**SCHEDULING PATIENTS IN NEXTGEN – CONTINUITY CLINIC**

NextGen has two modules: EHR and PM.
- EHR allows you to manage patient visits and records.
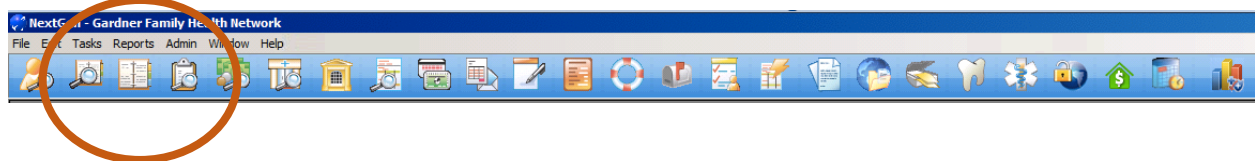- PM handles scheduling and billing.

(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.
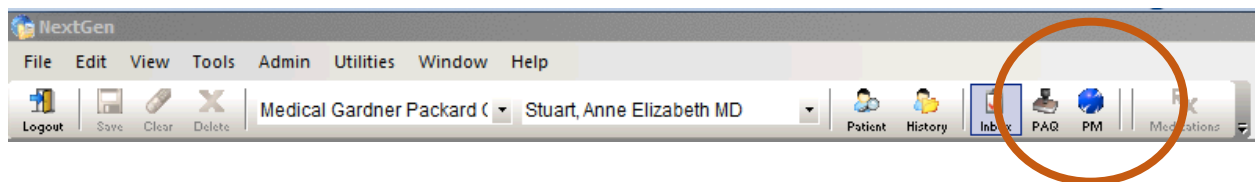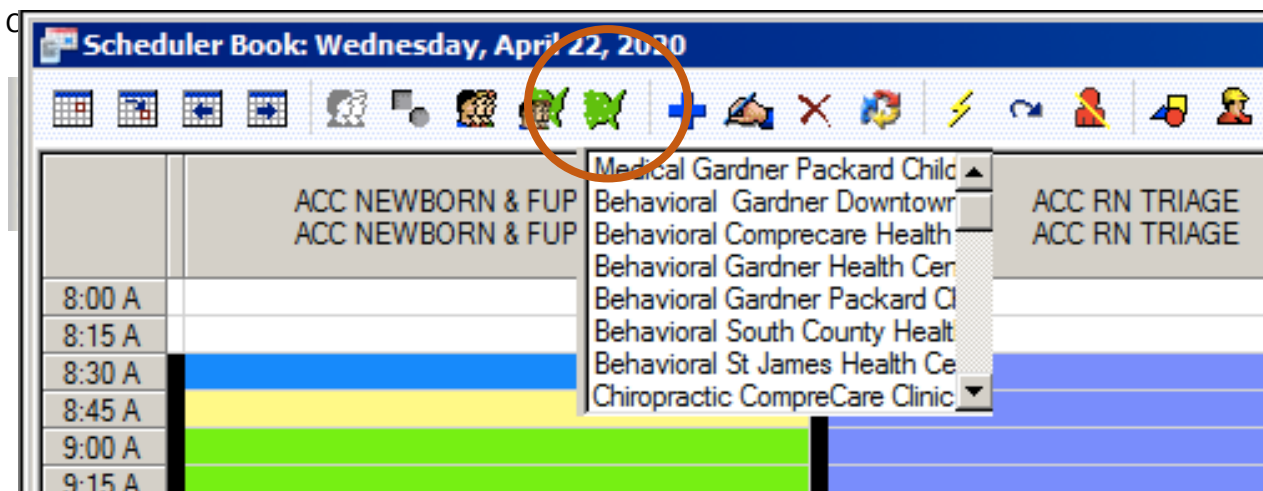

