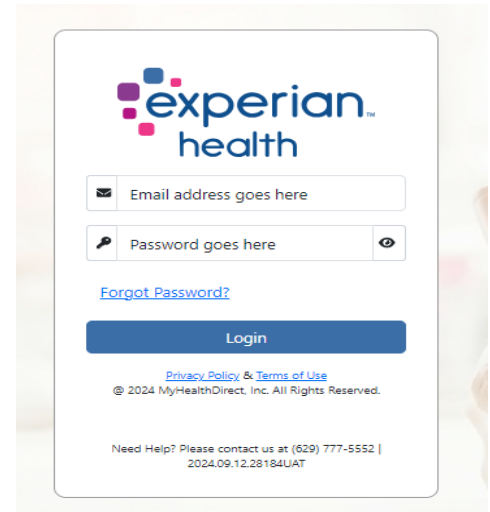


MHCP Connect to Care Quick Guide

Scheduling an Appointment with Experian – Patient Schedule (MyHealth Direct)

Step 1: Login

- Go to Experian - Patient Schedule login page. You will receive a link specific to your referral team.
- Enter your Username (email address) and password and select “Login”
 - Please note: You will have three attempts to enter the correct password. After the third failed attempt, you will be locked out of your account. If you do not remember your password, please select ‘Forgot Password’ to reset.



Step 2: Search for Patient

- Enter the patient’s first name, last name, date of birth, and/or phone number
- If the patient is new to the system, “**No Patients Found!**” will pop up in the bottom left of the screen. Click ‘create’ and complete the patient’s demographic fields, which are noted with an * as required.

FIRST NAME	first name
LAST NAME	last name
DATE OF BIRTH	09/09/1990
PHONE NUMBER	615-555-5555
Search Patient	Reset

No patients found!
 Can't find the patient you are looking for? Please [create](#) a new patient.

Search Patient

Add Patient

*FIRST NAME First Name Required	MIDDLE NAME Middle Name	*LAST NAME Last Name Required
*DATE OF BIRTH 09/09/1990 Required		
*GENDER Select		
*PHONE (INSTRUCTIONS HERE) *Phone (instructions here)	ALTERNATE PHONE Alternate Phone	
*ADDRESS *Address	ADDRESS (LINE 2) Address (Line 2)	
CITY City	*STATE Al	*ZIP CODE *Zip Code Required
*EMAIL ADDRESS *Email Address		

Save **Cancel**

- If the patient does not have a phone number, enter your own main office number as a placeholder.
- If the patient does not have an address write the name and address of the shelter, or “Unhoused” for the street address + Milwaukee, WI, 53201

Step 3: Begin Booking

- Select 'Book' to schedule an appointment with the patient that was searched or created

Patient Results

1 patient found

	First Name	Last Name	Member Id	Gender	Date of Birth
Book	Testing	Test	-	F	09/09/1990

- You can also review the patient's booking history of appointments previously scheduled in the Experian tool by clicking anywhere in a bar where the patient is listed.

Patient Results

1 patient found

	First Name	Last Name	Member Id	Gender	Date of Birth	Address	Phone (H)	Phone (M)	Email
Book	Testing	Test	-	F	09/09/1990	123 Test	615-555-5555	-	test@test.com

- Complete the questions on both pages of the workflow.

Testing Test >

*Service Category:

Medical ▾

*Payor Type:

Please select one ▾

Commercial

Medicaid

Medicare

Uninsured

Testing Test >

*Specialty:

Please select one ▾

*Insurance:

Please select one ▾

*Primary Language of Patient:

Please select one ▾

*In Need of an Interpreter? **Please allow 4 days before appointment for clinic to schedule interpreter

Yes No

*Has this patient been seen at the receiving clinic previously?

Please select one ▾

Previous
Next

- **Service Category** – Option to select **Medical** or **Substance Abuse – Adult Only**
- **Payor Type** - Select the patient's insurance category
- **Specialty Type**
 - For **Medical appointments**:
 - For the broadest results, select “Primary Care—Adult” or “Primary Care—Youth”
 - For inpatient discharge, choose “Inpatient Follow-up: Surgical” or “Inpatient Follow-up: Non-Surgical” (*expectation is to establish primary care, not post-surgical care*)
 - For **Substance Abuse – Adult Only** select the most appropriate option
- **Insurance** – This question will only appear if Commercial, Medicare, or Medicaid is selected as the Payor Type
 - If the patient doesn't know their plan, select “Other/I don't Know”
- **Primary Language of Patient** – select one of the following:
 - English
 - Spanish
 - Hmong
 - OTHER Primary Language Noted Under Reason for Visit
 - The Reason for Visit free text box will be on the appointment confirmation page at the end of the

process

- **In Need of an Interpreter?** ****Please allow 4 days before appointment for clinic to schedule interpreter - Note if the patient needs an interpreter by clicking “Yes” or “No”**
- **Has the patient been seen at the receiving clinic previously?** -Note if the patient has been seen at the receiving clinic by clicking “Yes,” “No,” or “I don’t know”
 - *Outreach Community Health Center does not accept existing patients through this program. Please call the call center at 414-727-6320 to make an appointment.*

Step 4: Select Appointment

- Click on the appointment time slot based on the patient's preference for appointment time and location.
 - **Site Filter** – allows you to filter by available location
 - **Sort By** – allows you to sort by first available appointment, alphabetical by last name, or distance from patient’s zip code on file

****Consider showing the screen to the patient and talking through different locations and time options**

Provider Results
Showing 1 - 6 of 17 providers found

Sorted By: First Available | Site Filter: Select...

