


Epic Scheduling



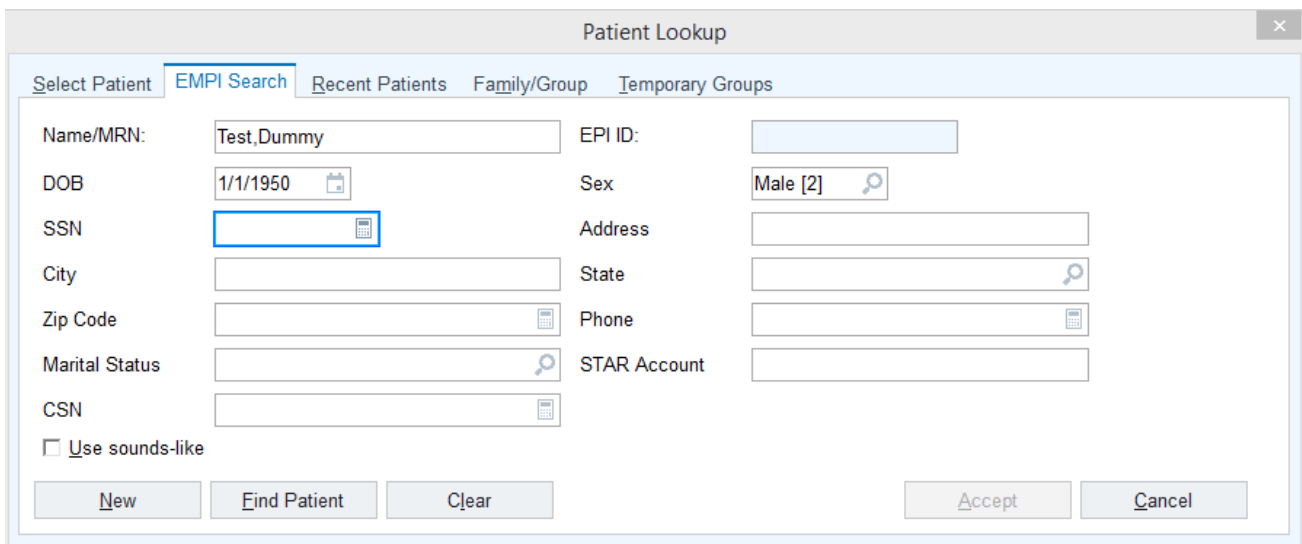
How to make an appointment in Epic

1. Log into Epic with your username and password.



The login screen features the Epic logo in red, with '2017' in small red text and 'HYPERSPACE®' in blue below it. There are two input fields: 'User ID' and 'Password'. Below these is a 'Log In' button and a link that says 'Reset your password'.

2. Identify the patient you would like to schedule with Patient Lookup and click Find Patient. Matching records will pop up, select the correct patient.



The 'Patient Lookup' window has a title bar with a close button. Below the title bar are tabs: 'Select Patient', 'EMPI Search' (which is selected), 'Recent Patients', 'Family/Group', and 'Temporary Groups'. The main area contains two columns of input fields. The left column includes 'Name/MRN:' (with 'Test,Dummy' entered), 'DOB' (with '1/1/1950' and a calendar icon), 'SSN' (with a calendar icon), 'City', 'Zip Code' (with a calendar icon), 'Marital Status' (with a magnifying glass icon), and 'CSN' (with a calendar icon). The right column includes 'EPI ID:', 'Sex' (with 'Male [2]' and a magnifying glass icon), 'Address', 'State' (with a magnifying glass icon), 'Phone' (with a calendar icon), and 'STAR Account'. At the bottom left are buttons for 'New', 'Find Patient', and 'Clear'. At the bottom right are buttons for 'Accept' and 'Cancel'. There is also a checkbox labeled 'Use sounds-like'.

