Milford Regional Physician Group
The Benchmark for Quality Care

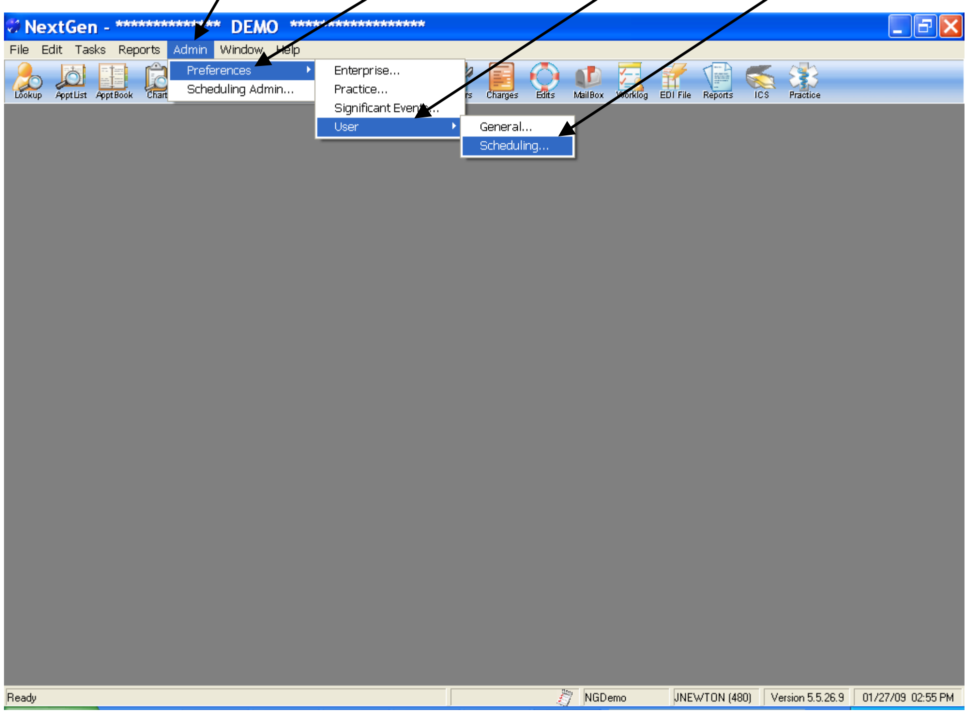
Workflow for: ☒ **Internal Medicine** ☒ **Pediatrics** ☒ **Family Medicine** ☒ **Specialty**

☒ **Clerical** ☒ **Clinical** ☒ **Provider**

Date Updated: 3/11/10 **Pages: 13** **Approved by: On File**

NextGen: Scheduling Preference Settings

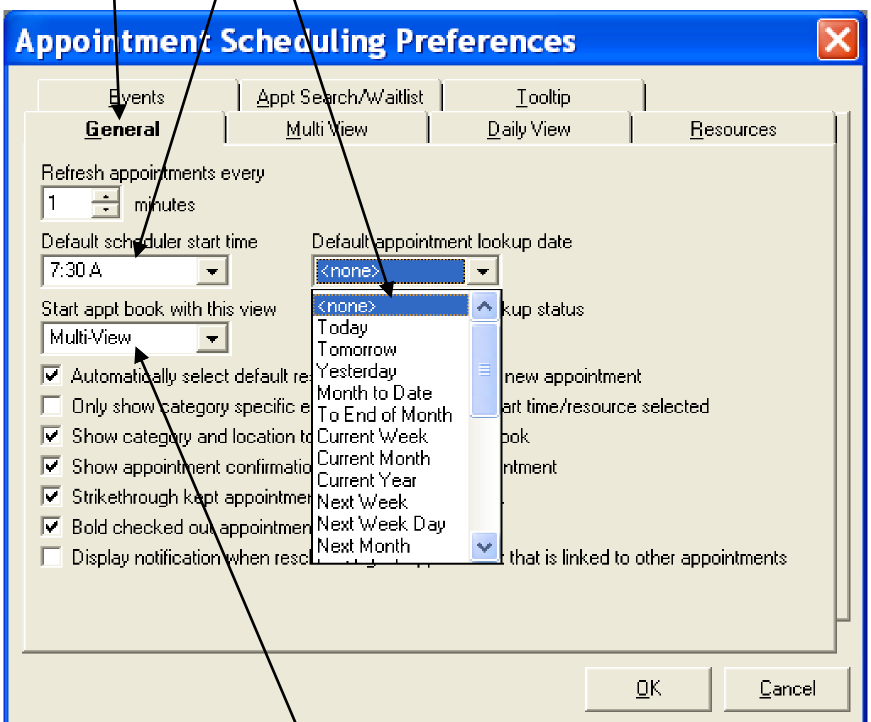
Click on Admin, select Preferences, then User, then Scheduling.



