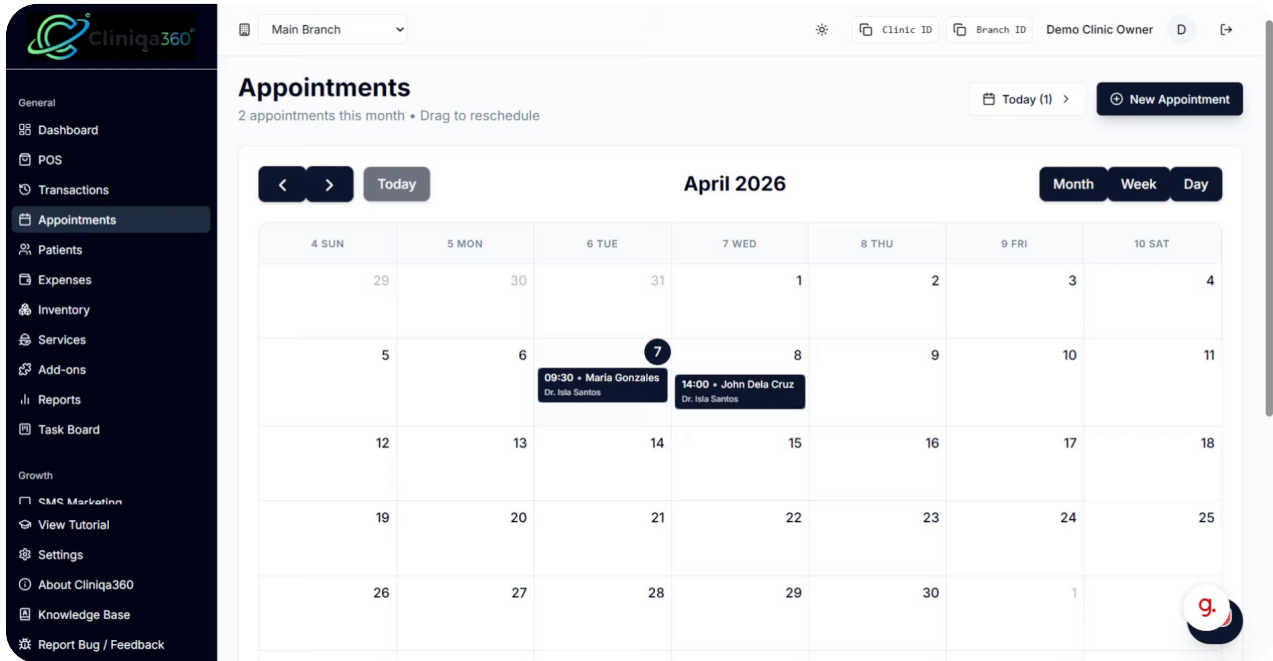


This tutorial guides you through scheduling and managing patient appointments using Clinica360.

Go to app.cliniqa360.com

01 Introduction

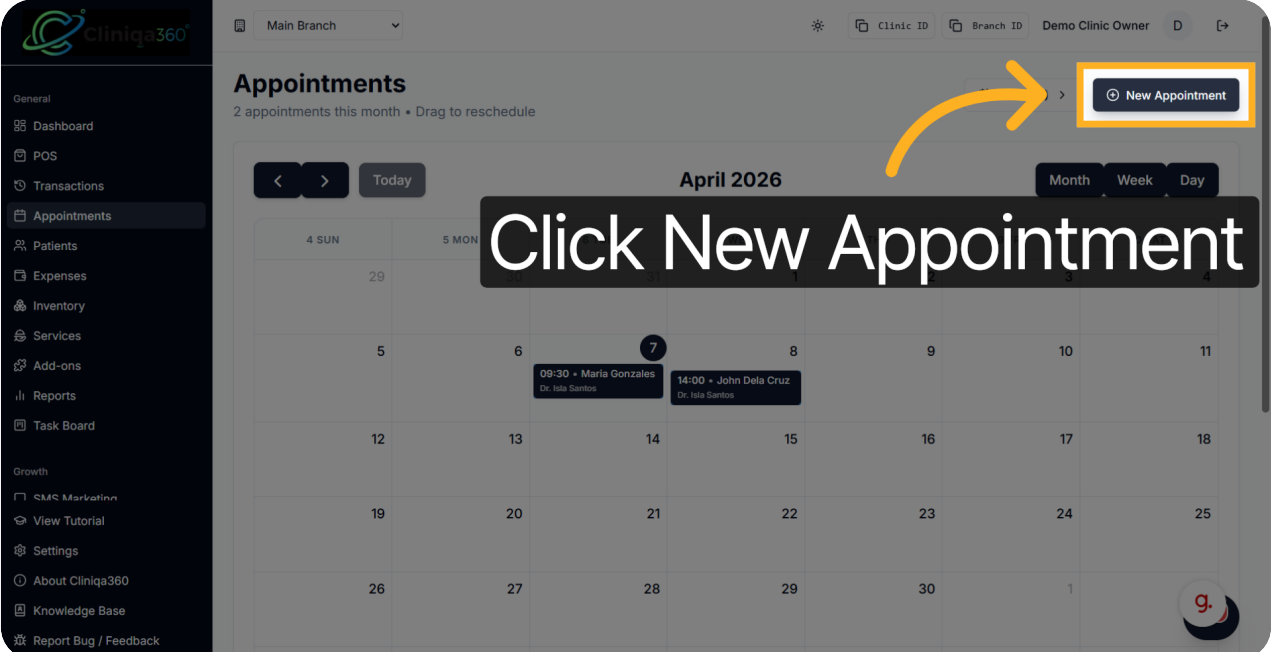
You will learn how to create new patients, set appointment details, and update or reschedule appointments efficiently.



The screenshot displays the Cliniqa360 Appointments interface. On the left is a dark sidebar with a navigation menu including: General, Dashboard, POS, Transactions, Appointments (highlighted), Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board, Growth, SMS Marketing, View Tutorial, Settings, About Cliniqa360, Knowledge Base, and Report Bug / Feedback. The main content area shows the 'Appointments' section for 'Main Branch' with a user 'Demo Clinic Owner'. It indicates '2 appointments this month' and provides a 'New Appointment' button. A calendar for 'April 2026' is shown in 'Month' view, with two appointments on the 7th: '09:30 - Maria Gonzales, Dr. Isla Santos' and '14:00 - John Dela Cruz, Dr. Isla Santos'. A 'Today' button is visible above the calendar.

02 Open New Appointment Window

Click "New Appointment" to start scheduling a new patient visit.

