

Scheduling Behavioral Health Clinician (BHC) Appointments

- Only patients established with GVHC can be scheduled with Behavioral Health Clinicians
- Patient is new to BH if they haven't seen a BHC in 6 months or more – you will search for “Behavioral Health Intake” appointment slot.
- Existing patients to BH are those that have been seen by a BHC within the last 6 months – you will search for “Behavioral Health” appointment slot.
- **Yellow same day appointment** slots can be scheduled only on the day of or after 5:00 p.m. the day before
- Behavioral Health Clinicians (BHC) can only see patients who are 5 years old and older.
 - Patients requesting BH services for children under 5 can call their health plan or the parent can be scheduled with a BH Case Manager for linkage of services outside of GVHC.
- Foster Care Minors – BHC needs to have legal consent from the legal guardian in order to conduct an Intake and provide services. The legal guardian is the person assigned by the court (county social worker, attorney, or legal guardian). Legal documentation will be required at time of Intake. If this document is not presented, the appointment will be rescheduled. The call center will annotate under ‘Reason’ if the patient is a foster care minor.
- Minor patients with Custody Order – Current/Active custody orders will need to be presented at time of Intake.

Screening Questions/script at time of scheduling BH Appointments

“In an effort to avoid any delays in services, we are going to ask a few questions”

- *What is your relationship to the minor? (Bio-parent? Grandparent? Step-parent?). If grandparent or other extended family member – we will need documentation that they can give legal consent to treat the minor.. If they don't have any documentation, a BH appt can still be scheduled (with a caregivers affidavit).*
- *Are you the minor's legal guardian? Yes –schedule appt.*
- *Is the minor in foster care? Yes – “Thank you, in that case, the Clinician will need to have legal consent for services from County Social Worker or a document from court that assigns you as the legal guardian, please bring that to your appt”. Annotate ‘Foster Care’ under ‘Reason’ along with the typical descriptors (i.e, Anxiety, Depression, etc).*
- *Is there a custody order in place?_Yes – “Do you have share legal or sole legal custody? If yes – “Please bring copy of court order to appt otherwise your child may not be seen” If not, the parent holding legal consent will need to bring child to appt.*

Step-parents would not be able to bring minor to the first BH appt – Intake. The legal guardian or bio-parent will have to come at least to the initial appt (Intake).

