# 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.

health	
Email address goes here	1
Password goes here	
Forgot Password?	
Login	
Privacy Policy & Terms of Use @ 2024 MyHealthDirect, Inc. All Rights Reserved.	
Need Help? Please contact us at (629) 777-5552   2024.09.12.28184UAT	

FIRST NAME	
firsrt 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 <u>create</u> a new patient.	

Middle Name	Last Name
	Required
v	
ALTERNATE PHONE	
Alternate Phone	
ADDRESS (LINE 2)	
Address (Line 2)	
*STATE	*ZIP CODE
AL	*Z/p Code
	Required
	Attransfer Price           Attransfer Price           Abtendis Price           ADORESS (Line 2)           Address (Line 2)           State           AL

• If the patient does not have a phone number, enter your 414-585-4932 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,

Step 3: Begin Booking

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

patient f	ound					
_		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	<u>615-555-5555</u>		test@test.com

• Complete the questions on both pages of the workflow.

	Testing Test >
Testing Test ≻	*Specialty:
*Service Category:	Please select one
	*Insurance:
Medical Y	Please select one
*Payor Type:	*Primary Language of Patient:
	Please select one
Please select one	"In Need of an Interpreter? **Please allow 4 days before appointment for clinic to schedule interpreter
Commercial	O Yes O No
Medicaid	"Has this patient been seen at the receiving clinic previously?
Medicare	Please select one
Uninsured	Previous Next

- Service Category Choose Medical for primary care or another category to match patient need
- 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:
  - o English
  - $\circ$  Spanish
  - o Hmong
  - o 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 Return to Questions					Sorted By First Available	~	Site Filter Select	
MyHealthDirect	Residents Pool Outreat: Community Health Centers 210 W Capito Onive Milliwakee, WI 53212 23 miles away 414-727-5320 Verw Meeting Cambra	Tige 9/1724 1000 am 2000 pm	Wed 9/12/4 900 am 900 am	Thu 0/10/24 10/00 am 2:00 pm	Fri 9,20,24 1000 am 200 pm	Sat 9/21/24	Sun 9/22/24	Search Next 30 Days Mon 6/23/24 1000 am 3:00 pm
MylealthDirect	Annette Stokes, MD Family Practice PCHC Hildie Family Health Care 1452 Nr. Th Street 204 Floor Missukee, WI 53205 17 miles away 414.342-2018 Vew Monthy Clanate	1600 am	1600 am 300 pm					
MyHoalthDirect	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

HEN	WHERE
dnesday, 09/18/2024 00 am CST (patient time) 00 am CST (provider time)	Annette Stokes, MD Family Practice PCHC Hilliside Family Health Care
	Office <u>414-342-2018</u> Fax <u>414-287-0907</u> 1452 N. 7th Street 2nd Floor Milwaukee, WI 53205
PE	
gular	
1: Reason For Visit	
nter why you are referring the patient in the "Reason for Visit" field. (If their language is not listed, also list the primary anguage here[	
3/8000	2
p 2: Configure Patient Notifications	
Email Appointment Confirmation will automatically be sent to test@test.com. Optionally, you may override that er	mail below.
Other Email Address	
Patient Consent: TEXT Appointment Reminder	
Other Phone Number $  \vee  $	
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 X V	

## Step 6: Confirm

- $\cdot$  Click "Schedule Appointment" and the appointment is scheduled
- $\cdot$  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

Destinut Information	Annual statement information					
Patient information	Appointment information					
NAME Testing Test	WHEN	WHERE				
DATE OF BIRTH	10:00 AM CST (nation)	Annette stokes, MD Family Practice				
09/09/1990	10:00 AM CST (provider time)	PCHC Hillside Family Health Care. Progressive Community Health Centers				
63/63/1330		Office 414-342-2018				
HOME		Fax <u>414-287-0907</u>				
615-555-5555		1452 N. 7th Street				
MOBILE		Zho Floor Milwaukee WI 53205				
		Miniatec, 11 55255				
ADDRESS	ТҮРЕ	INSURANCE				
123 Test	Regular					
Milwaukee, WI 53201	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)					
	PATIENT ATTENDANCE					
	Not Reported					
Additional Information						
INFORMATION FROM PROVIDER						
	Welcome to Progressive C	ommunity Health Center!				
We look forward to working together to manage your health and prevent future illness.						
fou are scheduled at the <u>Hillinde Family Heash Clino</u> . This clinic is located at 1452 N. 7th Street, 2nd Floon						
You are scheduled at the <u>Hillside Family Health Clinic</u> . This clinic is located at 1452 N. 7th Street,	Ind Floor.					
You are scheduled at the <u>Hillside Family Health Clinic</u> . This clinic is located at 1452 N. 7th Street, Please arrive <u>ON TIME</u> for your appointment. You will meet with a financial counselor if needed and then your	Ind Floor. medical provider.					
You are scheduled at the <u>Hillede Family Heath Cling</u> . This clinic is located at 1452 N. 7th Street. Please arrive <u>QN TME</u> for your appointment. You will meet with a financial counselor if needed and then your Please bring the following items with you:	ind Floor. medical provider.					
Vou are scheduled at the <u>Hinde Family HeahClinb</u> . This clinic is located at 1452 N. 7th Street. Please arrive <u>QN TIME</u> for your appointment. You will meet with a financial counselor if needed and then your <u>Please brings the following items with your</u> "You pill bottles or a list dyour mediations.	nd Floor. medical provider:					
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