Once inside the "remote environment" double click on the NextGen icon to open the Launchpad. With the Launchpad open, single click on the link for Practice Management. Practice Management will be referred to as the PM from here on out. If you double click the link then you will hide the username and password prompt behind the Launchpad. To unhide it, look at the bottom of your screen and click on the icon for the PM that is sitting in the taskbar.
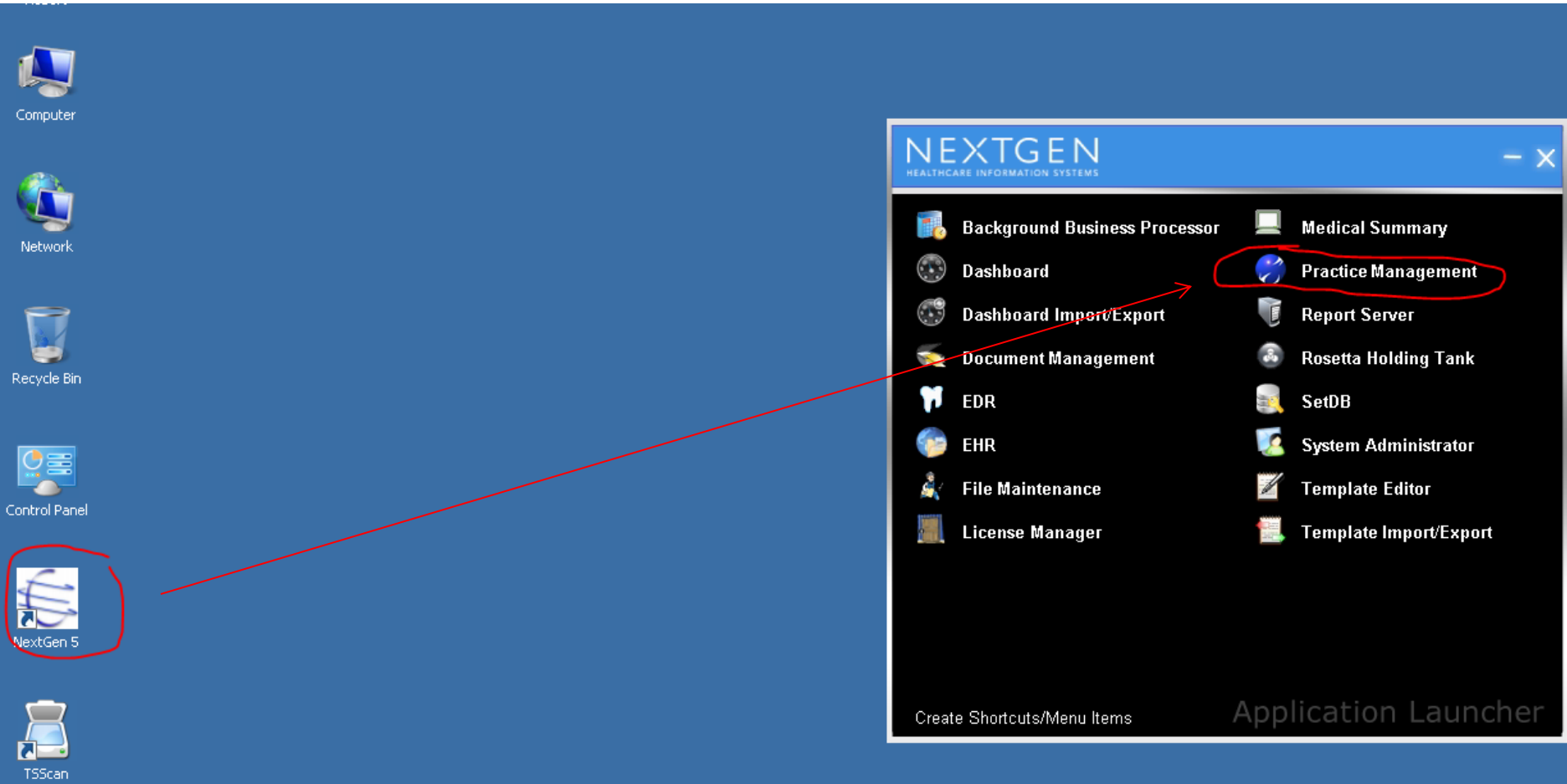
Enter your username and password in the designated fields and click Logon to continue.
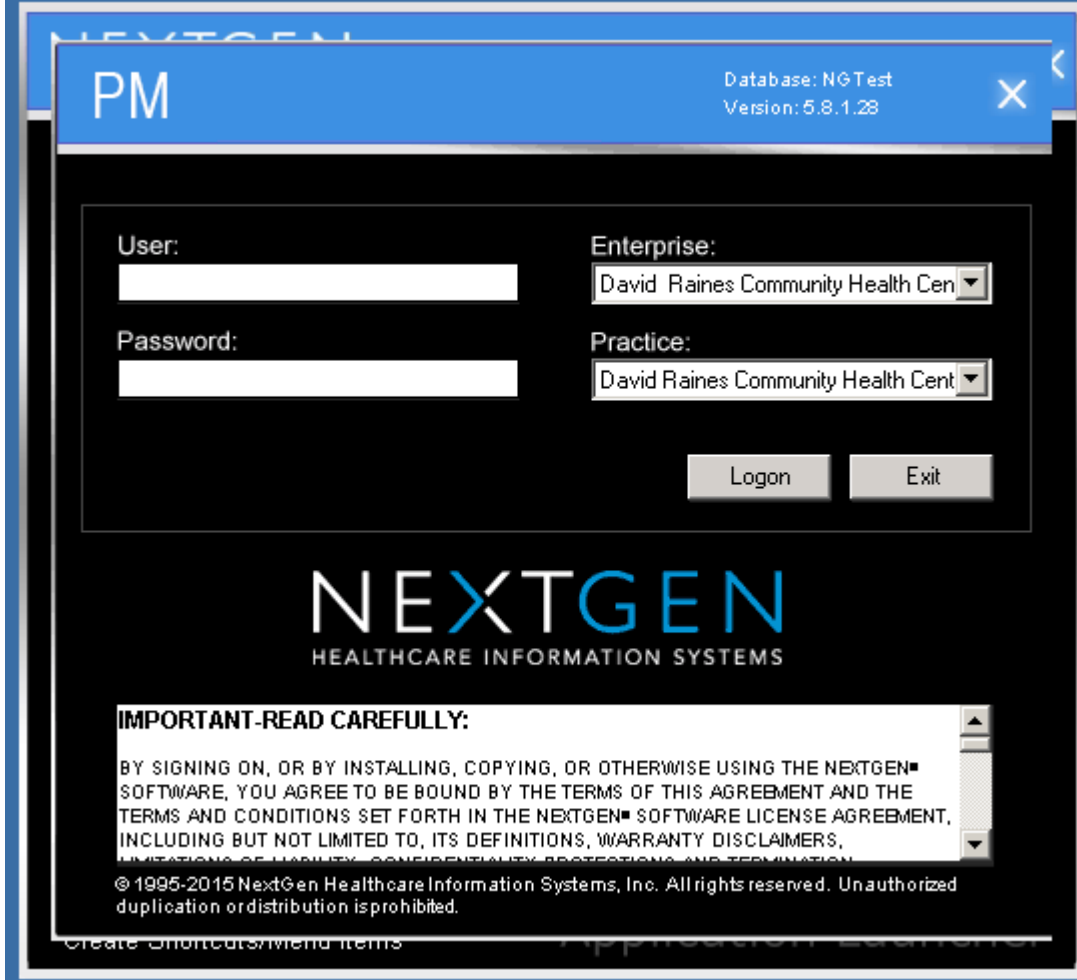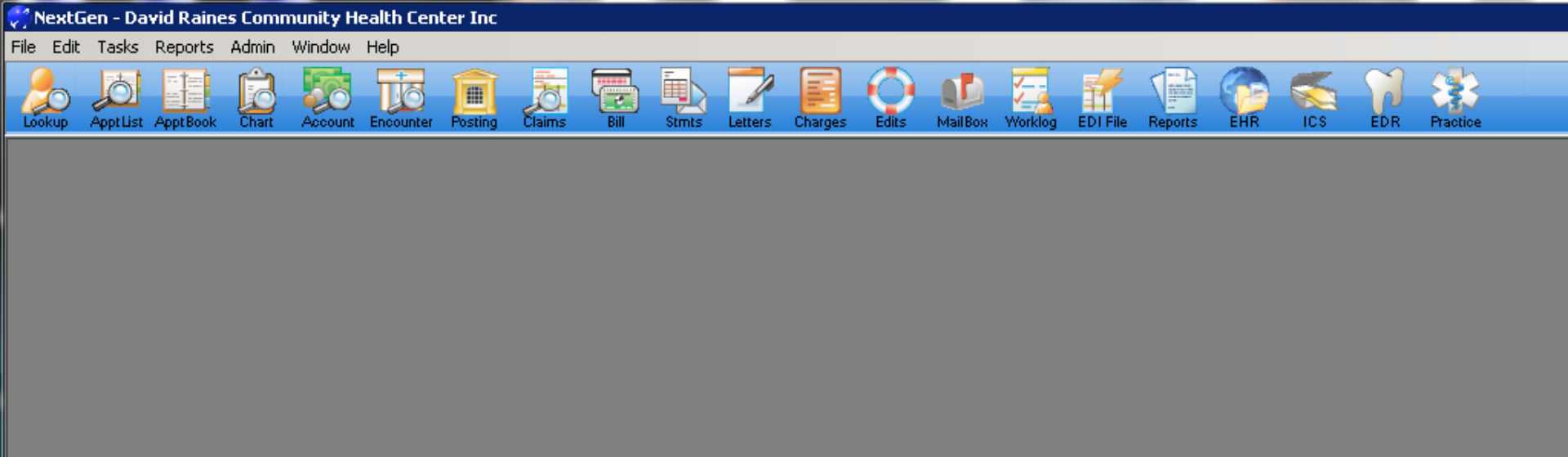
Up at the top of your screen, with the PM open, you now have a File Menu and a Toolbar. In the toolbar you have access to functions that are not available in the File Menu. Lets start with opening the Appointment Book. It is the 3rd button from the left in the toolbar.

