Adding a visit to a case in the Scheduling application

1. Within the **Scheduling** application of **Healthbridge**, identify if a case is without a **Visit**
2. Click the **Worksheet View** tab
3. A blank cell in the **Visit** column means there is no Visit attached to this case
4. Right click on the case with the blank visit
5. Select **Details**
6. Then click **Appt/Visit Link**
7. Select the check box for the visit that will be linked to this case
8. Then click **OK**
Adding the Visit and Patient Age column to the Worksheet view tab

1. Click Preferences
2. Then click Return to Default Roster by Location

Visits can also be linked in the Calendar view tab

1. Open the Calendar View tab
2. Right click the case
3. Select Details
4. Click Appt/Visit Link
5. Select the check box for the visit that will be linked to this case
6. Then click OK
Adding a visit to a case in the Surgical Care application

1. Within the Surgical Care application of Healthbridge, identify if a case is without a Visit
   A. No patient visit selected will display in the Patient Header
   B. In the Surgical Case Detail tab, there will be a Blue text: This case has no visit.
   C. Case Validation Errors message will display: This case does not have a visit attached to it. Case cannot be close

2. To add a visit to this case, click the Link icon from the Surgery Case Details tab
3. Select the check box for the visit that will be linked to this case
4. Then click OK