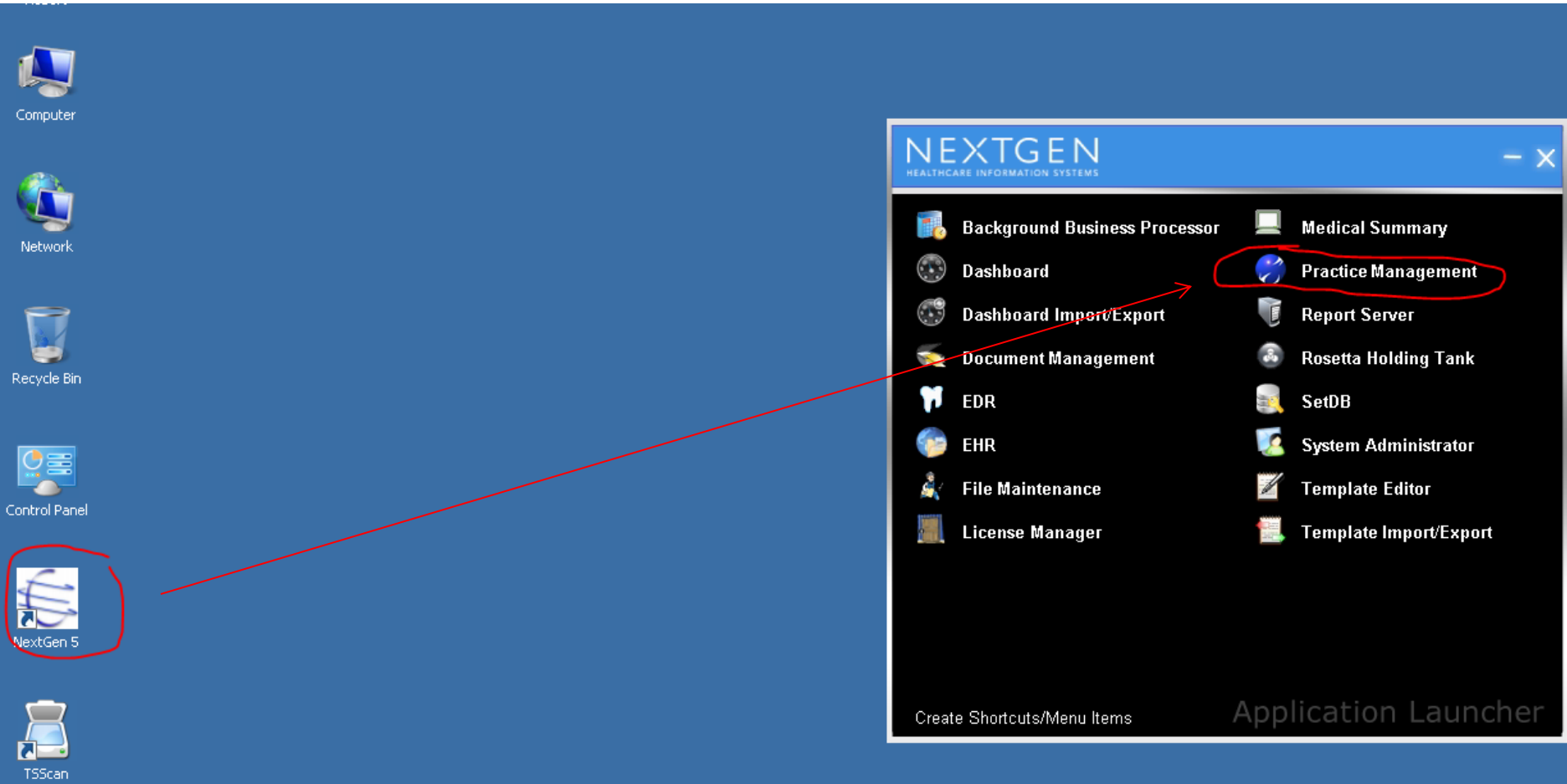
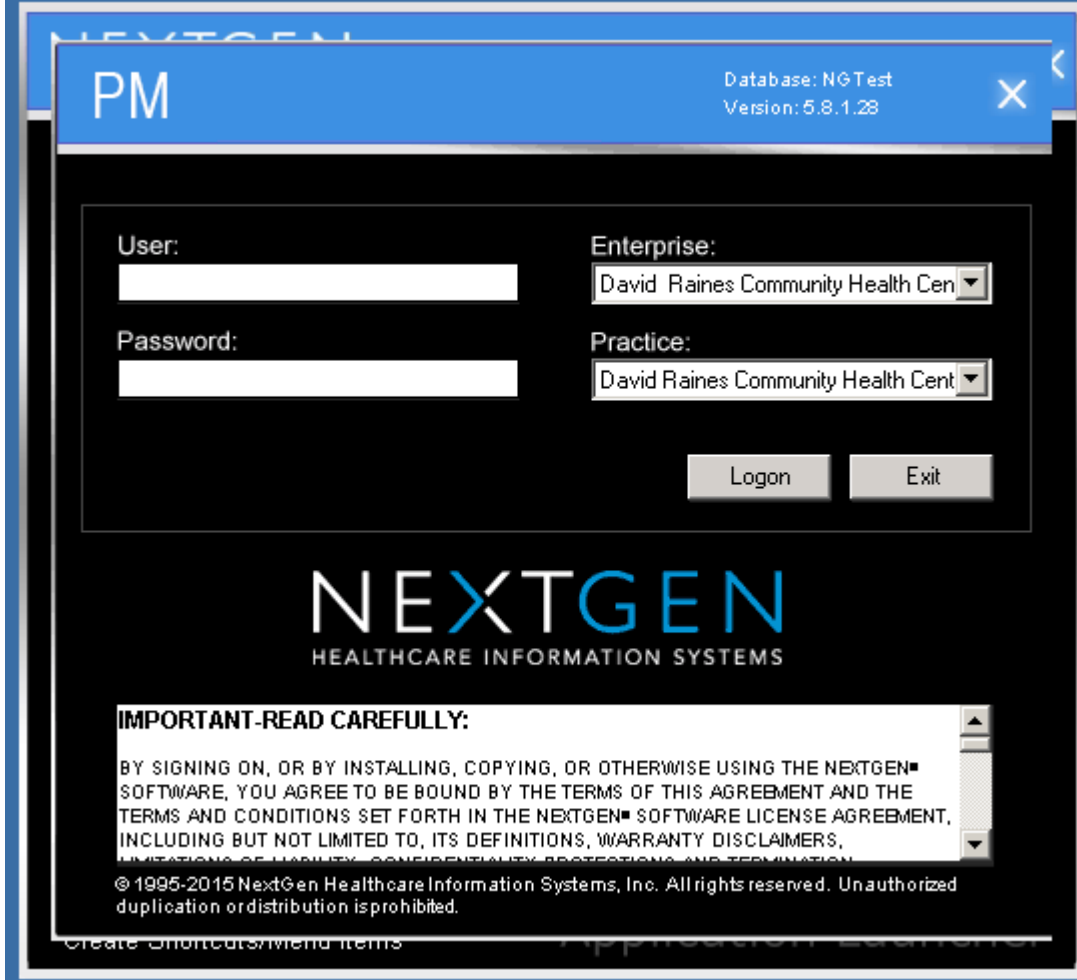
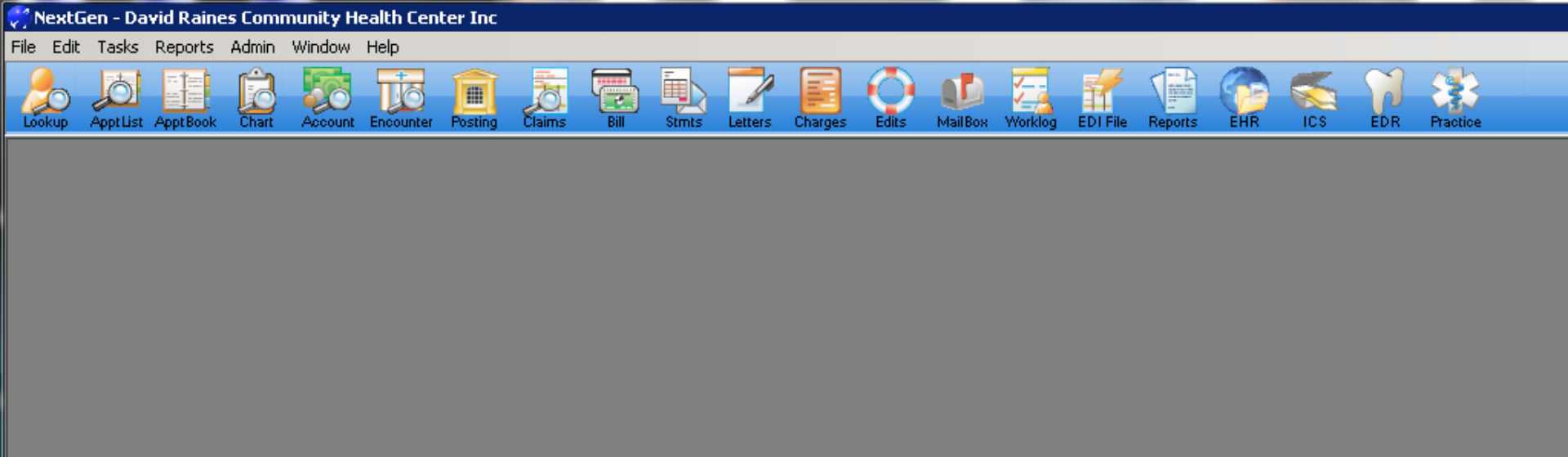


