Determining an Appointment Date Without a Patient Name

Overview

Introduction
It is possible to determine the next available appointment date prior to registering a patient or accessing an existing patient’s account.

This module introduces the steps used to determine the next approximate appointment date prior to entering a patient name.

Objectives

Upon completion of this lesson, you should:

- Understand the steps used to determine the next approximate appointment date

Prerequisites

Prior to beginning this lesson, you should have completed the following classes:

- No prerequisites specified for current module
Determining an approximate appointment date

Steps for determining an approximate appointment date:

1. Leave the Patient name field blank.

2. Enter the criteria in the appropriate fields:
   • Appt Reason
   • Provider
   • Department
   • Appt Type

Example: New Appointment Screen

Example: New Appointment Screen - First Available Search

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Example: New Appointment Screen-Schedule Search

4. **Select the appropriate appointment time and click Next.**

5. **The following pop-up displays to inform you that it is time to select a patient.**

   ![Centricity® Business Alert]
   
   Please select a patient for appointment 1.
   
   **OK**

6. **Click OK.** The Delayed Patient Selection Screen displays.
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Example: Delayed Patient Selection Screen

7. Enter the patient search criteria.

<table>
<thead>
<tr>
<th>Look-up command instructions</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full name look-up</td>
<td>JONES,JOHN</td>
</tr>
<tr>
<td>Partial name look-up</td>
<td>JON,JOH</td>
</tr>
<tr>
<td>Partial name &amp; year of birth</td>
<td>JON,JOH;55</td>
</tr>
<tr>
<td>Partial name, year of birth &amp; sex</td>
<td>JON,JOH;55;M</td>
</tr>
<tr>
<td>Medical Record Number (MRN)</td>
<td>M10008835 or .10008835</td>
</tr>
<tr>
<td>Social Security Number (SSN)</td>
<td>S488997777</td>
</tr>
<tr>
<td>Phone Number</td>
<td>#314-555-6382 (or #3145556382)</td>
</tr>
<tr>
<td>Scheduling Appointment number</td>
<td>V1234</td>
</tr>
<tr>
<td>Soundex (phonetic search)</td>
<td>JON,JOH?</td>
</tr>
</tbody>
</table>

8. Click Next. The Patient Selection screen displays.
9. Select the appropriate patient or select New Reg to register a new patient.

Note: The steps to determine if the patient has an existing account in aMPI were discussed in the module: Steps of the PFS Process

10. After selecting the appropriate patient (or registering a new patient) click OK.

11. The delayed patient selection screen will redisplay with the patient’s name listed in the Patient field.
Example: Delayed Patient Selection Screen

12. Click Next.

13. Complete the remaining scheduling screens and file the appointment as usual.
Lesson Summary

In this lesson, you learned:

• Understand the steps used to determine the next approximate appointment date