From the General tab:

Set the Default scheduler time to the time the office opens.

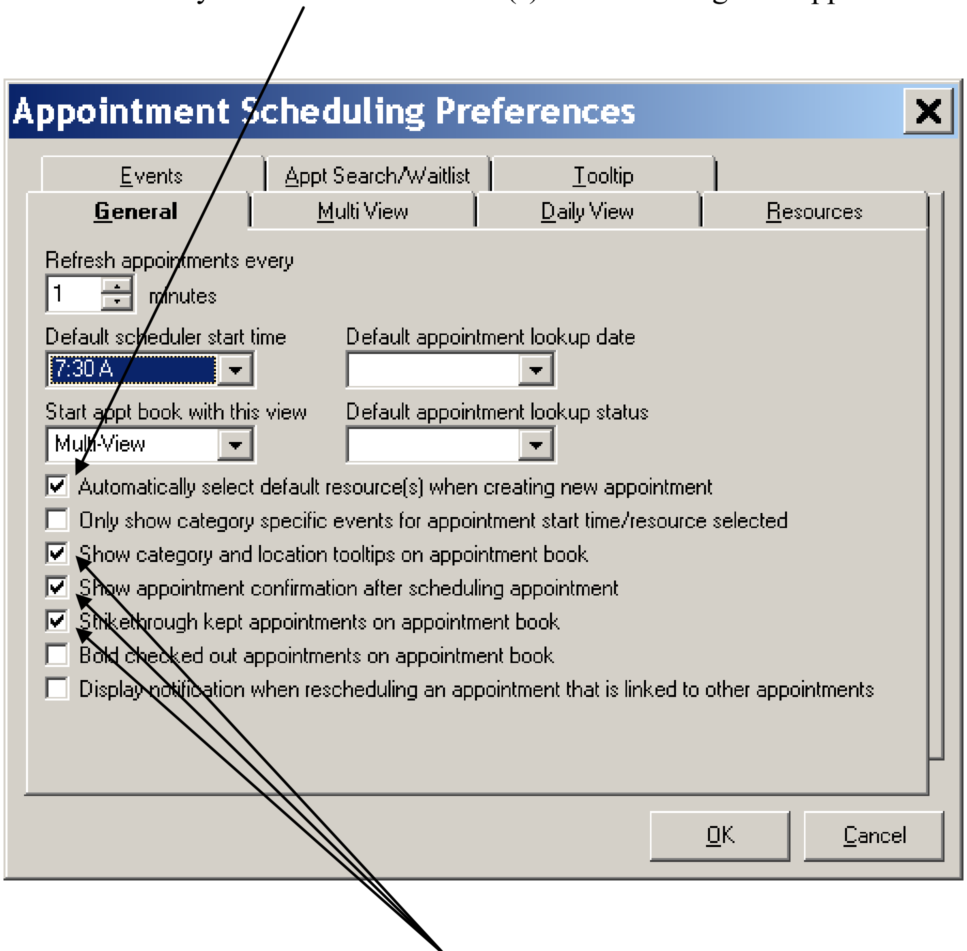
Set the Default appointment look up date to <none> from the drop down list.



Select the desired view for your appointment book from the dropdown list (Multi-View in most cases).

