NextGen® Practice Management
Appointment Scheduling Guide

Version 5.8
The following terms may be used interchangeably throughout this document:

- NextGen Ambulatory EHR and NextGen EHR
- NextGen Practice Management and NextGen EPM
- NextGen Optical Management and NextGen Optik
- NextGen Document Management and NextGen ICS
- NextGen Patient Portal and NextMD
- NextGen Remote Patient Chart Synchronization and NextGen PatientSync
- NextGen Real Time Services and NextGen Real-time Transaction Server
- NextGen CHS and NextGen HIE
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CHAPTER 1

Introduction

This section provides information about the organization and purpose of the NextGen Practice Management Appointment Scheduling Guide. It provides a general overview of the topics covered in this guide, defines the audience, and lists assumptions about the level of knowledge required for this guide.

Reference: For a brief description of the functionality covered in each of the guides that makes up the core series of guides, refer to NextGen Practice Management Core Series of Guides in the NextGen Practice Management Getting Started Guide.

About This Guide

The NextGen Practice Management Appointment Scheduling Guide provides the information you need to create and maintain patient appointments with NextGen Practice Management.

This guide is intended for the NextGen Practice Management users. A NextGen Practice Management user is any person who works for your practice and has the proper authorization (User ID and Password) to log in and use the application. Each practice could have different standards and internal procedure; therefore, NextGen Practice Management users might have diverse rights and permissions for the use of the application. Your System Administrator should assist all users with the setup of authorization needed to log in, as well as specific rights and permissions needed to use the application.

Assumptions

This guide assumes that you have basic knowledge and skills for all of the following:

› Microsoft Windows operating systems
› Microsoft Office applications
› All applicable NextGen ambulatory products

Logging on to the NextGen Applications

You must log on with a user name and password to access the applications. However, with Single Sign On, if you are already logged on to a non-administrative application, such as NextGen Ambulatory EHR, NextGen Practice Management, NextGen ICS, or NextGen Optical Management, you can access other non-administrative applications without logging on again.
To access any of the NextGen applications:

1. From the START button on the Taskbar, click Programs > NextGen > NextGen or double-click the NextGen shortcut on your desktop.
   The NextGen Application Launcher displays.

2. Click the appropriate application.

Reference: For additional detail and for application-specific information, refer to the NextGen Ambulatory EHR and Practice Management Logon Guide.

Note: The items listed in the Application Launcher may differ for individual users depending on the user security rights set in the System Administrator application. Some utilities may not be available from the Application Launcher and must be accessed from either the C:\Nextgen (the default location) or \NextGenRoot folder.
The *Security Logon* dialog box displays.

### Note:
The Authentication field displays only if your System Administrator enables integrated authentication.

There are three types of integrated authentication available:

- **NextGen Database**: requires manual authentication using your NextGen user credentials.
- **Active Directory**: requires manual authentication using your Windows user credentials.
- **Windows Integrated**: automatically authenticates by applying the Windows logon credentials used for the current session.

3. Select the appropriate Enterprise and Practice.

4. To log on with your NextGen credentials:
   - If the Authentication field displays, select NextGen Database.
   - Enter your User ID and Password. User ID is case-sensitive.

5. To log on manually with your Windows credentials:
   - In the Authentication field, select Active Directory.
   - The Domain field displays.
Chapter 1  Introduction

Enter your **User ID**, **Password**, and **Domain** associated with your Windows log on credentials.

6  To log on automatically with your Windows credentials:
   - In the **Authentication** field, select **Windows Integrated**.
   - The Windows credentials used to log on to the computer automatically displays in the **User ID**, **Password**, and **Domain** fields and cannot be changed.

7  Click the **Logon** button or press the Enter key.
CHAPTER 2

Scheduling Administration

Scheduling Administration is a crucial part of your appointment book. Use it to set up resources, events and event chains that can be scheduled, and the templates that define the category, or kind, of appointment.

General Process

With Scheduling Administration, you can set up all available resources so that you can more easily schedule appointments, procedures, and so on. Before you can schedule the first encounter, though, you must ensure that all information about all the resources is in NextGen® EPM. Below is a very general checklist of the setup:

1. Your Resources, which are to be associated to a class.
2. The different Classes of your practice, for example, physician, nurse, and room. Then select the Member Resources for each Class.
3. Your Events, which are associated with resources, locations, and service items.
4. Any Event Chains, which are multiple events linked together.
5. Your Categories of appointments, which are associated events and event chains.
6. Your weekly or daily Template, which is associated with categories and service locations.
7. Return to Resources to apply the newly created templates to the appropriate time frame.

Note: After all scheduling information is set up in Scheduling Administration, users can set up their own User Preferences for Scheduling. See the NextGen EPM User Guide for more information.

This is only a guideline. You might have to enter the information as you gather it. You always update resources with personnel changes. So, there is no perfect method for 'putting it all together' the first time. The sections that follow are in the same order as the tabs that appear on your screen:

<table>
<thead>
<tr>
<th>Tab/Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classes</td>
<td>Define the separate categories of available people, places, and things here. These are like items such as Nurses.</td>
</tr>
<tr>
<td>Resources</td>
<td>Set up your available people, places, and things here.</td>
</tr>
<tr>
<td>Events</td>
<td>These are the types of appointments you normally schedule.</td>
</tr>
<tr>
<td>Event Chains</td>
<td>You can set up a string of events that are treated as one event so that plenty of time is allotted. In other words, you could set up a New Patient Packet so that when scheduling a new patient you allot plenty of time for the encounter as well as all of the paperwork that must be completed.</td>
</tr>
<tr>
<td>Categories</td>
<td>You can assign color codes to blocks of time here. This enables you to color-code your appointment book for quick-referencing at a glance.</td>
</tr>
<tr>
<td>Tab/Section</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Weekly Templates</td>
<td>Setting up a weekly template enables you to schedule around an entire resource group that shares the same schedule of hours.</td>
</tr>
<tr>
<td>Daily Templates</td>
<td>Setting up a daily template enables you to schedule around numerous resources - on a daily basis - that do not share the same work hours.</td>
</tr>
</tbody>
</table>

**Accessing Scheduling Administration**

To access Scheduling Administration:

1. Open NextGen EPM.
2. Select the **Admin** menu > **Scheduling Admin**.

**Classes Tab**

On the **Classes** tab, you define your classifications of your people, places, and things that you schedule. Classes can be used to search for a group of like resources on the *Appointment Search Ahead* dialog box.

![Classes Tab Image]

To set up classifications:

1. Click the **Open Menu** button and then select **New**.
The *Add Classification* dialog box displays.

2. Type a descriptive name for the classification.
3. Type any notes that describe the classification in the **Details** field. This field is not used anywhere else in the system.

4. Use the **Add** and **Remove** arrows to associate resources with the classification.
   - If the **Interval** column displays, then the **Member Resources** list can only contain resources that have the same interval. For example, you cannot add one 10-minute resource and one 15-minute resource in the same classification. This column only displays when the **Allow interval overrides** check box is selected on the **Appt Scheduling** Practice Preferences.
   - If you do not have any resources at this time, they can be added later. Also, if you associate a resource with a classification on the **Resources** tab, it displays in the **Member Resources** list here.

**Resources Tab**

Resources are the people, places, and things that are available for scheduling. You set them up on the **Resources** tab of **Scheduling Administration**. In addition to the resource and kind of template applied, you can also see the provider subgroupings that are specified in the Provider master file. The **Max Template Date** is the date that the assigned template expires for the resource.
To set up resources:

1. Do one of the following:
   - To add a new resource, click the **Open Menu** button, and then click **New**.
   - To modify a resource, select the item in the list, click the **Open Menu** button, and then click **Open**.
   
   The **Add/Edit Resource** dialog box displays.

2. Enter the resource description and type (**Person**, **Place**, or **Thing**).
   
   The resource description displays in the Appointment Book at the top of the resource's schedule or schedule column.

3. If the resource is available for scheduling, select the **Available on Holidays** check box.
   
   **Note:** For this check box to take effect, holidays must exist in the **Holidays** Practice Preferences.

4. If the **Time Interval** field displays, you can change the interval for the time slots from the practice default.
   
   **Notes:**
   - Any information directly affected by the new interval is deleted and you must reenter it. Affected information includes: Member Classes, appointment conflict checking data, Appointment Search Ahead data, appointment waitlists, classification memberships, default resource assignments, event duration overrides, recall plans, template assignments, and template exceptions.
   - This field only displays when the **Allow interval overrides** check box is selected in the **Appt Scheduling** Practice Preferences.

5. If you do not want the resource to display on the **Resources** tab, click the **Hide Resource** check box.

6. Enter information on the **General** tab (on page 17) and **External** tab (see "External Tab for Resources" on page 18) as necessary.
   
   For information about setting up these tabs, see the sections that follow.

7. To assign a template to the resource, select either **Daily Templates** or **Weekly Templates**, then click **Template**.
   
   For more information about assigning templates, see Assigning Templates to a Resource (on page 43).
8 Click OK when you finish setting up the resource.

**General Tab**

On the General tab, you can add basic information about a resource.

**To add resource information:**
1. Type any notes that describe the resource in the Detailed Description field.
2. To link the resource to a physician from the Provider master file, select a provider in the Physician Link field.

   The provider selected in the Physician Link field becomes the default Rendering Physician when you select this resource for an appointment in EPM

   **Notes:**
   - Leave this field blank if the resource is a place.
   - If the Physician Link field has a selection in it, first delete the name in the field, and then select another provider.
   - The providers that you can select from are the ones available in the current practice as defined by the Provider Practice Access in File Maintenance.
3. To link a user to the resource, select the user from the list in the User Link field.

   On the Day Timer report in EPM, the To-Do list prints for the resource only if the User Link is set to the resource.
4. In the Templates section, assign either the Daily or Weekly template to this resource.
5. Use the Add and Remove arrows to associate resources with the classification.

   If the Interval column displays, then the Member Classes list can only contain classes that have the same interval. For example, you cannot add one 10-minute class and one 15-minute class for the same resource. This column only displays when the Allow interval overrides check box is selected in the Appt Scheduling Practice Preferences.

   **Note:** If you associate a resource with a classification on the Classes tab, the classification automatically displays in the Member Classes list on this tab, too.
6. Click OK.

**Making Resources Available On Holidays**

When holidays are specified in Practice Preferences, you can make a resource available for all holidays or for no holidays. You cannot select individual holidays.

**To allow a resource to be scheduled on holidays:**
1. Open NextGen EPM.
2. On the Admin menu, click Scheduling Admin.

   The Scheduling Administration dialog box displays.
3. Click the Resources tab, then double-click a resource in the list.

   The Edit Resource dialog box opens.
4 Select the **Available On Holidays** check box.

![Edit Resource](image)

5 Click **OK**.

**External Tab for Resources**

The **External** tab on the *Add/Modify Resources* dialog box allows you to add external systems that interface with the NextGen application and to import appointments to EPM.

**To access the External tab:**

> On the *Add/Edit Event* dialog box, click the **External** tab.

The **External** tab displays the following columns:

![External Tab](image)

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>External ID</td>
<td>Lists the IDs assigned to the external systems.</td>
</tr>
<tr>
<td>External System</td>
<td>Lists the external systems that interface with the NextGen application.</td>
</tr>
<tr>
<td>Creator</td>
<td>Displays the name of the user who created the ID.</td>
</tr>
<tr>
<td>Create Date</td>
<td>Displays the date that the ID was created.</td>
</tr>
</tbody>
</table>

**To add an external system:**

1 From the **External** tab, do one of the following:

> To add a new item, click the **Open Menu** button and then click **New**.

> To modify an item, select the item in the list, click the **Open Menu** button and then click **Open**.
The Add External Interface dialog box displays.

2. For the External ID, enter a name for the system.
3. For the External System, select the system to interface with the NextGen application.
4. Click Next to add another system or click OK.

   **Note:** If you are editing an existing system, the Next button does not display.

**Viewing Hidden Resources**

If any resources have been set to be hidden, they do not display on the Resources tab in Scheduling Administration. However, you can force these items to display on the Resources tab.

**To display the hidden resources in the list:**

1. Access the Resources tab.
2. Click the Include Hidden Items check box.

   The hidden items display in the list and the Hidden icon 📝 displays next to each one.

   **Note:** If you clear the check box, the hidden items are removed from the list.

**Events Tab**

You can create, edit, and delete the events you schedule during the day under the Events tab. For example, you might have a New Patient Encounter event comprised of a new patient exam, blood work and a cholesterol check. Creating this type of appointment ensures that you schedule enough time without overbooking the physician or other resources such as examination rooms, lab, or x-ray.
Adding Events

The Add Event dialog box contains a general information section and several tabs for more specific information about that particular event.

To set up events:

1. Click the Open Menu button, and then click New. The Add Event dialog box displays.

2. Enter the event description and a short description of up to three characters. The description displays on the Add/Edit Appointment dialog box for Event description. The short description displays on the appointment scheduling book beside the appointment description in the Weekly List, Weekly Schedule and Multi-View. Be sure that this description is user-friendly because it is only 3 characters.

3. Use the up and down arrows to enter the event’s duration. The duration increments are determined in the Appt Scheduling Practice Preferences for the default time interval and whether the interval can be overridden.

4. If another event must be scheduled after this event, select it in the Successor Event field. Once an appointment with this event is marked Kept, EPM prompts you to make the successor appointment or event that you specify here.

5. Enter any necessary notes to describe the event in the Details field. This selection populates the Details field when you add an appointment, if you select Pull details from event details in the Appt Scheduling Practice Preferences.

6. To set up the event as a default for the Appointment Search Ahead dialog box, select the appropriate class in the Default Class for Appointment Search field.

7. To require linking to a patient appointment, select the Require linked patient appointment check box.
To exclude this event from printing a reminder, select the **Exclude printing appointment reminders** field check box.

If you are licensed for Chart tracking and want an outguide to print whenever this event occurs, select the **Print chart tracking outguide** check box.

To require a note template when a new appointment based on the event is being scheduled, select the **Require note template** check box.

You can then select the required note templates on the **Note Template** tab.

To require a marketing plan when users create or modify an appointment that uses this event, select the **Require marketing data** check box.

The **Marketing Plan** field becomes a required field in the appointment book.

If you want to associate a color with the event, select the slot color in the **Background Color** field and select the text color in the **Foreground Color** field.