Once inside the “remote environment” double click on the NextGen icon to open the Launchpad. With the Launchpad open, single click on the link for Practice Management. Practice Management will be referred to as the PM from here on out. If you double click the link then you will hide the username and 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 3<sup>rd</sup> button from the left in the toolbar.

NextGen - David Raines Community Health Center Inc

File Edit Tasks Reports Admin Window Help

Lookup ApptList ApptBook Chart Account Encounter Posting Claims Bill Strmts Letters Charges Edits MailBox Worklog EDI File Reports EHR ICS EDR Practice

Scheduler Book: Monday, July 06, 2015

	Alexandra Drake PMHNP Alexandra Drake PMHNP	Amanda Briggs LCSW Amanda Briggs LCSW	Angela Miller FNP Angela Miller FNP	Benjamin Bumgardner DDS Benjamin Bumgardner DDS
7:00 A				
7:05 A				
7:10 A				
7:15 A				
7:20 A				
7:25 A				
7:30 A				
7:35 A				
7:40 A				
7:45 A				
7:50 A				
7:55 A				
8:00 A				
8:05 A				
8:10 A				
8:15 A				
8:20 A				
8:25 A				
8:30 A				
8:35 A				
8:40 A				
8:45 A				
8:50 A				
8:55 A				
9:00 A				
9:05 A				
9:10 A				
9:15 A				
9:20 A				
9:25 A				
9:30 A				
9:35 A				
9:40 A				
9:45 A				
9:50 A				
9:55 A				
10:00 A				
10:05 A				



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.