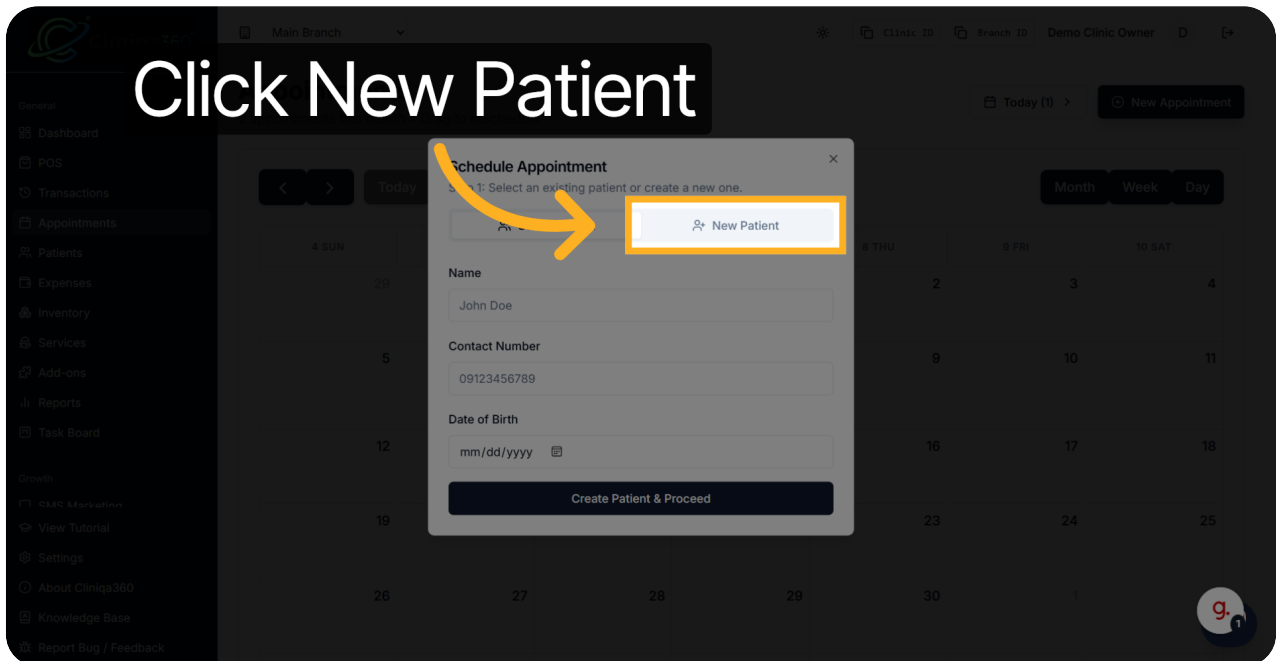


The screenshot displays the Clinica360 interface for managing appointments. The top navigation bar includes the Clinica360 logo, a dropdown menu for 'Main Branch', and user information: 'Demo Clinic Owner'. The main content area is titled 'Appointments' and shows '2 appointments this month • Drag to reschedule'. A calendar for 'April 2026' is visible, with two appointments scheduled for the 7th: '09:30 • Maria Gonzales Dr. Isla Santos' and '14:00 • John Dela Cruz Dr. Isla Santos'. A yellow arrow points to a 'New Appointment' button in the top right corner, which is highlighted with a yellow box. A large black overlay with white text reads 'Click New Appointment'.

| 4 SUN | 5 MON | 6 TUE | 7 WED | 8 THU | 9 FRI | 10 SAT | 11 SUN |
|-------|-------|-------|---|---|-------|--------|--------|
| 29 | | | 09:30 • Maria Gonzales Dr. Isla Santos | 14:00 • John Dela Cruz Dr. Isla Santos | | | |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 | |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 | |
| 26 | 27 | 28 | 29 | 30 | 1 | | 9. |

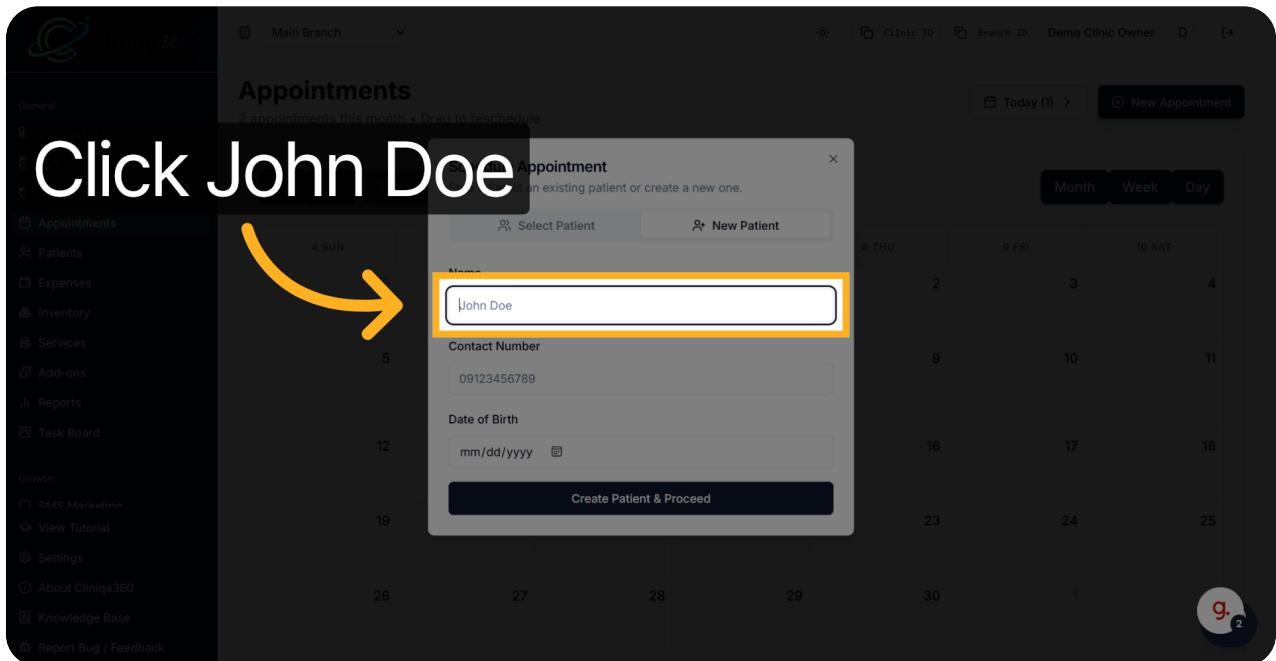
03 Initiate New Patient Entry

Click "New Patient" to add a new patient to the system.



04 Select Existing Patient

Click "John Doe" to choose an existing patient profile.