Return to Questions | Search Next 30 Days

Provider	Tue 9/17/24	Wed 9/18/24	Thu 9/19/24	Fri 9/20/24	Sat 9/21/24	Sun 9/22/24	Mon 9/23/24
Residents Pool Family Medicine Outreach Community Health Centers 210 W Capitol Drive Milwaukee, WI 53212 2.5 miles away 414-727-6320	10:00 am 2:00 pm	9:00 am 10:00 am	10:00 am 2:00 pm	10:00 am 2:00 pm			10:00 am 3:00 pm
Annette Stokes, MD Family Practice PCHC Hillside Family Health Care 1452 N. 7th Street 2nd Floor Milwaukee, WI 53205 1.7 miles away 414-342-2018	10:00 am	10:00 am 3:00 pm					
Northside Milwaukee Family Medicine Resident Family Practice Northside Milwaukee Family Medicine Residency Program	11:00 am 1:00 pm	11:00 am	11:00 am 1:00 pm	11:00 am 1:00 pm			11:00 am 1:00 pm

Step 5: Schedule Appointment

- Review and Confirm appointment details with patient
- Get consent from the patient about text and email reminders
- Enter why you are referring the patient in the "Reason for Visit" field. (If their language is not listed, also list the primary language here)

(Screenshot on following page)

Schedule An Appointment

Testing Test >

<p>WHEN Wednesday, 09/18/2024 10:00 am CST (patient time) 10:00 am CST (provider time)</p>	<p>WHERE Annette Stokes, MD Family Practice PCHC Hillside Family Health Care Office 414-342-2018 Fax 414-287-0907 1452 N. 7th Street 2nd Floor Milwaukee, WI 53205</p>
<p>TYPE Regular</p>	

Step 1: Reason For Visit

Enter why you are referring the patient in the "Reason for Visit" field. (If their language is not listed, also list the primary language here)

143/8000

Step 2: Configure Patient Notifications

Email Appointment Confirmation will automatically be sent to test@test.com. Optionally, you may override that email below.

Other Email Address

Patient Consent: TEXT Appointment Reminder

Other Phone Number

Enter Other Phone Number

* Please enter a valid phone number

How many hours prior to appointment time would you like the TEXT reminder to be sent?

24 TEXT reminder will be sent at 10:00 am on 09/17/2024

Select a notification language:

English

* Form is invalid, please review validation messages.

Reservation will expire in **02:39**

Step 6: Confirm

- Click "Schedule Appointment" - and the appointment is scheduled
- Print out the appointment confirmation
- Discuss why having a health home and attending the appointment is important and any barriers the person may face (ex. transportation)

Appointment Details

<p>Patient Information</p> <p>NAME Testing Test</p> <p>DATE OF BIRTH 09/09/1990</p> <p>HOME 615-555-5555</p> <p>MOBILE -</p> <p>ADDRESS 123 Test Milwaukee, WI 53201</p>	<p>Appointment Information</p> <p>WHEN Wednesday, 09/18/2024 10:00 AM CST (patient time) 10:00 AM CST (provider time)</p> <p>WHERE Annette Stokes, MD Family Practice PCHC Hillside Family Health Care, Progressive Community Health Centers Office 414-342-2018 Fax 414-287-0907 1452 N. 7th Street 2nd Floor Milwaukee, WI 53205</p> <p>TYPE Regular</p> <p>REASON FOR VISIT Enter why you are referring the patient in the "Reason for Visit" field. (If their language is not listed, also list the primary language here)</p> <p>PATIENT ATTENDANCE Not Reported</p>	<p>INSURANCE</p>
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Additional Information

INFORMATION FROM PROVIDER

Welcome to Progressive Community Health Center!

We look forward to working together to manage your health and prevent future illness.

You are scheduled at the [Hillside Family Health Clinic](#). This clinic is located at 1452 N. 7th Street, 2nd Floor.

Please arrive **ON TIME** for your appointment. You will meet with a financial counselor if needed and then your medical provider.

Please bring the following items with you:

- * Your pill bottles or a list of your medications
- * Your photo ID and insurance card

We will try to call you to remind you of your appointment. If you have any questions, or need to change your appointment please call us at (414)935-8000 ext.221. Your first appointment will be 1-2 hours long.

Prescription Drive Policy
 Progressive CHC will NOT prescribe narcotics unless you are already an established patient with our clinic.

Referral Information

BOOKED BY TestUser AWSJHEDO	TIMESTAMP 09/17/2024 10:47 AM EDT
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