**Note:** Event colors display on the **Weekly Schedule** and **Multi-View** tabs of the Appointment Book only when they are enabled. For more information about event color setup, see Associating Colors with Events (on page 29).

If you do not want the event to display on the **Events** tab, click the **Hide Event** check box.

If you are finished with this event, click **OK**. To assign default resources, limits, or SIMs, click on the appropriate tab.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overrides</strong></td>
<td>You can override the default time value for a resource here. For example, if putting a cast on a patient requires more time than a normal office encounter, then you can create an event with the appropriate amount of time that overrides the normal office encounter time allotment for an exam room, doctor, nurse, and so on.</td>
</tr>
<tr>
<td><strong>Default Resources</strong></td>
<td>You can assign default resources; that is, resources that are automatically associated with this event on this tab.</td>
</tr>
<tr>
<td><strong>Limits</strong></td>
<td>Limit the number of events, or appointments, that you can schedule for a resource here.</td>
</tr>
<tr>
<td><strong>SIMs</strong></td>
<td>To attach a SIM to this event and have it automatically default to the <strong>Charge Posting</strong> dialog box, set it up here.</td>
</tr>
<tr>
<td><strong>Locations</strong></td>
<td>You can select the locations where the event can be scheduled.</td>
</tr>
<tr>
<td><strong>External</strong></td>
<td>You can add external systems that interface with the NextGen application and to import appointments to EPM.</td>
</tr>
<tr>
<td><strong>Note Template</strong></td>
<td>You can select the note templates to use as the defaults when users add a note to a new appointment.</td>
</tr>
</tbody>
</table>

**Overrides Tab**

You can add a resource to an event that has a different duration time than the default duration time for that event. When you set up and then select a resource with a duration time override, the application automatically changes the default duration time to reflect the duration time for that resource.
**Note:** A duration time override for a resource cannot be less than the practice **Default Time Interval**, which is set on the **Appt Scheduling** Practice Preferences. For example, if the default time interval is 30 minutes, then you cannot set a resource duration time override for less than 30 minutes. However, if the default time interval changes, the duration time for the appointment reflects the default time interval, not the resource duration time override.

### Multiple Resources and Duration Times

When assigning resources to an event, keep in mind that if the duration time for the resource is less than the default duration time for the event or the Default Time Interval, the resource time does not override either of these default times.

**To set up an event with resources that have different duration times than the event default duration time:**

1. Select the **Admin** menu > **Scheduling Admin**.
   The **Appointment Book Scheduling** dialog box displays.
2. Click the **Events** tab.
3. Select the event to assign resources to and then double-click to display the **Edit Event** dialog box.
   **Note:** If the **Interval** column displays on the **Overrides** tab, then each resource's default time interval displays. This column only displays when the **Allow interval overrides** check box is selected in the **Appt Scheduling** Practice Preferences.
4. On the **Overrides** tab, click the **Open Menu** button, and then click **New**.
   The **Add Event/Resource Duration Override** dialog box displays.
5. In the **Resource** field, select a resource.
6. Use the up and down arrows in the **Duration** field to set the duration time.
   **Note:** The duration time you set cannot be less than the default duration time in the event **Duration** field, which is located above the tabs. In addition, you can increase the duration time on the **Add Event/Resource Duration Override** dialog box in one of two ways. Either the duration time increases in increments equal to the default event duration time or, if the resource intervals display, in increments equal to the resource's interval. For example, if the default event duration time or the resource interval is 30 minutes, then the duration time can only be increased in increments of 30 minutes, which would give you 60, 90, 120, and so on.
7. Click **OK**.
The Add/Edit Event dialog box displays again with the resource and the duration time added to the Resources/Duration Overrides section of the dialog box.

8 Click OK to close the Edit Event dialog box.

Default Resources Tab

When scheduling appointments based on pre-defined events, you can have the necessary resources scheduled along with the event by assigning default resources to the event. You can assign these resources to the event on the Default Resources tab of the Add/Edit Event dialog box.

1 On the Add/Edit Event dialog box, click the Default Resources tab.

2 Click the Open Record button next to the Default Resources section. The Resources dialog box displays.

3 Use the Add and Remove arrows to move resources from the Available column to the Included column.

4 Once all the necessary resources are assigned, click OK.

Limits Tab

You can set limits for the number of appointments that can be scheduled for a specified event and resource combination by the day of the week and by a specific date. This provides better control over scheduling appointments. If a resource reaches its daily appointment limit, keep the following in mind:
If you attempt to schedule another appointment using that resource, an appointment conflict generates. Keep in mind, however, that you can override the conflict.

The Appointment Search Ahead dialog box does not display or find appointment slots for 'full' resources.

The appointment limits update immediately. The changes take effect as soon as you make them.

**Setting Limits**

You can set event/resource limits on the Add/Edit Events dialog box under the **Limits** tab.

**To set event/resource limits:**

1. On the Edit Events dialog box select the **Limits** tab.

2. Under Resource Appointment Limit, click the Open Menu button and then select **New**. The Add Event/Resource Appointment Limit dialog box displays.

3. Select the resource from the drop-down list next to the Resource field.

4. Use the following table to set the values for the remaining fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Valid Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limit Default</td>
<td>Equal to or greater than 1</td>
<td>Limits the number of appointments that can be scheduled for a specific event/resource for everyday of the week. The default value for this field is 1.</td>
</tr>
<tr>
<td>Weekday Limit Overrides</td>
<td>0</td>
<td>Indicates that no override is in place for the specified day of the week. The number in the Limit Default field will be used. Zero is the default value for this field.</td>
</tr>
<tr>
<td></td>
<td>-1</td>
<td>Indicates that no appointments can be scheduled for a specific event/resource for</td>
</tr>
</tbody>
</table>
### Field Valid Values Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Valid Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>the specified day of the week.</td>
</tr>
<tr>
<td></td>
<td>Equal to or greater than 1</td>
<td>Limits the number of appointments that can be scheduled for a specific event/resource for the specified day of the week.</td>
</tr>
<tr>
<td>Date Limit Override</td>
<td>-1</td>
<td>Indicates that no appointments can be scheduled for a specific event/resource for the specified date. This field overrides the Limit Default and the Weekday Limit Overrides fields.</td>
</tr>
<tr>
<td></td>
<td>Equal to or greater than 1</td>
<td>Limits the number of appointments that can be scheduled for a specific event/resource for the specified date. This field overrides the Limit Default and the Weekday Limit Overrides fields.</td>
</tr>
</tbody>
</table>

5. Click **OK**.

The date and override limit display in the **Date Limit Override** list.

**Note:** Once a date limit override is entered, you can edit the Limit field, but not the Override Date field. To edit the Limit field, click the **Open Menu** button in the **Date Limit Override** section and select **Open**. If the wrong date was entered, you must delete the original entry and reenter it with the correct date.

6. Click **OK**.

The limits you set for this resource for this event display in the **Resource Appointment Limit** list.

7. Click **OK**.

**SIMs Tab**

To simplify your posting process, you can have Service Items post automatically and display on the **Charge Posting** dialog box by assigning the SIM to the appropriate event. You can do that from the **SIMs** tab on the **Add/Edit Event** dialog box.
To assign a SIM to an event:

1. On the Add/Edit Event dialog box, click the SIMs tab.

2. Click the Open Record button next to the Member SIMs/SIM Groups list. The Service Items dialog box displays.

3. Use the Add and Remove arrows to move the appropriate SIMs or SIM groups from the Available column to the Included column.

4. After you assign all the necessary SIMs, click OK to return to the SIMs tab.

5. To change the order that the SIMs display on a claim, select an item row on the SIMs tab to highlight it, then do one of the following:
   - Click the up or down arrow to move the item up or down in the list.
   - OR
   - Click the double arrows to move the item to the top or bottom of the list.

Locations Tab

When you set up an event, you can specify that when a user schedules an appointment with the event, it can be scheduled only at specific locations. If users try to schedule events at non-specified locations, he or she can override the warning message if they have the appropriate rights. These locations must already exist in the Locations master file before you can add them to the group.
To associate locations with an event:

1. On the Add/Edit Event dialog box, click the Locations tab.

2. Under Valid Locations, click the Open Record button. The Locations dialog box displays.

3. To add a location, select the item in the Available list, then click the Include button. The location moves from the Available list to the Included list.

   To search for a location, type the beginning of the location name in the Available field. A possible match displays in this field and is also selected in the list.

4. If you want to remove a location from the event, select the location in the Included list, then click the Exclude button. The location moves from the Included list to the Available list.

5. Continue adding or removing locations until all of the ones you need are in the Included list.

6. Click OK to save the included locations.

External Tab for Events

The External tab on the Add/Modify Events dialog box allows you to add external systems that interface with the NextGen application and to import appointments to EPM.

To access the External tab:

- On the Add/Edit Event dialog box, click the External tab.

The External tab displays the following columns:
Table 2-1: External Interface Column Descriptions

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>External ID</td>
<td>Lists the IDs assigned to the external systems.</td>
</tr>
<tr>
<td>External System</td>
<td>Lists the external systems that interface with the NextGen application.</td>
</tr>
<tr>
<td>Creator</td>
<td>Displays the name of the user who created the ID.</td>
</tr>
<tr>
<td>Create Date</td>
<td>Displays the date that the ID was created.</td>
</tr>
</tbody>
</table>

To add an external system:

1. From the **External** tab, do one of the following:
   - To add a new item, click the **Open Menu** button and then click **New**.
   - To modify an item, select the item in the list, click the **Open Menu** button and then click **Open**.
   The **Add External Interface** dialog box displays.

2. For the **External ID**, enter a name for the system.
3. For the **External System**, select the system to interface with the NextGen application.
4. Click **Next** to add another system or click **OK**.
   
   **Note**: If you are editing an existing system, the **Next** button does not display.

**Note Template Tab**

You can add one or more note templates (Blank, Chart, New Custom, or SOAP Template) to an event so that when a user adds a new appointment, he or she can attach note templates to the appointment based on the selected event. If note templates are required for the event, the user cannot save the appointment without adding notes.

To add note templates to an event:

1. Open an event (see "Adding Events" on page 20).
   The **Add/Edit Event** dialog box displays.

2. To require note templates when someone schedules a new appointment for the event, select the **Require note template** check box.
3 Click the **Note Template** tab.

4 Click the **Open Menu** button to select the note templates.
   The **Note Templates** dialog box displays.

5 To add a note template, select one in the **Available** list, then click the **Include** button. The note template moves from the **Available** list to the **Included** list.

6 To remove a note template, select it in the **Included** list, then click the **Exclude** button. The note template moves from the **Included** list to the **Available** list.

7 Click **OK** to return to the **Note Template** tab.

8 If you want to change the order in which the templates appear from first to last, select a template in the **Note Template Members** list, and then click the **Up** or **Down** arrow. The list order from top to bottom reflects the order in which the templates display.

### Associating Colors with Events

You can now associate colors with events. When an appointment uses an event, the appointment slot displays the event color in the Appointment Book. The event-specific colors display only in the **Weekly Schedule** and **Multi-View** tabs of the Appointment Book.

**To set an event color:**

1 In EPM, select the **Admin** menu > **Scheduling Admin**.
   The **Scheduling Administration** dialog box displays.

2 Click the **Events** tab, and double-click an event.
   The **Edit Event** dialog box displays.
3 In the **Background Color** field, select the slot color. You cannot select white as the background color.

4 In the **Foreground Color** field, select the text color.

5 Click **OK**.

**Notes:**

- Once an event color is set, you cannot remove the color; you can only change it.
- Event color overrides category color. However, if the event color is not set, then the category color displays.
- If the preference **Display appointment text in Workflow status color** is set on the Appointment Scheduling Preferences > **General** tab, then the foreground color for the event will not be used; instead the workflow status color will be used. See the *NextGen® EPM User Guide* for the user-level scheduling preferences and the *NextGen® Ambulatory Products Administrator Guide* for the master file-level scheduling preferences.

**Enabling Event Colors in the Appointment Book**

Event colors only display in the Appointment Book when they have been enabled.

**To display event colors in the Appointment Book:**

1 At the user-level, open the Appointment Scheduling Preferences in EPM.

   -or-

   To enable the colors by default for all users, open the Default User Prefs - Scheduling master file in File Maintenance. Users can override the default with the user-level Appointment Scheduling Preferences.

2 Select the **Display event color in scheduled slots** check box on the MultiView tab.

**Viewing Hidden Events**

If any events have been set to be hidden, they do not display on the **Events** tab in Scheduling Administration. You can, however, force them to display.

**To display the hidden events in the list:**

1 Access the **Events** tab.

2 Click the **Include Hidden Items** check box.

   The hidden items display in the list and the Hidden icon 📝 displays next to each one.

**Note:** If you clear the check box, the hidden items are removed from the list.
**Event Chains Tab**

Sometimes multiple events must be scheduled together to complete a patient encounter. In NextGen EPM, this series of events is an *event chain*. Each event in the event chain is an *event chain member*. You can schedule the events in a “best-fit” manner or in a defined sequence. You assign Resources, Limits, SIMs, and Overrides to an Event Chain in the same manner as you would with a single Event.

To set up an event chain:

1. On the *Scheduling Administration* window, click the **Event Chain** tab > **Open Menu** button > **New**. The *Add/Edit Event Chain* dialog box displays.

2. Enter the event chain description and a short description of up to three characters.
   > The description displays on the *Add/Edit Appointment* dialog box.
   > The short description displays on the Appointment Scheduling book next to the appointment description in the Weekly List, Weekly Schedule, and Multi-View.

3. Type any additional notes for the Event Chain in the **Details** field.
If you selected **Pull details from the event details** option in the **Appt Scheduling** Practice Preferences, the contents of this **Details** field populate the **Details** field when you add an appointment in EPM.