The appointment book will auto-display all of the available providers in alphabetical order by their first name. Notice the red arrow pointing to the Green Map on the new toolbar? This will allow you to shrink the display of providers down to a specific department and location. An example of this is Bossier Medical.

When selecting Bossier Medical, or any other location and department, you must double click the selection. The list of providers changes to only show who is working at that location in that department on the selected day.

The date can be changed by using any one of the four calendar boxes shown here. Hover over them for details as to which one does what. The selected date will display in the blue bar directly above the date selection boxes.

With the correct date showing select a box that corresponds with the provider columns on the top and the time rows along both sides. Right click on the desired box to display another menu of choices. From here, to book an appointment, select New. The Add Appointment window appears. In this window it is important to start on the right with the toggle circled below.

When clicking on the toggle, select the option for Lookup and the following box appears allowing you to search our database for the patient in question.

When the box below appears you can search a person by a number of different field options but we find it best to search by date of birth; and the patients are more used to us asking them for their birthdates. Enter the information pertaining to the patient and click Find or press enter to find them.
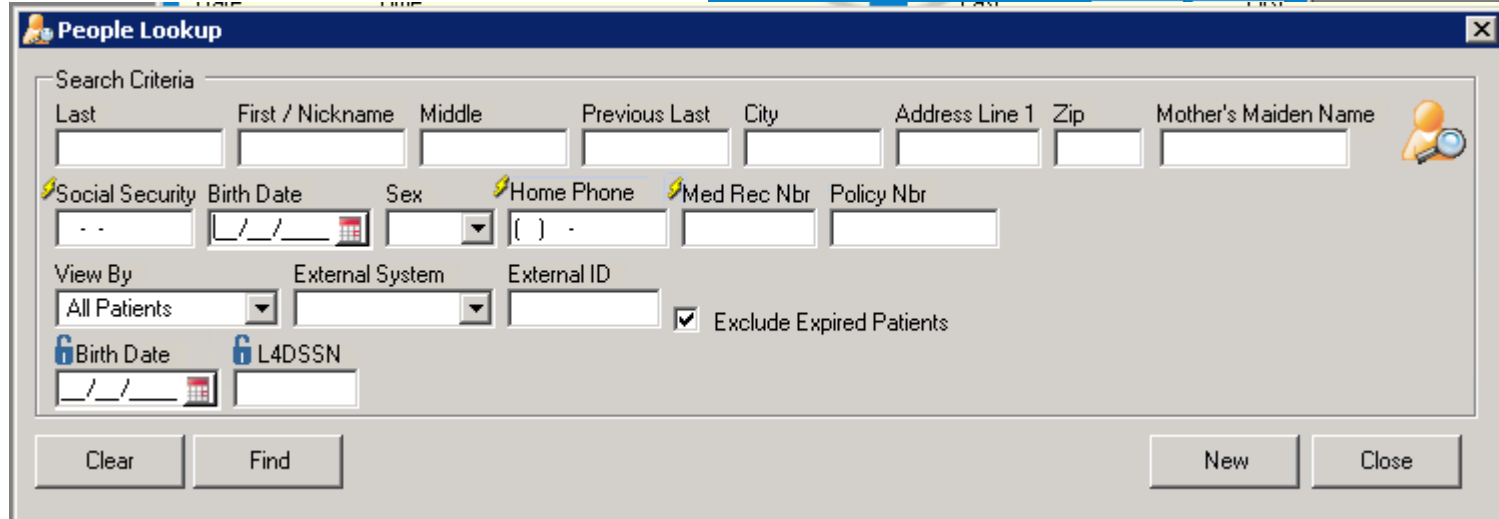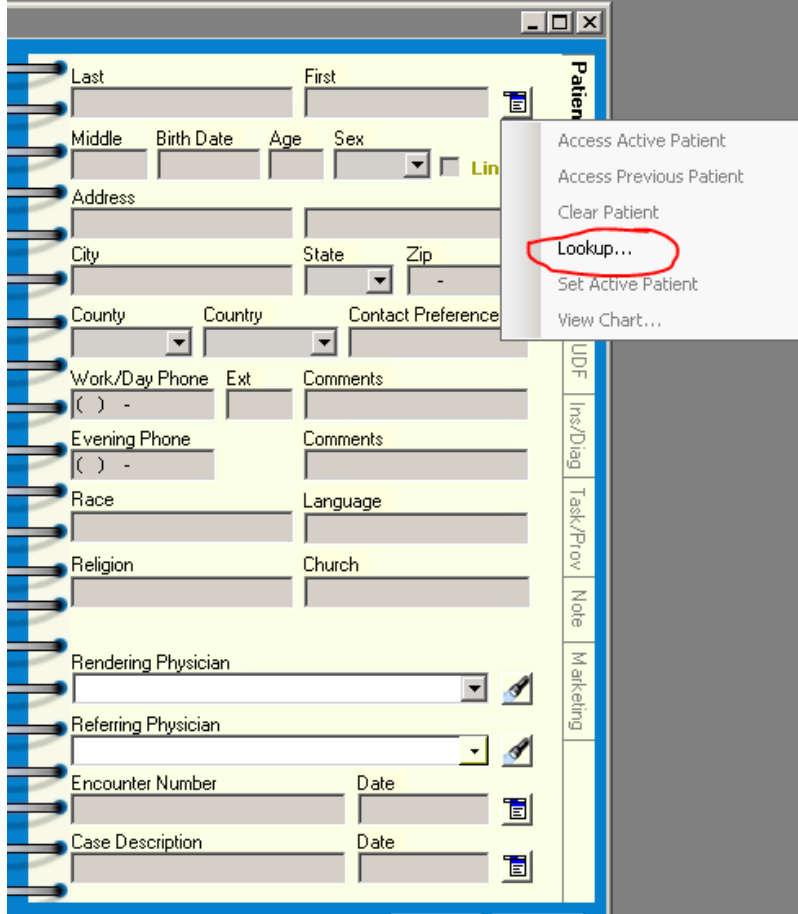
