

ER & Hospital Follow Up Appointment Slots

South Region Event Slots:

- Hospital Follow Up event – search for PA Diana Renteria
- TCM event – search for:
 - Family practice
 - Internal Medicine (adults only)
 - Pediatrics (children only)

North, South, West Regions Event Slots:

- TCM, TCM Telephone Visit, & Video Visit events – search for:
 - Family Practice
 - Internal Medicine (adults only)
 - Pediatrics (children only)

Important: Make sure to COVID-19 screen on every appointment you schedule & reschedule

When patients calls in to schedule an appointment...

Always ask patients if they have been seen at ER or admitted to the hospital for the reason they are needing to be seen.

- If the patient answers yes, ask for the following details
 - Were you admitted to the hospital or was it just to the emergency room?
 - What hospital did you go to?
 - When or what were the dates of your ER visit or hospital admission?
 - What was the exact reason you went to the hospital?

You will use the Record Request Communication template to request medical records & replace the red with patient specific information

For New & Existing Patient ER or Hospital Admission Follow Up Record Requests

Record Request Communication Template

Patient Name: **(John Smith)**

DOB: **(01/01/1000)**

CB#: **(209-123-4567)**

Caller Name: **(Nurse Kay Smith or Self)**

Relationship to Patient: **(Mother or Self)**

Hospital: BE SPECIFIC - **(DMC Manteca or DMC Modesto - MMC Los Banos or MMC Modesto)**

