TuftsMedicine

EpicEdge Tips & Tricks

Adding and Documenting Missed Visits in Remote Client

When a visit in a visit set is missed, it will appear in red in the Contact list (tree view). If the visit will not be rescheduled, complete the visit set requirement by adding and documenting a Missed Visit.

Add New Other Contact

1. To add a Missed Visit select New Other Contact from the Contact Activity.

讲 My Patients	Almondjoy, Dean-HHDC			67	67 y.o. (10/26/1957) Male Episode MRN: 35500634 Zzhhstwo,			SOC Ce 2/13/2025		Current Cert Period 2/13/25 - 4/13/25
	New Cert Period	New Assessment	lî‡New ⊻isi l	A New Other C	ontact	🖻 <u>E</u> dit 🔚 Vie <u>w</u>	X <u>D</u> elete	✓ <u>C</u> lose	/ Edit Contact	Type 🞇 Undo Trun
6 1	⊞ Show List View	Show Current Cer	rt Period	✓ Expand All	*	Collapse All				
Schedule	Cert Perio	d [2/13/25 - 4/13/25]	- PT OASIS	START OF CAI	RE - 02/1	13/2025 by Airh	ead, Dako	ota-Pt, PT	(Closed) *Misse	ed visits
M		PT - 1 visit every we	eek for 1 weel	k [2/13/2025 - 2/	/14/2025]				
In Basket		PT - 2 visits as need PT - 2 visits every w	ded (Pain) [2/ veek for 5 wee	eks [2/15/2025 - 4/13/.	- 3/21/20	25] *Missed visi	ts			
A		Missed visit -	- (2/15/2025 -	2/15/2025)						
		- Missed Visit	- (2/15/2025 -	2/15/2025)						
		(2/16/2025 - 2	- (2/15/2025 - 2/22/2025)	2/15/2025)						
Admin		Missed visit (2/16/2025 - 2 (2/16/2025 - 2 (2/16/2025 - 2 (2/23/2025 - 2	- (2/15/2025 - 2/22/2025) 2/22/2025) 3/1/2025)	2/15/2025)						
Admin Address Book		Missed visit (2/16/2025 - 2 (2/16/2025 - 2 (2/23/2025 - 2 (2/23/2025 - 2 (2/23/2025 - 2 (2/23/2025 - 2	- (2/15/2025 - 2/22/2025) 2/22/2025) 3/1/2025) 3/1/2025)	2/15/2025)						
Admin Address Book Reports		Missed visit - (2/16/2025 - 2 (2/16/2025 - 2 (2/23/2025 - 2 (3/2/2025 - 3) (3/2/2025 - 3)	- (2/15/2025 - 2/22/2025) 2/22/2025) 3/1/2025) 3/1/2025) /8/2025) /8/2025)	2/15/2025)						
Admin Address Book Reports		 Missed visit (2/16/2025 - 2) (2/16/2025 - 2) (2/23/2025 - 3) (3/2/2025 - 3) (3/2/2025 - 3) (3/9/2025 - 3) 	- (2/15/2025 - 2/22/2025) 2/22/2025) 3/1/2025) 3/1/2025) /8/2025) /8/2025) /15/2025)	2/15/2025)						
Admin Address Book Reports Past Visits		Missed visit (2/16/2025 - 2) (2/23/2025 - 2) (2/23/2025 - 3) (3/2/2025 - 3) (3/2/2025 - 3) (3/2/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3)	- (2/15/2025 - 2/22/2025) 2/22/2025) 3/1/2025) 3/1/2025) /8/2025) /8/2025) /15/2025) /15/2025)	2/15/2025)	4/14/202	151				
Admin Address Book Reports Past Visits Chart Review	e – É	Missed visit (2/16/2025 - 2) (2/23/2025 - 2) (2/23/2025 - 3) (3/2/2025 - 3) (3/2/2025 - 3) (3/2/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3) (3/9/2025 - 3)	- (2/15/2025 - 2/22/2025) 3/1/2025) 3/1/2025) 3/1/2025) /8/2025) /15/2025) /15/2025) /15/2025) eek for 3 weel	2/15/2025) ks [3/22/2025 - 4	4/11/202	(6]				
Admin Address Book Reports Past Visits Chart Review Flowsheets	e — ∰ e — ∰ Aide e — ∰ Med	Missed visit (2/16/2025 - 2) (2/23/2025 - 2) (2/23/2025 - 3) (3/2/2025 - 3) (3/2/2025 - 3) (3/9/20	- (215/2025 - 2/22/2025) 3/1/2025) 3/1/2025) 3/1/2025) /8/2025) /8/2025) /15/2025) /15/2025) eek for 3 weel	2/15/2025) <s 2025<="" 22="" [3="" td=""><td>4/11/202</td><td>[5]</td><td></td><td></td><td></td><td></td></s>	4/11/202	[5]				

2. Select the appropriate Missed Visit **Contact Type** and enter the **Date** the visit should have been completed, then **Accept**. Now you are ready to document the Missed Visit.