NextGen - David Raines Community Health Center Inc

File Edit Tasks Reports Admin Window Help

LookUp ApptList ApptBook Chart Account Encounter Posting Claims Bill Stmtz Letters Charges Edits MailBox Worklog EDI File Reports EHR ICS EDR Practice

Scheduler Book: Monday, July 06, 2015

Category: Location: D

Time	Location/Department	Provider	Provider	Provider
7:00 A	Bossier Affor	DRCHC Bossier Behavioral He	Bossier Medicaid Application	Christine Zum FNP
7:05 A	Bossier Affor	DRCHC Bossier Dental	Bossier Medicaid Application	Christine Zum FNP
7:10 A	Bossier Affor	DRCHC Bossier KidMed		Larry Daniels MD
7:15 A	Bossier Affor	DRCHC Bossier Medical		Larry Daniels MD
7:20 A	Bossier Affor	DRCHC Gilliam Dental		Malinda Whitfield FNP 010115
7:25 A	Bossier Affor	DRCHC Gilliam KidMed		Malinda Whitfield FNP
7:30 A	Bossier Affor	DRCHC Gilliam Medical		
7:35 A	Bossier Affor	DRCHC Haynesville Dental		
7:40 A				
7:45 A				
7:50 A				
7:55 A				
8:00 A		Salgado, Yari - EST		
8:05 A				
8:10 A				
8:15 A				
8:20 A				
8:25 A				
8:30 A				
8:35 A				
8:40 A				
8:45 A				
8:50 A				
8:55 A				
9:00 A		Mendez-Rivera, Kassandra - IMM		
9:05 A				
9:10 A				
9:15 A				
9:20 A				
9:25 A				
9:30 A				
9:35 A				
9:40 A				
9:45 A				
9:50 A				
9:55 A				
10:00 A		Zhou, Ziqian - IMM		
10:05 A				
10:10 A				
10:15 A				
10:20 A				

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.

NextGen - David Raines Community Health Center Inc

File Edit Tasks Reports Admin Window Help

LookUp ApptList ApptBook Chart Account Encounter Posting Claims Bill Stmt Letters Charges Edits MailBox Worklog EDI File Reports EHR ICS EDR Practice

Scheduler Book: Monday, July 06, 2015

DRCHC Bossier Behavioral He  
 DRCHC Bossier Dental  
 DRCHC Bossier KidMed  
 DRCHC Bossier Medical  
 DRCHC Gillam Dental  
 DRCHC Gillam KidMed  
 DRCHC Gillam Medical  
 DRCHC Haynesville Dental

Bossier Alfai  
 Bossier Alfai

Bossier Medicaid Application  
 Bossier Medicaid Application

Christine Zurn FNP  
 Christine Zurn FNP

Larry Daniels MD  
 Larry Daniels MD

Malinda Whitfield FNP 010115  
 Malinda Whitfield FNP

7:00 A  
 7:05 A  
 7:10 A  
 7:15 A  
 7:20 A  
 7:25 A  
 7:30 A  
 7:35 A  
 7:40 A  
 7:45 A  
 7:50 A  
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 8:00 A  
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 9:55 A  
 10:00 A  
 10:05 A  
 10:10 A  
 10:15 A