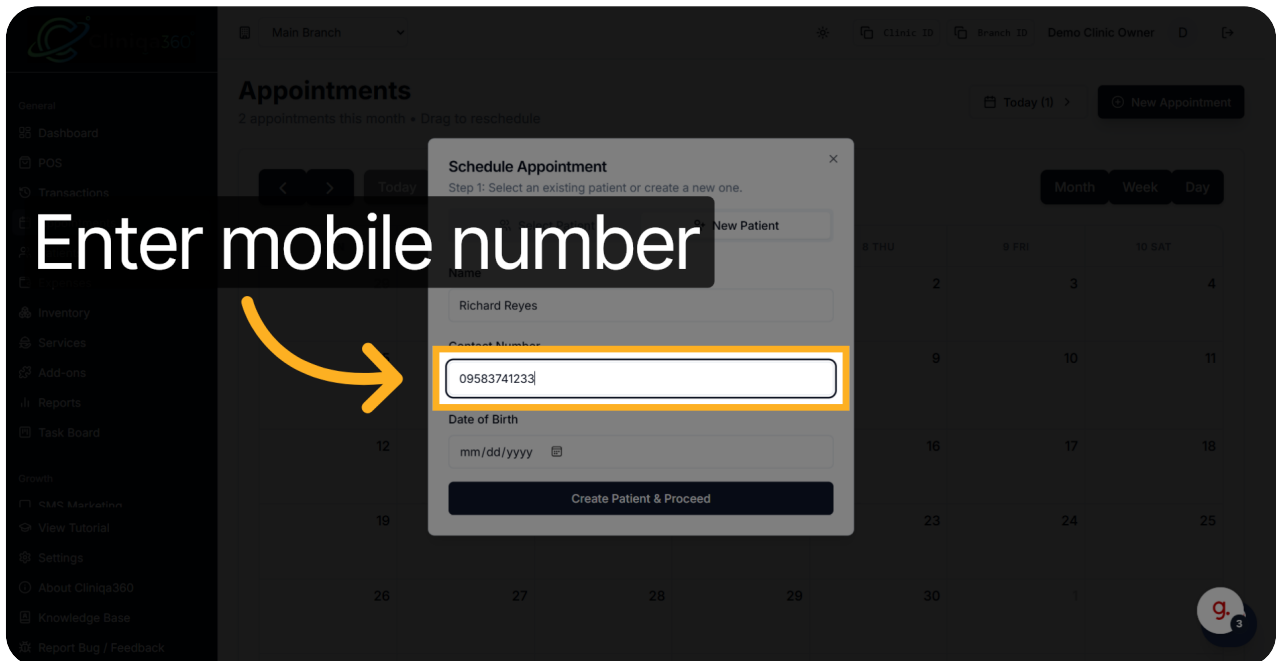
05 Enter Patient Full Name

Enter the patient's full name, "Richard Reyes", in the designated field.

The screenshot displays the Clinica360 software interface. On the left is a dark sidebar with a navigation menu including: General (Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, Task Board), Growth (CMS Marketing, View Tutorial, Settings, About Clinica360, Knowledge Base, Report Bug / Feedback), and a Clinica360 logo. The main area is titled 'Appointments' and shows a calendar for 'Main Branch' with '2 appointments this month'. A 'Schedule Appointment' modal is open, containing the following fields: 'Name' (with a cursor), 'Contact Number' (09123456789), and 'Date of Birth' (mm/dd/yyyy). The modal also has buttons for 'Select Patient', 'New Patient', and 'Create Patient & Proceed'. The background calendar shows dates from 4 SUN to 10 SAT.

06 Input Patient Mobile Number

Enter the patient's mobile number to ensure contact information is up to date.



07 Access Additional Patient Details

Click here to reveal more patient information fields for completion.

The screenshot displays a medical software interface with a dark theme. A modal window titled "Schedule Appointment" is open, showing a form for patient information. The form includes fields for Name (Richard Reyes), Contact Number (09583741233), and Date of Birth (mm/dd/yyyy). A yellow arrow points to the Date of Birth field, which is highlighted with a yellow border. The text "Click here" is written in white on a black background next to the arrow. The background shows a calendar view with a "New Appointment" button and a "Today" button.

08 Set Patient Birthdate

Enter the patient's birthdate to complete the initial personal details.

The screenshot displays the Clinica360 'Appointments' interface. A modal window titled 'Schedule Appointment' is open, showing the following details:

- Step 1:** Select an existing patient or create a new one.
- Select Patient / New Patient:** Two buttons are visible, with 'New Patient' selected.
- Name:** Richard Reyes
- Contact Number:** 09583741233
- Date of Birth:** mm/dd/yyyy
- Action:** Create Patient & Proceed

The background shows a calendar view for the month of August, with a 'New Appointment' button in the top right corner.

09 Create Patient Profile

Click "Create Patient & Proceed" to save the new patient and continue scheduling.

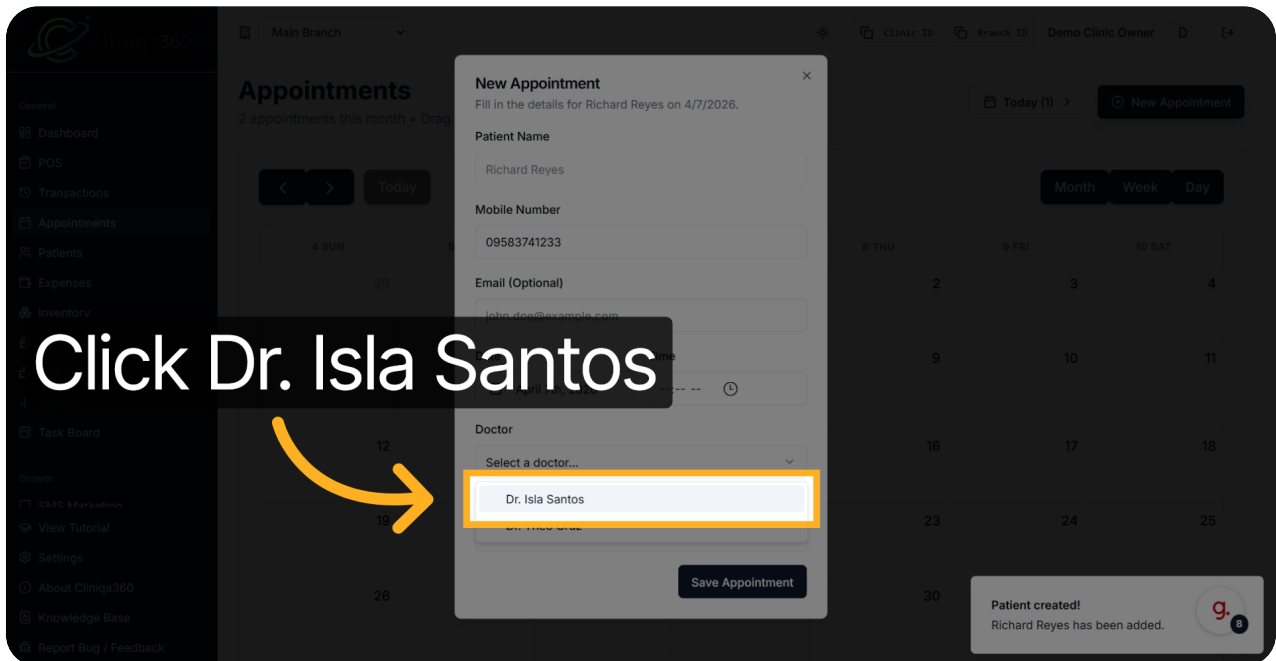
The screenshot displays the Clingo360 software interface. A modal window titled "Schedule Appointment" is open, showing the "New Patient" tab. The form contains the following information:

- Name: Richard Reyes
- Contact Number: 09583741233
- Date of Birth: 06/16/1998

The "Create Patient & Proceed" button at the bottom of the form is highlighted with a yellow border. A yellow arrow points from the text "Click Create Patient & Proceed" to this button. The background shows a calendar view for the month of June, with a "New Appointment" button in the top right corner.