- **Scheduling BH Intake appointment (New to BH Services)**

Existing GVHC patient who has not been seen by BHC in 6 months or more

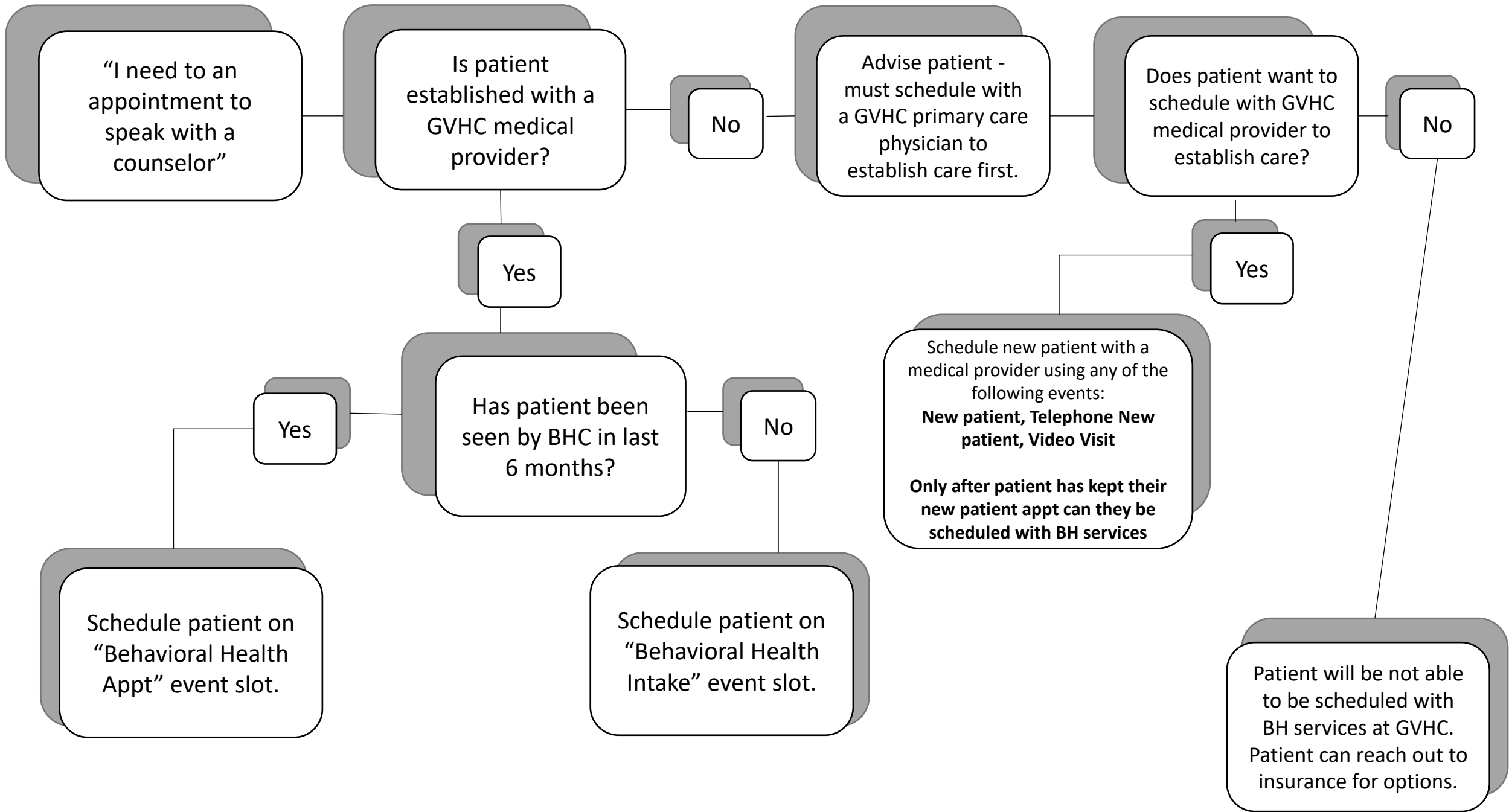
Existing GVHC patient who is 5 years old and older

Schedule patient according to the County they live in

Behavioral Health Clinicians can be LCSW and ASW

Review all guidelines provided

Note: During the COVID-19 pandemic, any BH appointment you schedule will be a telephone visit.