In this first example, let's say we are trying to book an appointment for Thelma Oliver. I see her in the list as an option. From here I can double click her name, or I can select it and press Open. Both options do the same thing.

Below you see a System alert which will commonly appear when accessing a patient file. You can close this without worry.

Here the Update Patient Information box appears. There are key fields that must be maintained before an appointment can be set on the books. Notice the 'red' Home Phone field? You cannot set the appointment until the number is entered. If fields were missing in other tabs there would be red arrows along the top to warn you of that. We will see that later. For now, when the patient exists: update all missing red fields, verify the most current contact information exists, and then click Okay.

Back in the Add Appointment window you can see that they right hand of the screen has been filled in with the patient information. Now we have the left side Red area to deal with. First notice the date/time, Resources, and Service Loaction are already filled in. That information pulled from the set information tied to the spot on the appointment book you are trying to fill. For Event/Event Chain you have a drop down menu. Stick to the basics of: Medical New Patient, Medical EST Patient, Dental New Patient, Dental EST Patient, BH New Patient, or BH EST Patient. If the patient has been here before then choose EST.

Under type of insurance, same rules, keep it simple. Use Medicaid or Commercial Insurance and ignore the rest. For the last question, it will never be a Walk In if they are calling you. Answer No and click Okay.

The appointment Confirmation box appears, not of interest to your group as printing a confirmation letter and handing it to a person over the phone is hard to do. Click Close and move on.