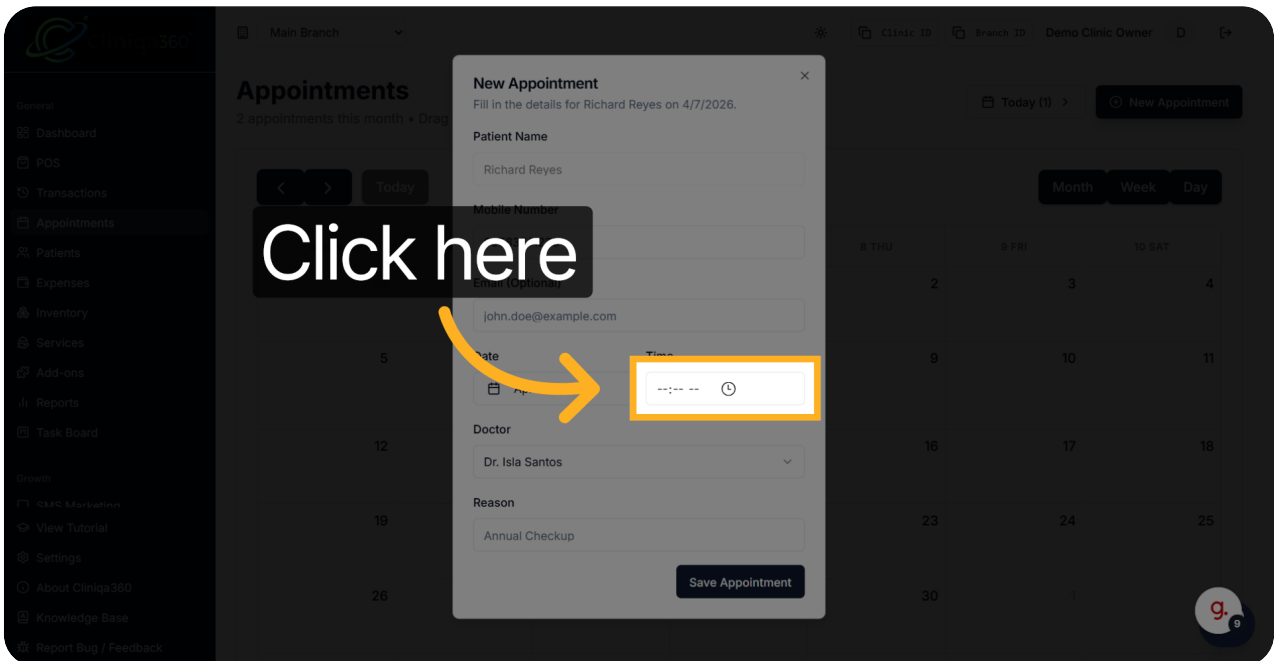
10 Assign Doctor To Appointment

Click the Doctor to select the attending physician for the appointment.



11 Open Appointment Time Selection

Click here to choose the appointment time slot.



12 Enter Appointment Time

Enter the appointment time for the patient visit.

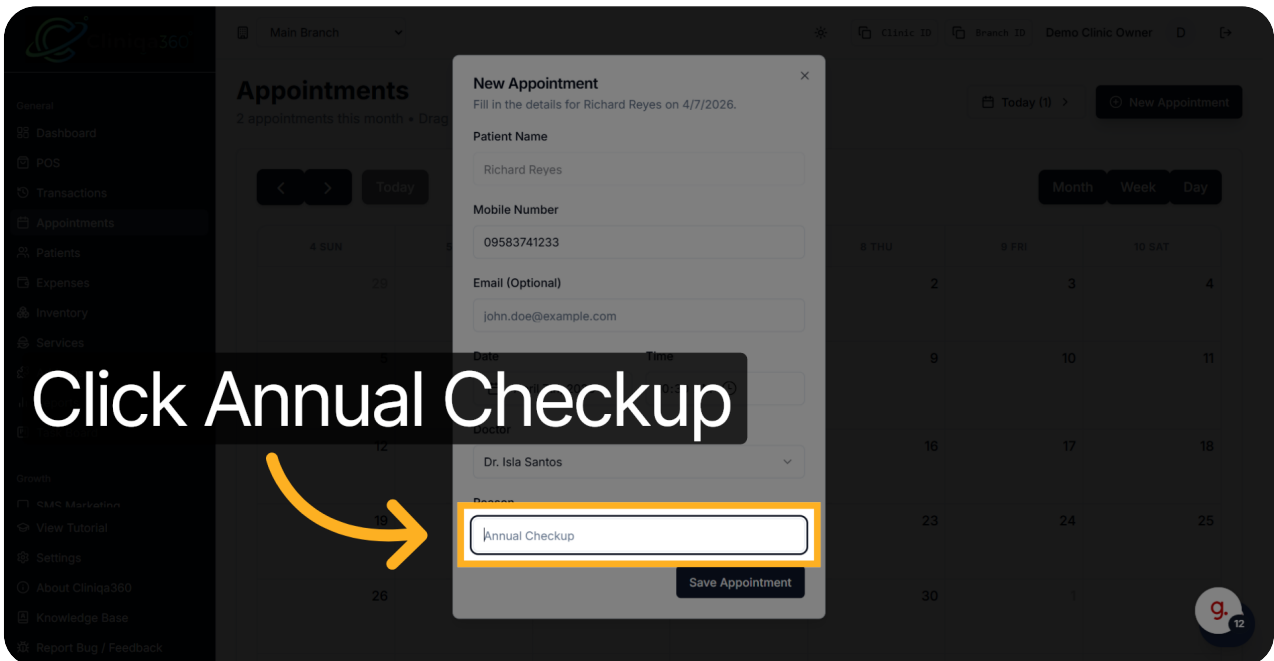
The screenshot shows the Clinica360 interface with a 'New Appointment' modal form open. The background is a calendar for April 2026, showing dates from 4th to 30th. The modal form is titled 'New Appointment' and contains the following fields:

- Patient Name:** Richard Reyes
- Mobile Number:** 09583741233
- Email (Optional):** john.doe@example.com
- Date:** April 7th, 2026
- Time:** A time selection field currently showing '---:--' with a clock icon.
- Doctor:** Dr. Isla Santos (selected from a dropdown menu)
- Reason:** Annual Checkup

A 'Save Appointment' button is located at the bottom right of the modal. The background calendar shows a grid of dates with a 'Today' button and navigation arrows. The Clinica360 logo is visible in the bottom right corner of the interface.