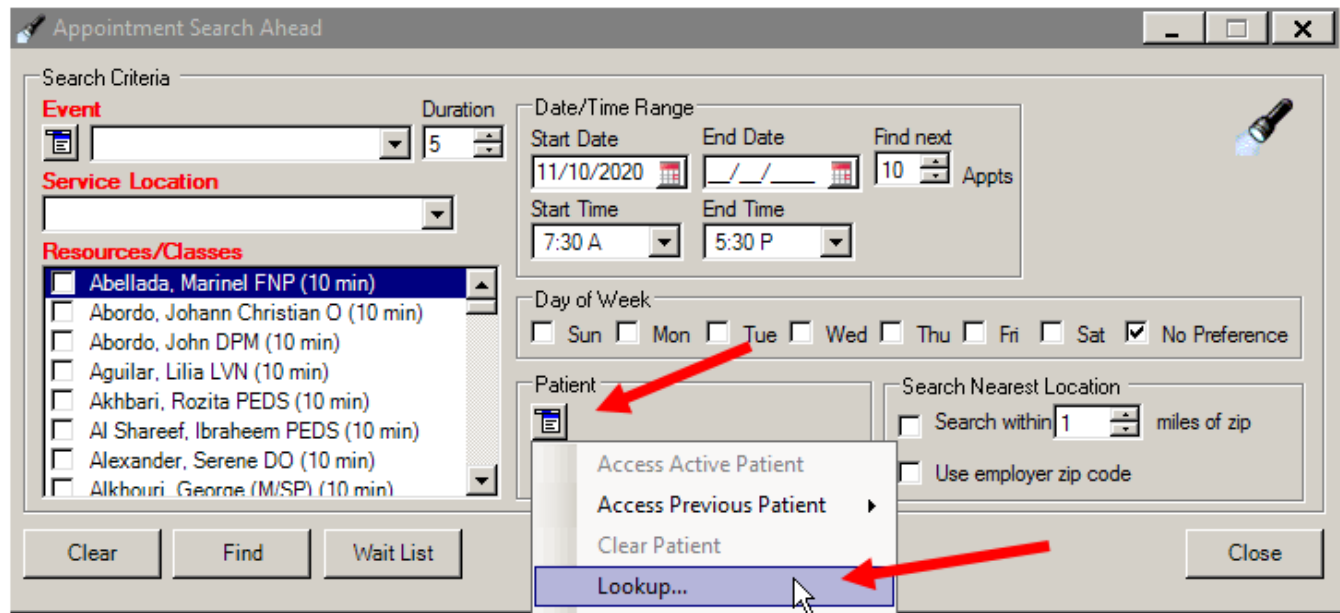
From within Nextgen, click on ApptBook



Click on the flashlight icon



Appointment Search Ahead will come up. Click on patient >>click on Lookup



People Look Up will come up.

- Enter date of birth & click find
- Look for patient's name, last & first
- Highlight patient and double click

Note: If patient not found with date of birth, search by name, phone number, and/or address

People Lookup

Search Criteria

Last First / Nickname Middle Previous Last City Address Line 1 Zip Mother's Maiden Name

Social Security Birth Date Sex Phone Med Rec Nbr Policy Nbr

View By External System External ID

All Patients Exclude Expired Patients

Matching Records

Name	Patient Portal	Nickname	Maiden Name	Address	Sex	Birth
PATIENT, TEST	Y	Twilight Spa...		1058 Bill Street Modesto, CA 95855 USA	Female	08/...

Records Found: 43

Clear Find New Open Close

After you double click on patient, the Update Patient Information will appear along with the Nextgen Alerts box.

- d. Make sure to review alerts as there may be important information
- e. Ask patient to verify address and phone number
 - i. Is there an alternate number patient wants to add?
- f. Ask patient for an email address
- g. Update address & phone number if needed

Click on the x to exit

Alert box may tell you to verify a password before allowing anyone access, or not to schedule with a specific provider, or patient may be a Code Jane.

Click ok once update or verification is complete

Patient name will now appear in Patient box

1. **Event:** Behavioral Health Intake
2. **Service location:** Patient's preference within their county
3. **Resource/Classes:** Behavioral Health
4. **Click Find**
5. Highlight appointment and double click

Appointment Search Ahead: TEST PATIENT

Search Criteria

Event: Behavioral Health Intake (Duration: 10)

Service Location: GVHC Florida Medical - Distance Not Av

Resources/Classes:

- Zhan, Lei FNP (10 min)
- Zhan, Lei FNP (10 min)
- Allergy
- Behavioral Health**
- Cardiology
- Case Manager
- Chiropractor
- CPSP

Date/Time Range

Start Date: 11/11/2020 | End Date: / / | Find next: 70 Appts

Start Time: 7:30 A | End Time: 5:30 P

Day of Week

Sun Mon Tue Wed Thu Fri Sat No Preference

Patient

TEST PATIENT

Zip Code: 95855

Search Nearest Location

Search within 1 miles of zip

Use employer zip code

Available Timeslots

Date/Time	Resource(s)	Location(s)	Distance	Location Address
Wednesday, December 23, 2020 at 09:00 A	Najera, Elaina LCSW	GVHC Florida		1540 Florida Avenue Mo
Wednesday, December 30, 2020 at 03:00 P..	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo
Monday, January 04, 2021 at 09:00 AM	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo
Monday, January 04, 2021 at 03:00 PM	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo
Tuesday, January 05, 2021 at 01:30 PM	Scott Angela, ACSW	GVHC Florida..		1510 Florida Avenue Mo
Tuesday, January 05, 2021 at 03:00 PM	Saldivar Marycruz, ACSW	GVHC Florida..		1510 Florida Avenue Mo

Buttons: Clear, Find, Wait List, Close

After you've double clicked on appointment selected by patient, Add Appointment will come up. Patient's information should already be populated on the right side of the box as well as all of the appointment details.