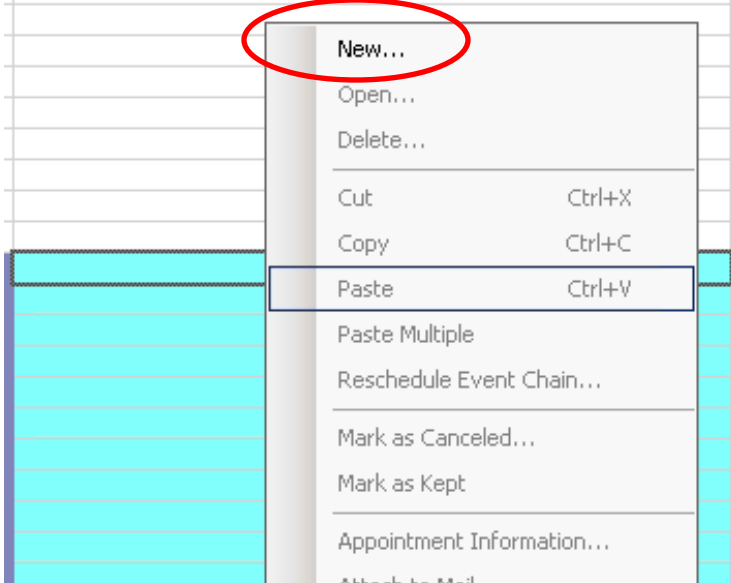
Salgado, Yair - EST

Mendez-Rivera, Kassandra - IMM

Zhou, Zijian - IMM

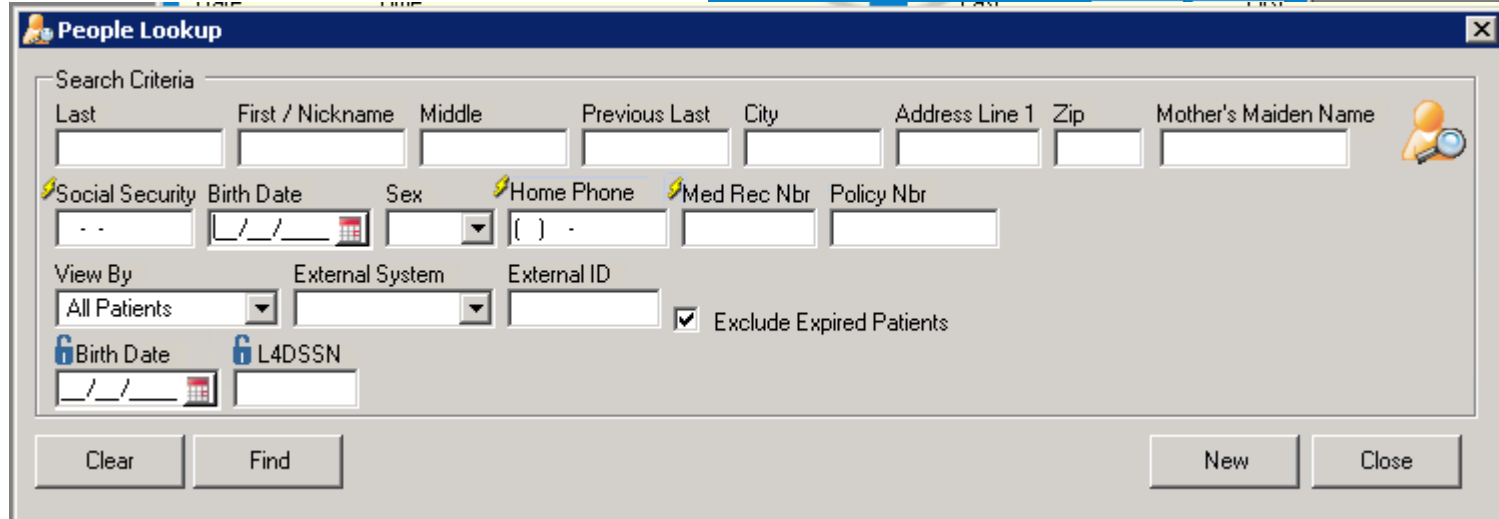
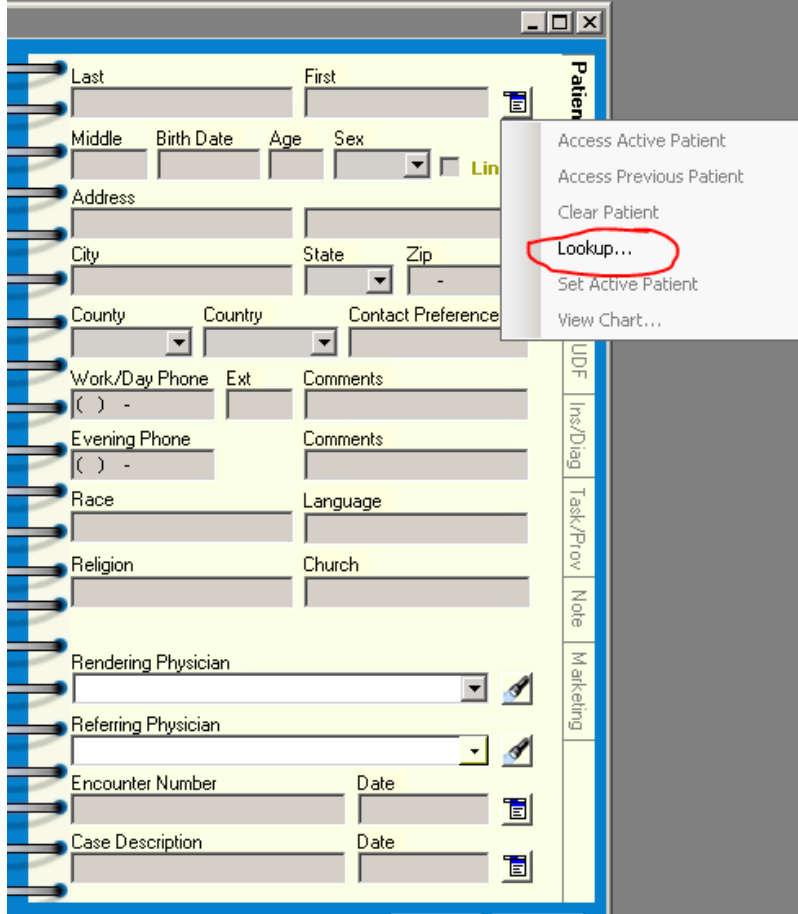
The date can be changed by using any one of the four calendar boxes shown here. Hover over them for details as to which one does what. The selected date will display in the blue bar directly above the date selection boxes.

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.