4 Use the following table to select the next four options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Event Sequence Matters</strong></td>
<td>If the sequence of the events is important, then select this check box. If it does not matter, then leave it unchecked. The sequence affects how you can schedule the event chain appointment.</td>
</tr>
<tr>
<td><strong>Allow Events to Span Multiple Days</strong></td>
<td>If the Member Events must take place on separate days, it might be necessary to select this option.</td>
</tr>
<tr>
<td><strong>Linked Events</strong></td>
<td>If the Member Events must be dependent on one another (for example, one must happen before the other), then select this option.</td>
</tr>
<tr>
<td><strong>Allow Event Duration Overrides</strong></td>
<td>Selecting this option enables you to use the <strong>Overrides</strong> tab to override scheduling conflicts here. If you select this, you must go to the <strong>Overrides</strong> tab on the <strong>Edit Events</strong> dialog box and assign the overrides to these Member Events.</td>
</tr>
</tbody>
</table>

5 Use the **Add** and **Remove** arrows to associate events with the chain.

**Note:** If the **Duration** column displays in the **Available** and **Member Events** lists, then you can only add events that have the same base time duration. For example, you cannot add one event that has a duration of 10 and another event that has a duration of 45. This column only displays when the **Allow interval overrides** check box is selected in the **Appt Scheduling** Practice Preferences.

6 Use the **Promote** and **Demote** arrows to sequence the member events.

7 After you add events to the **Member Events** list, right-click on an event and then click **Open** to set the event chain interval (see "Setting Up Event Chain Intervals" on page 34).

8 When you finish adding the appropriate events to the Event Chain, click **OK**.

**Note:** If the Event Chain's durations, resources, limits, or SIMs need modification, you must make these changes at the Event level through the **Edit Event** dialog box on the **Event** tab.

### Scheduling an Event Chain to Span Multiple Days

You can set up an event chain that enables you to schedule each member event for a different day or time. The only exception to this rule is the first event listed in the event chain, which is scheduled using the **Date** and **Time** fields in Appointment Details.

### Setting Up Events to Span Multiple Days

You can set up an event chain that enables you to schedule each member event for a different day or time. The only exception to this rule is the first event listed in the event chain, which is scheduled using the **Date** and **Time** fields in Appointment Details.

**To allow multiple days for member events:**

1 Access the **Edit Event Chains** (see "Event Chains Tab" on page 31) dialog box.
2 Click the Allow Events to Span Multiple Days check box.

3 Set up the intervals for each event in the event chain (see "Setting Up Event Chain Intervals" on page 34).
   OR
   Click OK.

**Controlling Event Start Times in an Event Chain**

You can control the start times for each event in the event chain by setting the intervals between events. Events within event chains can be set up to occur concurrently or sequentially. The use of start and end times enables you to have better control over when events can be scheduled.

There are many ways to configure event start times. You can use a start time or end time to schedule each event in an event chain. You can apply the interval time to the event start time, end time, or a combination of start/end time.

**About Event Start Times**

When you use start time to configure event start times, the application adds the interval time to the start time of the previous event.

**Formula for Setting Up Event Start Times Using Start Time**

Previous event start time + interval = event start time

**Example:**

8:00 (event 1 start time) + 30 mins. (interval) = 8:30 (event 2 start time)
8:30 (event 2 start time) + 0 mins. (interval) = 8:30 (event 3 start time)
8:30 (event 3 start time) + 30 mins. (interval) = 9:00 (event 4 start time)

**About Event End Times**

When using end time to determine event start times, the application adds the interval time to the end time of the previous event. The event end time is determined by the duration of the event. Using end time allows you to add time between events to allow enough time for room availability, test results, etc.

**Formulas for Setting Up Event Start Times Using End Time**

Previous event start time + duration = event end time

Event end time + interval = event start time

**Example:**

8:00 (event 1 start time) + 30 mins. (duration) = 8:30 (event 1 end time)
8:30 (event 1 end time) + 10 mins. (interval) = 8:40 (event 2 start time)
8:40 (event 2 start time) + 15 mins. (duration) = 8:55 (event 2 end time)
8:55 (event 2 end time) + 0 mins. (interval) = 8:55 (event 3 start time)
8:55 (event 3 start time) + 15 mins. (duration) = 9:10 (event 3 end time)
9:10 (event 3 end time) + 15 mins. (interval) = 9:25 (event 4 start time)

**Setting Up Event Chain Intervals**

The Event chain interval sets the time between the previous and next events in the event chain. The intervals specify when the next event in the chain is to start. For example, you can have a two-event chain with an interval of 15 minutes applied to the end of the first event. The start of the second event in the chain equals the end of the first event in the chain plus the interval. The intervals you set only apply to Appointment Search Ahead.

**To add or modify Event Chain intervals:**

1. In the *Scheduling Administration* dialog box, click the *Event Chains* tab.
2. Double-click on the event chain to open it.
The **Interval** column indicates the time between events. 
The **Applied To** column field designates whether the interval applies to the start or end time.

3. If you want to view the event start date and time in Appointment Details, click the **Allow Events to Span Multiple Days** check box on the **Edit Event Chain** dialog box.

4. In the **Member Events** list, right-click the event to modify, and then click **Open**. The **Event Chain Interval** dialog box displays.

5. Under **Time interval before the next event**, define the minimum amount of time (days, hours, or minutes) that must pass before the next event in the chain can be scheduled.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interval</td>
<td>Use the up and down arrows to enter how much time there is before the next event. The intervals you can select from are determined by the practice default time interval settings.</td>
</tr>
<tr>
<td>Scale</td>
<td>Select Days, Hours, or Minutes. Days is only available when you select the <strong>Allow events to span multiple days</strong> check box on the <strong>Add/Edit Event Chain</strong> dialog box. There is no limit to the number of Hours or Minutes you can set. For example: If you want to define an event interval in hours that spans two days, you can enter 48 hours. Likewise, you can enter 180 minutes to define an event interval that spans three hours.</td>
</tr>
<tr>
<td>Apply To</td>
<td>Select whether the interval applies to the <strong>Appt Date</strong>, <strong>Start Time</strong>, or <strong>End Time</strong>. When the scale is days, then the <strong>Apply To</strong> field defaults to the value of <strong>Appt Date</strong> and cannot be changed. When the scale is hours or minutes, then only <strong>End Time</strong> or <strong>Start Time</strong> can be selected in the <strong>Apply To</strong> field.</td>
</tr>
</tbody>
</table>
6 Under **Schedule the next event within**, do one of the following:
   - Use the **Interval** and **Scale** fields to define the span of time that the system should consider eligible to book the subsequent appointment. This span of time occurs after you set the options under **Time interval before the next event**.
   - If you select the **Schedule Next Event Immediately After Interval** check box, then the **Interval** and **Scale** fields within the same frame are disabled and the next appointment must occur immediately after the interval.

7 Click **OK**.

**Note:** From the Appointment Book, you can override the event start time. To do so, double-click on the event in the event chain to override and enter the desired date and time for the event in the pop-up dialog box.

### Clearing an Event Chain Interval

To remove an interval setting from an event in an event chain:
   - Right-click on the event on the **Add/Edit Event Chain** dialog box, and then select **Clear Interval**.

### Setting Up the Event Duration Override

You can override the duration of any event in an event chain that displays in the **Appointment Search Ahead** dialog box. You must enable the override for the specific event chain.

To override the duration of an event chain event:
1. Access the **Edit Event Chains** dialog box (see "**Event Chains Tab**" on page 31).
2. Double-click on the event chain to open it.
3. Select the **Allow Event Duration Override** check box.

4 Click **OK**.
Categories Tab

You can color-code your appointment book by assigning colors to blocks of time called categories. At a glance you can see which appointments are scheduled or can be scheduled.

To set up a category:

1. In the Scheduling Administration dialog box, click the Event Chains tab.
2. Click the Open Menu button, and then click New.
   The Add Category dialog box displays.
3. Enter the category description.
   The description displays in the upper right corner of the Appointment Scheduler if you also select Show category and location tooltips on appointment book in Appointment Scheduling Preferences, General tab under User Preferences.
4. To select the background color assigned to this category, click the Open Record button under Background Color.
The Color dialog box displays.

5. Select a color, then click OK.

   **Note:** Do not select the following colors:
   
   - White – it is the default color for unassigned (no category assigned) time slots.
   - Red – it is the default color for exceptions to the schedule.
   - Gray – it is the color for time slot separations.

6. To select the foreground color on the Add/Edit Category dialog box, click the Open Record button under Foreground Color, then repeat the previous step.

   The Color dialog box closes.

7. On the Add/Edit Category dialog box, use the Add and Remove arrows to associate events to the category.

8. If you do not want appointments to be scheduled in this category, select the Prevent time slots in this category from being returned in Appointment Search Results check box.

   **Note:** Users can override this restriction if they have the Override Category Conflicts security right in the System Administrator application under Rights > Operations > Scheduling.

9. Click OK.

**Templates**

A template determines the basic structure for a document. Every document created on a computer is based on some type of template. Assigning a template to a resource or an event not only streamlines the scheduling process, but actually can help reduce some of the guess work. By creating scheduling templates, both daily and weekly, you can take some of the guess work out of scheduling and reduce conflicts and overbooking.

For example, if Dr. Jones is never available in the office on Wednesday afternoons due to surgery, you can create a template that automatically prevents anyone from scheduling office appointments that include him on Wednesday afternoons. If you have a staff meeting each Tuesday at noon, you can include that in your scheduling templates as well. Using your categories as a starting point, build your scheduling templates to match and meet the needs of your categories.
**Weekly Templates Tab**

The **Weekly Templates** enable you to schedule resources based on your categories. The template can be for one specific resource or shared by many resources with the same weekly schedule.

![Weekly Templates Tab](image)

**Creating a Weekly Template**

To create a weekly template:

1. In the **Scheduling Administration** dialog box, click the **Weekly Templates** tab.
2. Click the **Open Menu** button and select **New**.
3 In the **Template** field, type the a name that describes the template. This field is required.

4 To associate a color with the template, select a color by clicking the **Open Record** button in the **Associated Color** field.

   **Note:** Do not select the following colors:
   - White – it is the default color for unassigned (no category assigned) time slots.
   - Red – it is the default color for exceptions to the schedule.
   - Gray – it is the color for time slot separations.

5 If the **Time Interval** field displays and this template is new, you can change the default time interval for the time slots. You can only change the interval for new templates.

   The template time slots update with the new intervals. Any information directly affected by the new interval, such as the category and location, is removed and you must reenter it.

   **Note:** This field only displays when the **Allow interval overrides** check box is selected in the Appt Scheduling Practice Preferences.

6 Select a category to apply to a time period from the **Category** list.

   The **Color** field automatically displays the category color.

7 In the **Service Location** field, select the location where the service is to be performed.

   The **Color** field automatically displays the color selected for that location in the Practice master file.

8 To select a time slot, right-click on a row for the appropriate time, and then select one of the following options:

<table>
<thead>
<tr>
<th>Menu Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Category</td>
<td>Inserts the category of appointment that can be scheduled during the time slot.</td>
</tr>
</tbody>
</table>
### Menu Selection

<table>
<thead>
<tr>
<th>Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply Location</strong></td>
<td>Inserts the location of appointment that can be scheduled during the time slot.</td>
</tr>
<tr>
<td><strong>Apply Both Category/Location</strong></td>
<td>Inserts the category and location of appointment that can be scheduled during the time slot.</td>
</tr>
<tr>
<td><strong>Apply Daily Template</strong></td>
<td>Inserts a daily template for a day in a weekly template.</td>
</tr>
<tr>
<td><strong>Clear Selection</strong></td>
<td>Clears the selection of any previous or current selections.</td>
</tr>
<tr>
<td><strong>Clear Week</strong></td>
<td>Clears the entire week of any previous or current selections.</td>
</tr>
<tr>
<td><strong>Decrease Overbooking</strong></td>
<td>Restricts this time slot from overbooking.</td>
</tr>
<tr>
<td><strong>Increase Overbooking</strong></td>
<td>Allows this time slot to be overbooked.</td>
</tr>
</tbody>
</table>

Note: You can only select this option if you selected a category.

Note: You can only select this option if you selected a location.

Note: You can only select this option if you selected a category and a location.

---

9. Repeat the steps 5 through 8 for applicable categories and appropriate time slots.

10. Enter any notes that describe the use or special circumstances that apply to the template in the Notes field and then click OK.

---

**Daily Templates Tab**

The Daily Templates tab enables you to set up daily templates to schedule resources based on the already-established categories.
Creating a Daily Template

To create a daily template:

1. In the Scheduling Administration dialog box, click the Daily Templates tab.
2. Click the Open Menu button and select New.
   The Add Template dialog box displays.

3. In the Template field, type the a name that describes the template. This field is required.

4. To associate a color with the template, select a color by clicking the Open Record button in the Associated Color field.
   Note: Do not select the following colors:
   - White – it is the default color for unassigned (no category assigned) time slots.
   - Red – it is the default color for exceptions to the schedule.
   - Gray – it is the color for time slot separations.

5. If the Time Interval field displays and this template is new, you can change the default time interval for the time slots. You can only change the interval for new templates.
   The template time slots update with the new intervals. Any information directly affected by the new interval, such as the category and location, is removed and you must reenter it.
   Note: This field only displays when the Allow interval overrides check box is selected in the Appt Scheduling Practice Preferences.

6. Select a category to apply to a time period from the Category list.
   The Color field automatically displays the category color.

7. In the Service Location field, select the location where the service is to be performed.
The **Color** field automatically displays the color selected for that location in the Practice master file.

8 To select a time slot, right-click on a row for the appropriate time, and then select one of the following options:

<table>
<thead>
<tr>
<th>Menu Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Category</td>
<td>Inserts the category of appointment that can be scheduled during the time slot.</td>
</tr>
<tr>
<td>Clear Selection</td>
<td>Clears the selection of any previous or current selections.</td>
</tr>
<tr>
<td>Clear Day</td>
<td>Clears the entire day of any previous or current selections.</td>
</tr>
<tr>
<td>Decrease Overbooking</td>
<td>Restricts this time slot from overbooking.</td>
</tr>
<tr>
<td>Increase Overbooking</td>
<td>Allows this time slot to be overbooked.</td>
</tr>
</tbody>
</table>

9 Repeat steps 6 through 8 for all of the applicable categories and time slots.

10 In the **Notes** field enter any notes to describe the use or special circumstances applicable to the template and click **OK**.

**Working with Templates**

Now that you have set up all your templates, assign them to the appropriate resources. Assigning them to resources enables you to actual control your practice's scheduling efficiently. You can also see more clearly where you may need to make so adjustments to your templates, or create some new ones to cover not previously thought of areas.

**Assigning Templates to a Resource**

You can assign a daily template or a weekly template to a resource, but you cannot assign both.

