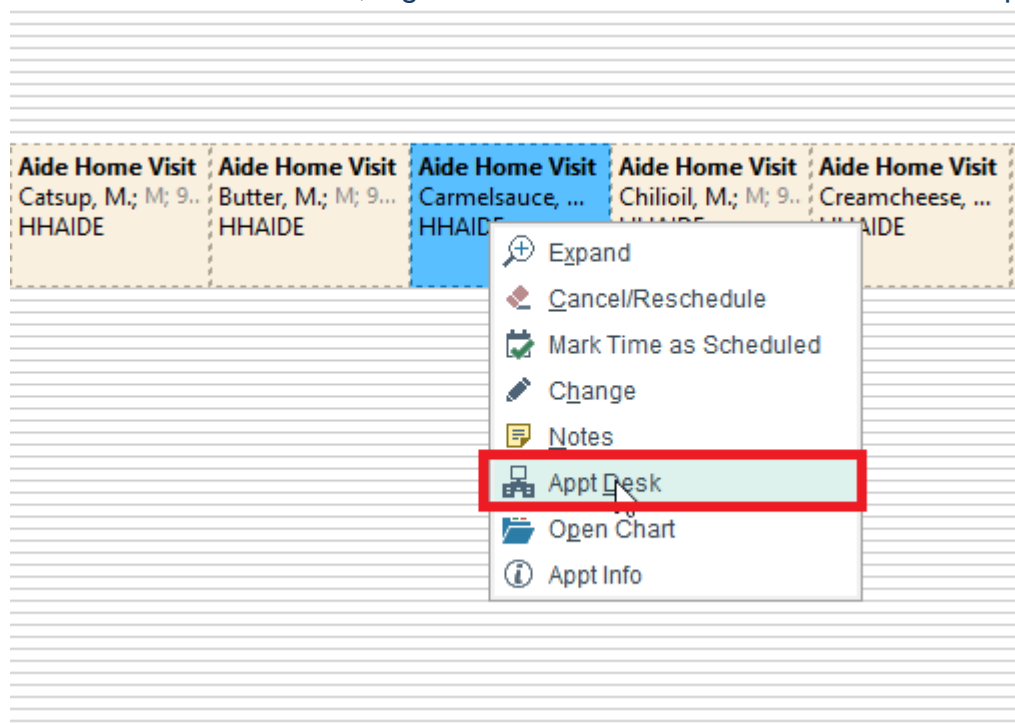


Reviewing Previous Daily Schedules for Missed Visits

Friday, April 8, 2022

From the Snapboard, you can review previous days to check whether visits were missed.

- Visits in Purple were not opened on the Remote Client, and require followup
 - Drag to another day to reschedule
 - If the appointment was scheduled in error (a duplicate), you can click Cancel/Reschedule to cancel the extra visit
 - If the visit was truly missed, contact the manager to enter a Missed Visit note for the visit that will satisfy the Visit Set Order
- Visits in Green were opened on the Remote Client
 - Clinicians and schedulers cannot change these visits
 - Managers can cancel these if they were opened in error
 - This may happen if a clinician opens a visit in advance and isn't able to actually complete the visit
 - If you want these to go back to scheduling workqueues (ie, the SOC workqueue), they must be canceled
 - To cancel, right click the incorrect visit and click Appt Desk



Tips & Tricks

TuftsMedicine
EpicEdge
Defining the edge of what's possible. Together.

- Click the Past tab, and find the incorrect appointment. Right click and choose Cancel Check In, then Cancel/Reschedule and choose a Cancel Reason

The screenshot shows the Epic Appointment Desk interface. The patient summary for Merle-HSPCFIELD (96 yrs) is visible. The 'Past' tab is selected, and a context menu is open over the appointment list. The menu options include 'Check In', 'Check Out', 'Reschedule', 'Cancel/Reschedule', 'No Show/Reschedule', 'Change Appointment', 'Edit Appointment Notes', 'Edit Appointment Info', 'Copy into Make Appointment', 'Edit Appointment Statistics', 'Action Referral', 'Cancel Check In', 'Label', 'Message', and 'Open Unauthorized Rpts'. The 'Cancel Check In' and 'Cancel/Reschedule' options are highlighted with red boxes.

- The visit will fall back to the appropriate scheduling queue

Visits that were not opened will automatically update to Red on the Snapboard, and have a status of HH Incomplete. If you review and find that this was a duplicate appointment and there was another that did occur, follow these steps to cancel the HH Incomplete appointment and remove it from reports:

- Right click on the appointment, click Appt Desk, and find it on the Past tab as above
- Right click the appointment and choose Edit Appointment Statistics
- Choose a status of Canceled to cancel the appointment

Documenting a Call while Scheduling a SOC/Initial Eval

- Schedulers will document communications directly on the referral when working the SOC/Initial Eval workqueues. This puts a communication note on the referral directly that will remain permanently.