NEXTGEN APPOINTMENT LIST DEMONSTRATION

This demonstration reviews use of the appointment list.

This has been prepared for EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

Appointments 02/20/2013 ▼ **Duffy**

Time ▲	Room	Patient/Subject	Reason	Status
09:00 AM		Flinstone, Wilma/Follow U...		Attended
10:45 AM		RUBBLE, BARNEY/Follow U...		KEPT
11:15 AM		FLINTSTONE, FRED/Follow ...		BOOKED

Tasks | All Tasks | Refills | Test Results | Questions |

📄	✓	Due Date ▲	Patient/Subject	Description
!☑	☐	01/23/2013	Quagmire, Charlene/F...	Unable to find insurance inf...
!☑	☐	01/23/2013	Quagmire, Charlene/L...	Unable to find insurance inf...
🔄	☐	10/24/2012	TEST, DEBBIE/notified ...	Testing Advanced audit ...
☑	☐	10/19/2012	**TEST, DEBBIE**	**ORT SHOULDER COMPLETE**
🔄	☐	08/22/2012	**Horton, PedsAsthma003**	
🔄	☐	08/10/2012	**Test, Mickey**	
🔄	☐	06/28/2012	**BarnesB, Example002**	
🔄	☐	06/28/2012	**OsbornK, Example002**	
🔄	☐	06/28/2012	**WoodsA, Example002**	
🔄	☐	06/28/2012	**DuffyR, Example001/...**	**Communication**
🔄	☐	06/28/2012	BowenC, Example002	

This is the basic appearance of the appointment list. (There are variations of this appearance that can be selected by individual users.)

Note the Status column. Patients that have not yet arrived are listed as BOOKED. Patients that have arrived at the front desk appear as KEPT; when they ready to move to a room, they are Attended. You may see also see other statuses, such as Cancelled or No Show.

Offline

Compose | Remove | + To Do | + To Chart | Chart

Open the patient's chart by double-clicking on the name.

Ashleigh Quagmire (F)   DOB: 01/02/1957 (57 years)   Weight: 162.00 lb (73.48 Kg)   Allergies: (4)   Problems: (4)   Diagnoses: (19) Medications: (4)   ⊙

Address: **123 Toejam Trace**   MRN: **000000007762**   Emergency Relation: PCP: **ATKINSON, TANGELA C ...**
         Mobile, AL 36604   Insurance: **MEDICAID OF ALABAMA**   Emergency Phone: Referring:
Contact: **(251) 555-1234 (Home)**   NextMD: **No**   Pharmacy 1: **CAFFEYS PHARM...**   Rendering: **DUFFY, ROBERT LAMAR ...**

Alerts   OBGYN Details   Patient | Lipid Clinic Data | Order Admin... | ❖ Sticky Note | ❖ Referring Provider | ❖ HIPAA | ❖ Advance Directives | ❖ Screening Summary

◁ 📋 02/21/2014 02:01 PM : "*USA Intake"   ✕

                                                                                          🛑 TOB   ⊘ HTN   ⊘ DM   ⊘ CAD   ⚙

Specialty ▼ Family Practice   Visit Type ▼ Office Visit

🏠   **Intake**   **Histories**   **SOAP**   **Finalize**   **Checkout**

Standing Orders | Adult Immunizations | Peds Immunizations | My Plan | Procedures | Order Management

Care Guidelines | Global Days   Panel Control: ⊙ Toggle ⊙ | ↻ | Cycle ↻

General   ⊙

⊙ Established p

Reason for Vis   ⊙

☑ Do not launch   ❖ Intake Comments
   asthma
   chest pain

When the nurse is through rooming the patient, to inform the provider that the patient is ready to be seen, she will do this through the appointment list. One way is through the tracking system. Click on the Tracking Icon on the **Information Bar**.

Todays Patient Tracking

Appointment date: 02/21/2014   Today's date: 02/24/2014

Appointment information:

| 9:00 AM DUFFY MD, ROBERT LAMAR Reason: |

Room: **Status:**

| | | Attended | (Entries uploaded on "Save and Close".)

Patient Tracking: The Inbox will update today's calendar and not the appointment date shown.

Appt Time ▽	Room	Status	Time	Documented By

Click in the Room box.

[Task] [EHR Appointments] [Save & Close] [Cancel]

Todays Patient Tracking

Appointment date: 02/21/2014   Today's date: 02/24/2014

Appointment

9:00 AM DUF

Room:

Patient Tracki   tment date shown.

