

Workflow for: Internal MedicineImage: PediatricsImage: Family MedicineImage: SpecialtyImage: Image: I

Date Updated: 3/11/10

Pages: 13 Approved by: On File

NextGen: Scheduling Preference Settings

Click on Admin, select Preferences, then User, then Scheduling.



From the General tab:



from the dropdown list (Multi-View in most cases).

Click to check off the boxes next to the following preference options:

 $\sqrt{\text{Automatically select default resource(s) when creating new appointment.}}$

Appointment Scheduling Preferences
Events Appt Search/Waitlist Iooltip General Multi View Daily View Resources
Refresh appointments every
Default scheduler start time Default appointment lookup date
Start appt book with this view Default appointment lookup status
Automatically select default resource(s) when creating new appointment Only show category specific events for appointment start time/resource selected Show category and location tooltins on appointment book
 Show appointment confirmation after scheduling appointment Shikettrough kept appointments on appointment book
Bold checked out appointments on appointment book Display polyitation when rescheduling an appointment that is linked to other appointments
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- $\sqrt{}$ Show category and location tooltips on appointment book. $\sqrt{}$ Show appointment confirmation after scheduling appointment. $\sqrt{}$ Strikethrough kept appointments on appointment book.

Click the MulitView Tab.
Appointment Scheduling Preferences
Events Appt Search Waitlist Iooltip General Multi View Daily View Resources
FPC FPC
New bn/Order Rename Luis A. Dellete ary Michael
Iorley Elizab
<u>D</u> K <u>Cancel</u>

Click the Norton button and select New.

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	Enter name I	for the ne	w Multi-View <u>c</u>	jroup
CX.	Medway Pedi			
			<u>C</u> ancel	
l	\ Enter the Sit	e Nam	e and click	COK

From the drop down list select the site.
Appointment Scheduling Preferences
Events Appt Search/Waitlist Iooltip
<u>G</u> eneral <u>Multi View</u> <u>D</u> aily View <u>R</u> esources
Multi-View Groups Default multi-view group
Sleep Lab Show 9 🗧 Resources per screen
FPC Flu Clinic
FPC Nurse Visit
Russell PA, Nancy P.
🔽 Woodward MD, Monica 💌
<u> </u>



Select the site from the Default mulit-view group.

Click the arrows up or down to fi the providers on the liss Appointment Scheduling Preferences Image: Click the arrows up or down to fi Events Appt Scarch/Waitlist Image: Click the arrows up or down to fi
Multi-View Groups Medway Pedi Resource Selection/Order Clemente MD, Emmett Cohan MD, Kathryn L. Soles MD, Gary Michael Conlan MD, Andrew A. Conley MD, Thomas G. Connie Norton Fall 2007

Click to check off the boxes next to the Providers (Resources) for the Site.

Click the arrows up or down to select the appropriate number of Resources to ensure all the schedules fit on the screen.

*If you will be working at more than one site you can repeat this process to customize the appointment book for additional sites.

Or....

You can change your Multi-view location by clicking on the icon from the scheduler book tool bar

and double clicking on the site from the drop down list.

I R xtGen -Tasks Reports Admin Help ApptList ApptBook Chart Encounter EDI File Reports Practice Posting MailBox ICS Ø E Rill Lookup Scheduler Book: Wednesda iary 28, 2009 X y 🚹 🧧 🟦 🕜 🍳 🔓 🥘 Category: <None> Location: «None» 🕂 🙈 🗙 🐉 🥠 5 Tri County Sleep Center Belingham Medical Assocrates Blackstone Valley Family Trivis Blackstone Valley Db/Gym Community Cancer Care Community Pediatrics Of Medv Community Pediatrics Of Medv Community Pediatrics Of Millio Draper Place FPC Nurse Visit FPC Nurse Visit Dr. Eric Kohler Kohler MD, Eric P. Dr. Carreiro Carreiro MD, Luis A. Cook 2009 0, Thorley Eliz. Russell,Nancy NP Russell PA, Nancy P. Woodward Woodward MD, Monic. Time 7:30A 7:45A 8:00A 8:15A 8:30A 9:00A 9:15A 9:00A 9:15A 9:00A 9:15A 9:00A 9:15A 9:15A 9:00A 9:15A 10:00A 10:15A 11:00A 11:15A 11:00A 11:15A 11:15A 11:15A 11:12A 9:12A 12:00P 12:30P Test, Pamela · PE F Multi-<u>V</u>iew Weekly <u>S</u>chedule Weekly <u>L</u>ist Monthly Yearly NGDemo JNEWTON (480) Version 5.5.26.9 10/27/09 12:05 PM **,2**





Next, click on the Resources tab.

Click the box next to the Resources (Providers) at your site.

This will provide easier access to your Resources when utilizing the Appt Search feature.



Next, click on the Events tab.

Click the box next to the events (appointment types) most frequently scheduled at your site.

This will provide easier access to these events with the appointment scheduling process.

Next, click on the Appt Search tab.

Click the arrow up to 15 to increase the number the number of appointments found with the appointment search feature.

Appointment Scheduling Preferences		×
Multi View Daily View Resources	s _]	<u>G</u> eneral
Defaults Find Next 15 Appts		_
Day of Week Mon Tue Wed Thu Fri Sat Sun No Preference		
Appointment Search Display resources before classes		—
Display event chains before events Only show event/chains for appointment		
■ Search within 1 → miles of zip code Default end date to No End Date ▼ from today		
Waitlist Suspend Appointment Search from Waitlist		
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Check the box next to "Display resources before classes".

Lastly, click on the Tooltip tab.
Adjust to Display after 2 seconds
Appointment Scheduling Preferences
Multi View Daily View Resources Events Appt Search/Waitlist Tooltip General Display after 2 seconds
Select your custom toolup items Account Self-Pay Balance Pinancial Policy Updated (Patient Chart User Defined 1) Ration Primary Care Provider Ration Primary Insurance Appointment Date Appointment Regin Time Appointment Event Appointment Event Appointment Data Appointment Event Appointment Detaits Eligibility Verified (Appointment User Defined 1) Confirmation Info (Appointment User Defined 2) Appointment Kept? Appointment Kept?
<u>D</u> K <u>Cancel</u>
 Scroll down the list of items and click the box next to: 1. Account Self-Pay Balance 2. Financial Policy Updated 3. Patient Primary Care Provider 4. Patient Primary Insurance
Scheduler Book: Wednesday, March 10, 2010 Scheduler Book: Wednesday
\ Now click "OK" to save

all the preferences just made.