**To assign a template to a resource:**

1 From the **Resources** tab, double-click a row in the **Resource** column.
The Edit Resource dialog box displays the selected resource.

2 In the Templates section, select either Daily Templates or Weekly Templates.

**Important:** To enable the Weekly Templates button for existing resources, all weekly templates assigned for any part of the calendar must be cleared from the calendar.

3 Click the Templates button.

The Assign Weekly Templates or Assign Daily Templates window displays.

4 Select the applicable weeks or days to apply the template to the calendar.

If you want to apply the template to the whole year or most of the year, click on the year at the top right corner of the calendar. This automatically selects all of the weeks in the year.

**Note:** To remove days or weeks, click the selected days or weeks again.

5 Select the applicable template.

6 Click the Apply button.
Note: You can apply multiple templates to one resource’s calendar.

7 Click the Close button.

The applied template and its expiration date display on the Resources tab.

**Designating Exceptions for a Template**

You can designate exceptions for a template. For example, closing the office for a holiday would be an exception to the template.

**To apply exceptions to a template:**

1 On the Resources tab, double-click the appropriate resource to open it.

2 Ensure that either Daily or Weekly Templates is selected in the Template section, and then click the Template button.

3 Select the applicable weeks or days to apply the template exception to the calendar, right-click, and then select Exception.

4 Depending on whether Daily or Weekly Templates was selected in the previous step, select the applicable days or weeks to apply the template exception to the calendar.

Note: To remove days or weeks, click the selected days or weeks again.

5 Right-click on the day or week that the exception will occur and then click Exception.
The Template Exception dialog box displays.

6 Make the changes for the exception by using the same basic steps you use to create templates.
7 Click OK.

The week now displays in red in the Assign Daily/Weekly Template window.

Editing a Template

You can edit an existing template or a template you are in the process of creating or after you create it. At any time while working on a template, you can right-click in the template and select from the pop-up menu. Refer to Creating a Daily Template (on page 42) or Creating a Weekly Template for further explanation about editing templates.

Printing a Template

You can print a daily or weekly template to your printer. The template prints just as it displays on the Edit Template dialog box and covers the hours that are set up.

To print a template:
1 In the Scheduling Administration dialog box, click the Daily Templates or Weekly Templates tab.
2 Double-click the template in the list
   OR
   Right-click the template, then click Open.
   The Edit Template dialog box displays.
3 Click Print.
   The template prints with the template name at the top of the printout and the current date at the bottom.

Assigning Multiple Templates to a Resource

You can assign multiple templates to a resource to provide more flexibility in scheduling appointments.
To assign multiple templates to a resource:

1. From the Assign Weekly/Daily Template window under the Resources tab, select the weeks or days that you want to assign a different template to.

2. Click the Multiple button.

   The Multiple Templates dialog box displays. Weeks and days with already applied templates display as well.

3. Select the templates that you want to apply to the resource for the time period selected.

4. Click OK.

**Copying Scheduling Templates**

You can copy an existing scheduling template and use it for another resource while making only minor modifications to the template setup. When you copy a scheduling template, all the information associated with the original template will be copied including category information, location information, and appointment overbooking information.

For example, if there is an existing scheduling template for Dr. (X) and Dr. (Y) has a schedule that is similar, you can copy the scheduling template for Dr. (X) and make the necessary modifications to meet the scheduling needs of Dr. (Y) without having to create a new template.
To copy an existing scheduling template:

1. In the Scheduling Administration dialog box, click the Weekly Templates or Daily Templates tab.

2. Select a template that you want to copy from the list.

3. Right-click and select the Copy option.

   The Template Copy dialog box displays.

4. Enter the name of the new scheduling template in the Enter new template name field.

5. Click OK.

   You can now make the applicable modifications to the new template.
CHAPTER 3

Appointment Book

The NextGen Practice Management Appointment Book provides a visual overview of the appointment schedule. You can use the Appointment Book to create, change, or cancel patient appointments. You can view appointments by day, week or month.

Appointment Book Toolbar

You can use the Appointment Book toolbar to work efficiently with the appointment schedules.

The table below explains the buttons found on the Appointment Book toolbar.

<table>
<thead>
<tr>
<th>Button</th>
<th>Name of Button</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Change Dates</td>
</tr>
<tr>
<td></td>
<td>Go To Today</td>
</tr>
<tr>
<td>Button</td>
<td>Name of Button</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Previous Day</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Next Day</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Change Resources</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Change Multi-View Group</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Change Multi-View Group Location</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Change Multi-View Group Location</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Add Appointment</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Edit Appointment</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Delete Appointment</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Make Recurring</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Refresh</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Reset Desktop</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Hide Patient Names</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Preferences</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Scheduling Admin</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Appointment Search</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Appointment Waitlist</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>View Chart</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Charge Posting</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Claim Edits</td>
</tr>
<tr>
<td><img src="image" alt="Button" /></td>
<td>Exit</td>
</tr>
</tbody>
</table>
**Appointment Statuses**

Each appointment in the Appointment Book can have one of the following statuses at a given time:

- **Canceled** - The appointment has been canceled.
- **Expected** - There is no indication that the patient won't show up as scheduled.
- **Kept** - The appointment that has gone through the Checkin/Create Encounter autoflow process, which automatically selects the *Appointment Kept* check-box.

  - OR -
  - The appointment was opened and the *Appointment Kept* check-box was manually selected.
- **No Show** - The appointment status automatically changes to *No Show* after midnight of the scheduled day if the *Appointment Kept* check box has not been checked.
- **Pending** - An appointment that has been attached to a NextGen Practice Management email that was sent to a user requesting that they cancel, delete, or reschedule the appointment, has a status of *Pending* until the requested action is completed.

**Category and Location Tooltips**

When you select the category and location tooltips option, the scheduling overbooking information for the time-slot where your mouse is pointed displays alongside the cursor. This information also displays simultaneously in the top right corner of the appointment book. This feature displays in the Daily view, Weekly Schedule view and Multi-view.

The numbers in the parentheses indicate that one of three available appointments (an overbooking limit of three) for the selected time slot has been filled.

The tooltips display box displays the type of encounter and the number of available appointment slots that have been filled. The location, if applicable, displays with the pointer.

![Tooltip Example](image)

**Note:** To display the tooltips, you must select the Show category and location tooltips on the appointment book check box on the Appointment Scheduling Preferences dialog box. In addition, the tooltips only display when the number of appointments is one or greater and less than the overbooking limit. Also, the scheduling overbooking number must be greater than one.

In all three appointment book views, if the scheduling overbooking number is greater than "1", the tooltips display box and the Category field in the upper right corner of the appointment book will show "x" out of "y" appointments are available for that time slot, along with the appointment category and location. If the scheduling overbooking limit has been reached for that time slot, the "x" out of "y" listing does not display when the pointer is placed over the appointment.
However, even if the scheduling overbooking limit has been reached, the location and category continue to display on both the tooltips display box and the top right corner of the appointment book in the Daily, the Multi-view, and the Weekly Schedule views.

**Viewing Appointment Schedules**

Use the Appointment Book to view the appointment schedule. To access the Appointment Book:

- Click the **ApptBook** button on the main tool bar
- or -
- Select **Tasks** menu > **Appt Book**

---

**Daily View**

The Daily View presents a graphical display of the schedule for a single Resource for a single day. You can use the Daily View to quickly find an available time slot in the resource's schedule. Double booked time slots display the appointments side by side. If more than two appointments are booked in a slot, the user must scroll to the right to display the additional appointment(s).

Appointments that have been checked-in display with a check mark symbol. Additional symbols include that display for appointments in the Daily View are confirmed appointment, recurring appointment, and the patient's sex.
You can resize the Daily View's appointment columns. Only 3 appointments can be displayed side-by-side.

In the Daily View, the Next Day and Previous Day buttons move you from day to day.

**Viewing Appointments for a Week**

You can view appointments for the week by using one of the following Appointment Book views:

- Weekly List (see "Weekly List View" on page 53)
- Weekly Schedule (see "Weekly Schedule View" on page 54)

**Weekly List View**

The Weekly List view displays the schedule for a single resource for an entire week, with each day being a block. Scheduled appointments display in a list format within the daily blocks. Double booked time slots display the appointments above/below the other. Open time slots do not display. Only booked time slots display. Categories and locations do not display.

In the Weekly List View, the Next Week and Previous Week buttons move you from week to week.
**Weekly Schedule View**

The **Weekly Schedule** view presents a graphical display of the Monday – Friday schedule for a single Resource. You can view Saturday and Sunday by scrolling left and right. Each column represent one day. The time frames are color-coded according to category. Double booked time slots are indicated by a drop down arrow.

The appointment information shown includes the description of the appointment (usually the patient’s name), and the short description of the event. You can resize the day columns on the Weekly Schedule view.

**Note:** Names in *italics* are awaiting some form of action.
**Monthly View**

The Monthly View displays the monthly schedule for a single resource. The total number of expected, kept, pending, and no-show appointments display for each day of the month. Double clicking a date opens that day’s schedule in Daily View.

You can use the Monthly View to obtain a quick overview of the resource's schedule for a month. You can add appointments from the Monthly View, but you cannot modify or delete appointments from this view.

Dates and appointments displayed in:

- Red indicates that appointments have been scheduled on that date.
- Blue shows the day with which you are currently working.

Each day displays the following information:

- The number of appointments booked
- The number of appointment slots booked
- The number of open appointment slots
- The daily utilization percentage (displayed as a progress bar in which:
  - Red = over utilized
  - Green = 100% utilized
  - Orange = under utilized

**Note:** The Monthly View automatically opens to the first resource selected on the Multi-View list of the User Appointment Scheduling Preferences. You can change the resource that displays first by changing the order of your Multi-View list.

**Multi-View**

The Multi-View displays a single day’s schedule for multiple resources. Each column represents one resource. The time frames are color-coded according to category and service location.
You can change the location that the Multi-View is displaying information for by clicking the Change Multi View Location button on the toolbar.

The appointment information displayed includes a description of the appointment (usually the patient’s name), and the short description of the event. Names displayed in *italics* are awaiting some form of action. You can resize the resource columns on the Multi-view schedule.

**Note:** If you only have one location in your practice. The location field in the top-right corner of your Appointment Book, Multi View tab, does not display a location. If you have multiple locations, you can change the location that the Multi-View displays by clicking the Change Multi-View Location button and selecting the location from the list of locations.

### “On the Fly” Multi-View Group

You can use “On-the-fly” multi-view groups to quickly display a select set of resources side by side. The selected resources remain in the view until:

- another “on-the-fly” group is created
- a different multi-view group is selected (from the change multi-view group or multi-view location icons
- the appointment book is closed

**To create an “on-the-fly” Multi-View Group:**

1. Right-click anywhere on the current Multi-View display.
2. Select Multi-View Group from the shortcut menu.
3. Select the resources that you want to view.
4. Click OK.

### Workflow Status Color for Appointment Text

When the appointment schedule user preference, *Display appointment text in Workflow status color*, has been selected, the appointment text becomes the color of the Workflow status.
Printing Insurance Card from the Appointment Book

To print the patient's insurance card from the patient's appointment in the Appointment Book:
1. Right-click on the patient's appointment in the Appointment Book ledger.
2. From the short-cut menu, select Print > Insurance Cards.
This page is intentionally left blank.
This section provides information on creating, editing, rescheduling and removing appointments.

**Adding a New Appointment**

To add a new appointment to the schedule:

1. Click the **ApptBook** button on the NextGen Practice Management menu. The Appointment Book displays.

2. In the **Daily, Weekly Schedule** or **Multi-View** view, select the time slot for which you want to create the appointment.

3. Click the **Add Appt** button on the Appointment Book tool bar. 
   - or -
   Right-click on the time slot and select **New** from the short-cut menu.
The Add Appointment dialog box displays. Note: When you resize and reposition the Add/Edit Appointment dialog box, the application remembers the changes for future displays.

4 Complete the fields described below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date and Time</td>
<td>Select the date and time of the appointment or accept the default date and time.</td>
</tr>
<tr>
<td>Event/Event Chain</td>
<td>Select an event or event chain from the drop-down list. This field is required.</td>
</tr>
<tr>
<td>Duration</td>
<td>The duration time that displays in the Duration field is disabled when an event chain is selected. The application automatically recalculates the duration time when resources with override duration times are selected. The time displaying in the Duration field cannot be changed manually.</td>
</tr>
<tr>
<td>Show all events</td>
<td>Select this option to display all the available events in the Event/Event Chain list.</td>
</tr>
<tr>
<td>Resources</td>
<td>Select the resource(s) for the appointment in the Resource list.</td>
</tr>
<tr>
<td></td>
<td>When a resource is selected for this event, the default duration time changes only under the following conditions:</td>
</tr>
<tr>
<td></td>
<td>▪ If one of the selected resources has an override duration time. For example, if Dr. Adams is selected, the default duration time automatically changes to 60 minutes.</td>
</tr>
<tr>
<td></td>
<td>▪ If more than one resource has override duration times, then the default duration time automatically changes to reflect the resource with the greatest duration time.</td>
</tr>
<tr>
<td>Service Location</td>
<td>Select the service location for the appointment from the drop-down list of locations. This field is required.</td>
</tr>
<tr>
<td>Description</td>
<td>You can enter a brief description for the appointment.</td>
</tr>
<tr>
<td>Procedure with Resident</td>
<td>You can designate that this appointment is to be conducted by a resident.</td>
</tr>
<tr>
<td>Appointment Kept</td>
<td>You can indicate that the patient showed up and kept the appointment by clicking this check box.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Confirmed</td>
<td>You can indicated that the patient has confirmed the appointment by clicking this check box.</td>
</tr>
<tr>
<td>User-Defined fields</td>
<td>The fields that display in this section of the Add Appointment dialog box are fields that are created and named in the Enterprise Preferences for the practice. The information that you enter into these user-defined fields is decided by your practice.</td>
</tr>
</tbody>
</table>

5 To assign a patient to the appointment, click the **Open Menu** button of the *Add Appointment* dialog box and select one of the following options:

- **Access Active Patient** - If there is currently a patient set as the active patient in NextGen Practice Management, then you can select this option to assign that patient to the appointment.
- **Access Previous Patient** - Select this option to assign the most recent patient who was assigned to an appointment to the new appointment. You can also press CTRL+SHIFT+F9 to insert the previous patient into the appointment.
- **Lookup** - Select this option to locate in the system the patient whom you want to assign to the appointment. When you select the **Lookup** option, the *People Lookup* dialog box displays.