Add "Intake" in the Details box

Click Ok

The screenshot shows the 'Add Appointment' window with the following details:

- Date:** 12/23/2020
- Time:** 9:00 A
- Event/Event Chain:** Behavioral Health Intake
- Duration:** 10
- Resources:** Najera, Elaina LCSW (10 min) (selected)
- Service Location:** GVHC Florida North
- Description:** PATIENT, TEST
- Details:** Intake
- Checkboxes:** Procedure with Resident, Appointment Kept, Confirmed
- User Defined:** Code Jane Visit (No)
- Transportation Coordinated:** (empty)
- Patient Information:** Last: PATIENT, First: TEST, Middle: (empty), Birth Date: 08/29/1990, Age: 30 yrs, Sex: Female, Linked: checked
- Address:** 1058 Bill Street, City: Modesto, State: CA, Zip: 95855-
- County:** STANISLA, Country: USA, Contact Preference: Cell Phone
- Work/Day Phone:** (209) 386-3017
- Home Phone:** () -
- Alt Phone:** () -
- Sec Hm Phone:** () -
- E-Mail:** (empty)
- Cell Phone:** () -

The Appointment Confirmation will pop-up. It is important to re-cap all appointment details back to patient before ending the call.

- Appointment date & time
- Location
- Provider name

Sample script: “Ok, Ms. Test. Your appointment has been scheduled with counselor Elaina Naiera on Wednesday, Dec. 23 at 9am at our location on 1540 Florida Ave.”

Appointment Confirmation

Patient Information

Name: PATIENT. TEST **Home Phone:** (209) 386-3017

Address: 1058 Bill Street **Day Phone:** N/A

Modesto, CA 95855 USA **Alt Phone:** N/A

Contact Preference: Cell Phone **Sec Home Phone:** N/A

Comments: N/A **E-Mail:** N/A

Appointment Information

Date: 12/23/2020 **Time:** 9:00 A **Day of Week:** Wednesday

Event: Behavioral Health Intake

Location: GVHC Florida North

Resources: Naiera, Elaina LCSW

Print Close

Click close after re-cap complete

Note: If appointment is incorrectly scheduled, you will need to cancel the appointment and start over.

Scheduling BH appointment (Existing patient with BH Services)

Existing GVHC patient who has seen a BHC within the last 6 months

Existing GVHC patient who is 5 years old and older

Schedule patient according to the County they live in

- Follow the steps on slides 4, 5, & 6

Note: During the COVID-19 pandemic, any BH appointment you schedule will be a telephone visit.

1. **Event:** Behavioral Health Appt
2. **Service location:** Where patients current BHC is located
3. **Resource/Classes:** Select the BHC patient has been seen by
4. **Click Find**
5. Highlight appointment and double click

Appointment Search Ahead: TEST PATIENT

Search Criteria

Event: Behavioral Health Appt Duration: 10

Date/Time Range: Start Date: 11/11/2020 End Date: Find next: 10 Appts Start Time: 7:30 A End Time: 5:30 P

Service Location: GVHC Florida Medical - Distance Not Av

Resources/Classes:

- N Merced MA (10 min)
- N Merced NST (10 min)
- N Merced Quest Lab (10 min)
- Nadig, Pallavi OB/GYN (10 min)
- Najera, Elaina LCSW (10 min)
- Nakhongsri, Arunee FNP-C (10 min)
- Narayan, Jyotishna FNP (10 min)
- Narayan, Jyotishna FNP (10 min)

Day of Week: Sun Mon Tue Wed Thu Fri Sat No Preference

Patient: TEST PATIENT Zip Code: 95855

Search Nearest Location: Search within 1 miles of zip Use employer zip code

Available Timeslots

Date/Time	Resource(s)	Location(s)	Distance	Location Address
Friday, December 18, 2020 at 08:00 AM	Najera, Elaina LCSW	GVHC Florida		1540 Florida Avenue Mo
Friday, December 18, 2020 at 08:30 AM	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo
Friday, December 18, 2020 at 10:30 AM	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo
Friday, December 18, 2020 at 11:00 AM	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo
Friday, December 18, 2020 at 11:30 AM	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo
Friday, December 18, 2020 at 01:00 PM	Najera, Elaina LCSW	GVHC Florida..		1540 Florida Avenue Mo

Buttons: Clear Find Wait List Close

Note: If patient's BH provider is out for a long period, you can offer to schedule with someone else. Also, patients can choose to change BH providers.

After you've double clicked on appointment selected by patient, Add Appointment will come up. Patient's information should already be populated on the right side of the box as well as all of the appointment details.