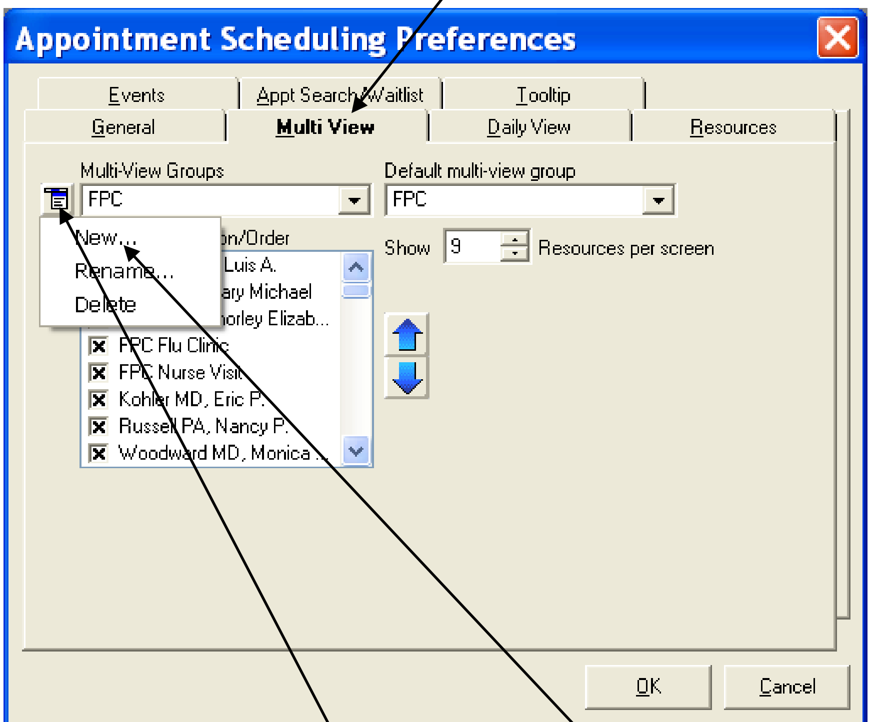
Click to check off the boxes next to the following preference options:

√ Automatically select default resource(s) when creating new appointment.

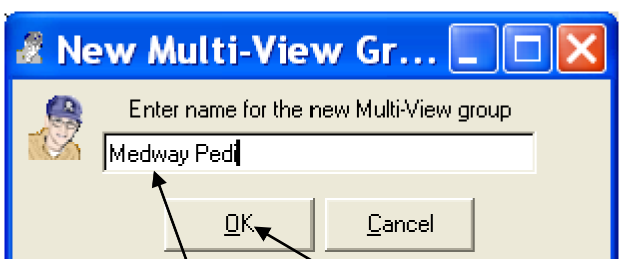


√ Show category and location tooltips on appointment book.
√ Show appointment confirmation after scheduling appointment.
√ Strikethrough kept appointments on appointment book.

Click the MulitView Tab.