![People Lookup dialog box](image)

You can use the *People Lookup* dialog box to locate and select the patient you want to assign to the appointment. Double-click on the patient in the search results list to assign the patient to the appointment.

If the patient is new and has no existing record in the system, click the **New** button on the *People Lookup* dialog box and complete the information fields on the *Add Person Information* dialog box.

**Note:** If you select the wrong patient, you can click on the **Open Menu** button again and select **Clear Patient**.

6 From the drop-down lists, select the rendering and referring physicians in the **Rendering Physician** and **Referring Physician** fields and click **OK**.
The **Appointment Confirmation** dialog box displays.

The **Appointment Confirmation** dialog box displays only once. If you click the **Print** button, you can print one or more of the following items for the appointment:

- Appointment Reminder Letter
- Fee Ticket
- Form Template
- Label Template
- Patient Data Sheet
- Patient Data Sheet Detail

7. Click **Close** to complete the creation of the appointment. The appointment now displays in the Appointment Book.

**Scheduling Event Chains**

Multiple events strung together are called an **event chain**. Each individual event within an event chain is called an **event chain member**. You can schedule the events in a "best-fit" manner or in a defined sequence.

**Note:** You can set up whether or not an event chain **must** be scheduled sequentially in the **Scheduling Administration** (**Event Chains** tab).

**To schedule an event chain:**

1. Select the applicable event chain. Event chains are designated by the chain **»** icon in the **Event** field of the **Add Appointment** dialog box.

After you select the event chain, the duration displays automatically. It represents all the event members' default times.

- You cannot change the duration time.
Once you select a resource, if that resource has a duration override assigned to it, NextGen EPM recalculates the event chain duration automatically.

2 You must schedule a resource for each event within the chain.

**Note:** You must select at least one resource for each event member. If you need to change the time for this event member, select the resource first, and then change the event time. Otherwise, all event member default to the first event member's date and time.

If conflicts are found, and the event chain does not have to be scheduled in a sequential manner, a message warning informing you of a conflict displays.

For more detailed instructions about scheduling and editing an event chain for multiple day appointments, see Scheduling an Event Chain over Multiple Days.

3 Click **Yes** to re-sequence the events, or **No** to leave the events in their original order.

4 Complete the remainder of the Add Appointment fields to finish scheduling the appointment.

5 Click **OK**.

### Scheduling an Event Chain over Multiple Days

Event chains can include any type of event member already created. An event chain, for a pre-employment physical, for example, may require lab work, drug screening, x-rays, etc. that may or may not be able to be completed on the same day. Some of these items may need to be completed before others. Therefore, you may have to schedule some of the events in the chain for different days.

**Note:** For more information about setting up events or event chains, refer to the *NextGen® Ambulatory Products Administrator Guide*.

To schedule appointments for multiple days in an event chain:

1 Click the **Appt Book** button to launch the Appointment Book and highlight the time slot.

2 Click the **Add Appt** button.

3 Select the event chain to schedule.

The date and time display in the **Resources** field for each event in the event chain, except for the first event. The date for the first event displays in the **Date** and **Time** fields in Appointment Details.

4 Double-click on the event to schedule for a date other than the one EPM scheduled.

   › Or right-click and select **Change Date Time** from the short-cut menu.

   The **Add Appointment** dialog box displays.

   **Note:** To change the time for this event member, select the resource first, and then change the event time. Otherwise, all event member default to the first event member's date and time.

5 Click the calendar icon to select a new date or enter the date you want to schedule this event for in the date field.

6 Select a new time for this event in the time field and click **OK**.

   The new date and time display next to the event in the **Resource** field.

7 Complete the rest of the information necessary to schedule the appointment and click **OK**.
Creating an Event Chain "On-the-Fly"

If an event chain that you need does not exist when you are scheduling an appointment, you can create an event chain 'on-the-fly' during the appointment scheduling process.

To create an event chain on-the-fly:

1. Click the Open Menu button next to the Event field on either the Appointment Search Ahead or the Add Appointment dialog box and select Create Event Chain from the drop-down menu.

The On-The-Fly Event Chain dialog box displays.

2. Select events from the Available Events list and use the blue arrow to move them to the Member Events list.

3. Enter a name for the event chain you've created in the Event Chain field and an abbreviated name in the Short field.

4. Configure the available options for the event chain. The options are described below:

<table>
<thead>
<tr>
<th>Event Chain Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Sequence Matters</td>
<td>Indicate whether or not the sequence of the events in the chain is significant.</td>
</tr>
<tr>
<td>Allow Events to Span Multiple Days</td>
<td>Indicate if it is acceptable for the events in the chain to span more than one day.</td>
</tr>
<tr>
<td>Linked Events</td>
<td>Indicate if the events in the chain are linked.</td>
</tr>
<tr>
<td>Allow Event Duration Override</td>
<td>Indicate if you want users to be able to override the pre-configured duration of the events.</td>
</tr>
<tr>
<td>Add this Event to Scheduling Admin</td>
<td>Indicate if you want to add the on-the-fly event chain to the available events in Scheduling Administration/</td>
</tr>
</tbody>
</table>

5. Click OK.
**Rescheduling an Event Chain**

To reschedule an event chain:

1. Right-click the appointment in the Appointment Book and select `Reschedule Event Chain` from the shortcut menu.

   ![Reschedule Event Chain]

   The *Appointment Search Ahead* dialog box displays. The dialog box is pre-populated with all the information from the Event Chain (resources, location, etc.) and the application has performed the search.

   ![Appointment Search Ahead]

2. Select a new appointment time.
Making an Appointment Recurring

You can set an appointment to recur periodically.

To make an appointment recurring:

1. Click on an appointment in either the Daily, the Weekly List, the Weekly Schedule, or the Multi-View view, and access the Recurring Appointment dialog box using one of the following methods:
   - Click the Make Recurring button on the Appointment Book tool bar.
   - Right-click on the appointment and select Make Recurring from the shortcut menu.

   The Recurring Appointment dialog box displays.

2. Select the date for the next appointment by clicking the calendar icon in the Next Occurrence field.

3. Select one of the following options:
   - End after x Occurrences - Automatically schedules recurring appointments based on the number of occurrences.
   - End on - Automatically schedules recurring appointments based on an end date.

4. In the Occurs section, select either a Daily, Weekly, Monthly, or Yearly occurrence frequency.

5. Enter a detailed configuration for the occurrence frequency you selected. Example: If you selected Monthly, indicate the number of months and the day of each appointment occurrence.

6. Click the Check for Conflicting Categories check box to display a warning when a conflict is found. If this check box is not checked, the appointment is scheduled regardless of the category established in the template.

7. Click the Exclude Holidays check box to exclude designated holidays for your practice when scheduling daily recurring appointments.

8. Click OK.
**Attaching Email to an Appointment**

If you want to ask someone to modify or delete an appointment, you can attach the appointment to an e-mail so that you do not have to type in all the pertinent information. You can attach mail to appointments in all views of the appointment book, except for Monthly and Yearly. When you send an e-mail with an Action Request, a copy is automatically put into your Pending folder. You can always check this folder to see what issues are outstanding.

When the Recipient takes action on the appointment through the **Edit Appointment** button, a confirmation is loaded into the **Confirmation** field, and automatically sends a "confirmation" to the sender. When a confirmation has been "received", the e-mail is removed from the sender's Pending folder. The message that is stored in the Sent folder then has the Confirmation field filled in. If the e-mail was originally sent to multiple recipients, the system accepts the first confirmation. The e-mail for the rest of the recipients is moved to the Trash folder so that they do not take action on it.

**To attach an appointment to an email message:**

1. Right-click the appointment and select **Attach to Mail** from the shortcut menu. The **New Message** dialog box displays.

2. Select the action that you want performed on the appointment from the **Action Required** field.

3. Type in the text message you want to include in the email.

4. On the **Properties** tab set the priority for the message.

5. Click the **Read Receipt** check box if you want to be notified when the email recipients have read the message.
6 Click the **Address Book** button to select the users whom you want to receive the email message. The Address Book dialog box displays.

![Address Book dialog box](image)

7 Use the blue arrow buttons to move the recipients you want from the Available Users and Groups list on the left to the Message Recipients list on the right.

8 Click the **Send Message** button to send the email message.

### Copying an Appointment

You can create a new appointment within the Appointment Book by copying an existing appointment and pasting it into another time slot. After you copy an existing appointment, you can modify it to reflect the new appointment's requirements.

**Caution:** Do not copy appointments that have been kept or that have encounters attached to them. This creates errors in your database.

**To copy an appointment:**

1 Highlight the appointment you want to copy from the appointment book or list.
2 Right-click on the appointment and select **Copy** from the short-cut menu.
3 Right-click in the Appointment Book time slot to which you want to add the copied appointment and select **Paste** from the short-cut menu.

**Note:** You cannot paste an appointment into the Monthly View of the Appointment Book.

4 Edit the copied appointment as needed.
**Attaching Case Authorizations to Appointments**

To attach a case authorization to an appointment:

1. Open the appointment.
2. Click the Open Menu button that is located to the right of the Case Description and Date fields and select Open Existing Case.
3. Select a case that has an authorization defined for it.

**Adjusting the Add Appointment Dialog Box**

You can move or resize the Add Appointment dialog box. You can:

- Resize in the lower right corner to eliminate the scroll bars
- Resize right side of window
- Resize side tab columns
- Move window to dock form
- Changes are saved for the user

**Automatically Applying Primary Care Physician to Appointments**

You can configure the NextGen EPM application to automatically assign the patient's primary care physician from the patient chart demographics as the rendering physician for newly created appointments by checking the Default rendering phys from patient PCP if resource is not linked check box that is located on the Appt Scheduling tab of Practice Preferences.

The application applies the primary care physician as the rendering physician when you create a new appointment and the selected "non-physician" resource does not have a linked physician.

**Marking Appointments as Kept or Canceled**

To mark as appointment as either Kept or Canceled:

1. Access the appointment in either the Appointment Book or by using the Appointment Lookup dialog.
2. Right-click the appointment.
A drop-down menu displays.

3 Select either the **Mark as Kept** or the **Mark as Canceled** option from the drop-down menu to indicate the status of the appointment.

### Setting an Appointment's Workflow Status

When you right-click an appointment, the new **Workflow Status** menu item enables you to select from the list of available statuses. A check mark displays next to the appointment's current status. You can set the workflow status of an appointment in the:

- Appointment Book
- *Appointment Lookup* dialog box > **Appointment List**.

### Changing Appointments

You can edit the following appointment-related information:

- Appointment details (time, event, resources, etc.)
- The patient
- Patient demographic information (address, phone number, etc.)

**Note:** You can also change the order of the columns in all tabs of the **Appointment Detail** dialog. The application remembers the column changes that you make.

### Editing Appointment Details

**To edit appointment details:**

1. Open the appointment.
   - The **Edit Appointment** dialog box displays.

2. Make the necessary changes to the appointment in the **Edit Appointment** dialog box.

3. Click **OK** when you finish editing the appointment.
Changing the Patient Assigned to an Appointment

To change the patient assigned to an appointment:
1. Open the appointment.
2. Clear the Linked check box on the Edit Appointment dialog box.

The application asks you to confirm that you want to delete the Person link to the appointment.
3. Click OK to confirm that you want to delete the Person link.
4. Click the Open Menu button and select the Lookup option.
   The application displays the People Lookup dialog box.
5. Locate a different patient record or click New and enter information for a new patient.
6. Click OK.

Editing Appointment Patient Demographic Information

To edit demographic information for the patient:
1. Open the appointment.
2. Clear the Linked check box on the Edit Appointment dialog box.
3. Click OK to confirm the removal of the link to the database record.
   The patient demographic fields become available for edit.
4. Update the patient information.
5. Click OK.
6. Select a reason for the change and click OK.

Rescheduling Appointments

You can reschedule an appointment by using one of the following methods:

<table>
<thead>
<tr>
<th>Reschedule Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open and edit</td>
<td>Open the appointment and edit the Date and Time fields to reflect the new appointment time.</td>
</tr>
</tbody>
</table>
### Reschedule Method | Description
--- | ---
**Cut and paste** | Cut the appointment entry in one of the Appointment Book views and paste it into a different date and/or time slot. This method retains the original appointment's detail information and event(s).

*Note:* When you cut and paste an appointment with a different resource and destination service location, the destination service location defaults to the **Service Location** field on the *Edit Appointment* dialog box. This works from the Daily, Weekly Schedule, and Multi-view tabs of the appointment book.

*Caution:* You should not cut and paste appointments that have been kept or that have encounters attached to them. This can create errors in your database.

**Drag and drop** | You can drag and drop appointments in the Daily and the Weekly List views only.

To drag and drop an appointment:

a) Click on the appointment entry.
b) While holding down the right-mouse button, drag the appointment entry to the new time slot.
c) Release the right-mouse button.

**Stretch** | You can stretch an appointment entry in the Daily View only. You can click on an appointment entry and stretch its size to cover additional time periods. This extends the duration of an appointment.

*Note:* When you reschedule an appointment that is linked to other appointments (either manually or as part of an event chain), the application displays a message indicating that other appointments may need to be rescheduled as well.

---

**Cutting and Pasting Multiple Appointments**

When you perform an Appointment Lookup and the application returns a list of appointments that match your search criteria, you can select multiple appointments in the appointment list and cut and paste them to another date and time in the Appointment Book.

**To cut the selected appointments in the Appointment Lookup list:**

1. Right-click on one of the selected appointments.
2. Choose the **Cut Multiple** option from the short-cut menu.

**To paste the appointments into a location in the Appointment Book:**

1. Right-click on the slot.
2. Select **Paste Multiple** from the short-cut menu.

The **Cut Multiple** and **Paste Multiple** options are only available on the short-cut menu when you have selected more than one appointment in the Appointment Lookup list.
Rescheduling an Event Chain Appointment

To reschedule an appointment that is part of an event chain:

1. Access the appointment in either the Appointment Book or by using the Appointment Lookup dialog.
2. Place the cursor over the appointment and right-click with the mouse. A drop-down menu displays.
3. Select Reschedule Event Chain option from the drop-down menu.