Date of ER Visit: **(01/01/1000) Only if not admitted to hospital**

Admission Date: **(01/01/1000 only if admitted to hospital)**

Discharge Date: **(01/01/1000 only if admitted to hospital)**

Records Due by/for: **Appt. scheduled 11/12/2018 with Dr. Test in North Merced**

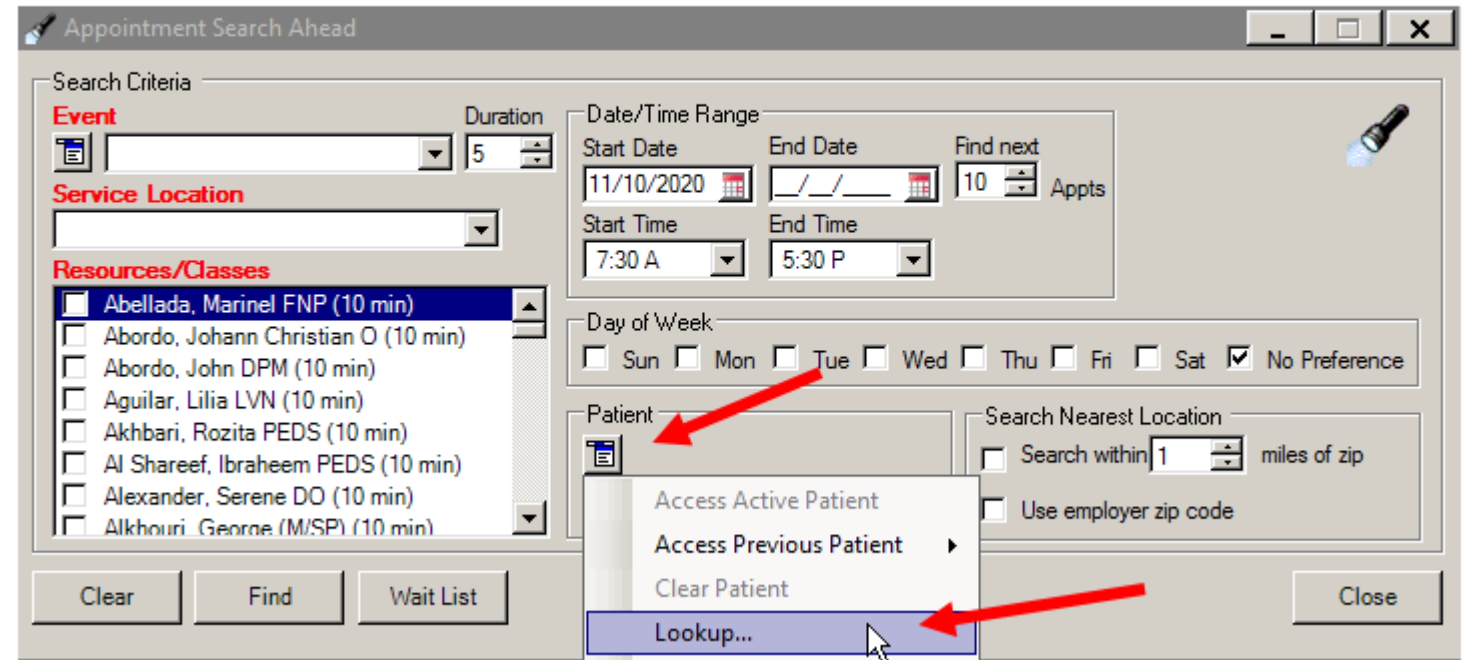
From within Nextgen, click on ApptBook



Click on the flashlight icon



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



People Look Up will come up.

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

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

Search Criteria

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

Social Security Birth Date Search 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

IMPORTANT: If it's a new patient, patient does not have a chart – follow the steps on how to register a patient.

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

Update Patient Information

Prefix: PATIENT, Last: TEST, First: Twilight Sparkle, Middle: , Suffix: , Nickname: Twilight Sparkle

Social Security: , Birth Date: 08/29/1990, Age: 30 yrs, Birth Sex: Femal, Current Gender: Female, Gender Identity: , Sexual Orientation: Straight or heteros, Preferred Pronoun: , Exempt from Person Merge:

Demographics

Address

Billing Secondary

Street 1: 1058 Bill Street, Street 2: , Address Type: , City: Modesto, State: CA (California), Zip: 95855, Country: USA, County: STANISLAUS

Demographics

Marital Status: , Mother's Maiden Name: , Student Status: , Pref Language: English, Religion: , Church: , Community Cd: , Primary Care Provider: Moti MD, Omarah L., Primary Dental Provider: , Expired: Expired Date: , Veteran: , Smoker:

Contact Information

Generate System Alert [International](#)

Contact Method	Number/Address
1. Home Phone	(209) 386-3017
<input type="checkbox"/> N/A	
2. Day Phone	() -
<input type="checkbox"/> N/A	
3. Alternate Phone	() -
<input type="checkbox"/> N/A	
4. Secondary Phone	() -
<input type="checkbox"/> N/A	
5. E-Mail	
<input type="checkbox"/> N/A	
6. Cell Phone	() -
<input type="checkbox"/> N/A	

NextGen Alerts

Alerts

System Alerts

- Future Appointments**
The patient has 1 future appointment(s).
- EHR Pending Charges**
There are currently 1 pending EHR charges for Encounter: 11485504

Account

OK Cancel

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

The patient' name will now appear in the "Patient" section.

- a. Event: Hospital Follow up
- b. Service Location: GVHC Northview Merced (Patient lives in Merced)
- c. Resource/Classes: Family Practice or Renteria, Diane PA

Appointment Search Ahead: TEST PATIENT

Search Criteria

Event: Hospital Follow Up | 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 Northview Merced Medical - Dist

Resources/Classes: Family Practice | Geniatrics | Health Educator | Internal Medicine | Laboratory | LVN/RN Nursing | MA Nursing | Nephrology

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, November 18, 2020 at 02:40 P...	Renteria, Diane Vang PA	GVHC Northvi...		3940 Sandpiper Avenue
Wednesday, November 18, 2020 at 03:40 P...	Renteria, Diane Vang PA	GVHC Northvi...		3940 Sandpiper Avenue
Wednesday, November 18, 2020 at 04:00 P...	Renteria, Diane Vang PA	GVHC Northvi...		3940 Sandpiper Avenue
Wednesday, November 18, 2020 at 04:40 P...	Renteria, Diane Vang PA	GVHC Northvi...		3940 Sandpiper Avenue
Monday, November 23, 2020 at 08:00 AM	Renteria, Diane Vang PA	GVHC Northvi...		3940 Sandpiper Avenue
Monday, November 23, 2020 at 08:20 AM	Renteria, Diane Vang PA	GVHC Northvi...		3940 Sandpiper Avenue

Buttons: Clear, Find, Wait List, Close

Note: Schedule ER & hospital admission appointments at least 3 days out to allow time for records to be requested.