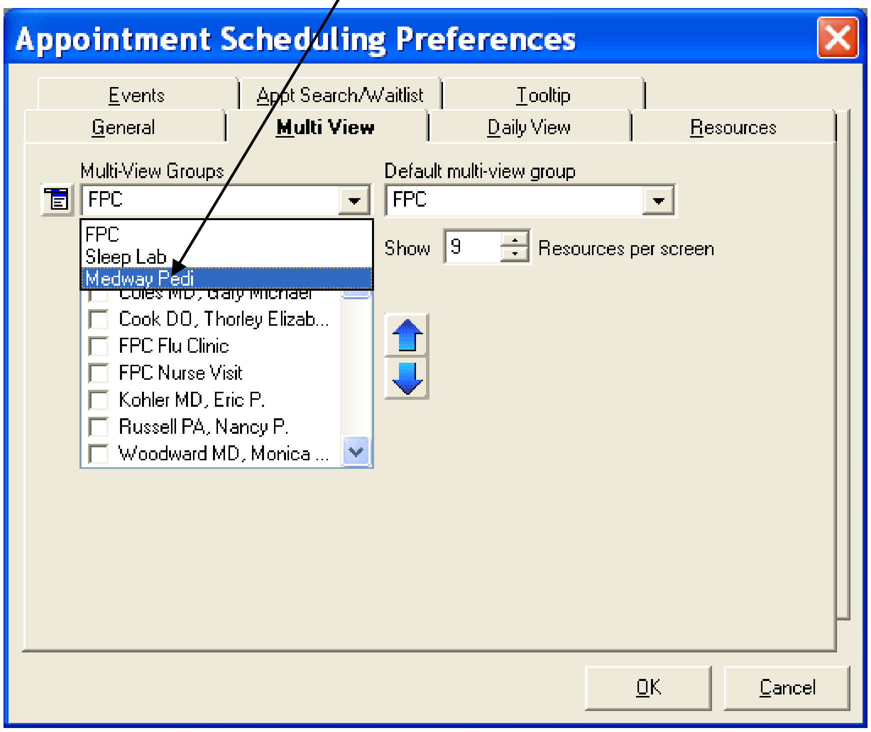


Click the Norton button and select New.

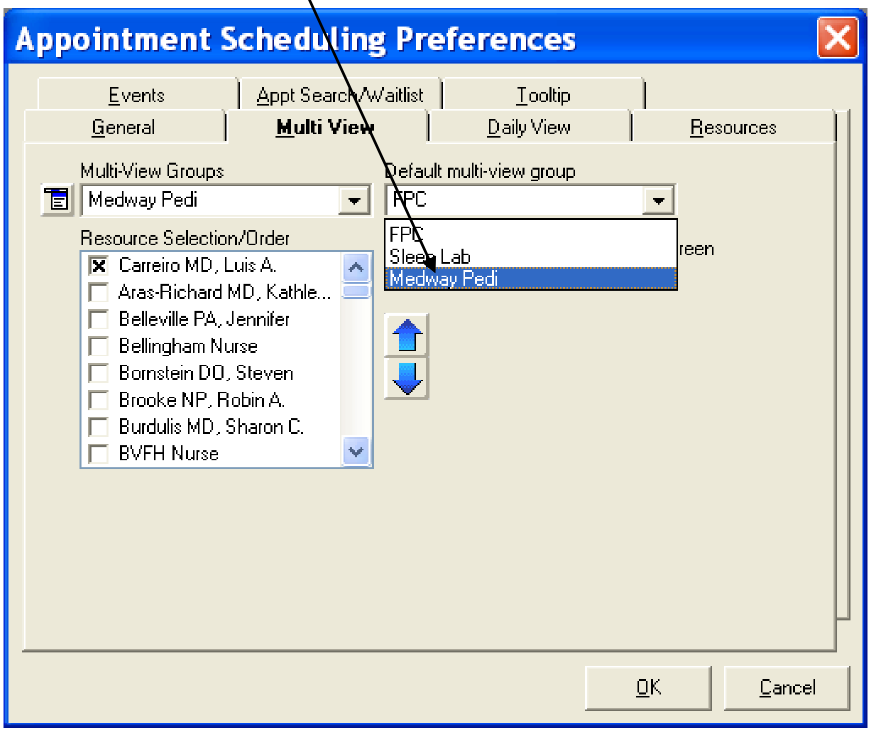


Enter the Site Name and click OK.

From the drop down list select the site.