Removing Appointments from the Schedule

To remove an appointment from the schedule, you can:

- Cancel the appointment - You can assign a Cancelled status to an existing appointment.
- Delete the appointment - You can remove the appointment listing from the application's appointment schedule.

Canceling an Appointment

Canceling an appointment removes the appointment from the schedules of all the appointment's resources at once.

To cancel an appointment:

1. At the bottom of the Edit Appointment window, check the Canceled check box.
2. Select a reason for the cancelation from the list of reasons in the Reason field and click OK.

Note: The list of reason available in the Reason field is controlled by the settings in practice preferences. Your specific practice preference configuration determines the appearance and functionality of your Appointment Book. Therefore, depending on your practice preferences, you may or may not be able to select a Reason for Cancelation.

The application changes the appointment status to Canceled. You can view the status of the appointment:

- On the patient chart, under the Appointment Notes node.
- On the Appt History tab on the Add/Edit Appointment dialog box.
Canceling a Linked Appointment

To cancel a linked appointment:

1. Open the linked appointment that you want to cancel in the Appointment Book.
2. Check the Canceled check box that is located on the bottom of the Appointment Details dialog box.
3. Select a reason for the cancelation from the Reason drop-down list.
   
   **Note:** The list of reason available in the Reason field is controlled by the settings in practice preferences.
4. Click OK.

   The Cancel Appointment dialog box displays.

   ![Cancel Appointment Dialog Box]

   In the Linked Appointments section, a list displays of all of the appointments that are linked to the appointment you selected. All of the appointments in the list are checked by default. When an appointment is checked, it is selected to be canceled.

   5. Clear the linked appointments that you do not want to cancel or accept the default to cancel all linked appointments, whichever is applicable.

   **Note:** A Cancel All Linked Appointments check box in the Cancel Options section of the dialog box is also checked by default. When this check box is checked, all linked appointments are canceled when you cancel the selected appointment.

   6. Click OK.

   7. Click OK on the Confirm Cancel of this Appointment(s)? message box.

Canceling a Recurring Appointment

When you cancel an appointment that is set up as a recurring appointment, you remove only the single instance of the recurring appointment. The remaining instances of the recurring appointment at future dates remain on the schedule. To remove all instances of a recurring appointment, you must delete the original appointment.

Deleting Appointments

You can delete appointments in the Appointment Lookup dialog box and all views of the appointment book, except Monthly and Yearly.
**Recommendation:** NextGen Healthcare recommends that you cancel appointments rather than delete them. For instructions on canceling appointments, see Canceling Appointments (see "Canceling an Appointment" on page 73).

You can delete an appointment by:

› Selecting its entry in the schedule and clicking on the **Delete** tool bar button, or
› Highlighting the appointment and right-clicking to use the **Delete** option in the short cut menu.
› When you want to delete a simple appointment (one resource, one event, and no recurrences), a confirmation message displays.

**Note:** When you delete an appointment, the status changes to **Cancelled**. You can view the appointment status on the patient chart, under **Appointment Notes**, as well as in the patient appointment history.

**Deleting a Linked Appointment**

When you delete or cancel a linked appointment, you can select which of the other linked appointments you want to delete or cancel. To help you manage linked appointments the **Delete Appointment** window displays when canceling or rescheduling any appointment within the group.

**To delete a linked appointment:**

1. Open the linked appointment from the Appointment Book.
2. Click **Delete**.

The **Delete Appointment** window displays.

By default, all of the appointments in the list are selected for deletion. There are also other items and options available to you from this window:

| If You want to delete an appointment with multiple resources attached ... | Then You can:
| --- | --- |
|  | • Delete the appointment for all the resources by clicking the **Delete All Resources Attached to the Appointment** check box.
|  | • Delete only the appointment(s) for the resource of the highlighted appointment. When you delete only the appointment for the single resource, the other resources’ appointment(s) remain available.

| If You want to delete a recurring appointment ... | Then You can delete:
| --- | --- |
|  | • a single appointment, or
|  | • all of its occurrences.

To delete all of a recurring appointment’s occurrences, check the **Delete All Recurring Instances** check box. This automatically deletes the recurring appointment from all resources’ appointment books. If you leave this check box unchecked, only the appointment highlighted is deleted.

| If You want to delete an appointment that is part of an Event Chain ... | Then You can:
| --- | --- |
|  | • Removing all Event Chain Members by checking the **Delete All Event Chain Members** check box.
|  | • Leave the check box unchecked to delete only event chain members for the highlighted appointment.
3 Clear the linked appointments that you do not want to delete or accept the default to delete all linked appointments, whichever is applicable.

**Note:** A **Delete All Linked Appointments** check box at the bottom of the dialog box is also checked by default. When this check box is checked, all linked appointments are deleted when you delete the selected appointment.

4 Click **OK**.

A dialog box displays with the message, **Confirm delete of this appointment?**

5 Click **OK** to delete the appointment along with any linked appointments also selected.

**Deleting a Recurring Appointment**

When you delete a recurring appointment, you can choose to remove every recurring instance of the appointment from the schedule.

**Retaining an Appointment**

When you schedule an appointment, the NextGen Practice Management application checks the status of the last appointment for the patient. If the status of that appointment is **No Show** or **Cancelled**, it displays a message that asks you to label the appointment as retained.

You can choose to label the appointment as retained or not, based upon the information provided below:

<table>
<thead>
<tr>
<th>If</th>
<th>Then</th>
</tr>
</thead>
<tbody>
<tr>
<td>The patient new appointment is for the same event as the missed or canceled appointment and within a reasonable period of time (no more than 6 months). Example: If a patient missed a contact lens fitting two months ago, and then calls for a contact lens fitting, that appointment is considered <strong>Retained</strong>.</td>
<td>Click <strong>Yes</strong> to label the appointment as retained.</td>
</tr>
<tr>
<td>The patient new appointment is for a different event or beyond a reasonable time period for the same event as the missed or canceled appointment. Example: If a patient missed a contact lens fitting two months ago, and then calls for a refractive consultation, that appointment is not considered retained because it is for a different event.</td>
<td>Click <strong>No</strong> to not label the appointment as retained.</td>
</tr>
</tbody>
</table>

**Note:** If you select **Yes**, the status of the prior appointment does not change. The NextGen Practice Management application labels it as **Retained**.

**Linking Appointments Together**

You can link appointments together for a single patient. This enables you to manage the appointments all at once as part of a group. Linking appointments together is useful when each appointment is part of a treatment plan for the patient.

The appointment linking feature provides you the option to:
Automatically group together appointments that are events in an Event Chain. When this option is set up, the application automatically links events together as they are scheduled.

Print fee tickets for all of the linked appointments or just the first appointment listed in the Appointment List that is a part of the group.

You can link only appointments with the following statuses:

- Expected
- No show
- Pending

**To link a patient’s appointments together as a group:**

1. From the *Appointment Book*, open an appointment that you would like to set up as a linked appointment.
2. Select the **History** tab.
3. Click in the check box to the left of each appointment that you want to set up as part of the group. You can click the check box to the left of the Date/Time heading to select all the appointments listed.
4. Click **OK**.

**Note:** You can un-link any of the member events, or appointments, by clicking the check box next to the appropriate event/appointment.
**Viewing the Record of a Linked Appointment**

You can view a record of linked appointments using the **History** tab on the *Edit Appointments* dialog box. The **History** tab dialog box displays an "X" mark next to appointments that are linked.

**Unlinking Appointments**

**To unlink appointments:**
1. Access the **History** tab for one of the linked appointments:
   - The appointments that are linked have an "x" in the check box on the far left.
2. Clear the check box for the appointment you want to unlink.

**Confirming an Appointment**

After you have confirmed the appointment with the patient, you can indicate that the appointment has been confirmed in the Appointment Book.

You can confirm an appointment by:
- Double-clicking on the appointment (all views except Daily view)
- Right-clicking on the appointment and select **Open** from the menu.
- Left-click to highlight the appointment and then click the **Edit Appointment** button.

**After the appointment opens:**
1. Select the **Confirmed** check box in the lower left

![Edit Appointment](image)

2. Click **OK**.

Confirmed appointments display a “telephone icon in Daily view of the appointment book.
Confirming Multiple Appointments

When you confirm an appointment for a patient with other unlinked appointments (same day or future), the application prompts you to confirm those other appointments at the same time. In this situation:

- Select the individual appointments to be confirmed
- or -
- Select the Confirm all unlinked appointments check box to confirm all the patient's appointments for the same time.
CHAPTER 5

Searching for Appointments

This section provides instructions on how you can search for appointments within NextGen Practice Management.

Finding Existing Appointments

You can use the Appointment Lookup feature to locate existing appointments.

**Note:** When Case Management is enabled for the practice and a case is assigned to the appointment, the Appointment Lookup dialog box displays case Onset Date and Case Description columns for the search results.

**To locate an existing appointment:**

1. Click the Appointment List button on the NextGen Practice Management toolbar. The Appointment Lookup dialog box displays.

2. Enter the search criteria for your appointment lookup. The more search criteria you enter, the more focused the appointment lookup becomes.
<table>
<thead>
<tr>
<th><strong>Search Criteria</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last, First, Middle</td>
<td>Search by the patient name or a portion of the name. Example: Typing in &quot;SM&quot; in the last name will show you all of the Smiley's, Smith's, and Smythe's.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Search by the patient's birth date.</td>
</tr>
<tr>
<td>Social Security</td>
<td>Search by the patient's social security number.</td>
</tr>
<tr>
<td>Resource</td>
<td>Search by the resource that is associated with the appointment you want to locate. When you enter the first letter of the resource, a list of resources that begins with that letter displays. For example, if you enter 'G', the display moves from the currently selected item in the list to the next available item that starts with 'G.'</td>
</tr>
<tr>
<td>Class</td>
<td>Search by the class (category or group of people, places, or things) as the search criteria for the appointment you are looking for.</td>
</tr>
<tr>
<td>Service Location</td>
<td>Search by the Service Location where the appointment is scheduled to take place. Note: This field displays only for practices with multiple locations.</td>
</tr>
<tr>
<td>Description</td>
<td>Search by the description of the appointment.</td>
</tr>
<tr>
<td>Event</td>
<td>Search by an event associated with the appointment. You cannot search by an event chain - only a single event. When you enter the first letter of the event, a list of events that begins with that letter displays.</td>
</tr>
<tr>
<td>Status</td>
<td>Search by the status of the appointment: The available statuses are: Canceled, Expected, Kept, No Show, or Pending. You can select more than one status if you want to search for appointments across statuses. Note: You can select multiple default statuses for the Appointment Lookup in your scheduling user preferences.</td>
</tr>
<tr>
<td>Appointment Date, Beginning, Thru</td>
<td>Search by the date range that includes the date of the appointment or appointments that you want to locate. search criteria you want to use.</td>
</tr>
<tr>
<td>Search By</td>
<td>You can search for appointments by one of the following search criteria in the drop-down list for this field:</td>
</tr>
<tr>
<td></td>
<td>- Med Rec Nbr: Medical Record Number</td>
</tr>
<tr>
<td></td>
<td>- Person Nbr: This is the number assigned to the person by EPM.</td>
</tr>
<tr>
<td></td>
<td>- Other ID Nbr: This is an ID field used by NextGen's EMR (Electronic Medical Records) patient demographic template. If you know the Other ID used by EMR, you can search by using it</td>
</tr>
<tr>
<td>Med Rec Nbr</td>
<td>Enter a medical record number as a search criteria.</td>
</tr>
<tr>
<td>User Defined</td>
<td>Search by a user-defined master list. If the master list has multiple items, you can select the one to use as a search criteria.</td>
</tr>
<tr>
<td>Confirmed</td>
<td>Check this box if you want to limit the appointments search to confirmed appointments.</td>
</tr>
<tr>
<td>Deleted</td>
<td>Check this box if you want to search for deleted appointments.</td>
</tr>
</tbody>
</table>
### Search Criteria

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retained</td>
<td>Check this box to find all retained appointments.</td>
</tr>
<tr>
<td>Rescheduled</td>
<td>Check this box if you want to search for appointments that have been rescheduled.</td>
</tr>
<tr>
<td>Medical Record</td>
<td>Search by the medical record number for the patient with the appointment you want to locate.</td>
</tr>
<tr>
<td>Workflow Status</td>
<td>Search by workflow status</td>
</tr>
<tr>
<td>Booked in Patient Portal</td>
<td>Search for appointments added to the schedule from the Patient Portal.</td>
</tr>
<tr>
<td>Chart Status - Home Location</td>
<td>Search by chart status.</td>
</tr>
<tr>
<td>Do not refresh lookup after updating appointments</td>
<td>Check this option if you do not want the list of appointments that meet the search requirements to be updated after you've accessed one of the appointments in the list and modified it. If the modified appointment no longer meets the search requirements, it remains in the current list.</td>
</tr>
</tbody>
</table>

3 Click **Find**.

The search results appear in the Appointment List. Double-click on the appointment that you want to access.

### Appointment List

Once you enter the applicable search criteria in the *Appointment Lookup* dialog box and click **Find**, the appointment list displays all the appointments matching your search criteria. Use the right-click shortcut menu to view the actions you can for each appointment in the list.

![Appointment List example](image)

### Printing Fee Tickets from the Appointment List

When printing fee tickets from the Appointment List, if a fee ticket has already been printed, a dialog box displays. The message in the dialog box states that a fee ticket has already been printed for a specific appointment and prompts for a response to the question, "Do you want to reprint the appointment’s fee ticket?" You can select one of the following options:
Chapter 5  Searching for Appointments

- **Yes All** – If you click this option, a fee ticket prints for each visit that a fee ticket already exists for, and you are not prompted with a message box again.

- **Yes** – If you click this option, a fee ticket prints for this patient and the visit that is referenced in the message box. Any subsequent visits that have a fee ticket that already exists, you are prompted with a message box for each individual visit.

- **No** – If you click this option, a fee ticket is not printed for this particular patient and referenced encounter.

- **No All** - If you click this option, no fee tickets print for appointments that have already had a fee ticket printed, and you are not prompted with a message box again.

**Printing Reminder Letters on Demand**

**To print Reminder letters on demand from the Appointment List:**

1. Place a check in the check box for the appointment in the Appointment List that you want to be sent a Reminder Letter.

