

## **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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• 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				
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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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