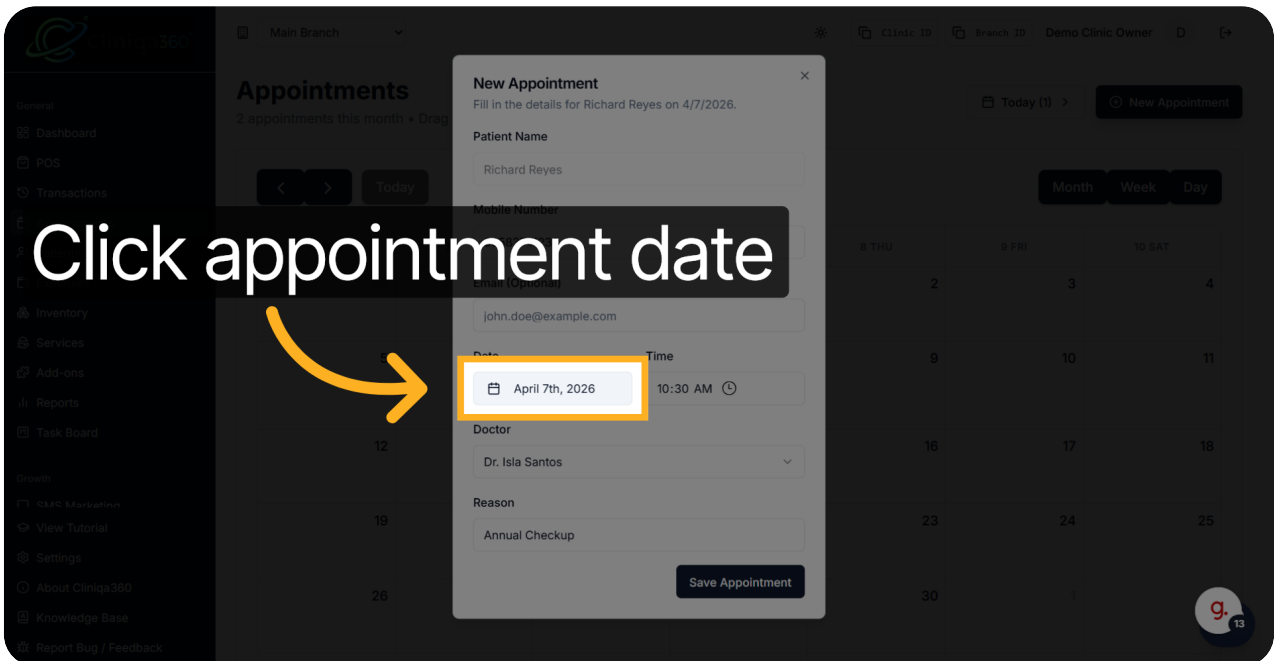
13 Select Appointment Reason

Specify the purpose of the appointment.



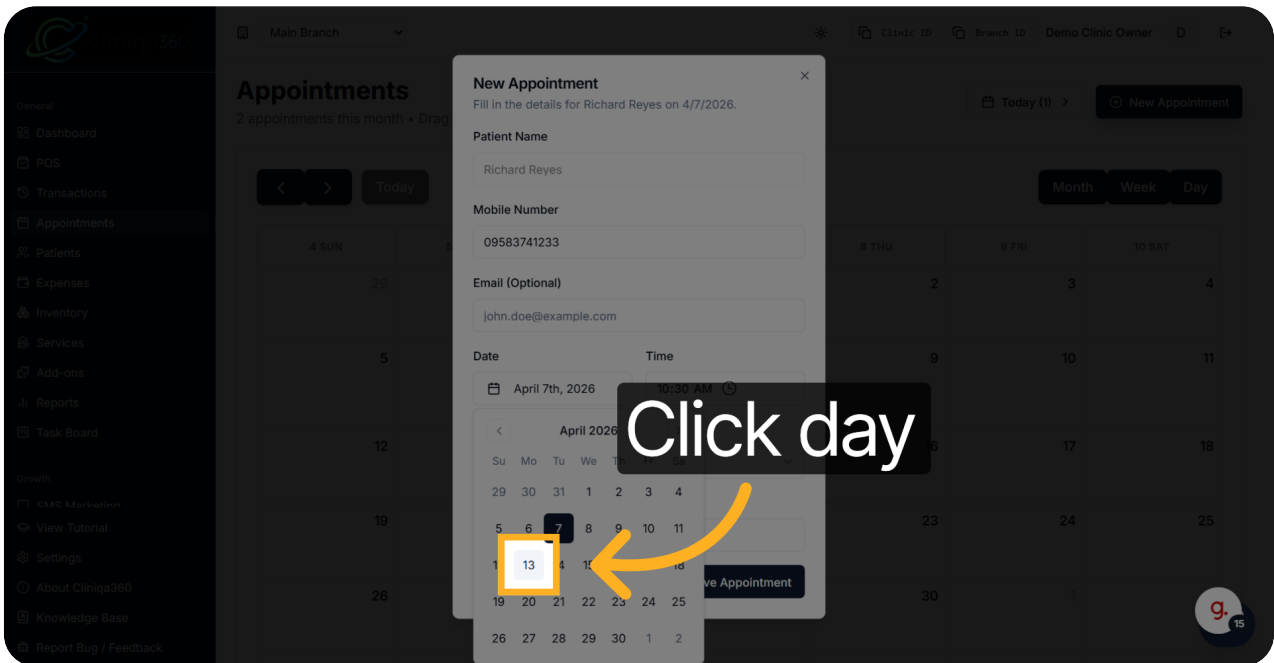
14 Choose Appointment Date

Click the date picker to set the date for the appointment.



