

This guide will help you schedule an appointment for a patient.

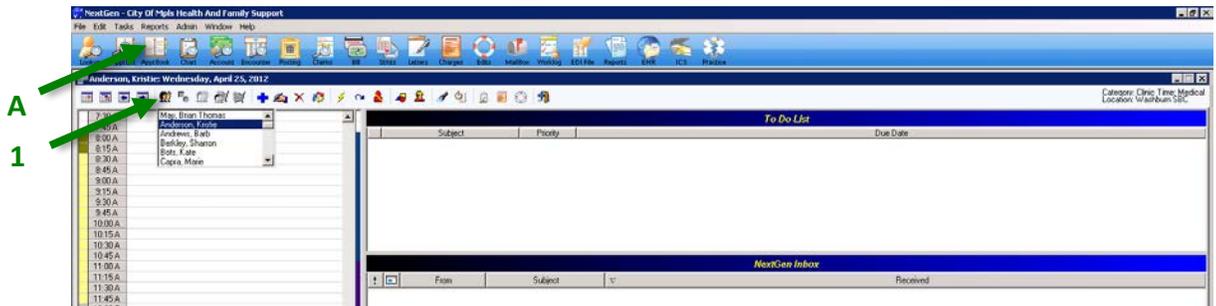
**I. Viewing Appointment Book**

**A. In the EPM click on *Appt Book***

The Appointment Book will automatically open to the Daily Schedule with your tasks and NextGen email.

*Note:* Make sure you updated your user preferences so that you are seeing your schedule, not someone else's. See *NextGen Setup Guide*.

1. If you are not seeing your own schedule, click on the *Chance Resource* icon  and double-click on your name. The next time you log in, you should see your schedule.

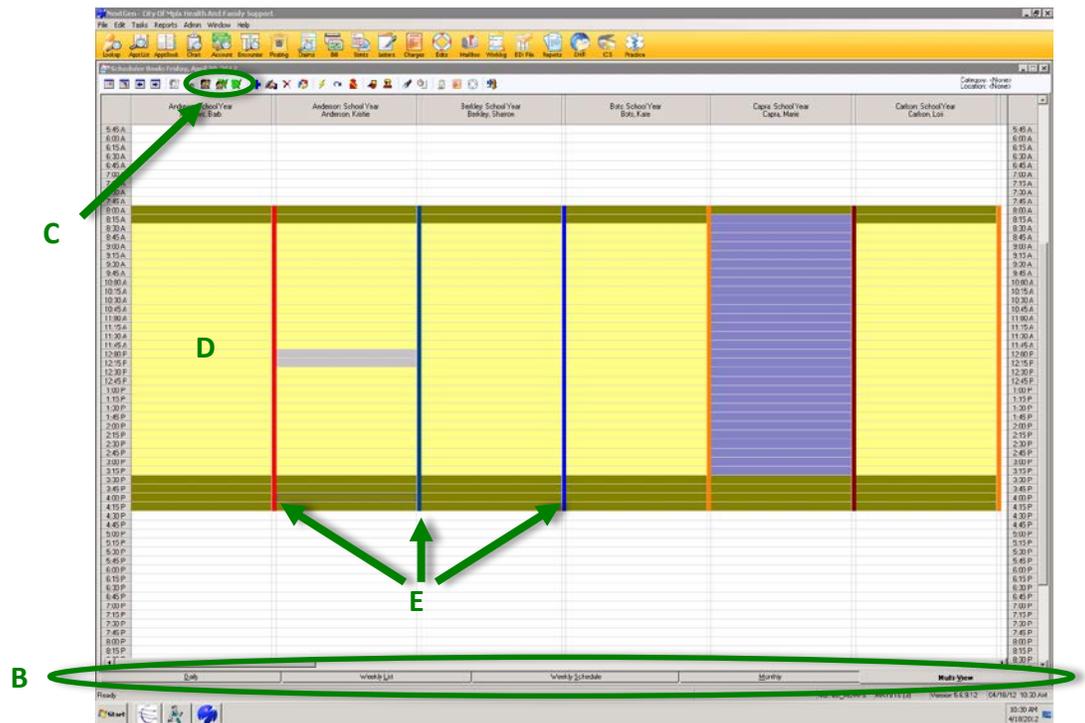


**B. Change the View**

You can change the view depending on what you're doing in the book.