This is always case by case – there may be instances where the appointment is needed asap, medical record requests can be escalated in order to expedite

ER & Hospital admission follow up appointments are to be scheduled on the following slots:

TCM or TCM Telephone appointment slots

Hospital Follow Up slot in South Region

This is for both New & Existing patients

Add Appointment

Date: 11/23/2020 Time: 9:00 A

Event/Event Chain: Hospital Follow Up Duration: 10

Resources:

- ✓ Renteria, Diane Vang PA (10 min)
- Rine, Kevin MD OB GYN (10 min)
- Riverbank Quest Lab (10 min)

Service Location: GVHC Northview Merced Medical

Description: PATIENT, TEST

Details: ER Follow Up - Chest Pain - DMC Modesto

Procedure with Resident Confirmed
 Appointment Kept

User Defined: **Code Jane Visit**
 No

Transportation Coordinated:

Patient: PATIENT TEST

Middle: 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: () -

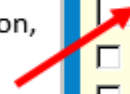
Sec Hm Phone: () -

E-Mail: () -

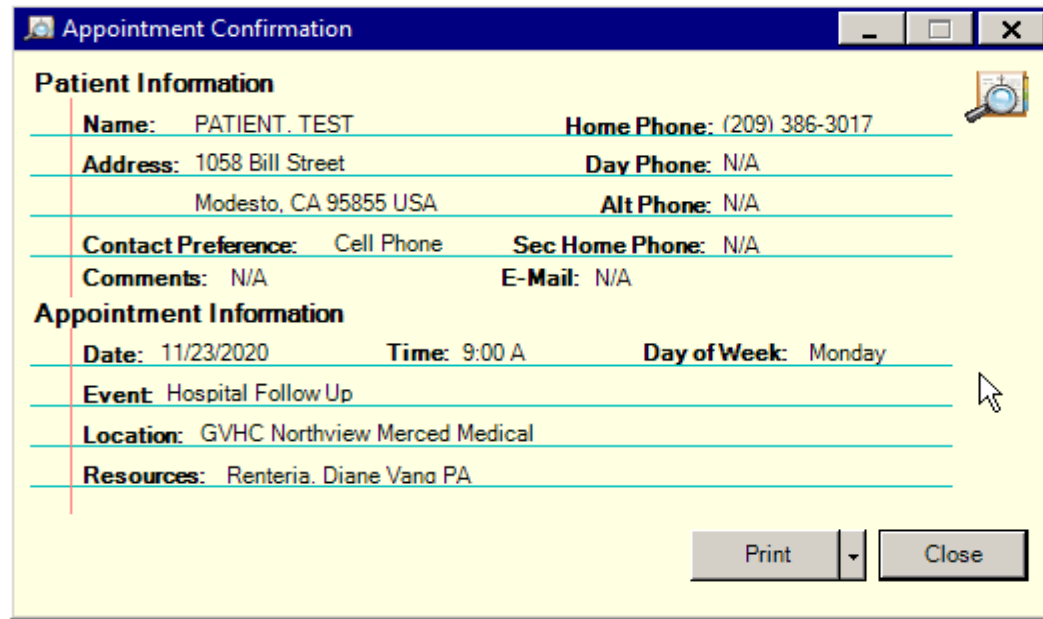
Cell Phone: () -

OK Cancel

In the Details box, include the type of appt., ER or Hospital admission, the reason for the hospital visit and the name of the hospital



Recap all appointment details from Appointment Confirmation box back to patient.



The screenshot shows a software window titled "Appointment Confirmation" with a yellow background and a blue title bar. The window 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	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: 11/23/2020	Time: 9:00 A	Day of Week: Monday
Event: Hospital Follow Up		
Location: GVHC Northview Merced Medical		
Resources: Renteria, Diane Vano PA		

At the bottom right of the window, there are two buttons: "Print" and "Close".

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

Now you will request medical records

For new patients with no medical record number, see Tasking Globe Patients flow.

For existing patients or new patients with a medical record number, continue to the next slide

Before requesting hospital records, remember the location and the provider you scheduled with. Your template should already be filled out.

- Record Request Communication
- Patient Name: **Patient, Test**
- DOB: **08/29/1990**
- CB#: **209-386-3017**
- Caller Name: **John**
- Relationship to Patient: **Spouse**
- Hospital: BE SPECIFIC - **DMC Modesto**
- Date of ER Visit: **11/05/2020**
- Admission Date: **only ER Visit**
- Discharge Date: **only ER visit**
- Records Due by/for: **Appt. scheduled 11/23/2020 with PA Diane Renteria, Northview**

From within Nextgen, Click on the EHR icon



The first box that comes up will be Select Location. It is important to select the location of where the ER Follow up appointment was scheduled at.