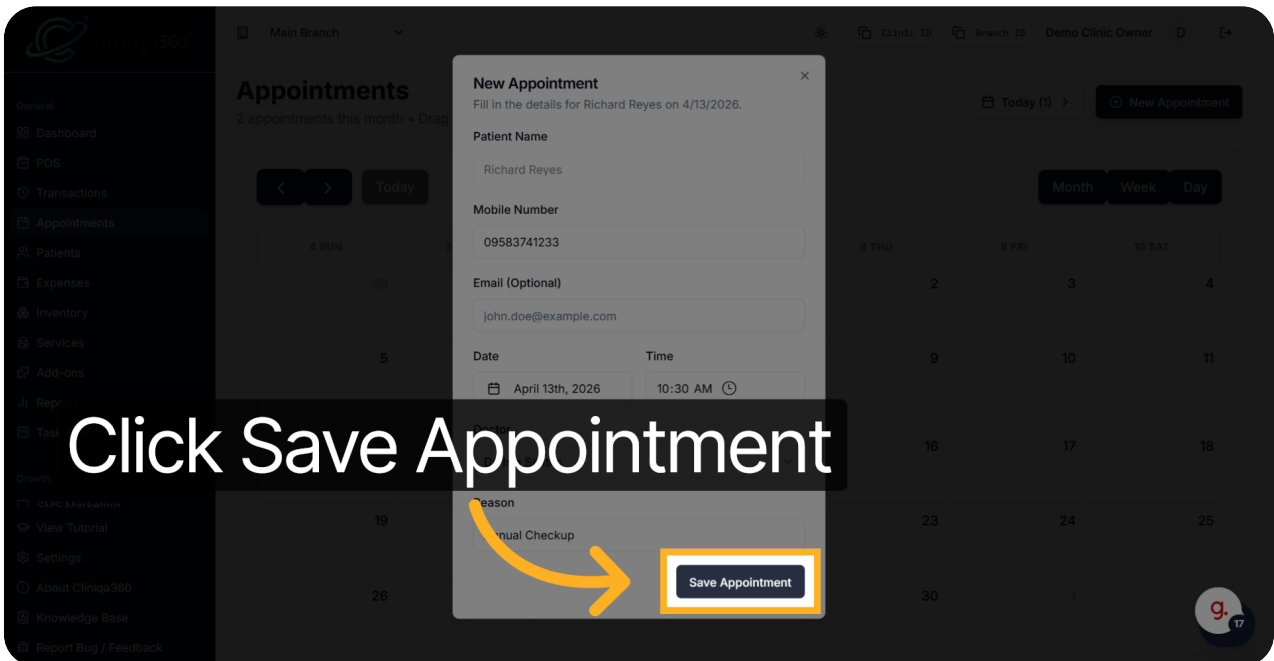
15 Select Appointment Day

Click the date picker to finalize the day selection for the appointment.



16 Save Appointment Details

Click "Save Appointment" to confirm and store the scheduled appointment.



17 Open Patient Profile

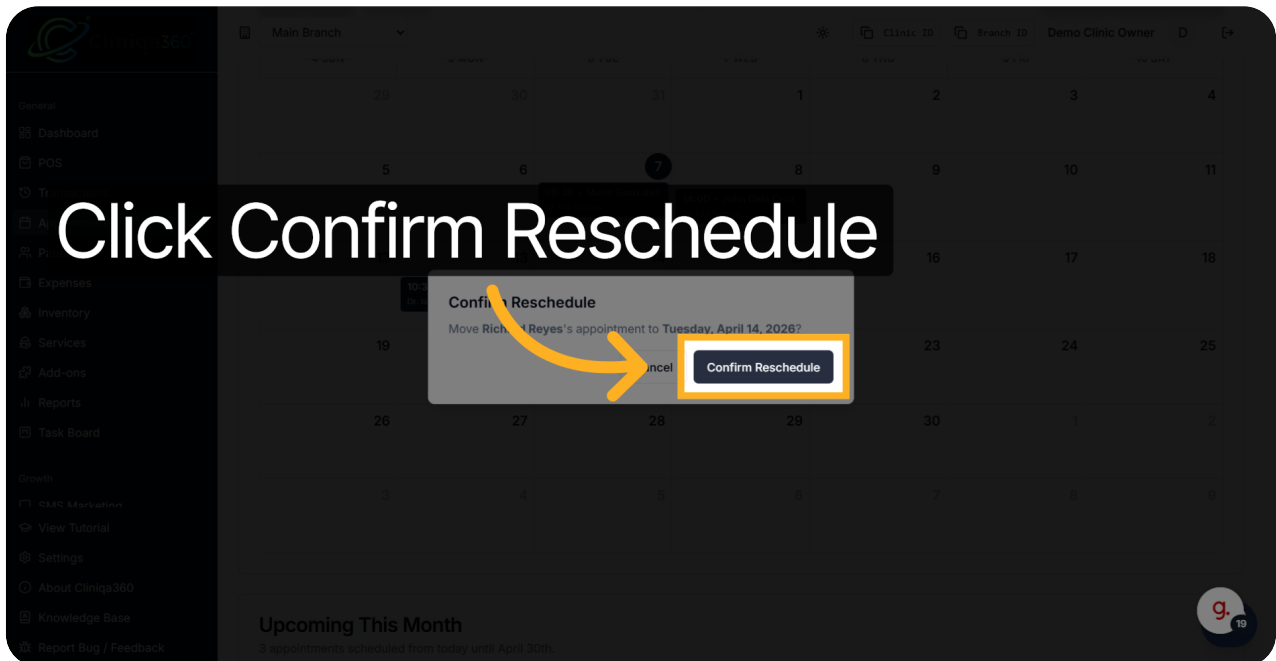
Drag and drop the patient to another day in the calendar to modify the patient's appointment schedule.

Click Richard Reyes

Upcoming This Month
3 appointments scheduled from today until April 30th.

18 Confirm Appointment Reschedule

Click "Confirm Reschedule" to finalize changes to the appointment time or date.



19 Access Appointment Options

Click here to open additional appointment management options.

The screenshot displays the Clinica360 interface. On the left is a dark sidebar with a navigation menu. The main content area features a calendar grid at the top, followed by a section titled "Upcoming This Month" which lists three appointments. A callout box with the text "Click here" and an arrow points to a square icon in the "Actions" column of the appointment table.

General

- Dashboard
- POS
- Transactions
- Appointments**
- Patients
- Expenses
- Inventory
- Services
- Add-ons
- Reports
- Task Board










Growth

- CMS Marketing
- View Tutorial
- Settings
- About Clinica360
- Knowledge Base
- Report Bug / Feedback