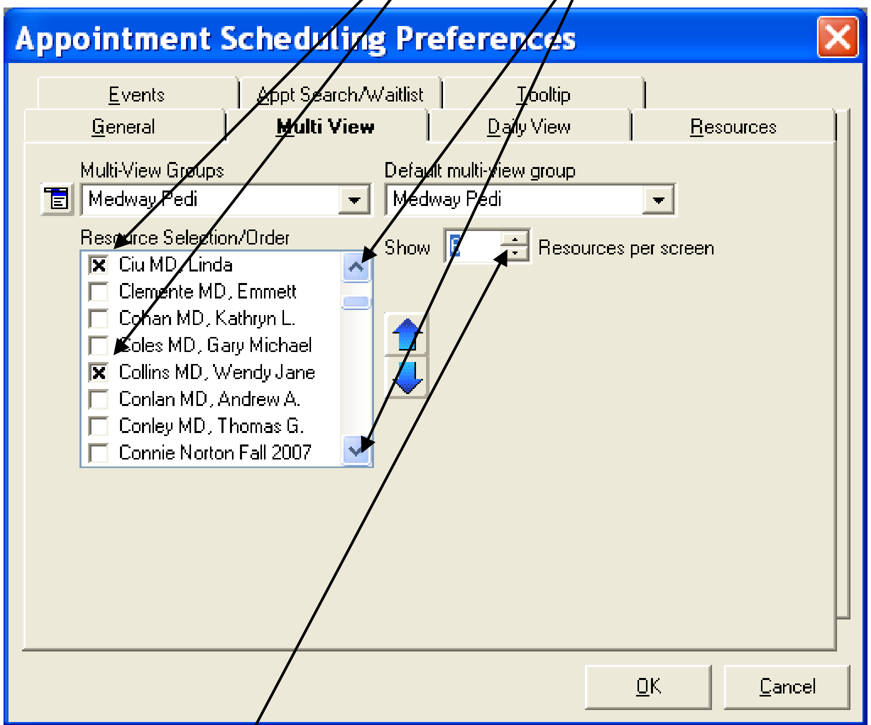


Select the site from the Default mulit-view group.



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

Click the arrows up or down to find the providers on the list.

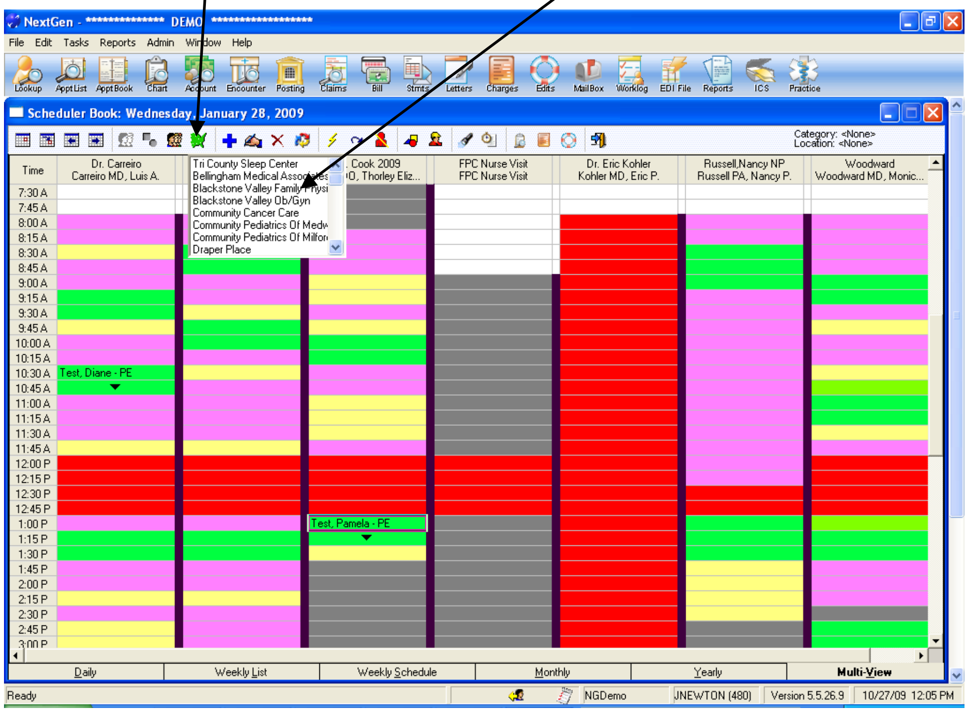


Click the arrows up or down to select the appropriate number of Resources to ensure all the schedules fit on the screen.