In our example: The location is Northview Merced. Highlight and double click

The "Select Location" dialog box contains the following information:

Name: GVHC Northview Merced Medical Phone: (209) 381-4104
Contact: [] [] [] Ext.: []
Address: 3940 Sandpiper Avenue Fax: (209) 381-4109
[] [] []
Merced CA 95340-8372

Buttons: OK, Cancel, Clear, Search

Type	Location Name	Last Name	First Name	Mi	Address Line One
	GVHC Newman Dental				637 Merced Street
	GVHC Newman Medical				637 Merced Street
	GVHC North Merced Medical				127 West El Portal
	GVHC Northern Calif Surgery Ctr, LP				3850 Geer Road
	GVHC Northview Merced Medical				3940 Sandpiper Avenue
	GVHC Northview Merced Prompt Care				3940 Sandpiper Avenue
	GVHC OBanion Medical				401 Leshner Drive
	GVHC Patterson Dental				200 C. Street

Next, you'll select the provider you scheduled the ER follow up with. If the provider does not populate on the list, click clear and enter the last name then click search.

Highlight the provider's name and double click

Select Provider

Last Name: OK

First Name: Cancel

Middle Name: Clear

Degree: Search

Last Name	First Name	Middle Name	Degree
Renteria	Diane	Vang	PA

You are now in the patient's health record

NextGen EHR: TEST PATIENT DOB: 08/29/1990 AGE: 30 years 2 months (Female) MRN: 000000600793

File Edit View Tools Admin Utilities Window Help

GVHC Northview Merced M Renteria, Diane Vang PA

TEST PATIENT (F) DOB: 08/29/1990 (30 years) Weight: 180.00 lb (81.65 Kg)

Address: 1058 Bill Street Modesto, CA 95855
Contact: (209) 386-3017 (H)

Alerts 2 Allergies 3 Problems 13 Diagnose 171 Medications 15 Appointments 6 Data Share 0 Lab Results

PCP: Moti, Omairah L MD
Referring: Generic Nurse, RN/LVN NRS

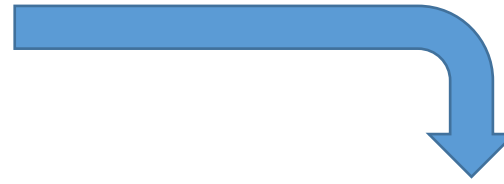
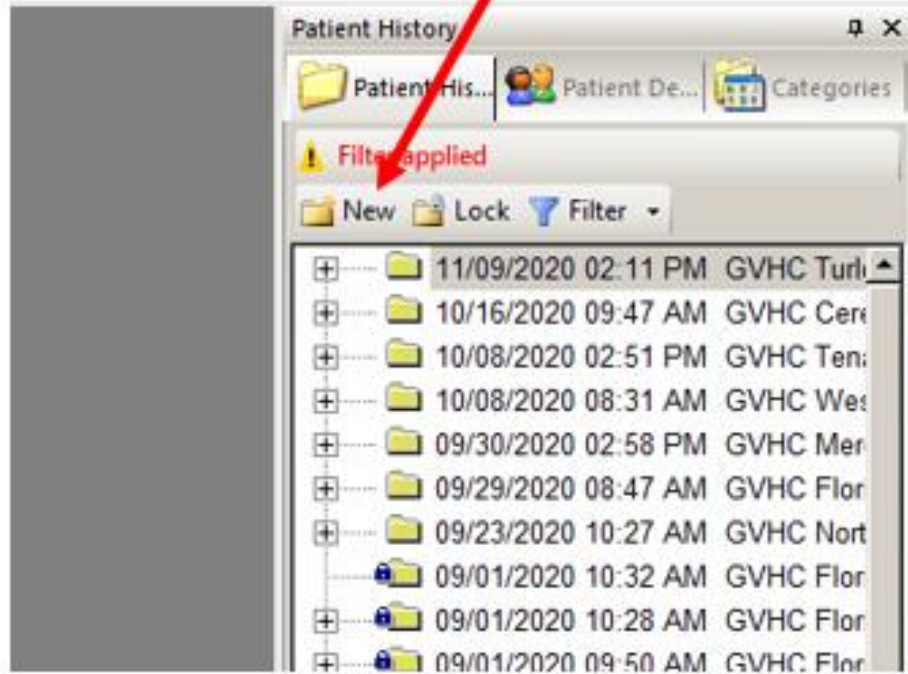
Patient History