A screenshot of the 'Add Appointment' window. The window title is 'Add Appointment'. It contains several sections: 'Date' (07/07/2015) and 'Time' (8:00 A); 'Event/Event Chain' with a dropdown and 'Duration' (5); 'Resources' with a list including 'Christine Zurn FNP (5 min)'; 'Service Location' (DRCHC Bossier Medical); 'Description'; 'Details'; checkboxes for 'Procedure with Resident', 'Appointment Kept', and 'Confirmed'; 'User Defined' section with 'Type of Insurance', 'Is this a walk-in?', and 'Travel/Infectious Exposure?'. On the right side, there are fields for 'Last', 'First', 'Middle', 'Birth Date', 'Age', 'Sex', 'Address', 'City', 'State', 'Zip', 'County', 'Country', 'Contact Preference', 'Work/Day Phone', 'Ext', 'Comments', 'Evening Phone', 'Race', 'Language', 'Religion', 'Church', 'Rendering Physician', 'Referring Physician', 'Encounter Number', 'Date', 'Case Description', and 'Date'. A red circle highlights a small icon (a document with a plus sign) next to the 'Last' field. On the far right, there is a vertical sidebar with buttons for 'Print', 'Hist', 'Recall/W/alist', 'UDF', 'Ins/Diag', 'Task/Prov', 'Note', and 'Marketing'. At the bottom, there are 'OK' and 'Cancel' buttons.

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.

The 'People Lookup' window contains the following search criteria:

- Last: [ ]
- First / Nickname: [ ]
- Middle: [ ]
- Previous Last: [ ]
- City: [ ]
- Address Line 1: [ ]
- Zip: [ ]
- Mother's Maiden Name: [ ]
- Social Security: [ ]
- Birth Date: 11/13/1962
- Sex: [ ]
- Home Phone: [ ]
- Med Rec Nbr: [ ]
- Policy Nbr: [ ]
- View By: All Patients
- External System: [ ]
- External ID: [ ]
- Exclude Expired Patients
- Birth Date: [ ]
- L4DSSN: [ ]

Matching Records:

Name	Nickname	Maiden Na	Address	Sex	Birth Dt	SS Nbr	Home Phon	Oth
Harkins, Karl			5005 Longstreet Pl Lot...	Male	11/13/1962		(318) 742...	
Oliver, Thelma			17391 Hosston Rd Rod...	Female	11/13/1962	###-##02...		

Records Found: 2

Buttons: Clear, Find, New, Open, Close

**NextGen Alerts**

## Alerts

### System Alerts

- Account Bad Debt**  
The patient has one or more encounter in bad debt.
- Percent Of Poverty**  
Patient's head of household family size and annual income are missing or expired; Percent of Poverty and Poverty Categories cannot be applied unless family size and annual income values exist and are current.

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.

**Update Patient Information**

Prefix: [Dropdown] Last: Oliver First: Thelma Middle: [Text] Suffix: [Dropdown] Previous Last: [Text] Nickname: [Text]

Social Security: 437-43-0234 Birth Date: 11/13/1962 Age: 52 yrs. Sex: Female

**Demographics** | Status | Client Defin... | Provider | Privacy | Employer | Relations/R... | UDS | Ext | History

Street: 17391 Hosston Rd Billing Address: [Text] Address Type: [Dropdown] Street: [Text] Secondary Address: [Text] Address Type: [Dropdown]

City: Rodessa State: LA (Louisia Zip: 71069 City: [Text] State: [Dropdown] Zip: [Text]

Country: [Dropdown] County: CADD0 Community Cd: [Dropdown] Country: [Dropdown] County: [Dropdown] Mother's Maiden Name: [Text]

Pref Language: English Religion: [Dropdown] Church: [Dropdown] Contact Preference: [Dropdown]

Marital Status: [Dropdown] Student Status: [Dropdown] Veteran:  Smoker:  Expired:  Expired Date: [Text] Int'l Hm Phn: [Text] Int'l Wk Phn: [Text] Int'l Zip: [Text]

Primary Care Provider: [Text] Primary Dental Provider: [Text]

Telephone Number / E-Mail: [Text] Comment: [Text] Generate System Alert:

1. **Home Phone** ( ) - [Text] [Text]
2. Day Phone (318) 223-4465 Ext [Text] [Text]
3. Alternate Phone ( ) - [Text] Ext [Text] [Text]
4. Secondary Hm Phone ( ) - [Text] [Text]
5. E-Mail [Text] [Text]
6. Cell Phone ( ) - [Text] [Text]

Insurance | Account | OK | Cancel

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 Location 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.

**Add Appointment**

Date: 07/08/2015 Time: 8:00 A

**Event/Event Chain** Duration: 5

**Resources**

- Christine Zurn FNP (5 min)
- David Bellew DDS (5 min)
- David Jordan Optometrist (5 min)

**Service Location**: DRCHC Bossier Medical

**Description**: Oliver, Thelma

**Details**

Procedure with Resident  Confirmed

Appointment Kept

**User Defined**

**Type of Insurance**

**Is this a walk-in?**

**Travel/Infectious Exposure?**

**Patient Information**

Last: Oliver First: Thelma

Middle: Birth Date: 11/13/1962 Age: 52 yrs Sex: Female  Linked

Address: 17391 Hosston Rd

City: Rodessa State: LA (Lc) Zip: 71069

County: CADDO Country: Contact Preference:

Evening Phone: (318) 223-4465 Comments:

Work/Day Phone: (318) 223-4465 Ext: Comments:

Race: Black / African American (U) Language: English

Religion: Church:

Rendering Physician:

Referring Physician:

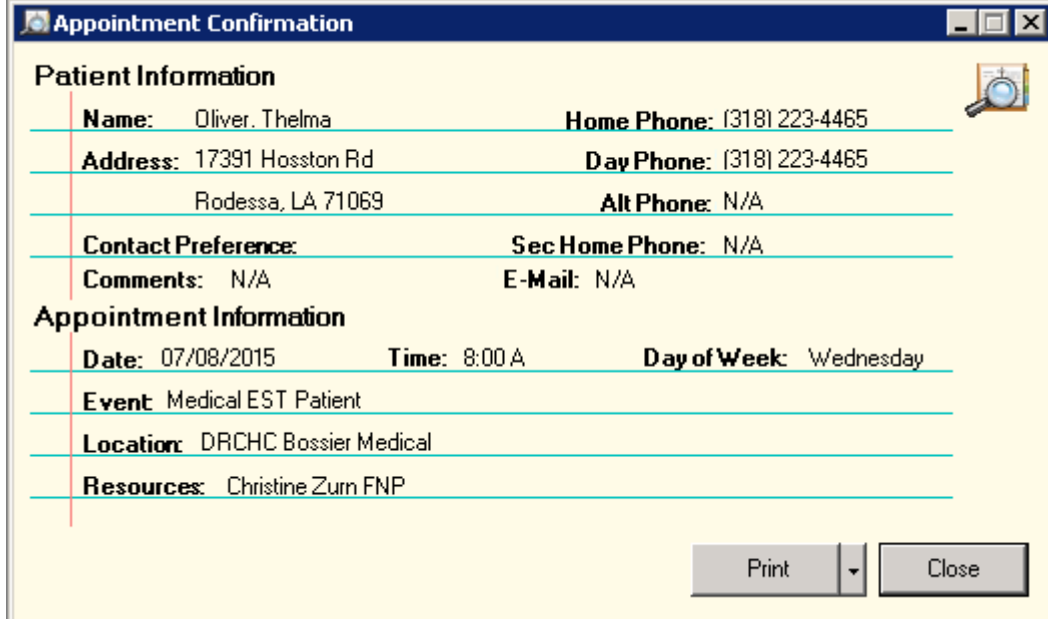
Encounter Number: Date:

Case Description: Date:

OK Cancel

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.



The image shows a software window titled "Appointment Confirmation" with a magnifying glass icon in the top right corner. The window is divided into two main sections: "Patient Information" and "Appointment Information".

**Patient Information**

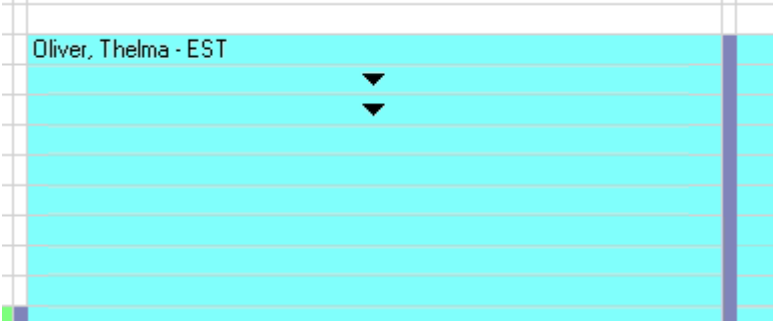
<b>Name:</b> Oliver, Thelma	<b>Home Phone:</b> (318) 223-4465
<b>Address:</b> 17391 Hosston Rd Rodessa, LA 71069	<b>Day Phone:</b> (318) 223-4465
<b>Contact Preference:</b>	<b>Alt Phone:</b> N/A
<b>Comments:</b> N/A	<b>Sec Home Phone:</b> N/A
	<b>E-Mail:</b> N/A

**Appointment Information**

<b>Date:</b> 07/08/2015	<b>Time:</b> 8:00 A	<b>Day of Week:</b> Wednesday
<b>Event:</b> Medical EST Patient		
<b>Location:</b> DRCHC Bossier Medical		
<b>Resources:</b> Christine Zurn FNP		

At the bottom right of the window, there are two buttons: "Print" and "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.

People Lookup

Search Criteria

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

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

User Defined

Religion: , Church:

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.

**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 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

User Defined

**Add Person Information**

Prefix Last First Middle Suffix Previous Last Nickname

Social Security Birth Date Age Sex

**Demograp** Status Client Def... Provider Privacy Employer Relations/Role U... Ext

Street Billing Address Address Type Street Secondary Address Address Type

City State Zip City State Zip

Country County Community Cd Country County Mother's Maiden Name

Pref Language Religion Church Contact Preference

Marital Status Student Status Veteran Expired Date Int'l Hm Phn Int'l Wk Phn Int'l Zip

Primary Care Provider Primary Dental Provider

Telephone Number / E-Mail Comment

Generate System Alert

1. Home Phone ( ) -

2. Day Phone ( ) - Ext

3. Alternate Phone ( ) - Ext

4. Secondary Hm Phone ( ) -

5. E-Mail

6. Cell Phone ( ) -

Insurance Account OK Cancel

All done on this tab,  
going to the next.