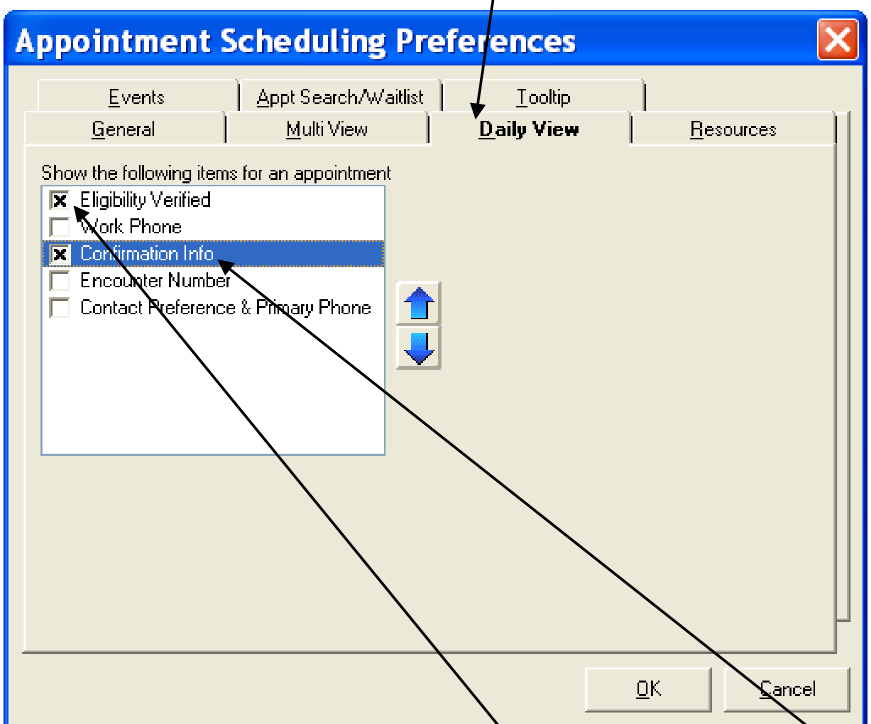
*If you will be working at more than one site you can repeat this process to customize the appointment book for additional sites.

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.

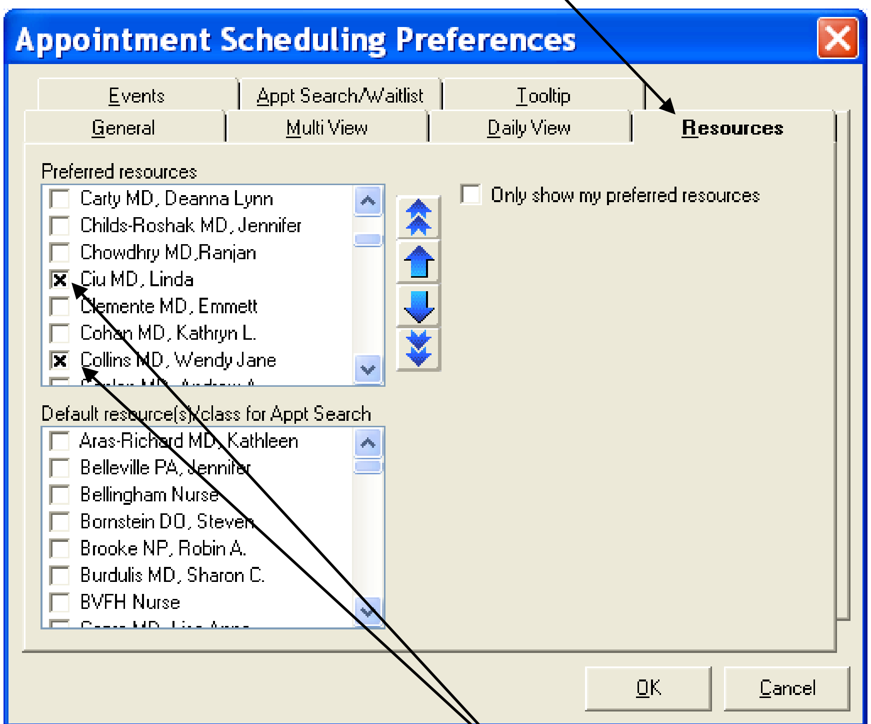


Next, click on the Daily View tab.



If you choose to use this view of the appointment book, it will be helpful to see if Eligibility and been verified, also if the appointment has been confirmed.