2. Right-click on the selected appointment and select Print > Appt Reminder from the drop-down menu.

3. The letter displays in the Demand Reminder Letter dialog box.

4. Review the letter and then click the Print button.

**Searching for Available Appointment Times**

When you need to find an available appointment time for an event (or event chain) and a resource (or a class of resources) for one or more locations, you can use the Appointment Search Ahead feature.

You can search for any of the following combinations:

- One resource per event
- Multiple resources per event
- One class per event

**Note:** You cannot select both a class and an resource for a search. Select either a single class or multiple resources.

**Example:** Patient X needs an appointment for physical therapy with Dr. Jones at the Main Office location. The appointment must be on a Wednesday, be in the morning, and occur sometime during the next two weeks. You can enter all of those criteria into the Appointment Search Ahead dialog box and the application will find available appointment times when that combination of patient
To perform an Appointment Search Ahead:

1. Click the **Appointment Search** button on the Appointment Book toolbar.
   - The **Appointment Search Ahead** dialog box displays.
2. Enter the criteria for your appointment time search. You **must** make a selection for each of the criteria fields that are labeled in red.

<table>
<thead>
<tr>
<th>Required Search Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event</td>
<td>The Event search criteria applies to the first event only in the event chain. For the remaining events in the chain, the application finds the next available appointment slot. You can only specify a date and time for the first event in the event chain.</td>
</tr>
<tr>
<td>Service Location</td>
<td>Place a check mark next to the location of locations that you want to include in the search. Place a check mark next to the All option to perform the appointment search across all the locations.</td>
</tr>
<tr>
<td>Resources/Classes</td>
<td>Select either a resource or a class of resources. An individual doctor is an example of a resource, whereas Physicians is an example of a class of resources. You cannot select both a resource and a class of resources.</td>
</tr>
</tbody>
</table>

3. You can select additional, optional criteria for your appointment time search.
4. Click **Find** to locate the appointment times after you gave entered the search criteria.
Appointment Reminder Letters

An Appointment Reminder letter includes information about the patient appointment. You can print the Appointment Reminder letter from the Appointment Confirmation window when the appointment is first added to the schedule. You can also print Appointment Reminder letters in batch from the NextGen Practice Management main menu.

**Note:** Appointment Reminder letters must first be created in File Maintenance > Practice Master Files > EPM > Letters. See the NextGen Ambulatory Products Administrator Guide for instructions on setting up Appointment Reminder letters.

Appointment Reminder letter example:

Nicole Smith  
8273 E 84th Ave  
Foothill Ranch, CA 92610

Dear Nicole Smith,  

This note is to remind you of your upcoming appointment on 06/30/2009 at 10:00 A.M. for an Established Patient Follow-Up with William Smith, M.D.

If you are unable to keep your appointment, please call our office at least 24 hours prior so that we may reschedule it for you. We can be reached at (949) 385-7600.

If you have any questions, please don’t hesitate to contact us.

We look forward to seeing you on 06/30/2009.

Sincerely,

The Staff and Physicians at

NEXTGEN Community Health Practice

To print Appointment Reminder letters in batch:

1. Access the Appointment Reminders dialog box from the NextGen Practice Management main menu by following this path: **File** > **Print Forms** > **Letters** > **Appt Reminders**

   The Appointment Reminders dialog box displays.

2. Enter as little or as much of the following search criteria:
Include appointments "X" days from today - The end of the date range to be printed equals (Today's Date + "Include" days). For example, if today is the 3rd, and this option is set at "21", the appointment date to stop pulling for will be the 24th. This value can be "1" to "30", and must be greater than "Exclude" days.

Exclude appointments "X" days from today - The start of the date range to be printed equals (Today's Date + "Exclude" days). For example, if today is the 3rd, and this option is set at "5", the appointment date to begin pulling for will be the 8th. This value must be "10" or less, and must be lower than "Include" days.

Location – Click the drop-down arrow and select the applicable appointment location search criteria.

Event – Click the drop-down arrow and select the appropriate event type search criteria.

Resource – Click the drop-down arrow and select the appropriate resource type search criteria.

Exclude Expired Patients – A check in this check box excludes all expired patients from the search criteria. The check box is checked by default.

3 Click the Find button.

4 Select the appointments you want to Print, Preview, or Export. The Appointment Letter template that is used to generate the letters is determined by what is stored in Practice Preferences.
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CHAPTER 6

Appointment Information

This section provides information on how to use the *Add Appointments* dialog box.

**Patient Tab**

The **Patient** tab of the *Add Appointment* dialog box is the default tab. It displays demographics and other appointment related information such as encounter number/date and rendering/referring physicians. You can view and/or modify the patient’s demographics by clicking the **Open Menu** button.

**History Tab**

You can view a history of the events associated with the patient on the **History** tab of the *Add Appointment* dialog box. Confirmed, deleted, retained, and reschedule indicators display for each listed appointment. You can resize and rearrange the columns to suit your preferences. You can also sort the columns, with the exception of the indicator columns.
Selecting multiple appointments using the check boxes on the **History** tab then clicking OK enables you to link appointments together. This is helpful if you want to cancel multiple appointments for a single patient. Canceling one of the appointments prompts you to cancel the remaining linked appointments.
Recall/Waitlist Tab

You can view lists of the active recall plans and wait list items for the patient on the Recall/Waitlist tab of the Add Appointment dialog box. The Recalls list displays the recall information including the recall plan type, the start date, and the expected return date.

The Recall/Waitlist tab displays active recalls and/or waitlisted appointments for the patient. You can add recalls and waitlist items for the patient by right-clicking in the applicable section and selecting New from the shortcut menu.
UDF Tab

The **UDF** tab (User Defined Fields) displays information entered in the patient’s Chart User Defined fields. The tab also displays information entered in the patient’s Client Defined fields. Chart level UDF fields are created in Practice Preferences > **Chart** tab. Enterprise level Client Defined fields are created in Enterprise Preferences > **Client Defined** tab.
**Insurance/Diagnosis Tab**

You can view the insurance information for the patient, as well as a list of diagnoses and procedures associated with the patient on the Insurance/Diagnosis tab of the Add Appointment dialog box.

![Add Appointment Dialog Box](image)

**Adding Insurance Authorizations**

After you add a patient to the appointment, the Ins/Diags tab is available. You can add authorizations at the time the appointment is scheduled. You do not have to wait to create the chart.

**To add an authorization number:**

1. From the Ins/Diags tab, highlight the insurance to which you want to add an authorization.
2. Right-click and select New Authorization.
The **Authorization Code Tracking** dialog box displays.

3 Enter the authorization code given to you by the insurance company in the **Authorization Code** field.

4 You can select the effective date from the pop-up calendar in the **Effective Date** field.

5 Select the expiration date for this authorization in the **Expiration Date** field.

6 In the **Authorization Mode** section, select whether this authorization is for the entire encounter or for units (procedures).

7 In the **Nbr Encounters** field enter the number of encounters allowed under this authorization.

   As the patient returns for encounters under this authorization, the number of authorized encounters remaining display in the **Encounters Left** field.

8 Select the rendering physician in the **Rendering** field.

9 You can add a description of what the authorization covers in the **Description** field.

10 Add the appropriate ICD9 and CPT4 codes in their respective fields.

11 Click **OK**.

   An authorization line displays below the insurance.

**Editing Authorizations**

To edit authorization information:

1 From the **Ins/Diags** tab, highlight the authorization information line that you want to edit.

2 Right-click and select **Open Authorizations**.

   The **Authorization Code Tracking** dialog box displays.

3 Make changes to the appropriate fields.

4 Click **OK**.
**Deleting Authorizations**

To delete authorization information:
1. From the **Ins/Diags** tab, highlight the authorization information line that you want to delete.
2. Right-click and select **Delete**.
   - The message, **Confirm delete of the authorization code...**, displays.
3. Click **OK**.
   - The authorization information is now deleted.

**Adding and Editing Referrals**

To add referral information from the Insurance/Diagnosis tab:
1. Right-click the patient's insurance listed in the Insurance Information section.

   ![Dropdown Menu]

2. Select **Open Referral** from the drop-down menu. (You can select **Open Referral** to select an existing referral or **Delete Referral** to remove an existing referral.)
The *Referral Code Tracking* dialog box displays.

3 Select Encounter Mode or Unit Mode:
   - **Encounter mode** - Tracks by the number of encounters remaining on the patient referrals is below the number entered.
   - **Unit mode** - Tracks by the number of units remaining on a patient's referrals is below the number entered.

4 Enter the Referral Code.

5 Enter the Effective and Expiration dates for the code.

6 If you selected Encounter Mode in step 3, enter the number of encounters that are allowed for the referral.

7 Select the rendering physician from the Rendering drop-down list.

8 Enter a description for the referral.

9 Select a range of ICD4 codes for which the referral applies.

10 Click OK.
**Task/Prov Tab**

You can view a list of the Worklog tasks associated with the patient on the Task/Prov tab of the *Add Appointment* dialog box. Worklog tasks can be created, deleted, hidden, and worked from the Tasks section of the Task/Prov tab. If using the Patient Providers feature, the patient’s providers display at the bottom of the tab. The Patient Providers section is view only and displays for patients (charts) only. You can enable the Patient Providers section from the Providers tab of Practice Preferences.

![Task/Prov Tab](image)

**Note Tab**

The Note tab displays chart and encounter notes. You can create Notes from this tab for a person or a patient by right-click and selecting New from the shortcut menu. From the Note tab, existing notes can be:
Double-click on any of the existing notes in the list to display them.
Marketing Tab

You can link marketing plans to an appointment and the Marketing tab. If set up to do so in Scheduling Administration, marketing plans may be required for specific events. A marketing plan on an appointment carries over onto the encounter that is created from the appointment.

If marketing data already exists on the patient chart, the appointment-level marketing data is stored at the appointment level but does not override the existing chart marketing data. If the person does not yet have a chart, the marketing data entered for the appointment is stored at the appointment level until a chart is created. When the chart is created, the appointment level data is added to the chart's marketing fields.
C H A P T E R 7

Appointment Wait Lists

When the time slot or resource that a patient wants for an appointment is not available, you can create a Wait List item for the patient. A Wait List Item is a marker that holds the patient's place in line for the time slot and/or resource that meets his or her first preference.

The interim appointment exists until an appointment time slot and/or resource that meets the patient first preference - as recorded on the Wait List Item - becomes available. At that point, if the Wait List feature is configured to process automatically, the application creates a Worklog task that instructs the current user to convert the Wait List Item to an appointment for the patient. The application then deletes the interim appointment since the patient now has an appointment that meets his or her first preferences.

Reference: For information on setting up the Wait List feature, see the NextGen® Ambulatory Products Administrator Guide.

Adding Patients to Appointment Wait Lists

When a patient wants an appointment time that is not available, you can add the patient to the appointment wait list.

To add a patient on a wait list:
1. Perform an Appointment Search Ahead search to find an appointment time that is an acceptable alternative time for the patient. Schedule an interim appointment for the patient at that time.
2. Click the Wait List button on the Appointment Search Ahead dialog. The Patient Wait List Item dialog box displays.
3 Click the **Wait List** button on the *Appointment Search Ahead* dialog. The Patient Wait List Item dialog box displays.

4 Select a value for the information for the **Event** and **Duration** fields.

5 Select the location in the **Service Location** field, if applicable.

6 Click the **High Priority** option if this Wait List item is to take precedence.

7 Select the resource(s) in the **Resource** field.

   **Note:** In the **Date/Time Range** section, limit the range in these fields as much as possible to narrow the scope of the search. Otherwise, once you run the wait list process, your results may be excessive in number.

8 Type the date in MM/DD/YYYY format in the **Start Date** field for the beginning of the date range for the desired appointment or click on the calendar icon to enter the date. The Start Date must be the current date or a future date. The default setting is the current date.

   **Note:** If you are creating this Wait List item from the Appointment Book, the default ending date is the day before the appointment.

9 Type the date in MM/DD/YYYY format in the **End Date** field for the ending of the date range for the desired appointment or click on the calendar icon to enter the date. The End Date can be the current date, but should be a future date. The default setting is one week from the current date. The starting and ending time ranges populate from the settings in Practice Preferences.

10 In the **Day of Week** section of the dialog box, change the default setting of Mon through Fri by clearing the boxes for the days of the week that are *not* applicable for the desired appointment.

11 In the **Search Nearest Location** section, in the **Zip Code** field enter the Zip code to use in searching for the nearest location.

12 Select the **Search within X miles of the pat zip code** option and enter the number of miles within which the location should fall.

13 If the patient wants an appointment at a location near his or her employer, select the **User employer zip code** option.

14 Click **OK**. The **Patient Waitlist** dialog box displays.
The Wait List item is now on the patient chart as well as the appropriate user's Worklog:

- As the time slots become available, the NextGen Practice Management application notifies the assigned user.
- The user can then schedule the appointment for the patient from the Worklog Edit Task dialog box.

**Adding, Editing, or Deleting a Wait List Item**

Once a Wait List Item has been created, you can:

- Add another item to the list
- Edit an existing item
- Delete any item

**To add, edit, or delete a wait list item:**

1. Access the patient Wait List item.
2. Right-click to display the short-cut menu.
3. Select the applicable shortcut option:
   - To add a Wait List Item, select **New** and follow the instructions for Entering a Patient on a Wait List.
   - To edit a Wait List Item, highlight the item, select **Open**, make the changes to the item, and click **Ok**.
   - To delete a Wait List Item, highlight the item, select **Delete**, and click **Yes** to the pop-up message, **Do you want to Delete this Wait List Item?**

**Creating a Wait List Item**

When the Appointment Search Ahead lookup fails to find an appointment time slot that meets the patient first preference, you can click the **Wait List** button and create a Wait List Item for the patient.

You must complete the *Patient Wait List Item* dialog box to add a Wait List Item to the Wait List for a patient. You can access the *Patient Wait List Item* dialog box:
When performing an appointment search ahead.
From the Appointment Book
From the patient chart

To complete the Patient Wait List Item dialog box:
1 Enter information for Events, Service Location, time and day.
2 In the Search Nearest Location fields, you can enter additional criteria that applies to a Wait List Item.
3 Click OK.

Finding Appointment Waitlist Items
You can use the Waitlist Lookup function to find wait list items for viewing, editing, or deleting.

To locate an Appointment Waitlist item:
1 Select Tasks menu > Lookup > Waitlists.
   The Waitlist Lookup dialog box displays.