Appointment Confirmation

Patient Information

Name:	Oliver. Thelma	**Home Phone:**	(318) 223-4465
Address:	17391 Hosston Rd	**Day Phone:**	(318) 223-4465
	Rodessa, LA 71069	**Alt Phone:**	N/A
Contact Preference:		**Sec Home Phone:**	N/A
Comments:	N/A	**E-Mail:**	N/A

Appointment Information

Date: 07/08/2015   **Time:** 8:00 A   **Day of Week:** Wednesday

Event: Medical EST Patient

Location: DRCHC Bossier Medical

Resources: Christine Zurn FNP

Print   Close

Here I can see the patient added to the book. Keep in mind that each "block" is 5 minutes and that the allotted time for an established (EST) medical patient visit is 15 minutes. Those 2 arrows below her name lay claim to those boxes that follow to show you they are no longer free to book an appointment.
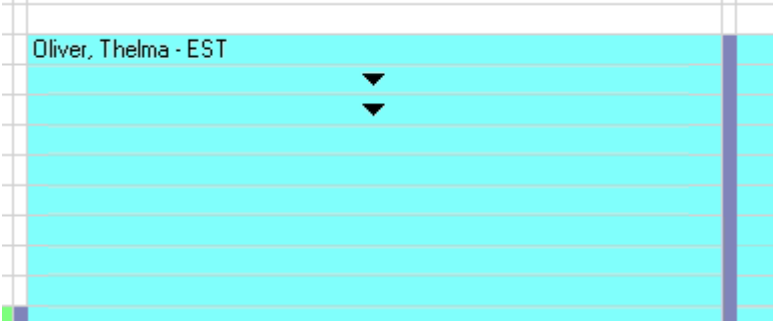
Now, lets look at what happens when the person calling does not already exist in our system.

Oliver, Thelma - EST

People Lookup

Search Criteria

Last	First / Nickname	Middle	Previous Last	City	Address Line 1	Zip	Mother's Maiden Name
Bobbie	Ricky						

Social Security Birth Date Sex Home Phone Med Rec Nbr Policy Nbr

View By: All Patients
External System
External ID
☑ Exclude Expired Patients

Birth Date L4DSSN

Clear   Find

New   Close

NextGen

ⓘ No records were found!

OK

☐ Procedure with Resident
☐ Appointment Kept

eligion   Church

User Defined

Click Okay on the warning and then New on the search box behind it. This allows you to create a new person to put on the books. Notice below that the name I had entered copied over? Fill in all red fields one at a time and pay attention to the red arrows on the tabs we mentioned before. There are fields there that must be filled in as well before we can continue.

All done on this tab, going to the next.

Done here but keep in mind that IF the person says they need transportation then you MUST also book an appointment in the transportation spot for the same location on the same day. Same as a regular appointment, follow the same steps but allow items to overlap if needed.

Last tab. For the Primary Medical Coverage box just pick the first option available. We will allow our front desk staff to verify and fix this when a patient shows up with insurance cards in hand.

From here, click Okay and you are back to setting the appointment as seen next.

This we have already covered, look back if you have questions. The only thing here for me to point out is that you built the person, therefore there is no question that they are a NEW patient.

Here we see even Ricky Bobbie can get on our books if you quickly build him.

As mentioned before, Transportation must be booked the same way should the patient state they need transportation. Along the top where the "doctor's" names are you will find a column for transportation for each of our locations that offer the service.

As of now, W70th is the only one not offering transportation.

Oliver, Thelma - EST

Bobbie, Ricky - DNE

Now, lets shed some light on the situation. Clicking on the Flashlight on the secondary toolbar allows you to search for appointments a little differently. Lets try it and see how it fits.

Clicking the flashlight gives me options to quickly sift through future openings when trying to book an appointment and not wanting to keep clicking from day to day in the appointment book looking for a whole to plug.

I can set the Event, just like before, for new or established patient visit by department, then choose my Service Location, to the right I can set a date and time range and even pick which day(s) of the week I am looking for while adjusting the number of available slots to display. Under that is the same toggle button to attach a patient to the search making booking easier. Yes, we skipped the Resources/Classes area, we'll come back to that in a minute.

Now, here we have Ricky Bobbie once again trying to set up an appointment as a new patient for Medical in Bossier. Difference here is he knows he wants to come in next month on either a Monday or a Wednesday but the specific time does not matter. Now we can look at the Resources/Classes box finally already having all else filled in.

Most of the time, a person calling will ask to see a specific "provider" either because it is who they saw last time or it is who auntie Jo sees when she comes in. In this case we are going to pretend Ricky Bobbie has not only never been here before but that he also has no auntie Joe.

By selecting the generic Medical Providers and clicking Find the system will display open slots for any medical provider assigned to that location without us having to know who works there on a given day. Now, let's go a step further and say Ricky doesn't want a first thing Monday morning appointment. I can change either the

Start Time or adjust the number of Find Next to show appointments that better fit Bobbie's schedule. Or, You can choose specific provider names to narrow it down.

After making the needed adjustments I find the appointment that best fits the patients schedule and right click on it to see I can book it right from here.

From the click on the Book Appointment I am brought here with the date, time, location, provider, and patient information all filled in. I need only fill in the red boxes at the bottom left that we have covered before.