

SCHEDULING PATIENTS IN NEXTGEN – CONTINUITY CLINIC

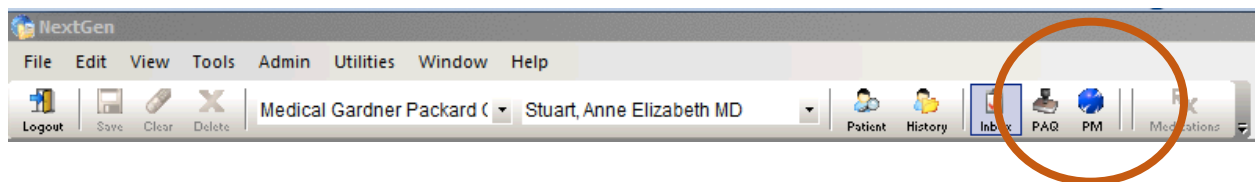
NextGen has two modules: EHR and PM.

- EHR allows you to manage patient visits and records.
- PM handles scheduling and billing.

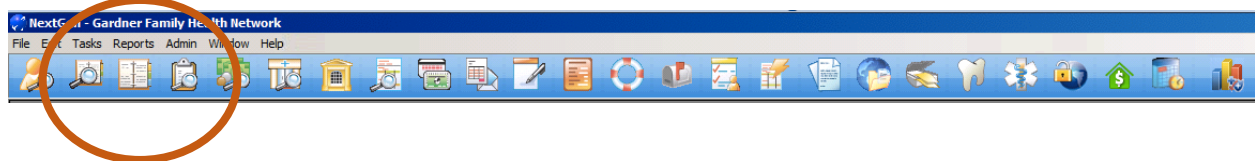
(If you have not already set up your location and scheduling preferences in NextGen, see the guide called Setting Up User Preferences in the PM Module)

To schedule a patient:

1. Open the PM module in NextGen. From the EHR, click the PM icon in the top menu bar.

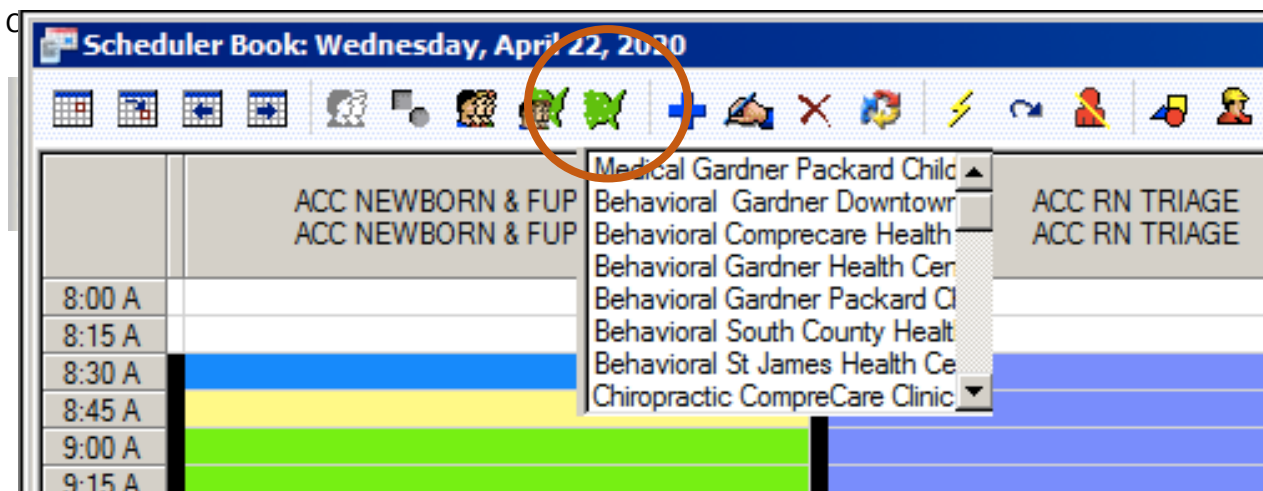


2. Open the Scheduler Book. Click the book icon in the top menu bar

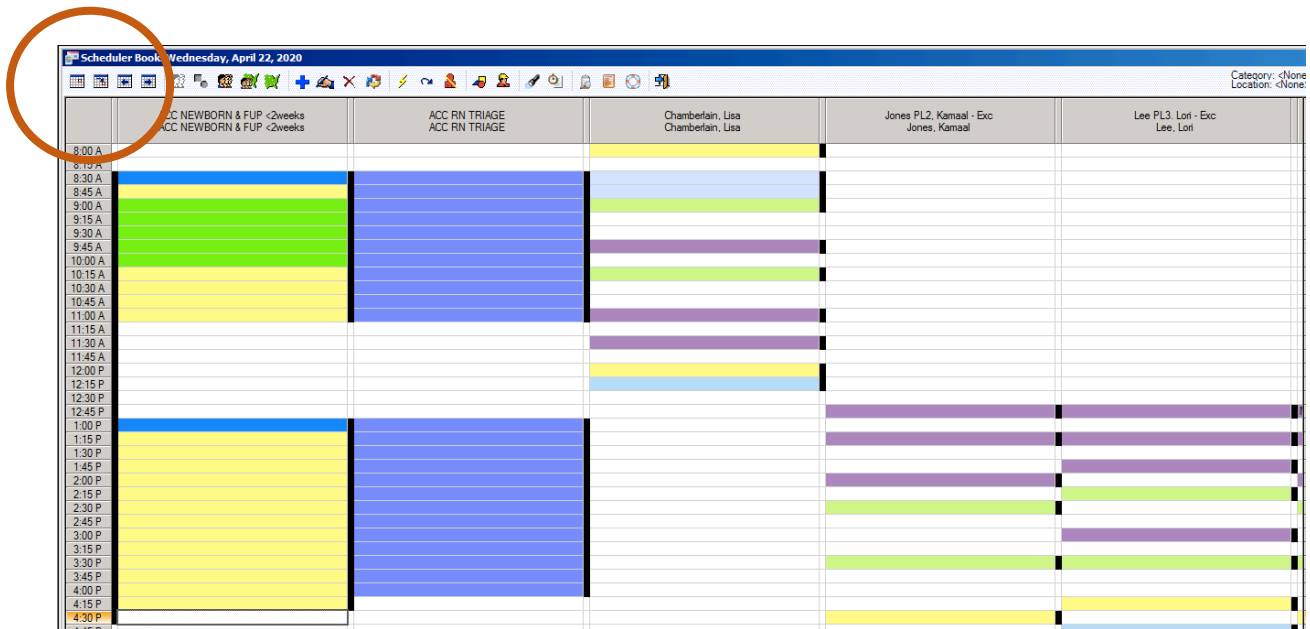


3. Click the green Locations icon. Double Click Medical Gardner Packard Children's in the drop-down list.

If the schedule book does not default to "Multiview", or if you don't see the Locations icon, click the gray Multiview tab at the bottom right corner of the screen.



Next Gen will bring up the scheduling screen:



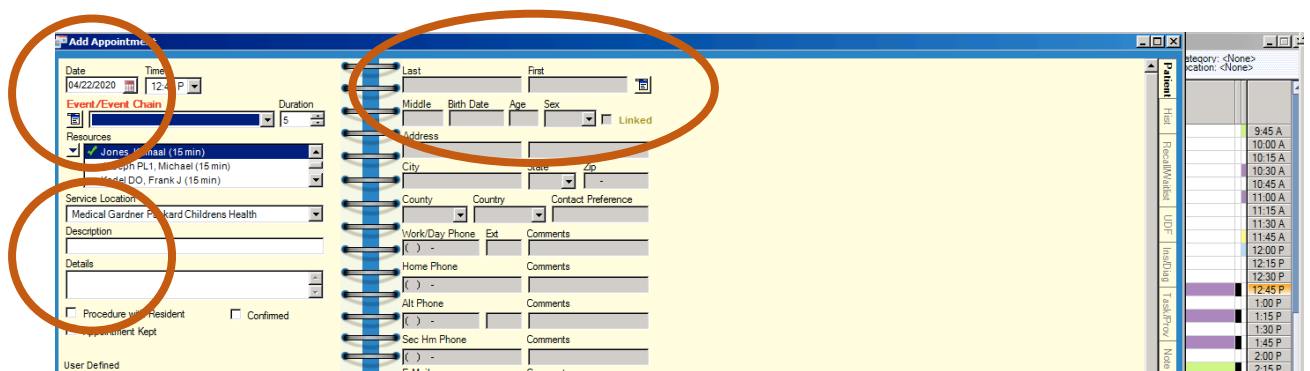
4. Use the calendar icon on the top left to look for a date and time slot that you want to use to schedule the patient. Double click on the appointment slot to begin scheduling.