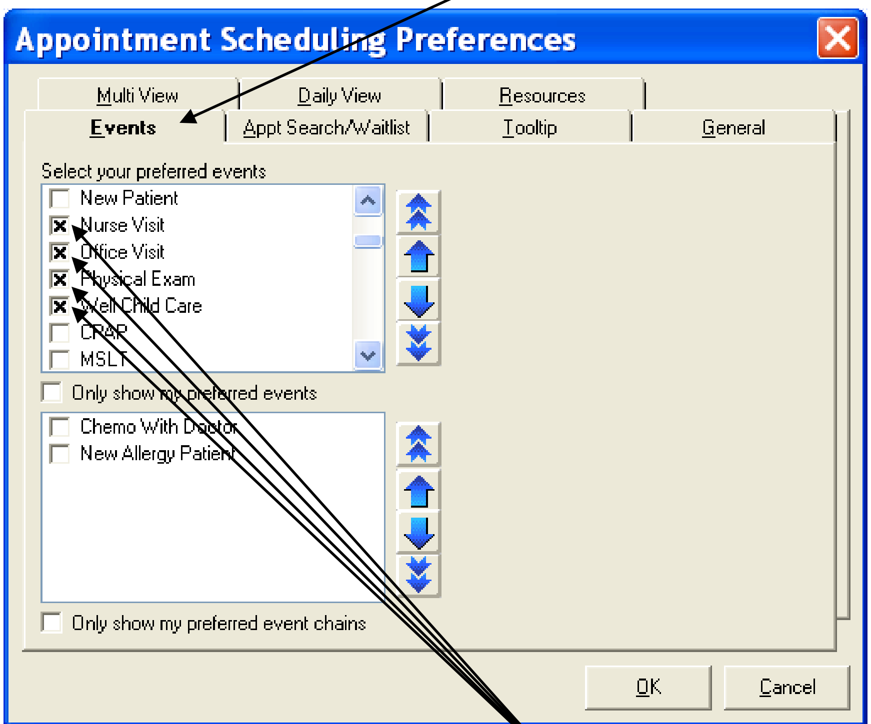
Next, click on the Resources tab.



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.

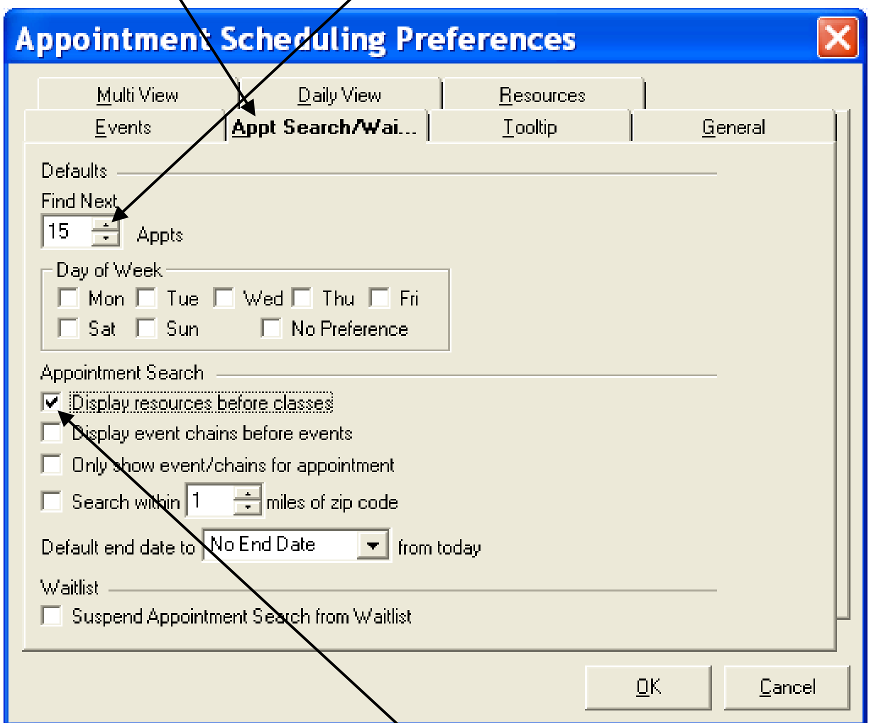


Click the box next to the events (appointment types) most frequently scheduled at your site.