1. **Weekly List:** View a list of your events (appointments) for the week.
2. **Weekly Schedule:** View your schedule/calendar for the week.
3. **Monthly:** View your monthly calendar.
4. **Multi-View:** View multiple providers' schedules for a specific date.

This is the view captured above. Please select *Multi-View* on your Appointment Book to continue with this guide.



**C. Change the Providers in Multi-View**

Use one of the 3 view buttons to view multiple providers' schedules on a specific date.

1. To look at the schedules of providers in a specific class (NP, RN, Mental Health, etc.). 
2. To look at the schedule of providers in a specific class at a specific location (i.e. Mental Health at South SBC). 
3. To look at the schedule of all providers at a specific location. 

**D. Categories**

Colored blocks indicate the types of events (appointments) that can be booked. In this example yellow is Clinic Time for Medical Staff.

The most important color to know is gray. This means the provider is generally unavailable during this time.

*Hint:* Don't worry too much about categories now. They will come naturally once you are familiar with the system.

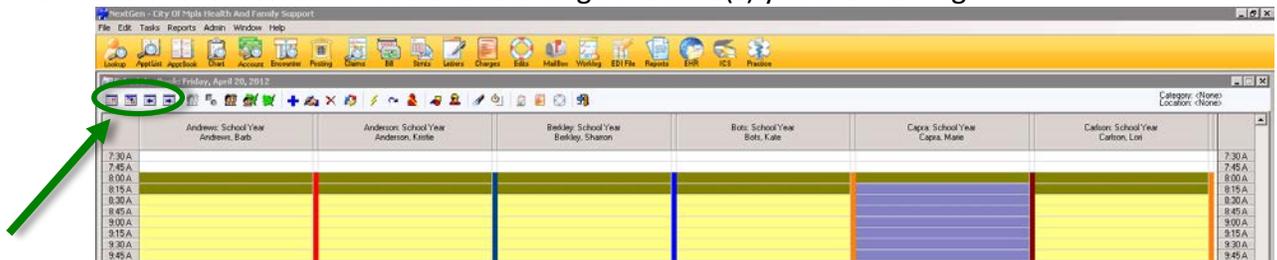
**E. Locations**

The location where the provider is at during a specific time is indicated by the skinny bar to the right of her schedule. Location colors are as follows:

- |                     |           |
|---------------------|-----------|
| Edison              | South     |
| Henry               | Southwest |
| Longfellow          | Washburn  |
| New Families Center | MDHFS     |
| Roosevelt           |           |

**F. Change the Date**

Use one of the 4 calendar buttons to change the date(s) you are viewing.

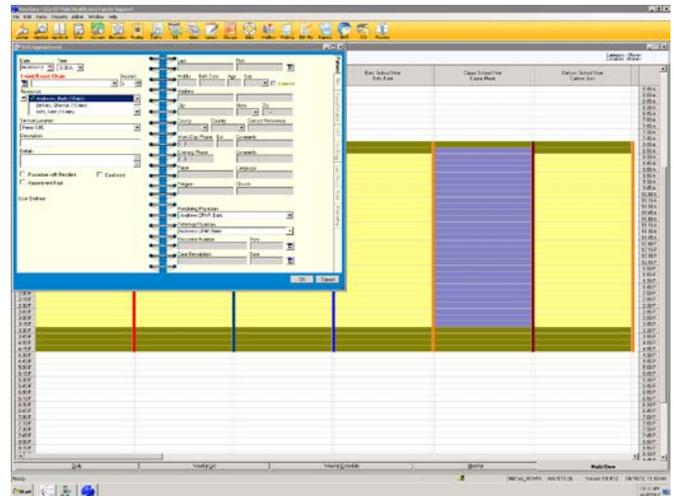


1. Find a date in the future (a calendar opens up). 
2. Come back to today or this week (depending on the view). 
3. Go back one day or week (depending on the view). 
4. Move ahead one day or week (depending on the view). 