Filter applied

New	Lock	Filter
+	+	+
+	+	+
+	+	+

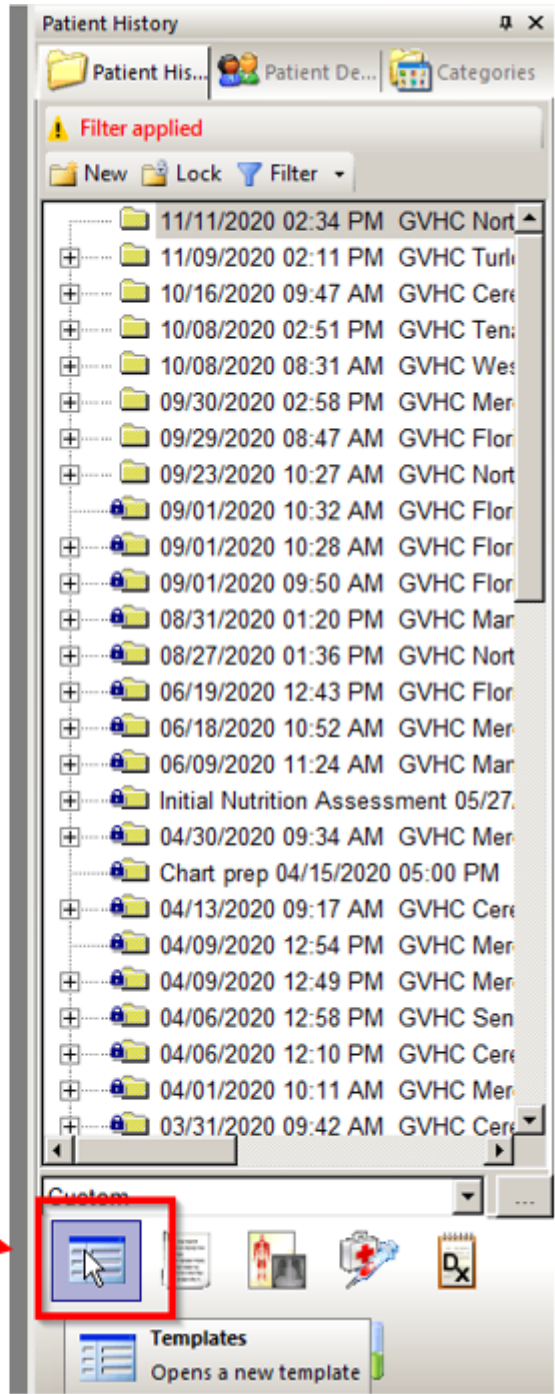
11/09/2020 02:11 PM GVHC Tur...
10/16/2020 09:47 AM GVHC Cer...
10/08/2020 02:51 PM GVHC Ten...

