

Tips & Tricks

Missed Visits/Visit Sets/Linking Contacts

Friday, April 8, 2022

How to Reschedule a Visit (when you can move the visit from today to tomorrow)

Note: Do not move visits from Saturday to Sunday, since this crosses the Medicare week

- Log into the Remote Client and navigate to the Schedule Task
- Click and drag the visit to tomorrow
 - You can put it in the TBD box and call the patient again, or schedule a specific time now
- Call or Tiger Text your scheduler that you have an additional opening on your schedule
- If this was an OASIS visit or Initial Eval, call or Tiger Text your manager so they can review and get a delayed SOC or Discipline Refused order if appropriate

How to Cancel a Visit (to have the scheduler reschedule to another day or with another clinician)

- Log into the Remote Client and navigate to the Schedule Task
- Single click the visit and click Cancel

The screenshot shows the Epic Edge interface for a patient named Sebastian-SOC. The patient's information is displayed at the top: 66 y.o. (4/9/1955) Male, Episode, SOC, Current Cert Period N/A, MRN: 255653, Secondary Pr... The interface includes a navigation menu on the left with options like My Patients, Schedule, In Basket, Admin, Address Book, Reports, Past Visits, Chart Review, Flowsheets, Contact, Medications, Allergies, DME, Care Plan, Plan of Care, and Orders. The main area shows a schedule for Friday, 4/8. The 'Schedule' button in the left menu is highlighted with a red box. The 'Cancel' button in the top navigation bar is also highlighted with a red box. A visit for Sebastian-SOC at 11:45a is highlighted in blue. The visit details are: Contact Type: SN OASIS START OF CARE, Appt Length: 90 min, Appt Notes: Specialty Services Required.

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- Sync, and the visit will fall back to the scheduler to reschedule
- Call or Tiger Text your scheduler that you have an additional opening on your schedule
- If this was an OASIS visit or Initial Eval, call or Tiger Text your manager so they can review and get a delayed SOC or Discipline Refused order if appropriate

How to Document a Missed Visit (when you cannot fulfill your visit frequency for a week)

- Log into the Remote Client and navigate to the Schedule Task
- Single Click the visit and click Edit
- Change the Contact Type to [Discipline] Missed Visit Notes