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

Next, click on the Appt Search tab.

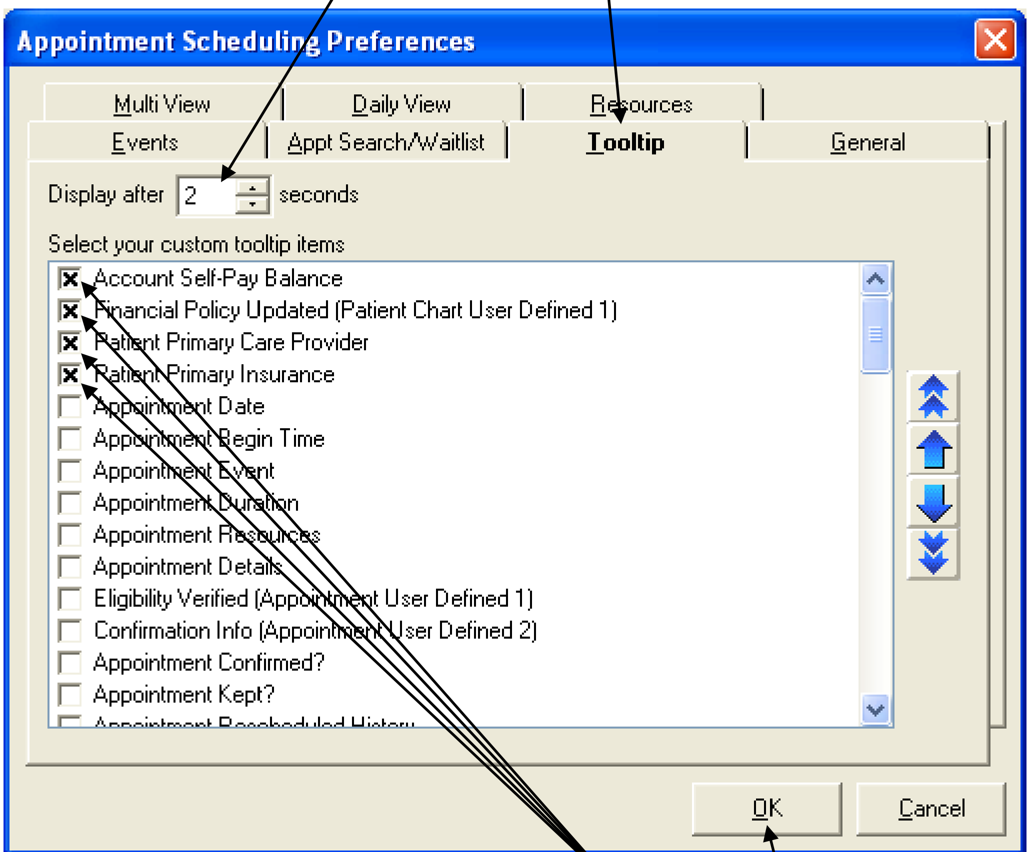
Click the arrow up to 15 to increase the number the number of appointments found with the appointment search feature.



Check the box next to "Display resources before classes".

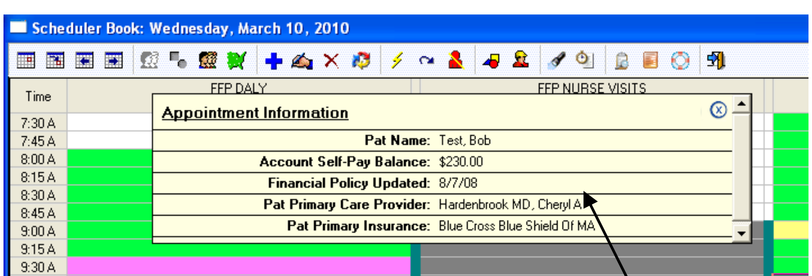
Lastly, click on the Tooltip tab.

Adjust to Display after 2 seconds



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



You can select any other fields you would like displayed.

Now click “OK” to save
all the preferences just made.