On the right side, click on New

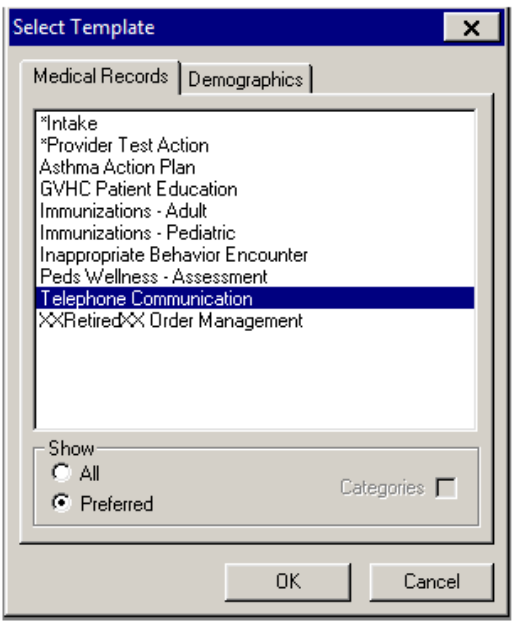


Today's date will populate, 11/11/2020





From the Select Template box, Highlight Telephone Communication and click OK



Click on the Templates icon



The "Telephone Communication" tab is now open

From the Call Type drop down, select Other

11/11/2020 02:34 PM : "Telephone Communication" x

Specialty select a specialty Visit Type select a visit type

Care Team Contagion Risk

Care Guidelines Global Days Comments

Panel Control: Toggle Cycle

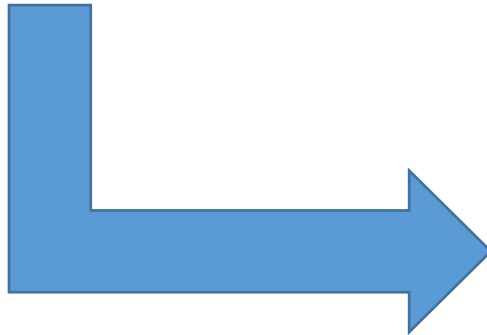
General

PCP: Omairah Moti Provider Communications Send letter to patient due to inability to contact

Communication

Call Type: [dropdown] Date: 11 Nov 2020, 02:49 PM After hours Cancel New Call

- Billing Question
- Charges
- Forms/Records Request
- Medical Question
- Medication Management
- Other**
- Referral Request
- Test Results Request



Fill out all Call Information

Contact Type: Incoming call

Urgency: If appt scheduled at least 3 days out – Within 24-72hrs

Records may be available well before the appointment date.

Spoke with: Who called in?

11/11/2020 02:34 PM : "Telephone Communication" x

Care Guidelines Global Days Comments

Panel Control: Toggle Cycle

General

PCP: Omairah Moti Provider Communications Send letter to patient due to inability to contact

Communication

Call Type: Other Date: 11 Nov 2020, 02:53 PM After hours Cancel New Call

Call Information	Contact Type	Urgency	Spoke With
Contact Information	Internal Task	Now - Emergency	Granddaughter
Communication	Chart Prep	within 1 hr	Grandmother
Action(s)	Incoming call	By noon	Grandson
Call Status	Incoming Fax	By 5 pm	Incoming Fax
	Incoming voice mail	Within 24 hrs	Mother
	Outgoing Call	Within 24-72 hrs	Mother-in-law
	Referral Inquiry	Within 2 business days	Nephew
	Other	When available	Niece
		Other	Significant other
			Sister
	Incoming email		Son
			Son-in-law
			Spouse
			John

Contact Information:

In case more information is needed, what is the best call back phone number?

The screenshot shows a software window with a header bar containing a 'Call Type' dropdown set to 'Other', a 'Date' dropdown set to '11 Nov 2020, 02:53 PM', and an 'After hours' checkbox. On the right side of the header are 'Cancel' and 'New Call' buttons. Below the header is a sidebar with a tree view containing 'Call Information', 'Contact Information', 'Communication', 'Action(s)', and 'Call Status'. The main area is divided into two columns: 'Preferred Contact' and 'Alternate Contact'. Under 'Preferred Contact', there is a 'Home: (209) 386-3017' field and an empty 'Other:' field. Under 'Alternate Contact', there is a 'Home: (209) 386-3017' field and an empty 'Other:' field.

Communication:

You will paste your Record Request Communication Template. It should already be filled in with patient information

The screenshot shows the same software window as above, but with the 'Communication' section selected in the sidebar. The main area now displays a 'Comments' field containing the following text: 'Patient Name: Patient, Test', 'DOB: 08/29/1990', 'CB#: 209-386-3017', 'Caller Name: John', 'Relationship to Patient: Spouse', 'Hospital: BE SPECIFIC - DMC Modesto', 'Date of ER Visit: 11/05/2020', 'Admission Date: only ER Visit', and 'Discharge Date: only ER visit'.

Always double-check before sending. Make sure the patient information in your Comments section matches the patient on the chart.

The screenshot displays the NextGen EHR interface for a patient named TEST PATIENT (F) with DOB 08/29/1990. The patient's information is shown in a header section, including address (1058 Bill Street, Modesto, CA 95355), contact information (209) 386-3017, and referring provider (Renteria, Diane Vang PA). The interface also shows various tabs for Alerts, Allergies, Problems, Diagnoses, and Medications.