Note that appointment slots are color coded, as follows:

- Purple: 30-minute visit. Best for kids under 12 and follow-ups.
- Light green: 45 minutes long. Use for adolescents or patients who need extra time.
- Yellow: MD approval. Can only be used/approved by the resident or one of the attendings on that resident's team.
- Light blue: not a real visit. This is a remnant of a workaround no longer in use.

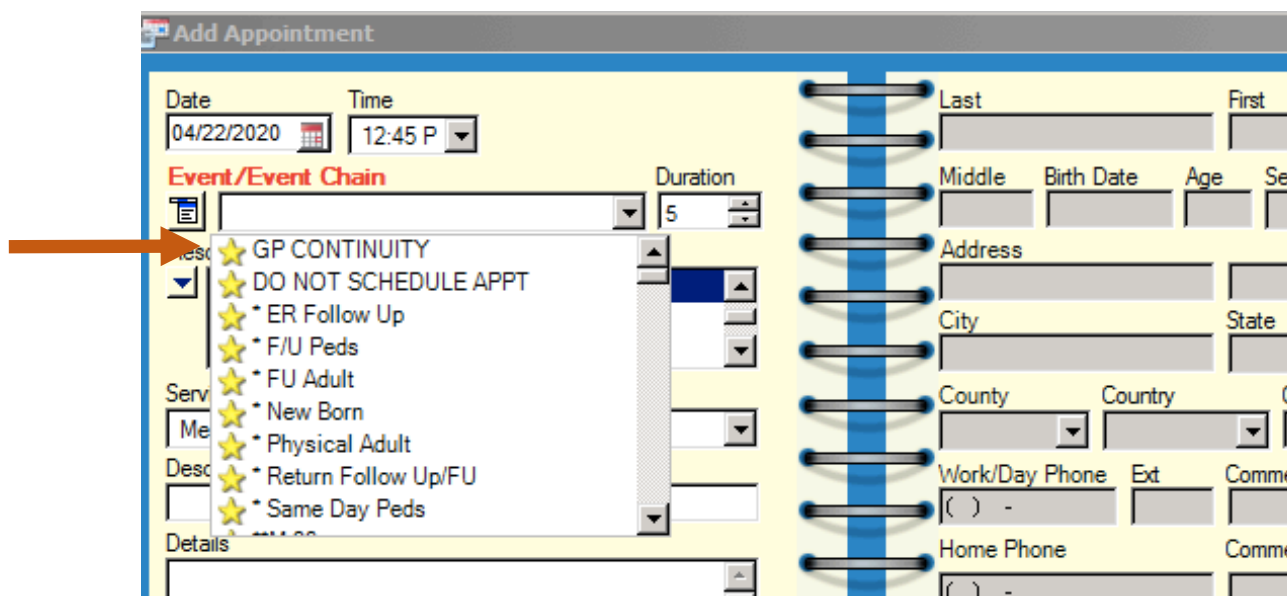
5. There are three sections to fill out in the Add Appointment form:

- Event type
- Patient information
- Description/Details

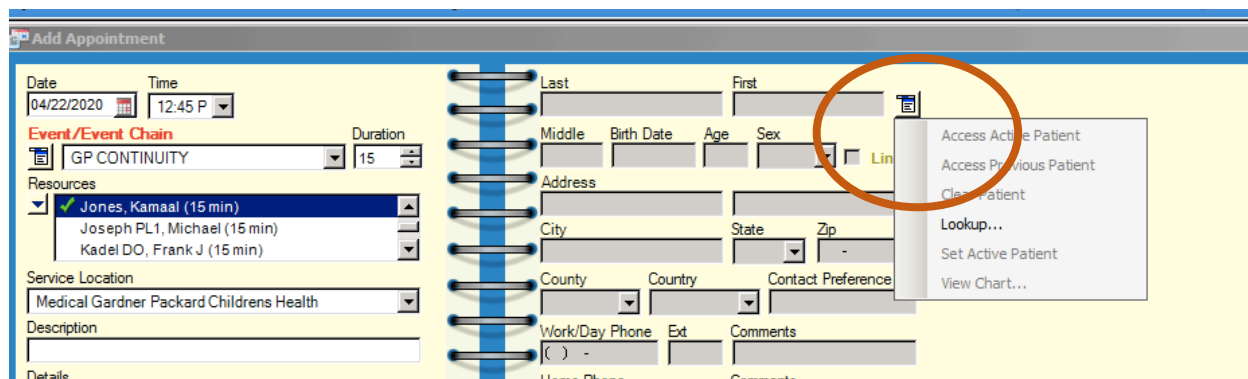


- A. To complete the **Event/Event Chain** field, select **GP CONTINUITY** from the drop-down list if you are scheduling an in-person continuity appointment. If scheduling telehealth, use **M Virtual Visit**.

There should automatically be a green check mark by the correct provider's name in the resource list. If not, hit Cancel at the bottom right of the screen and reselect an appointment slot under the correct name on the main scheduling screen.



- B. To add **Patient information**, click on the icon to the right of the Last and First name fields



In the drop down list, you can either select **Lookup**, to find the patient you want to schedule, or use **Access Previous Patient** if you are already in a patient's record in EHR.

When the patient details come up, confirm that you have the right patient, and click OK.

- C. In the **Description and Details** fields, include the patient's name, reason for visit, and provider's name. (Entering the same information in both fields makes the information visible in both PM and EHR.)

Add Appointment

Date: 04/22/2020 Time: 12:45 P

Event/Event Chain: GP CONTINUITY Duration: 15

Resources: Jones, Kamaal (15 min)

Service Location: Medical Gardner Packard Childrens Health

Description: Test, Mila - 9 MONTH WCC - K JONES

Details: Test, Mila - 9 MONTH WCC - K JONES

Procedure with Resident Confirmed Appointment Kept

Patient Information:

Last: Test First: Mila

Middle: Birth Date: 04/02/2019 Age: 7 mos Sex: Female

Address: 123 Hoover St, Redwood City, CA 94063

County: SAN MATEO Home Phone: (650) 123-8585

Work/Day Phone: Alt Phone: Sec Hm Phone

- 6. When you are finished entering Patient information, Event type, and Description/Details, click OK at the bottom of the screen.

You should now see the patient's appointment in the Scheduling Book.

NextGen - Gardner Family Health Network

File Edit Tasks Reports Admin Window Help

	Chamberlain, Lisa Chamberlain, Lisa	Jones PL2, Kamaal - Exc Jones, Kamaal	Lee PL3, Lori - Exc Lee, Lori
9:45 A			
10:00 A			
10:15 A			
10:30 A			
10:45 A			
11:00 A			
11:15 A			
11:30 A			
11:45 A			
12:00 P			
12:15 P			
12:30 P			
12:45 P		Test, Mila - 9 MONTH WCC - K JONES - Con	
1:00 P			
1:15 P			
1:30 P			
1:45 P			
2:00 P			
2:15 P			
2:30 P			
2:45 P			
3:00 P			
3:15 P			
3:30 P			
3:45 P			
4:00 P			
4:15 P			
4:30 P			
4:45 P			
5:00 P			

NOTES:

- If you make an error or need to make change, please ask one of the MAs or BOCs for help.
- DO NOT DELETE appointments. Deleting an entry does not actually remove it from the system. It disappears from view, but there will be a ghost entry that will wreak havoc....