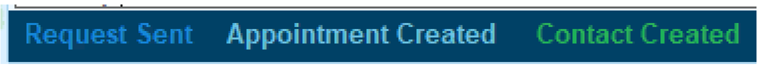
Remote Client – Visit Statuses (colors on the calendar)

Here is an explanation of the different appointment statuses (colors) in Remote Client.



Appointment statuses

Appointments on your schedule are color-coded to help you quickly see the status of each appointment. Refer to the legend at the bottom of the screen to see what status each color indicates. Read more about each appointment status below.

- **Request Sent (DARK BLUE) – see more info below on this status**
  - You aren't able to document in a requested visit.
  - If there's an open spot in the patient's visit set, you can schedule the requested appointment yourself by going to the **Visit Set** tab of the Care Plan task and clicking the **Schedule** link.
- **Appointment Created (LIGHT BLUE)**
  - This includes appointments that don't yet have an official time, which appear in the TBD slot at the top of the schedule.
  - When you've set a time for the appointment, drag and drop it from the TBD slot into the appropriate time slot.
  - You can edit the details of a created appointment, such as its time, length, or type, from the schedule. Once you open an appointment, you'll no longer be able to edit its details from the schedule.
- **Contact Created (GREEN)**
  - Each visit to a patient, such as a Start of Care (SOC) assessment visit or a routine home visit, is considered a contact.
  - When you open an appointment from the schedule, the contact is created. After you create the contact, you can no longer reschedule the appointment. See the Correct a contact date section of this guide for steps on how to correct the date of an opened contact.

The dark blue status is causing A LOT of issue for clinical staff. Adding the super overbooks in scheduling setup will help with this, but it won't solve the issue completely.

Some things that cause a dark blue status:

- They don't have any openings on your schedule, but the scheduler schedules the appointment
- The schedule template (in Hyperspace) says they are unavailable on the day scheduling is assigning a visit to the clinician
- The patient cannot have more than one visit with the same provider at the same start time.
- At the time the system attempted to 'commit' the appointment reschedule, someone else was working with the patient's chart in such a way that they had a lock. The system won't reschedule the appointment in that scenario to avoid data corruption.

If it happens, especially in off hours or on the weekend, first focus on helping the clinician get their visit setup for documentation, then deal with system cleanup after.

- For visit types that need to create a new cert period, ie: Start of Care, go into the Contact task on the Remote Client and using the New Cert Period button to create the encounter. Once this is done documentation will open for the user to complete the visit.

- For visit types that do not create a new cert period, initial evals, home visits, etc, go to the Care Plan task and create a 1x1 visit set for the discipline. Then back in the Contact task the user will be able to click on the visit set and create the new visit

- Focusing on getting the documentation in first, and then later we will need to cancel the previous appointments that are in the Request Sent status as additional cleanup.