Create Contact			×			
Provider:	der: ALMONDJOY, DAKOTA-HHPT					
Contact Type:	PT MISSED V	ISIT NOTES	9			
Date:	2/15/2025		<u>.</u>			
		✓ <u>A</u> ccept	X <u>C</u> ancel			

Document the Missed Visit

- 1. Open the missed visit contact
- 2. Document the **Admin** form. If there was no transit time, enter the start as one minute before the visit and end at the same time. Add 0 miles. If you drove to the place of service document the actual transit time and mileage.

- 3. Notify internal physicians of the missed visit using the **Case Communication** Form.
 - a. Select New Case Communication
 - b. Enter the physician's name in the **Route To** field.
 - c. Enter the message you want to send to the physician, then Accept.

Zzhhptdc, Revisit	67 y.o. (9/26/1957) Male Episode SOC Current Cert Period Patient F MRN: 35493554 Zzhhstwo, Ce 1/14/2025 1/14/25 - 3/14/25 Heart /
PT Missed Visit Notes (1/16/2025)	Case Communication
Hdd/Remove Forms	+ New Case Communication
Time/Charges/POS	*
Admin	
Place of Service Entry	Route Encounter
Missed Visit	A This message will be sent when the patient is next synchronized.
\rm Missed Visit	Route To:
Communication	Seeger, Marty, MD (Attending) McQueenie, Diana, MD (PCP)
Case Communication	Priority: 1
Communication Notes	Comments (2) + (2)

- 4. Document the Missed Visit form.
 - a. Select the Missed visit reason.
 - b. If the physician is not an internal physician, then contact the physician's office to notify them of the missed visit.
 - c. Document the Date and Time of the communication with the physician
 - d. Document who you Spoke to
 - e. Document if you Left message if no answer when applicable
 - f. Answer the Notified MD? question
 - g. Document why the visit was missed in the Comments

	Contraction of the second second	67 v.o. (9/26/1957) Male Enizode SOC Current Cert Period	Patient EV/s
(8)	Zzhhptdc, Revisit	MRN: 35493554 Zzhhstwo, Ce 1/14/2025 1/14/25 - 3/14/25	Heart Failure Readmis
My Datiants	PT Missed Visit Notes (1/16/2025) - Missed Visit		
ing runchus	Add/Remove Forms Missed visit real	son: 🗋 🤂 unable to reach patient family emergency no auth no order inpatient	
	Time/Charges/POS	patient went to FR/urgent care other appt(s) patient refuses	
Schedule	🕒 Admin 📓	patient upavailable patient on hold religious (holiday observance)	
	Place of Service Entry	patient unavanable patient of noid reingious/noilday observance	
\simeq	Missed Visit 😞	unable to contact patient to schedule the visit weather-related	
In Basket	Missed Visit	other (see comments)	
n l	Communication 😞 Date:		
Admin	Case Communication		0
	Communication Notes		O
Address Book	Spoke to:	D patient spouse caregiver family member other (see comment)	
0	Left message if	no Yes No	
Reports	answer?		
Past Visits	Notified MD?	9 Yes No	
Chart Review	Commenter		
Flowsheets	Comments:		
	~~~		
Contact			
Medications			
Allergies			

5. Sign and Close the contact.

Note: There are other acceptable ways to add Missed Visits.

- 1. If you started the Home Visit before you realized it was going to be a missed visit, you can edit the contact type from the Schedule to make it a Missed Visit, then document the appropriate Case Communication and/or Missed Visit Forms instead of adding a New Other Contact.
- 2. You can change the visit you started to a Contact Made in Error, then proceed with adding the Missed Visit as a New Other Contact as described above.
- 3. You can edit a scheduled visit on your schedule to change it to a Missed Visit contact type, then proceed with documenting that missed visit. This method may not work if too much time has passed between the date the visit was scheduled and when the visit is being edited.