2 Enter the appropriate search criteria.
3 Click Find. The results display in the Waitlist List section. Double-click on the item that you want to access.

Note: When you click Clear, the content of all the fields on the Waitlist Lookup dialog box are removed except for the date fields.

Viewing a Patient Wait List
If a patient has an active Wait List Item, you can view the wait list in two ways. You can use any of the access methods listed under Adding Patients to Appointment Wait Lists. You can also view the Wait List items for a specific patient by opening the patient appointment and clicking the Recall/WaitList tab.
Using Appointment Search Ahead for Wait List

The **Wait List** button located on the *Appointment Search Ahead* dialog box enables you to determine if:

- A patient is on a wait list
- A patient needs to be entered on a wait list.

Based the search results, the system displays either the:

- Patient Wait List for that patient, or
- Dialog box used to enter a patient on a wait list.

**To determine if a patient is on a waiting list:**

1. Access the *Appointment Search Ahead* dialog box by clicking **Tasks** on the main toolbar and then **Appt Search**.

   Or, click on the **Appointment Search** button.

   ![Appointment Search Ahead dialog box]

   When the *Appointment Search Ahead* dialog box displays.

2. Select the event in the **Event** field.

3. Select the length of time for the event in the **Duration** box or leave the default value.

4. Select the location in the **Service Location** field, if applicable.

5. Select the resource in the **Resource** field.

   **Note:** In the **Date/Time Range** section, limit the range in these fields as much as possible to narrow the scope of the search. Otherwise, once you run the wait list process, your results may be excessive in number.

6. Type the date in MM/DD/YYYY format in the **Start Date** field for the beginning of the date range for the desired appointment or click on the calendar icon to enter the date. The Start Date must be the current date or a future date. The default setting is the current date.

7. Type the date in MM/DD/YYYY format in the **End Date** field for the ending of the date range for the desired appointment or click on the calendar icon to enter the date. The End Date can be the current date, but should be a future date. The default setting is one week from the current date.

   The starting and ending time ranges populate from the settings in Practice Preferences.

8. In the **Day of Week** section of the window, change the default setting of Mon through Fri by clearing the boxes for the days of the week that are **not** applicable for the desired appointment.
9 In the **Patient** section, click the **Open Menu** button and select Lookup to search for a patient.

**Note:** See Locating Patients for more information on searching for patients.

10 In the **Search Nearest Location** section, in the **Zip Code** field enter the Zip code to use in searching for the nearest location.

11 Select the **Search within X miles of the pat zip code** option and enter the number of miles within which the location should fall.

12 If the patient wants an appointment at a location near his or her employer, select the **User employer zip code** option.

13 Click the **Find** button to search for an appointment,

14 If you find an appointment that matches the search criteria, select the appointment and the **Add Appointment** dialog box displays for scheduling the appointment.

   › Or, click the **Wait List** button to determine if a patient has been put on a Wait List.

   › If you clicked the **Wait List** button, the **People Lookup** dialog box displays.

15 Enter the patient name and click the **Find** button.

A list of Matching Records displays.

16 Double-click on the appropriate patient.

The **Update Patient Information** dialog box displays. Then, if any appointment-related System Alerts exist for that patient, they display at this time, along with Chart and Account Alerts. This includes alerts for Active Wait List Items. This is the only time an alert for a Wait List Item displays.

17 If an Alerts message displays click **Close**.

The **Update Patient Information** dialog box is still open.

18 Click **OK**.

At this point, NextGen Practice Management searches for a wait list Item for the patient you specified. This enables you to determine if the patient is currently on a wait list and if the wait list meets the patient scheduling needs.

   › If NextGen Practice Management finds a wait list item, it displays the **Patient Wait List** dialog box.

   › If a wait list Item is not found, the **Patient Wait List Item** dialog box displays, so that you can begin entering this patient on a wait list.

---

**Placing Waiting Patient with Available Appointments**

You must manually run the Wait List Process to match the patients on the appointment wait list with time slots and resources that have become available.

**To run the Wait List Process:**

1 Select **File** menu > **Processes** > **Wait List**.

2 Select the search criteria. The application compares the search information you enter to the active Wait List Items in your practice.

**Important:** If your search is not set up correctly, the message **No Wait List candidates meet this criteria** displays.

To set up a successful search:
The **Beginning** (date) must be a date earlier than the **Start Date** in the *Patient Wait List Item* dialog box. When the search is run, the beginning date is reset internally to the current date, so that the results are always current.

The **Thru** (date) must be a date later than the **End Date** in the *Patient Wait List Item* dialog box.

All of the fields are also compared to the template. For example, if the resource is in surgery on the day or time you are searching for an office appointment, no matching records are found.

3 Click the **Process** button.

**Note:** The wait list process can be stopped by pressing the **Esc** key. The process does not stop immediately; it stops when it reaches a cut-off point. Then, the Appointment Wait List Process report displays with information that was processed prior to being canceled.

The results display on the *Appointment Wait List Process* report.

4 To create an appointment from this list, double click on the desired time slot, and the system fills in the *Add Appointment* dialog box.

5 Complete any required fields and click **OK**.

### Expiration of Wait List Items

A Wait List Item automatically expires when the calendar date reaches the end of the Date/Time Range set up in a Patient Wait List Item. The Wait List Item is deleted without notification.

### Finding Appointment Waitlist Items

You can use the Waitlist Lookup function to find wait list items for viewing, editing, or deleting.

**To locate an Appointment Waitlist item:**

1 Select **Tasks** menu > **Lookup** > **Waitlists**.
   
   The *Waitlist Lookup* dialog box displays.

2 Enter the appropriate search criteria.

3 Click **Find**. The results display in the Waitlist List section. Double-click on the item that you want to access.
Note: When you click Clear, the content of all the fields on the *Waitlist Lookup dialog box* are removed except for the date fields.
CHAPTER 8

Overbooking Appointments

This section provides information on how to handle overbooked appointments.

Scheduling Conflicts and Alerts

If the Check for conflicting appointments and/or Check for conflicting categories options are activated on the Appt Scheduling tab of Practice Preferences, scheduling conflicts display when you attempt to schedule an appointment in a slot that is already scheduled or in a slot where the appointment is not normally allowed.

Appointment Conflict Message

Category Conflict
Overriding Appointment and Category Conflicts

If an OK button is available on the conflict window and you have security access rights in the System Administrator application to Override Appointment Conflicts and/or Override Category Conflicts, you can override the conflict and complete the appointment by clicking the OK button.

If an Override button is available on the conflict window and you do not have security access rights in the System Administrator application to override appointment and/or category conflicts, you can get another user to override the conflict if you have been granted the Override Conflict with Login security right. In this situation, clicking the Override button allows another user who does have security permission to override appointment/category conflicts to login and then complete the conflicting appointment.

The Appointment Override Conflict dialog box displays that enables the user who has the necessary override permissions to log in and override the conflict.

Changing the Limit for Appointment Scheduling Overbooking

To set limits for appointment scheduling overbooking for a resource:

1. Select Admin > Scheduling from the NextGen Practice Management menu.
The Scheduling Administration dialog box displays.

2 Select the Templates tab.
3 Double-click on the template that you want to modify.
   The Edit Template dialog box displays.

4 Select an appointment time from the list and right-click to display the shortcut menu.
5 Select one of the following options:
   ▶ Decrease Overbooking to increase the overbooking limit by 1.
   ▶ Increase Overbooking to decrease the overbooking limit by 1.

**Note:** The default setting for overbooking is 1.
6 Repeat Step 5 for the number of times you want to increase or decrease the appointment scheduling overbooking limit.

**Note:** There is a limit of up to 10 appointments per appointment slot.
You can use Recall plans to send out reminder notices to patients. You might want to recall a patient for a yearly exam, or a sequence of follow-up visits. You set up how often recall letters go out on a per-plan basis, and you designate which letters to use.

Reference: For information on setting up Recall Plans, see the NextGen® Ambulatory Products Administrator Guide.

### Placing a Patient on a Recall Plan

To place a patient on a recall plan:

1. Highlight an encounter in either the Appointment Book.
2. Right-click on an appointment and select Recall from the shortcut menu. The Patient Recall dialog box displays.
3. Right-click in the Recall Plan Information list and select New from the shortcut menu.
4 The *Recall Plan Maintenance* dialog box displays.

5 Select a recall plan by entering the first few letters of the recall plan in the *Available* field and then double-clicking on the plan in the list.

The *Return Date* field automatically populates. (The *Return Date* field calculates from the *Expected to Return Days* field on the *Recall Plans* dialog box.) The *Event*, *Resource*, and *Location* fields populate from the Recall Plans master file. If the recall plan is not configured to not allow overrides for the fields in the master file, they are disabled. If the plan's master file is configured in to allow overrides for the fields, they are active.

6 Click *OK*.

**Duplicate Recall Plans**

You can add multiple active occurrences of the same recall plan to a patient. Adding more than one occurrence of the same recall plan enables you to specify different resources or locations for a plan without the need to create a separate recall plan.

**To add the same recall plan to a different patient:**

1 Open the patient's chart and click the *Encounters* tab.
2 Access the patient recall dialog box using the following path:
3 Highlight the appropriate encounter, right-click and select *Recall* from the shortcut menu. The *Patient Recall* dialog box displays.
4 To add a recall plan, click the Open button and select New.

You can now add a recall plan to a patient regardless of whether or not the same plan is already attached. This is useful for when you want to use the same recall plan but with a different resource. When you add the same recall plan to a patient, NextGen Practice Management prompts you with a warning message.

5 Click Yes to add the same recall plan to the patient.

**Viewing Recall Plans**

To view the recall plan:

1 Right-click on the appointment.
2 Select Recall from the drop-down menu.

The Patient Recall dialog box displays. You restrict the recall plans that display in the list by selecting the Show Active Recall Plans Only check box.

**Note:** When accessing the Patient Recall dialog box, if no recall plans are set up for the patient, the system automatically displays the Recall Plan Maintenance dialog box. You can set a default value for "Days in Advance" and the appointment letter template in Practice Preferences > Appt Scheduling tab.

**Notification of Active Recall Plan**

You can set up the application to display an Alerts message when a patient who has an active recall plan is scheduled for an appointment. The message displays when you select the patient from the People Lookup dialog box, generated from the Appointment Book. The Alerts message displays only when recall plan notification has been activated in the Practice Preferences section of the application.

**Removing a Patient from a Recall Plan**

A patient is removed from a recall plan one of in three ways:
Chapter 9  Recall Plans

¬ All of the letters set up in the Recall Plan master file have been sent to the patient.
¬ The patient keeps an appointment with the event set up in the Recall Plan master file.
¬ You can manually remove the patient from the recall plan.

**Manually Removing a Patient from a Recall Plan**

To manually remove a patient from the recall plan:

1. From the patient's chart, **Encounters** tab, highlight an encounter. Right-click and choose the **Recall** option.  
   The **Patient Recall** dialog box displays.
2. Select the **Stop** option.
3. The following confirmation message displays.
4. Click **Yes** to continue with the removal. The patient's recall will now show a stop sign indicating the removal from the plan.

**Patient Recall Report**

The **Patient Recall** report is a listing of patients who are set up on a **Recall Plan**. From the **Filter 1** tab, the report can be generated to include all, exclude, or only display Active Plans. The **Filter 2** tab enables you to specify additional report criteria such as Recall Plan letter sent dates, the plan start and end dates, and the expected return date. Additional filters can be set for recall plans and practices. However, the **Totals** tab is not set up to include totals for this report.

**Select Reports > General > Patient Recall**
Recall Plan Letters

You can print Recall Plan letters individually on demand or in a batch.

Printing Recall Letters on Demand

You can print recall letters on demand as you need them.

To print recall letters on demand:

1. From the patient’s chart, click the **Encounters** tab.
2. Highlight the appropriate encounter, right click and select **Recall**.
   
   The **Patient Recall** dialog box displays.

3. Right-click on the plan and choose the letter to print.
   
   The **Preview** dialog box displays.

4. On the Print Preview toolbar, click the **Print** button to print the letter.

   **Note:** Printing the Recall letter does not update the Mailing Date. You have to print the letter from the **Recall Letters** dialog box, under the **File** menu.

Printing Recall Plan Letters in Batch

You can use recall plans as reminders to send out notices to patients. These reminders could be for a yearly exam, or a sequence of follow-up encounters due to surgery or child birth. You can designate how often you send recall letters on a per-plan basis, as well as which letters you send. Before you can send a recall letter to a patient, however, the patient must have a chart.

To print recall letters:

1. From the main menu, select **File** and then **Print Forms**.
2. From the Print Forms menu select **Letters** and then **Recall Letters**.
   
   The **Appointment Reminders** dialog box displays.

3. In the **Recall Plan** field, select the type of recall letter to print.

   **Note:** If you need to add, edit, or delete a recall letter, see your system administrator.

4. In the **Location** field, select the appropriate location whose recall letters to print.
5. In the **Event** field, select the appropriate event whose recall letters you want to print.
6. You can select the resource in the **Resource** field, whose recall letters you want to print.
7. You can choose to exclude expired patients by selecting the **Exclude Expired Patients** option.
There are eight (8) buttons you can click at this point.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear</td>
<td>Clear all fields with entries. You can after clicking this button select another type of recall letters, etc.</td>
</tr>
<tr>
<td>Find</td>
<td>You can search for any patients who meet the criteria you select. This enables you to see how many recall letters you are printing and sending.</td>
</tr>
<tr>
<td>Update Dates</td>
<td>By clicking this button, you update each of the patients’ charts with the letter and date it is being printed and sent.</td>
</tr>
<tr>
<td>Mailing Labels</td>
<td>You can choose to print the mailing labels for all the recall letters.</td>
</tr>
<tr>
<td>Preview</td>
<td>You can choose to preview the letters before printing and sending.</td>
</tr>
<tr>
<td>Print</td>
<td>Selecting to print by clicking this button, sends the selected letters directly to the printer.</td>
</tr>
<tr>
<td>Export</td>
<td>When you select to export the recall letters you are generating, you are exporting them to an ASCII format that enables you to send these letters to a clearing house.</td>
</tr>
<tr>
<td>Close</td>
<td>Clicking this button closes the Recall Letters dialog box without printing or generating any letters.</td>
</tr>
</tbody>
</table>
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