2. Open the Scheduler Book. Click the book icon in the top menu bar

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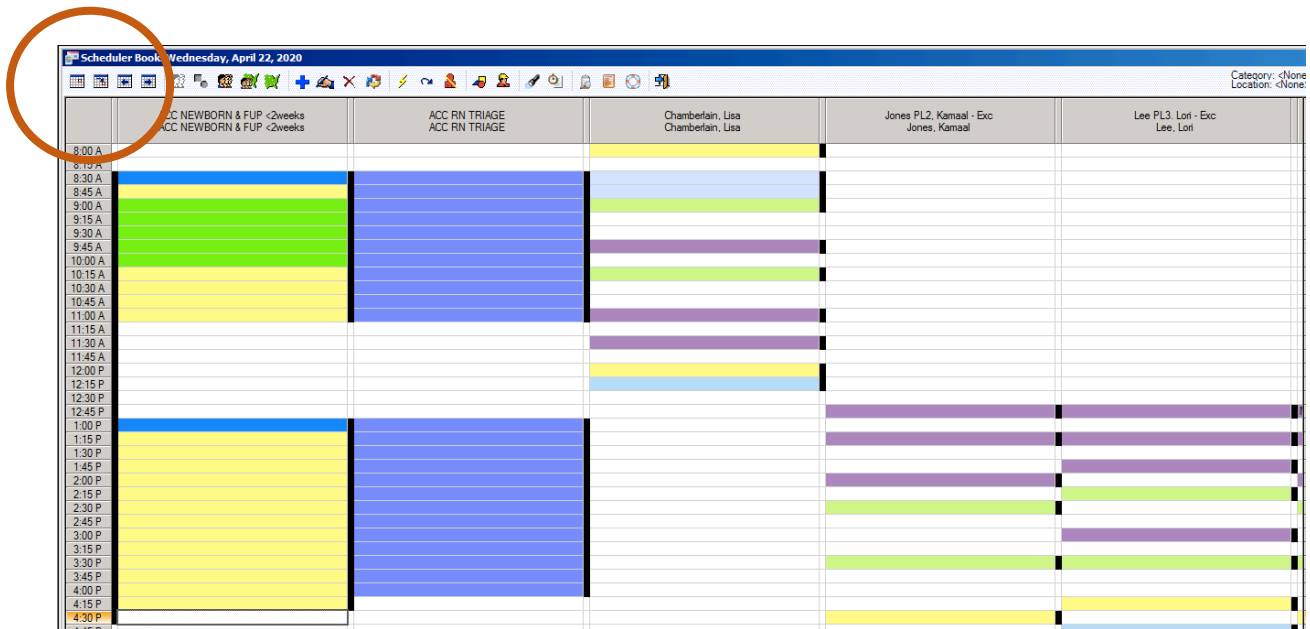
4. Use the calendar icon on the top left to look for a date and time slot that you want to use to schedule the patient. Double click on the appointment slot to begin scheduling.

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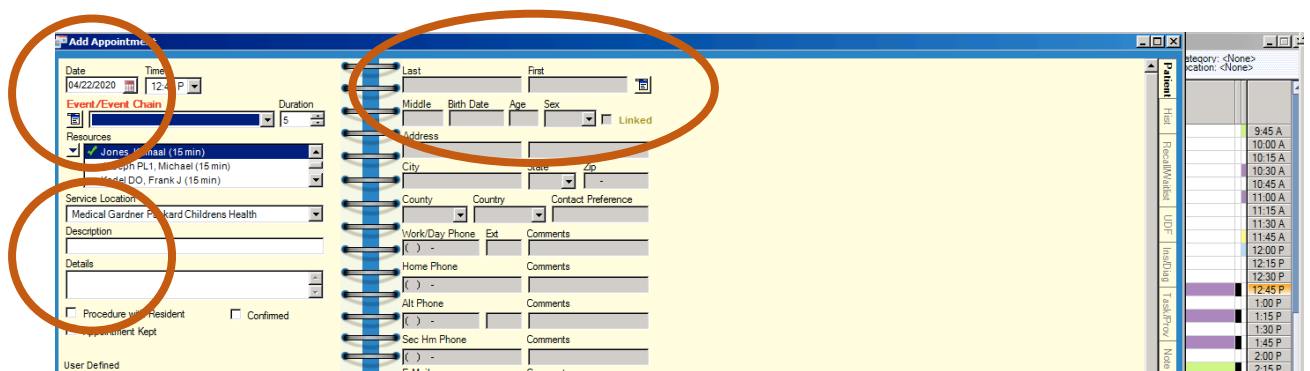
A. To complete the **Event/Event Chain field**, select GP CONTINUITY from the drop-down list if you are scheduling an in-person continuity appointment. If scheduling telehealth, use M Virtual Visit.

