

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
 - \circ 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

| Catsup, M.; M; 9 | Butter, M.; M; 9 | Carme | lsauce, | Aide Home Visit Chilioil, M.; M; 9 | Creamcheese, |
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| HHAIDE | HHAIDE | HHAID | € Expar | nd | AIDE |
| | <u></u> | | 🗶 <u>C</u> anc | el/Reschedule | |
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• Click the Past tab, and find the incorrect appointment. Right click and choose Cancel Check In, then Cancel/Reschedule and choose a Cancel Reason

| | 🗄 Hospice Intake 🛛 📇 POC Review 📄 Transcribe Orde | r 🛃 New Order 🎽 PPS Review | Hospital Account | eports 👻 📳 Media N | Manager | | |
|--|--|--|---|---|--|----------------------------|---------------|
| 😑 🌇 Carmelsauce, N | terle-HSP × | | | | | | |
| MC 🙈 | Appt Desk | | | | | | |
| WIC & Z | | | | | | | 0 Z |
| Merle-HSPCFIELD | 🛗 Make Appt 🔥 Walk In 🛗 Schedule 👻 👼 Beque | st 👻 🗐 Reports 👻 🛔 Patient Option | ns 🔹 🖶 Printing 👻 | | | | |
| Carmelsauce Male, 96 y.o., 06/12/1925 | Patient Summary (Edit *) | | | | | | |
| 555-555-7364 MRN: 254378 | Carmelsauce, Merle-HSPCFIELD | 6/12/1925 | Registration St New | | Mobile 555-555-9864 | E-mail devnull@epic.com | |
| | 1979 Milky Way Verona WI 53593 | SSN xxx-xx-8354 | Preferred Lang | uage | Home 555-555-7364 | Preventive Care | No past appts |
| D-19 Vaccine: Unknown yTuftsMed: Code expired | | Legal Name | Needs Interpre | ter? | Work | ricientite oure | |
| Marty Seeger | | Carmelsauce, Merle-HS | SPCFIELD | | | | |
| PCP - General | Guarantor Accounts | | | | | | No Shows |
| RAGE & FINANCIAL INFO | Account Name | | | ct # Serv Area | | Balance Acct Stat | us |
| CARE/MEDICARE PART A B (+1) | Carmelsauce, Merle-Hspcfield Pavor/Plan | New | | 067 WHS bscriber | P/F CARE | 0.00 | |
| antor: P/F - Self | MEDICARE/MEDICARE PART A AND B | Elapsed | | rmelsauce,Merle-H | spcfield | | |
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• 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.

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