Appt Time

Ngkbm Get Dbpicklist Items

List Item
Checkout
Exam 1
Exam 2
Exam 3
Exam 4
Exam 5
Exam 6
Lab
Procedure room
Waiting room
X-ray

Select a room; alternately, you can just type a room number in the box.

Refresh   OK   Cancel

Task   EHR Appointments   Save & Close   Cancel

Todays Patient Tracking ✕

Appointment date: 02/21/2014   Today's date: 02/24/2014

Appointment information:

| 9:00 AM DUFFY MD, ROBERT LAMAR Reason: |

Room: Status:
| Exam 1 | | Attended | (Entries uploaded on "Save and Close".)

Patient Tracking: The Inbox will update today's calendar and not the appointment date shown.

Appt Time ▽	Room	Status	Time	Documented By

Next, click in the Status box.

(Task)   (EHR Appointments)   (Save & Close)   (Cancel)

Appointment date: 02/21/2014   **Today's date: 02/24/2014**

Appointmen

9:00 AM DU

Room:

Exam 1

Patient Track

Appt Time

nent date shown.

Ngkbm Get Dbpicklist Items

List Item	
chart complete	
chart incomplete	
chart needs sign-off	
checked out	
discharged	
E&M Code Submitted	
ready for check-out	
waiting for educator	
waiting for nursing	
waiting for provider	
with nursing	
with provider	

Select waiting for provider.

Refresh   OK   Cancel

Task   EHR Appointments   Save & Close   Cancel

Todays Patient Tracking ✕

Appointment date: 02/21/2014   Today's date: 02/24/2014

Appointment information:

9:00 AM DUFFY MD, ROBERT LAMAR Reason:

Room: Status:
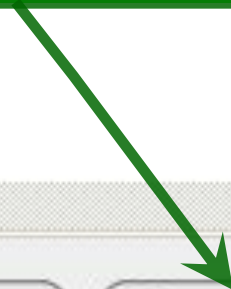Exam 1   waiting for provider   (Entries uploaded on "Save and Close".)

Patient Tracking: The Inbox will update today's calendar and not the appointment date shown.

Appt Time ▽	Room	Status	Time	Documented By

When done, click Save & Close.

(Task) (EHR Appointments) (Save & Close) (Cancel)

Appointments 02/24/2014 ▼ 👤 **DUFFY, ROBERT LAMAR MD**

Tasks [All Tasks]

Time ▲	Room	Patient/Subject	Reason	Status
09:49 AM		Quagmire, Ashleigh		Waiting for provider

	✓	Due Date ▲	Patient/Subject	Description
🖳	☐	01/30/2014	Quagmire, Genessa/P...	Sign off request

Go to Patient's Chart
Edit...
Check Eligibility

<Refresh>

The provider may wish to change the status at some point. For example, say you've documented everything but the physical exam. You want to move on to your next patient, but leave yourself a reminder to come back & do the PE, then submit the billing code.

Right-click on the patient & select Edit.

Offline

Compose   Remove   + To Do   + To Chart   Chart

Patient Appointments: Quagmire, Ashleigh　✕

When: | 09 : 49 AM ▲▼ | Now | 02/24/2014 | ... | | Close

Click in the Status box, select the text that is there, & then overtype whatever you like, e.g. Do PE & E&M.

Location: USA FAMILY MEDICINE

Room:

Reason: | | ☐ Cancelled: | | Update

Status: | Waiting for provider | | / / | ... | | Delete

When	Room	Provider
02/24/2014 09:49 AM		ROBERT LAMAR DUFFY, MD
01/29/2014 06:40 PM		ROBERT LAMAR DUFFY, MD

When done, click Update, then Close.

Clear

Search

Add

Work Flow [Duffy, Robert L]

Appointments 02/24/2014 ▼ 👤 DUFFY, ROBERT LAMAR MD

Time ▲	Room	Patient/Subject	Reason	Status
09:49 AM		Quagmire, Ashleigh		Do PE & E&M

Tasks [All Tasks]

📄	✓	Due Date ▲	Patient/Subject	Description
📋	☐	01/30/2014	Quagmire, Genessa/P...	Sign off request

The status change displays, & you can move on to your next available patient.

Add ▼ Remove Edit Send Chart

✉	From	Subject	Received ▲

Offline

Compose Remove + To Do + To Chart Chart

When the provider has submitted charges for the visit, you'll see the status change to **E&M Code Submitted**.

This concludes the NextGen Appointment List demonstration.

If Wile E. Coyote has enough money to buy all that ACME crap, why doesn't he just buy dinner?

R. Lamar Duffy, M.D.
Associate Professor
University of South Alabama
College of Medicine
Department of Family Medicine