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.
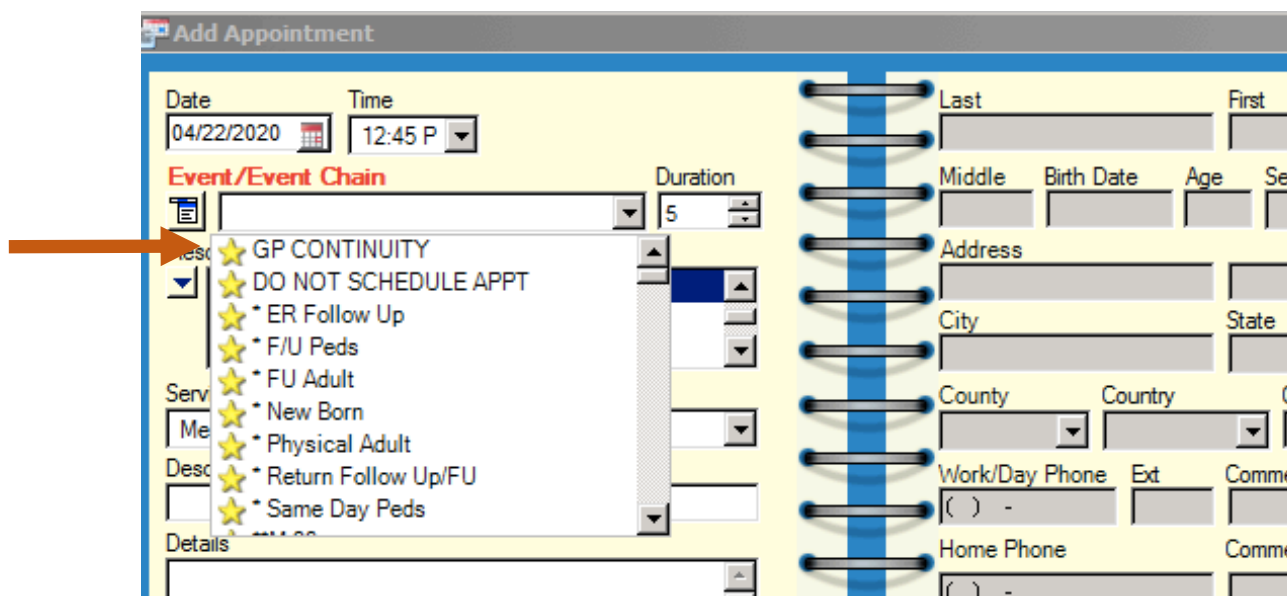
B. To add **Patient information**, click on the icon to the right of the Last and First name fields
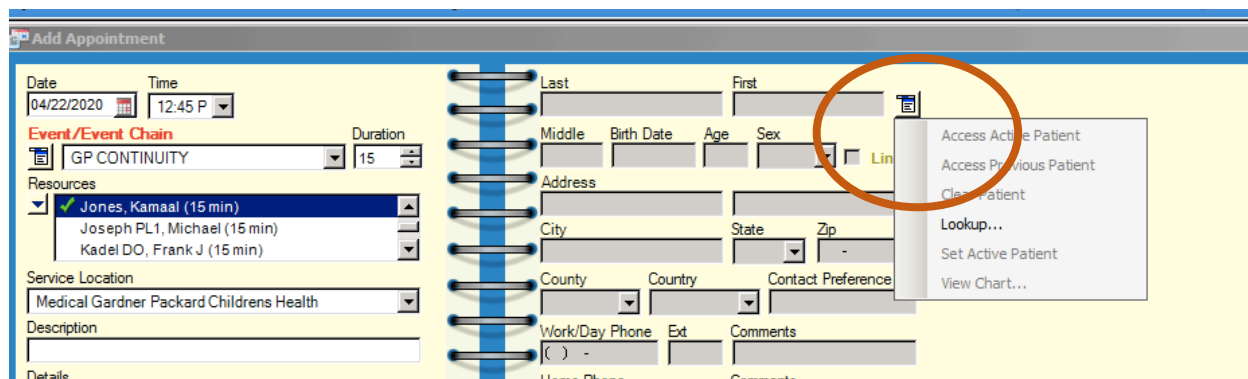
In the drop down list, you can either select Lookup, to find the patient you want to schedule, or use Access Previous Patient if you are already in a patients' record in EHR.

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.)

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.

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….