Main Branch

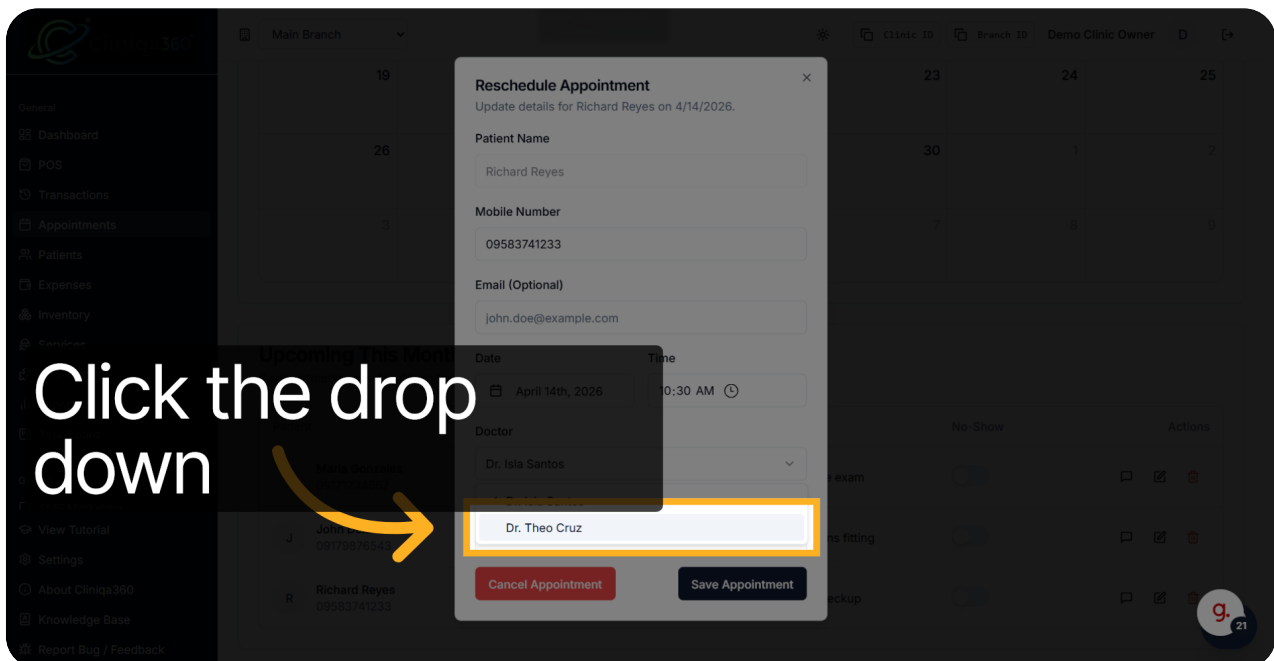
| | | | | | | |
|----|----|----|----|----|----|----|
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |

Upcoming This Month
3 appointments scheduled from today until April 30th.

| Patient | Date & Time | Doctor | Reason | No-Show | Actions |
|---------------------------------|-----------------------|-----------------|----------------------|--------------------------|--|
| M Maria Gonzales 09171234567 | Apr 7, 2026 09:30 | Dr. Isla Santos | | |    |
| J John Dela Cruz 09179876543 | Apr 8, 2026 14:00 | Dr. Isla Santos | Contact lens fitting | <input type="checkbox"/> |    |
| R Richard Reyes 09583741233 | Apr 14, 2026 10:30 | Dr. Isla Santos | Annual Checkup | <input type="checkbox"/> |    |

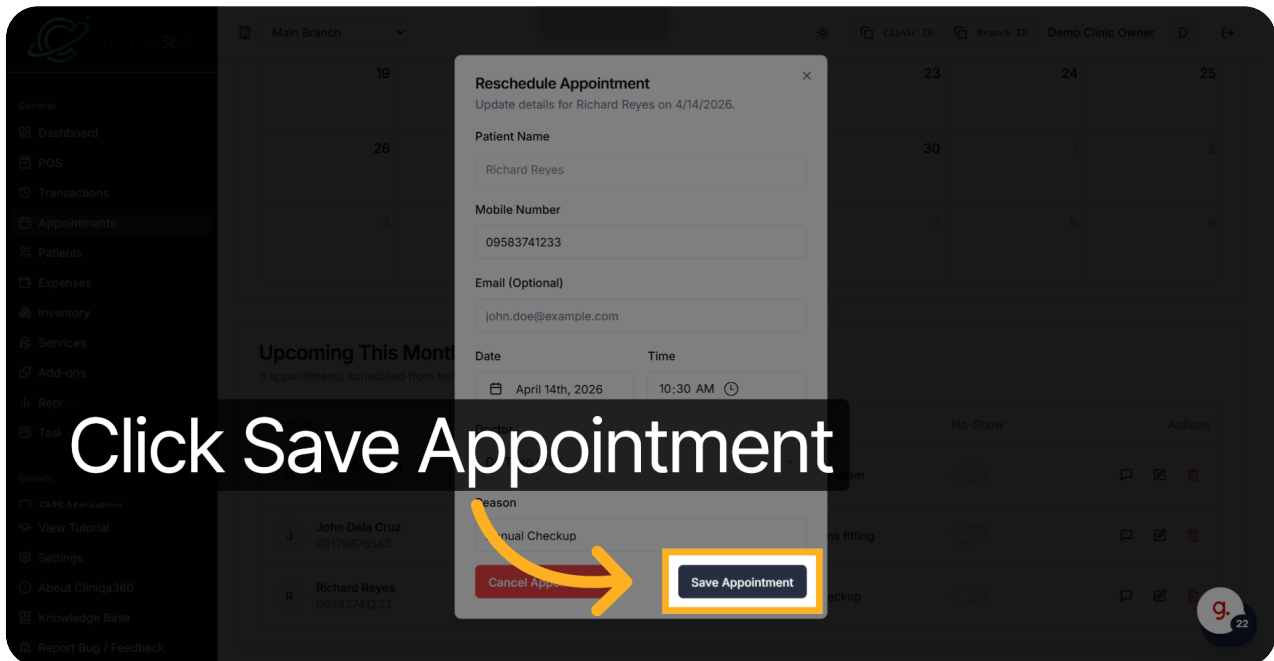
20 Change Assigned Doctor

Click the dropdown to update the attending physician for the appointment.