Add "BH" in the Details box

Click Ok

The screenshot shows the 'Add Appointment' window with the following details:

- Date:** 12/18/2020
- Time:** 10:30 A
- Event/Event Chain:** Behavioral Health Appt
- Duration:** 10
- Resources:** Najera, Elaina LCSW (10 min) (selected)
- Service Location:** GVHC Florida North
- Description:** PATIENT, TEST
- Details:** BH
- Procedure with Resident:**
- Appointment Kept:**
- Confirmed:**
- User Defined Code:** Jane Visit (No)
- Transportation Coordinated:** (empty)

On the right side, patient information is populated:

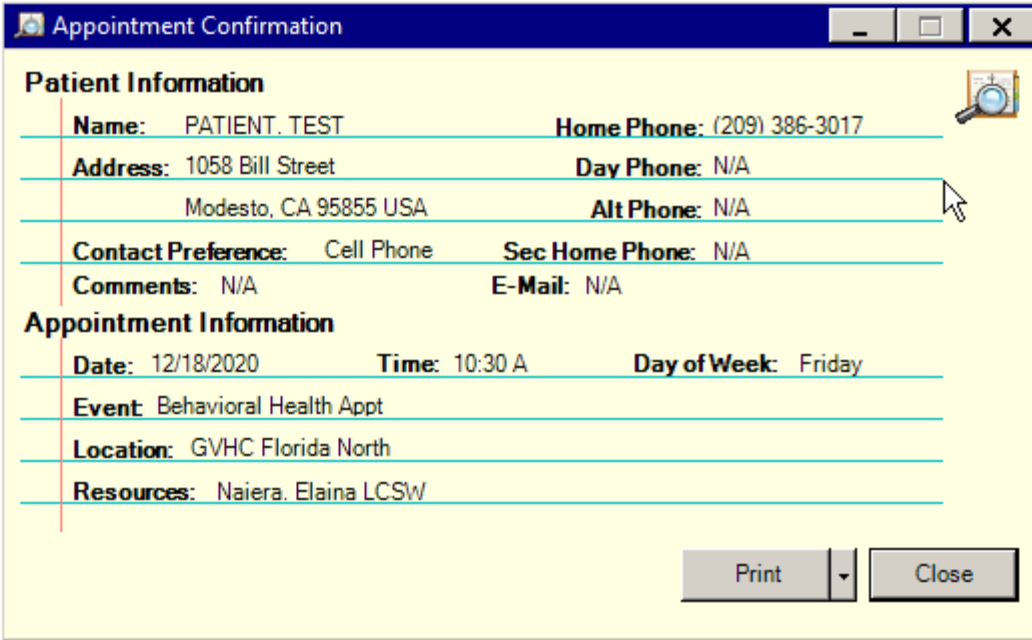
- Last:** PATIENT
- First:** TEST
- Middle:** (empty)
- Birth Date:** 08/29/1990
- Age:** 30 yrs
- Sex:** Female
- Linked:**
- Address:** 1058 Bill Street
- City:** Modesto
- State:** CA
- Zip:** 95855
- County:** STANISLA
- Country:** USA
- Contact Preference:** Cell Phone
- Work/Day Phone:** (209) 386-3017
- Home Phone:** () -
- Alt Phone:** () -
- Sec Hm Phone:** () -
- E-Mail:** (empty)
- Cell Phone:** () -

Buttons at the bottom: OK, Cancel

The Appointment Confirmation will pop-up. It is important to re-cap all appointment details back to patient before ending the call.

- Appointment date & time
- Location
- Provider name

Sample script: “Ok, Ms. Test. Your appointment has been scheduled with counselor Elaina Naiera on Wednesday, Dec. 18, at 10:30am at our location on 1540 Florida Ave.”



The screenshot shows a software window titled "Appointment Confirmation" with a yellow background. It is divided into two main sections: "Patient Information" and "Appointment Information".

Patient Information:

- Name:** PATIENT, TEST
- Home Phone:** (209) 386-3017
- Address:** 1058 Bill Street, Modesto, CA 95855 USA
- Day Phone:** N/A
- Alt Phone:** N/A
- Contact Preference:** Cell Phone
- Sec Home Phone:** N/A
- Comments:** N/A
- E-Mail:** N/A

Appointment Information:

- Date:** 12/18/2020
- Time:** 10:30 A
- Day of Week:** Friday
- Event:** Behavioral Health Appt
- Location:** GVHC Florida North
- Resources:** Naiera, Elaina LCSW

At the bottom right of the window, there are two buttons: "Print" and "Close". A magnifying glass icon is visible in the top right corner of the patient information section.

Note: If appointment is incorrectly scheduled, you will need to cancel the appointment and start over.