**II. Booking an Event (Appointment)**

**A. Opening the Schedule Book**

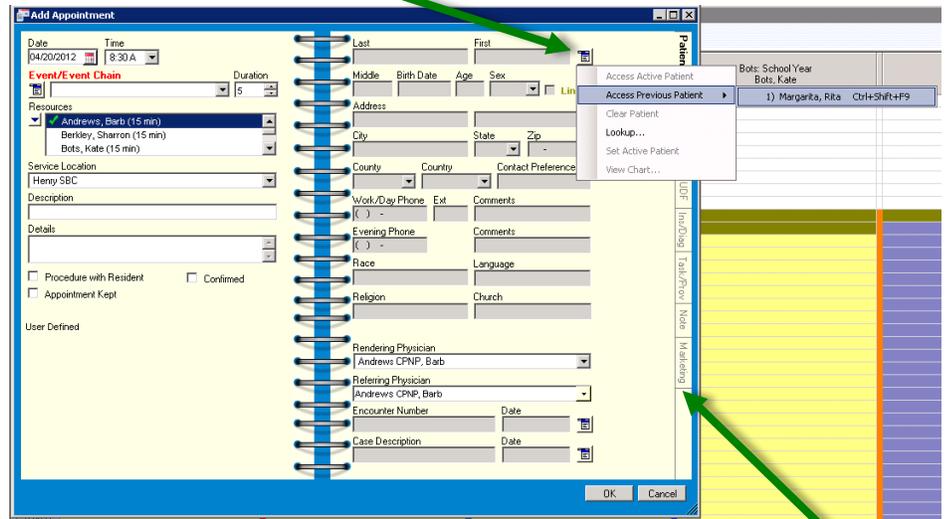
1. Double-click in the time slot you want to book the appointment in the provider's schedule. The Schedule Book will open.



**B. Select a Patient**

1. Click on the *Norton* button.
2. If you recently accessed a patient's account, he/she will be listed under *Access Previous Patient*.
3. Otherwise select *Lookup...* and search for the patient.

*Hint:* Use the *EPM-1: Lookup & Registration How-to Guide* to learn how to search for a patient. Always search by a student's ID number first.



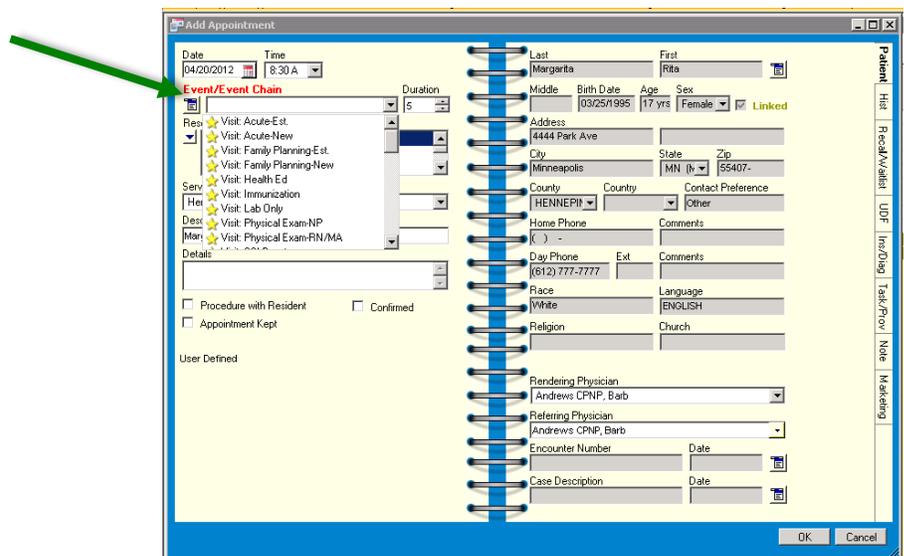
4. You can view and enter additional information on the patient in the tabs on the side if you wish.

**C. Select an Event**

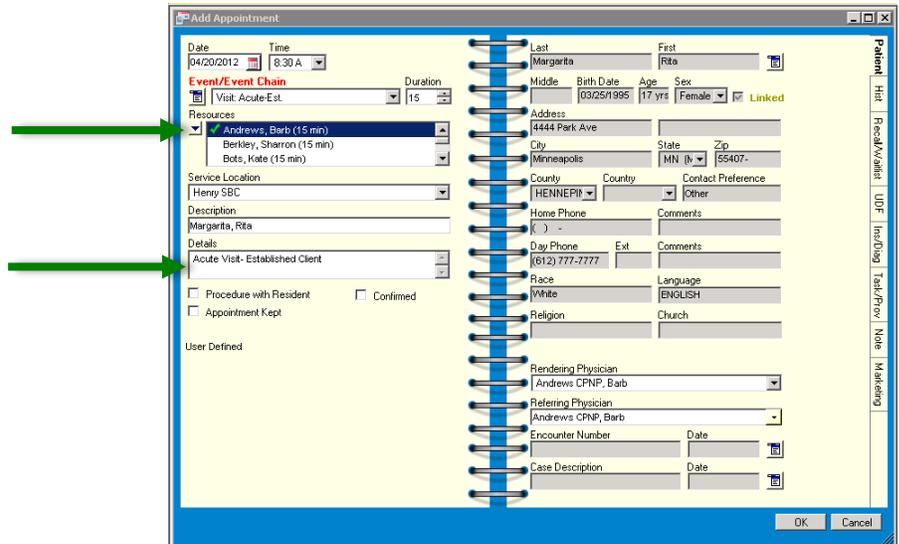
*Note:* If you are booking a series of events for a patient (Vitals & Acute visits, Physical Exams, etc), skip to *D: Select an Event Chain*.