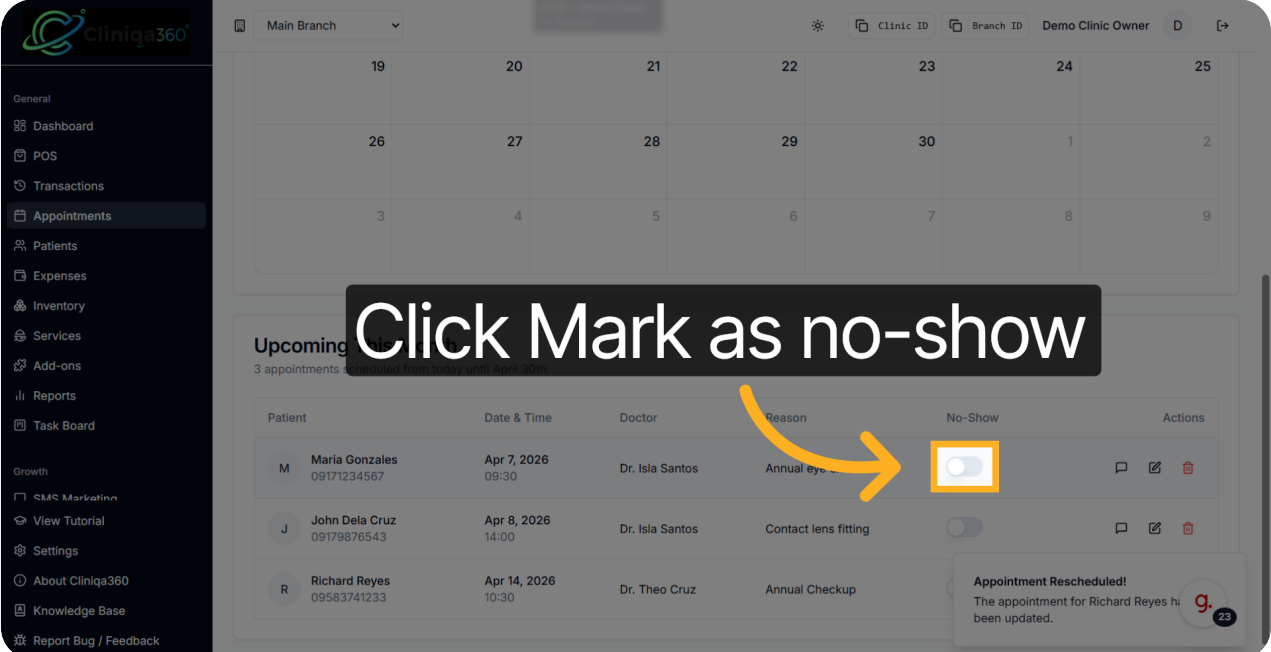
21 Save Updated Appointment

Click "Save Appointment" to apply changes to the appointment details.












22 Mark Appointment No-Show

Click "Mark as no-show" to indicate the patient did not attend the appointment.

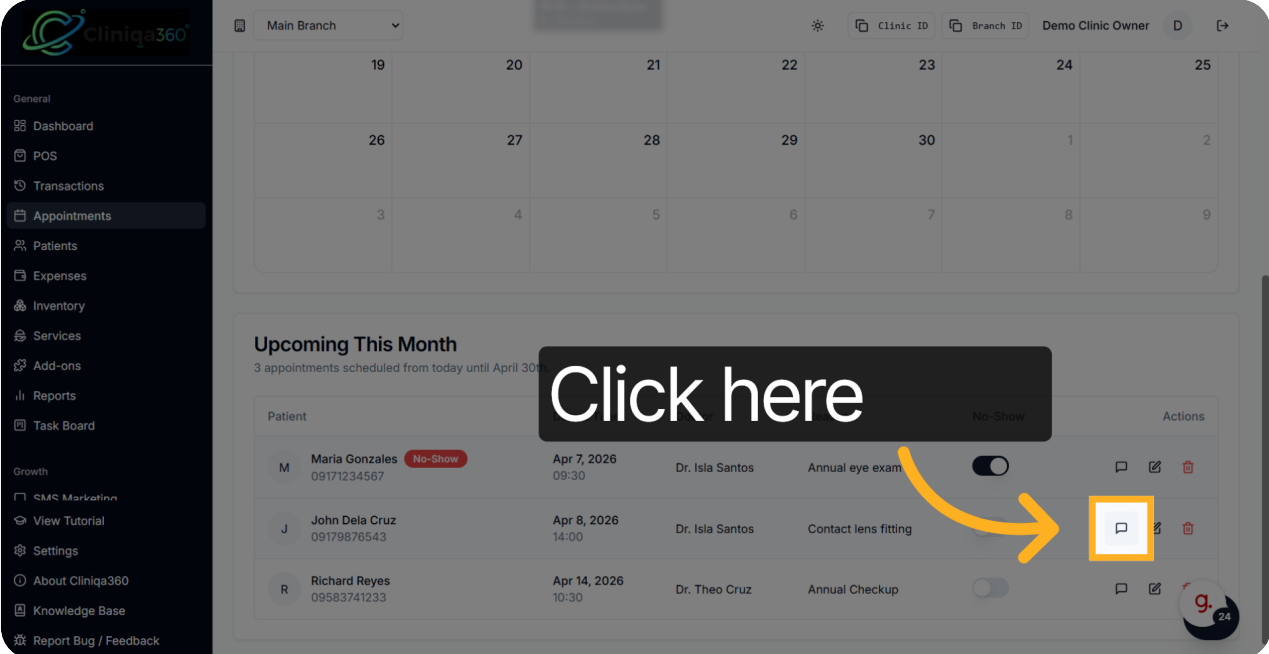


The screenshot displays the Clinica360 interface. A calendar view at the top shows dates from 19 to 25. Below the calendar, a table lists upcoming appointments. A black callout box with white text says "Click Mark as no-show" with an orange arrow pointing to a toggle switch in the "No-Show" column for the first appointment. A notification bubble in the bottom right corner reads "Appointment Rescheduled! The appointment for Richard Reyes has been updated." The interface includes a sidebar with navigation options like Dashboard, POS, Transactions, Appointments, Patients, Expenses, Inventory, Services, Add-ons, Reports, and Task Board.










| Patient | Date & Time | Doctor | Reason | No-Show | Actions |
|---------------------------------|-----------------------|-----------------|----------------------|-------------------------------------|--|
| M Maria Gonzales 09171234567 | Apr 7, 2026 09:30 | Dr. Isla Santos | Annual eye | <input checked="" type="checkbox"/> |    |
| J John Dela Cruz 09179876543 | Apr 8, 2026 14:00 | Dr. Isla Santos | Contact lens fitting | <input type="checkbox"/> |    |
| R Richard Reyes 09583741233 | Apr 14, 2026 10:30 | Dr. Theo Cruz | Annual Checkup | <input type="checkbox"/> |    |

23 Access Final Options

Click the message icon to send appointment reminder to the patient



The screenshot displays the Clinica360 interface. On the left is a dark sidebar with a navigation menu. The main area shows a calendar for the month of April 2026, with dates 19 through 25 visible. Below the calendar is a section titled "Upcoming This Month" with the subtitle "3 appointments scheduled from today until April 30, 2026".

| Patient | Date | Time | Doctor | Service | No-Show | Actions |
|---------------------------------|--------------|-------|-----------------|----------------------|--------------------------|--|
| M Maria Gonzales 09171234567 | Apr 7, 2026 | 09:30 | Dr. Isla Santos | Annual eye exam | <input type="checkbox"/> |    |
| J John Dela Cruz 09179876543 | Apr 8, 2026 | 14:00 | Dr. Isla Santos | Contact lens fitting | <input type="checkbox"/> |    |
| R Richard Reyes 09583741233 | Apr 14, 2026 | 10:30 | Dr. Theo Cruz | Annual Checkup | <input type="checkbox"/> |    |

A callout box with the text "Click here" and a yellow arrow points to the message icon in the actions column of the second appointment row. The message icon is highlighted with a yellow square.

You have successfully scheduled, updated, and managed patient appointments in Clinica360. Confirm appointments and reschedule or mark no-shows as needed to maintain accurate clinic records.

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