**Add Person Information**

Prefix Last First Middle Suffix Previous Last Nickname  
[ ] Bobbie Ricky [ ] [ ] [ ] [ ] [ ] [ ]

Social Security Birth Date Age Sex  
[ ] [01/01/1901] [114 yrs.] [ ]

**Demograp...** Status Client Def... Provider Privacy Employer Relations/Role U... Ext

Street Billing Address Address Type Street Secondary Address Address Type  
[ ] [ ] [ ] [ ] [ ] [ ]

City State Zip City State Zip  
[ ] [ ] [ ] [ ] [ ] [ ]

Country County Community Cd Country County Mother's Maiden Name  
[ ] [ ] [ ] [ ] [ ] [ ] [ ]

**Pref Language** Religion Church Contact Preference  
Arabic [ ] [ ] [ ] [ ]

Marital Status Student Status  Veteran Expired Date Int'l Hm Phn Int'l Wk Phn Int'l Zip  
[ ] [ ]  [ ] [ ] [ ] [ ] [ ] [ ]

Smoker  Expired

Primary Care Provider Primary Dental Provider  
[ ] [ ]

Telephone Number / E-Mail Comment  
1. **Home Phone** (555) 555-5555 [ ]  
2. Day Phone ( ) - [ ] Ext [ ] [ ]  
3. Alternate Phone ( ) - [ ] Ext [ ] [ ]  
4. Secondary Hm Phone ( ) - [ ] [ ]  
5. E-Mail [ ] [ ]  
6. Cell Phone ( ) - [ ] [ ]

Generate System Alert

Insurance Account OK Cancel

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.

**Add Person Information**

Prefix [ ] Last [Bobbie] First [Ricky] Middle [ ] Suffix [ ] Previous Last [ ] Nickname [ ]

Social Security [ ] **Birth Date** [01/01/1901] Age [114 yrs.] Sex [ ]

Demogra... Status **Client Def...** Provider Privacy Employer Relations/Role U... Ext

**Transportation**  
[No]

**Interpreter Needed**  
[No]

Disabled [ ]

Mentally Disabled [ ]

Visually Impaired [ ]

Hearing Impaired [ ]

Insurance Account OK Cancel



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.

**Add Person Information**

Prefix Last First Middle Suffix Previous Last Nickname  
Bobbie Ricky

Social Security Birth Date Age Sex  
01/01/1901 114 yrs.

Demogra... Status Client Def... Provider Privacy Employer Relations/Role UD- Ext

Homeless Status School Based Health Center Tribal Affiliation Descendancy

Migrant Worker Status Race Blood Quantum Primary Medical Coverage  
AARP United Healthcar  Self Pay

Language Barrier Ethnicity IHS Eligibility Status Consent to Treat Date  
 Consent To Treat

Public Housing Primary ... Veteran Status Classification/Beneficiary  
No

Sliding Fee Schedule Verification

Sliding Fee Sched	Eff Date	Exp Date
-------------------	----------	----------

Family Information

Family Size	Annual Income	Ref	Verify Date	Eff Date	Exp Date
-------------	---------------	-----	-------------	----------	----------

Insurance Account OK Cancel

The head of household must be set before you can enter family size and income. The head of household can only be set for patients (a chart exists). Changes to the Family Information will affect the patient head of household settings.

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.

**Add Appointment**

Date: 07/08/2015 Time: 8:20 A

**Event/Event Chain** Duration: 5

Resources:  
✓ Christine Zurn FNP (5 min)  
David Bellew DDS (5 min)  
David Jordan Optometrist (5 min)

Service Location: DRCHC Bossier Medical

Description: Bobbie, Ricky

Details:

Procedure with Resident  Confirmed  
 Appointment Kept

User Defined  
**Type of Insurance**  
  
**Is this a walk-in?**  
  
Travel/Infectious Exposure?

Patent: Last: Bobbie First: Ricky  
Middle: Birth Date: 01/01/1901 Age: 114 yr Sex:  **Linked**  
Address: City: State: Zip: -  
County: Country: Contact Preference:  
Evening Phone: (555) 555-5555 Comments:  
Work/Day Phone: ( ) - Ext: Comments:  
Race: Language: Arabic  
Religion: Church:  
Rendering Physician:   
Referring Physician:   
Encounter Number: Date:  
Case Description: Date:

Hist Recall/Walklist UDF Ins/Diag Task/Prov Note Marketing

OK Cancel

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.

The screenshot shows a software interface with a dropdown menu. The menu is open, displaying two options: 'Oliver, Thelma - EST' and 'Bobbie, Ricky - DNE'. The background is a light blue grid. The dropdown menu is a darker blue with white text and a downward arrow on the right side of each option.

Oliver, Thelma - EST
Bobbie, Ricky - DNE

NextGen - David Raines Community Health Center Inc

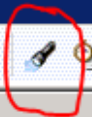
File Edit Tasks Reports Admin Window Help

Lookup ApptList ApptBook Chart Account Encounter Posting Claims Bill Strmts Letters Charges Edits MailBox Worklog EDI File Reports EHR ICS EDR Practice

Scheduler Book: Wednesday, July 08, 2015

Calendar icons: Day, Week, Month, Year, Home, Back, Forward, Print, Refresh, Search, Add, Delete, Cancel, Done, Help, Logout

	Bossier Affordable Care App Bossier Affordable Care App	Bossier Medicaid Application Bossier Medicaid Application	Christine Zum FNP Christine Zum FNP
7:00 A			
7:05 A			
7:10 A			
7:15 A			
7:20 A			
7:25 A			



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.