1. Click on the drop-down menu under *Event/Event Chain* and select the event you need to schedule.

*Hint:* You will only see events that are schedulable under the category selected for this provider in this time slot. If you want to see all available events, click on the *Norton* button and select *See all Events*.



2. Verify the *Resource* (provider) is correct. If multiple providers will see the patient at the same time, you can select additional resources.
3. Add any other details that may be useful to the provider and click *OK*.



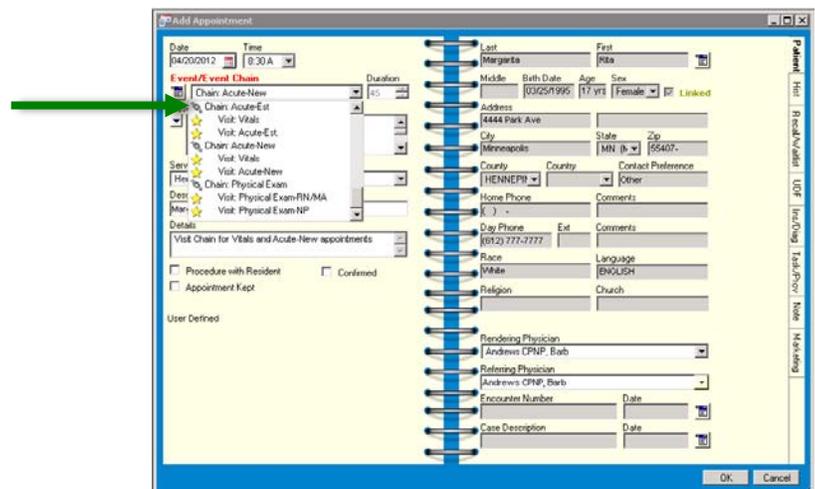
#### D. Select an Event Chain

Event Chains can be used when booking multiple providers to see a patient on the same type of visit. Using an event chain can save a lot of time. Currently we have the following event chains set:

- **Vitals and Acute-New Visits:** When you want to book an MA or RN to do the vitals on a new patient before he/she sees the NP.
- **Vitals and Acute-Established Visits:** When you want to book an MA or RN to do the vitals on a returning patient before he/she sees the NP.
- **Physical Exam Visits:** When you want to book an MA or RN to do her portion of a physical before the patient sees the NP.

1. Click on the drop-down menu under *Event/Event Chain* and select the Event Chain you need to schedule.

*Hint:* You will only see event chains that are schedulable under the category selected for this provider in this time slot. If you want to see all available events, click on the *Norton* button and select *See all Events*.



- Click on the *down arrow* button next to *Resources* to see a full list.
- You will see the first event in the chain listed. Select the provider who should be booked for this appointment. *In this example it's Sharron.*

The screenshot shows the 'Add Appointment' window. The date is 04/20/2012 and the time is 8:30 A. The event chain is 'Chain: Acute-Est' with a duration of 30. The 'Resources' list is expanded, showing several providers. 'Berkley, Sharron (15 min)' is selected. A green arrow points to the 'Resources' dropdown menu.

- Next scroll down to the second event in the chain. Select the provider who should be booked for this appointment. *In this example it's Barb Andrews.*

The screenshot shows the 'Add Appointment' window. The date is 04/20/2012 and the time is 8:30 A. The event chain is 'Chain: Acute-Est' with a duration of 30. The 'Resources' list is expanded, showing several providers. 'Andrews, Barb (15 min)' is selected. A green arrow points to the 'Resources' dropdown menu.

- Add any other details that may be useful to the provider and click *OK*. The respective events will now appear on each of the provider's schedule.

Congrats! You are done with this How-to Guide.