3. Click “Make Appt.”

Appointment Desk for Test,Dummy [E2231244]

Make Appt
 One Click
 Walk In
 Quick Appt
 Classes
 Itinerary
 Locate
 Week View
 Calendar
 New Recall
 Reg

Patient Summary (Edit)

Test,Dummy (70 yrs)
 PO BOX 15
 MILLER PLACE NY 11764

Reg Status: Elapsed
 SSN: xxx-xx-0000
 Home: 212-681-3312
 Comments: Attending Physician: , Phone: Fax:
 Admitting Physician: , Phone: Fax:

DOB: 1/1/1950
 Preferred Language: English
 Mobile: 631-465-6300

Patient Guarantor Accounts

4. Enter in the department, visit type and provider and double click on the date you need to schedule or click search.

Make Appointment

Department:
SFH NORTH COAST MED [10317020]

Appt notes:

Visit type:
NEW PATIENT [1003]

Px/Dx

Provider:
GAMBINO, CHARLES [1583] in SFH NORTH COAST MED [10317020]

[enter/double-click : select]
[spacebar : sort]

Provider/Resource	Thu 4/30	Fri 5/1	Sat 5/2	Sun 5/3	Mon 5/4	Tue 5/5	Wed 5/6
GAMBINO, CHARLES [1583]	0%	No Sch	No Sch	No Sch	No Sch	No Sch	No Sch

Display
Search

- Double click on the time slot and click Schedule.

Provider Schedule

GAMBINO, CHARLES [1583] in SFH NORTH COAST ME View: All Times, Single Provider

0% Thu 4/30/2020 NEW PATIENT - 40 minutes

Time	Pri?	MRN	Name	Visit Type	Len	Appt Notes
4:00p						
4:10p						
4:20p						
4:30p						
4:40p						
4:50p						
5:00p						
5:10p						
5:20p		END				

Day Week More Providers

Restrictions Skip full day Show joint

Date	Provider	Arrive By	Appt Time	Len
4/30/2020	GAMBINO, CHARLES [1583] in SFH NORTH COAST ME	4:00p	4:00p	40

Schedule

- The patient's registration information will open, complete any additional registration information and click Accept.

Registration

Test, Dummy

Male | 1/1/1950 (70 yrs) | xxx-xx-0000 | MRN: E2231244

Demographics

Po Box 15
Miller Place, NY 11764

Home: 212-681-3312
Work: 631-465-6300
Mobile: email@chsl.org
Email: email@chsl.org
Employment: Ehs Employer - Full Time

Additional Demographics

PCP Name: Nopcp, Doctor, MD
MyChart sign-up: Active

PCP Type: General

Patient Contacts

Dummyb Test (Spouse)
212-681-3312

Showing 1 of 1

Elapsed | Verify patient

Guarantors & Coverages

P/F Test, Dummy [703298]

Guarantor Demographics

Address linked to patient

Home: 212-681-3312
Work: email@chsl.org
Email: email@chsl.org

Rel to patient: Self
Employment: Ehs Employer - Full Time

Prof acct balance: 0.00
FPL Info: No FPL info on file

Hosp acct balance: 0.00

Elapsed | Verify guarantor

1. E-AETNA/AETNA POS PPO EPO

Subscriber Demographics

Test, Dummy
Address linked to patient

Home: 212-681-3312
Work:

Coverage Info

Member ID: 123456789
Subscriber ID: 123456789
Group: Effective from: 6/23/2018
Rel to subscriber: Self
Auth phone:

Content Error | Verify coverage member

Documents

Type	Description	Status	Date Received	Location
ADLW	hip	Not Received		
HIPAA NOP		Received	06/23/2019	GSH Samarita












Document Information

Restore Response Notification

Back Next Accept


7. You can now see the patient's appointment scheduled on the Appt Desk.

Appointment Desk for Test,Dummy [E2231244]

 [Make Appt](#)  [One Click](#)  [Walk In](#)  [Quick Appt](#)  [Classes](#)  [Itinerary](#)  [Locate](#)  [Week View](#)  [Calendar](#)  [New Recall](#)  [Reg](#)

← Patient Summary ([Edit](#))

→ **Test,Dummy (70 yrs)**

 PO BOX 15
MILLER PLACE NY 11764

Reg Status: Elapsed

SSN: xxx-xx-0000

DOB: 1/1/1950

Preferred English

Language:

Home: 212-681-3312

Mobile: 631-465-4

Comments: Attending Physician: , Phone: Fax:

Admitting Physician: , Phone: Fax:

Patient Guarantor Accounts

 [Future](#)  [Past](#)  [Referrals](#)  [Orders](#)

	Encounter Date	Time	Appt	Visit Type	Provider	Dept	Appt Notes
	4/30/2020 Thu	4:00 P	40	NEW PATIENT [1003]	GAMBINO, CHARLES [1583]	SFHNCM [10317020]	