**Appointment Search Ahead**

Search Criteria

**Event** [Dropdown] Duration: 5

**Service Location** [Dropdown]

**Resources/Classes**

- Behavioral Health Services
- Dental Hygerist
- Dentist
- Enabling Services
- Medical Providers
- Nurses
- Alexandra Drake PMHNP (5 min)
- Amanda Brions I CSW (5 min)

**Date/Time Range**

Start Date: 07/09/2015 [Calendar] End Date: [Calendar] Find next: 5 Appts

Start Time: 7:00 A [Dropdown] End Time: 6:00 P [Dropdown]

**Day of Week**

Sun  Mon  Tue  Wed  Thu  Fri  Sat  No Preference

**Patient** [Dropdown]

Clear Find Wait List Close

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.

**Appointment Search Ahead: Ricky Bobbie**

Search Criteria

**Event**  
 Medical New Patient    Duration: 45

**Service Location**  
 DRCHC Bossier Medical

**Resources/Classes**

- Behavioral Health Services
- Dental Hygienist
- Dentist
- Enabling Services
- Medical Providers
- Nurses
- Alexandra Drake PMHNP (5 min)
- Amanda Brinns LCSW (5 min)

**Date/Time Range**

Start Date: 08/01/2015    End Date: / /    Find next: 5 Appts

Start Time: 7:00 A    End Time: 6:00 P

**Day of Week**

Sun  Mon  Tue  Wed  Thu  Fri  Sat  No Preference

**Patient**  
 Ricky Bobbie

Clear    Find    Wait List    Close

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.

Appointment Search Ahead: Ricky Bobbie

Search Criteria

Event: Medical New Patient, Duration: 45, Date/Time Range: Start Date 08/01/2015, End Date, Find next 5 Appts, Start Time 7:00 A, End Time 6:00 P, Day of Week: Sun, Mon, Tue, Wed, Thu, Fri, Sat, No Preference, Patient: Ricky Bobbie

Resources/Classes

- Behavioral Health Services
- Dental Hygenist
- Dentist
- Enabling Services
- Medical Providers
- Nurses
- Alexandra Drake PMHNP (5 min)
- Amanda Brinns LCSW (5 min)

Available Timeslots

Date/Time	Resource(s)	Location(s)	Location Address	Locatio
Monday, August 03, 2015 at 08:00 AM	Christine Zum FNP	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318) 54
Monday, August 03, 2015 at 08:00 AM	Larry Daniels MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318) 54
Monday, August 03, 2015 at 08:00 AM	Malinda Whitfield FNP	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318) 54
Monday, August 03, 2015 at 08:00 AM	Pratibha Anne MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318) 54
Monday, August 03, 2015 at 08:05 AM	Malinda Whitfield FNP	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318) 54

Clear Find Wait List Close

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.

Appointment Search Ahead: Ricky Bobbie

Search Criteria

Event:  Medical New Patient    Duration: 45

Service Location: DRCHC Bossier Medical

Resources/Classes

- Haynesville ACA App (5 min)
- Haynesville Medicaid App (5 min)
- Hester Suh MD (5 min)
- India Gibson DDS (5 min)
- Larrie A Williamson MD (5 min)
- Larry Daniels MD (5 min)
- Malinda Whitfield FNP (5 min)
- Minden Affordable Care App (5 min)

Date/Time Range

Start Date: 08/01/2015    End Date:    Find next: 15 Appts

Start Time: 9:30 A    End Time: 3:30 P

Day of Week

Sun  Mon  Tue  Wed  Thu  Fri  Sat  No Preference

Patient:  Ricky Bobbie

Available Timeslots

Date/Time	Resource(s)	Location(s)	Location Address	Loc
Monday, August 03, 2015 at 10:15 AM	Larry Daniels MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318)
Monday, August 03, 2015 at 10:20 AM	Larry Daniels MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318)
Monday, August 03, 2015 at 10:25 AM	Larry Daniels MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318)
Monday, August 03, 2015 at 10:30 AM	Larry Daniels MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318)
Monday, August 03, 2015 at 10:35 AM	Larry Daniels MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318)
Monday, August 03, 2015 at 10:40 AM	Larry Daniels MD	DRCHC Bossi...	1514 Doctors Drive Bossier Ci...	(318)

Book Appointment...

Open Scheduling Multi-View...

Paste    Ctrl+V

Clear    Find    Wait List    Close



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.

**Add Appointment**

Date: 08/03/2015 Time: 10:30 A

Event/Event Chain: Medical New Patient Duration: 45

Resources: Larry Daniels MD (5 min)

Service Location: DRCHC Bossier Medical

Description: Bobbie, Ricky

Details:

Procedure with Resident  Confirmed

Appointment Kept

User Defined

Type of Insurance

Is this a walk-in?

Travel/Infectious Exposure?

Last: Bobbie First: Ricky

Middle: Birth Date: 01/01/1901 Age: 114 yr Sex: Male  Linked

Address:

City: State: Zip: -

County: Country: Contact Preference:

Evening Phone: Ext: Comments: (555) 555-5555

Evening Phone: Comments: ( ) -

Race: Language: Arabic

Religion: Church:

Rendering Physician: Daniels MD, Larry

Referring Physician:

Encounter Number: Date:

Case Description: Date:

OK Cancel

Patent Hist Recall/Waitlist UDF Ins/Diag Task/Prov Note Marketing