The main window is titled "Communication" and shows a form for entering a communication. The "Call Type" is set to "Other" and the date is "11 Nov 2020, 02:53 PM". The "Comments" section is expanded, showing the following information:

- Patient Name: Patient, Test
- DOB: 08/29/1990
- CB#: 209-386-3017
- Caller Name: John
- Relationship to Patient: Spouse
- Hospital: BE SPECIFIC - DMC Modesto
- Date of ER Visit: 11/05/2020
- Admission Date: only ER Visit
- Discharge Date: only ER visit

At the bottom of the form, there is a text input field labeled "<comments>" and a set of buttons: "Add", "Add & Task", and "Save & Reply".

If all information matches, click on Add & Task

From the New EHR Task window, click on Add

New EHR Task

Due Date: 11/11/2020 Priority: Normal

Assign To: [Empty] **Add**

Subject: **Other**

Re: Patient: TEST PATIENT **Add**

Description: Contact Type: Incoming call, Urgency: Within 24-72 hrs, Spoke With: Spouse: John. Preferred Contact: Home: (209) 386-3017. Communication: Patient Name: Patient, Test DOB: 08/29/1990 CB#: 209-386-3017

Attachment: Template telephone_call_com_gv_84

Categories: Telephone Call **Setup...**

Send Task **Cancel**

Select Task Recipients

Review the listing. Look for the Medical Record Region associated with the clinic where the appointment was scheduled Highlight the region. Click Add>>then OK

Select Task Recipients

Available Users / Workgroup:

- Medical Records North Region
 - Lorreta task group
 - Los Banos BH (Los Banos BH)
 - Los Banos BO (Los Banos BO)
 - Los Banos CPSP (Los Banos CPSP)
 - Los Banos Dental FO (Los Banos Dental FO)
 - Los Banos FO (Los Banos FO)
 - Los Banos FOS/BOS (Los Banos FOS)
 - Los Banos Health Ed (Health education services for patients)
 - Los Banos Lety Costa, FNP (Lety Costa, FNP)
 - Los Banos MD Family Practice (Dr. Christopher Costa, MD)
 - Los Banos Medical Peds Team (Dr. Richa Verma)
 - Los Banos Medical Sangjun Team
 - Los Banos SBIRT (Los Banos BH SBIRT Group)
- Manteca BOS/CM
- Manteca FO
- Manteca Health Ed (Health education services for patients v
- Manteca, BO-Dr.Doshi
- Manteca,BO- Dr.Nimbargi
- Manteca,BO- Emily Njoroge
- Maria Orozco, HE
- Martene Perez, HE
- Medical Assistants / PSR Floats (857 W. Childs Ave SHAW)
- Medical Records MID Region (Rob Rd./ Henshaw/ Ceres (Ea
- Medical Records North Region (Florida Campus/ Empire/ Ri**
- Medical Records South Region (Merced Campus/ N. Merce

Add >> **<< Remove** **Clear**

OK **Cancel**

New EHR Task

Due Date: 11/11/2020 Priority: Normal

Assign To: **Medical Records South Region** **Add**

Subject: **Other**

Re: Patient: TEST PATIENT **Add**

Description: Contact Type: Incoming call, Urgency: Within 24-72 hrs, Spoke With: Spouse: John. Preferred Contact: Home: (209) 386-3017. Communication: Patient Name: Patient, Test DOB: 08/29/1990 CB#: 209-386-3017

Attachment: Template telephone_call_com_gv_84

Categories: Telephone Call **Setup...**

Send Task **Cancel**

Click Send Task

After your task has been successfully sent, you will be back at the “Telephone Communication” tab.

Review the Details, recipient, and location.

11/11/2020 02:34 PM : "Telephone Communication" x

Communication

Filter by Type: All Status: All Document New Task View: All This Encounter

Call Type	Contact Date	Details	Employee	Recipient	Encounter	Location	Completed	After
Other	11/11/2020 02:53 PM	Contact Type: Incoming call, Urgency: Within 24-72 hrs, Spoke With: Spouse: John. Preferred Contact: Home: (209) 386-3017. Communication: Patient Name: Patient, Test DOB: 08/29/1990 CB#: 209-386-3017 Caller Name: John Relationship to Patient: Spouse Hospital: BE SPECIFIC - DMC Modesto Date of ER Visit: 11/05/2020 Admission Date: only ER Visit Discharge Date: only ER visit Records Due by/for: Appt. scheduled 11/23/2020 with PA Diane Renteria, Northview.	Claudia Terrazas, SUPV	Medical Records South Region	11/11/2020 02:34 PM	GVHC Northview Merced Medical	No	

