

POLICY & PROCEDURE



TITLE: Scheduling Appointments				
Scope/Purpose: To ensure access to care in a timely and non-discriminatory manner, and to minimize interruptions in the scheduling process, disruptions in the delivery of care, and reduce cost to the center in terms of lost revenue and wasted staff efforts.				
Division/Department: All HealthPoint Clinics			Policy/Procedure #:	
Original Date: 7/23/14			<input checked="" type="checkbox"/> New <input type="checkbox"/> Replacement for:	
Date Reviewed:	Date Revised:	Implementation:	CPIC Approved:	Board Approved:
October 2015		10.29.2015	10.29.2015	
Responsible Party: Administrator of HealthPoint Initiatives; Director of Practice Management				

DEFINITIONS:

Established patient	A patient is considered an established patient if they have been seen by one or more clinical providers in a HealthPoint clinic within the last three (3) years.
Routine appointment	Conditions determined to be routine in nature not requiring medical evaluation in a specific time frame. (e.g. F/U)
Urgent appointment	Newly developing or worsening conditions in which a medical evaluation is needed within a specific time frame. (e.g. ACC)
Short visit types	Visit types designated as sick visits (ACC), revisits (REV), follow-up visits (F/U), Lab (LAB), etc
Long visit types	Visit types designated as physicals (PHY), new patient (NP), well child (WCC), FP Initial (INT), Annuals (ANN) etc.

POLICY:

HealthPoint will offer patients an appointment with their primary care provider in a timely manner regardless of the patient’s condition or status.

It is the policy of HealthPoint to schedule all appointments in a consistent manner. HealthPoint reserves time for same day appointments for routine and urgent care based on patient preference. To promote continuity of care, HealthPoint encourages each patient to select a Primary Care Provider (PCP) to provide and coordinate his or her healthcare which will be a part of the Care Team. A Care Team consists of the

PCP, a member of the nursing staff (e.g., Licensed Vocational Nurse - LVN, Medical Assistant – MA), and support staff.

Further, it is the policy of HealthPoint to inform patients of the importance of keeping appointments and the expectation they will call to cancel as soon as they know they will be unable to keep the appointment. In order to maintain proper provider and staff productivity levels and to provide quality primary care to the patients of the center, HealthPoint may investigate the causes of patient no-shows. Under certain conditions, the patient may be prevented from scheduling future appointments.

PROCEDURE:

I. Scheduling Appointments During Regular Business Hours

- A. Any patient who needs to be seen during our regular business hours (Monday-Friday), will be seen that day with an available provider. Every effort will be made to make sure the patient’s Primary Care Provider is available, but the patient will have the choice of selecting the earliest available provider.
- B. To ensure the clinic maintains a specific number of same-day appointments for urgent or routine care visits, this procedure will be implemented until backlog reduction has occurred and advanced access is achieved.
 - a. Provider schedule templates are set to ensure ‘same day access’ slots are available. The minimum number of same day access slots should be one slot in the AM session and one slot in the PM session for each provider
 - b. The held appointments will be available to be filled as soon as the clinic opens for the day and can be used for acute, urgent, or routine care.

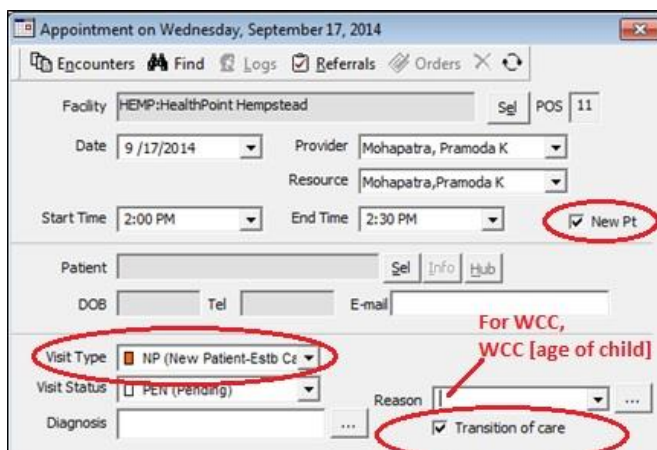
*Note: Some clinics have already achieved advanced access (daily open appointment slots) and will not need to incorporate the ‘same day access’ slots into their schedule.

C. Scheduling an appointment

- 1. Verify info
 - a. Staff will obtain and/or verify name, date of birth, phone number, email address, and eligibility or insurance of all patients requesting an appointment
- 2. Confirm or Assign PCP (rendering provider)
 - a. Staff will confirm or assign the patient’s primary care provider according to the Continuity of Care P&P.
 - i. Staff will designate the requested or appropriately identified PCP in eCW as the Rendering Provider in the “Information Screen” and schedule the patient with him/her, if available according to the guidelines below.
- 3. Schedule in appropriate slot
 - a. Same day appointments (e.g. ACC or F/U)
 - i. Patients requesting same day appointments are scheduled with their PCP, if available, or given the choice of seeing that PCP at

a later date, if appropriate, or seeing another HealthPoint Provider

1. Patients who schedule same day appointments are added:
 - a. to any open slot that is convenient for the patient
 - b. to any slot that becomes available during the day for the current day's appointments (due to cancellations or reschedules)
 - c. to the schedule at the end of either the morning session or afternoon session, pending approval from the provider
 - d. to the reserved same day access slots
- ii. If the patient reports potentially urgent problems, such as chest pain or shortness of breath:
 1. Via phone-call to the clinic: the patient is directed to the nearest Emergency Room
 2. In person at the clinic: a nurse is notified immediately and triage procedures are followed (See Urgent Assessment Policy and Procedure)
- b. Patients who do not need a same day appointment are added to the scheduled based upon the reason/visit type. (Timely Appointment Availability)
 - i. Short visits (i.e. ACC, REV, F/U) are scheduled with the patient's PCP within 2 business days.
 - ii. Long visits (i.e. NP, PHY, WCC) are scheduled with the patient's PCP within 5 business days.
- c. For established patients who are scheduling with a provider following an ER, Hospital, or Specialist visit, fill in the following
 - i. Use the "FU" visit type AND the "Transition of Care" checkbox is checked in the appointment screen
 - ii. The Reason in the appointment screen should state "ER FU" or "hospital FU."
4. For new patients, fill in the following:
 - a. If a patient is new to HealthPoint, the "NP" visit type is used with the 'New Pt' checkbox AND the 'Transition of Care' checkbox checked in the appointment screen.



- b. For New Patient Well-Child Checks
 - i. The NP visit type, 'New Pt' checkbox, and 'Transition of Care' checkbox are all to be used.
 - i. The Reason in the appointment screen should state "WCC [age of child]".
 1. E.g., "WCC 4 years", "WCC 3 mo", "WCC 2 wks"

5. Obtain the reason for the visit
 - a. When making an appointment for a patient, staff will ask the patient the reason for the visit and enter this into the Reason box.
6. Remind the patient to call when he/she cannot keep the appointment
 - a. Staff will inform patients of the importance of keeping appointments and the expectation they will call as soon as they know they will be unable to keep the appointment. (See No-Show Policy and Procedure)

II. Scheduling Appointments Outside Regular Business Hours

- a. Any patient who needs to be seen outside our regular business hours for routine or urgent care, can be seen on a walk-in basis only at our Acute Care Clinic. Appointments will not be scheduled in advance. The Acute Care Clinic hours are Monday, Tuesday, Thursday, Friday from 9am-7pm and Saturday from 9am-2pm.

REPORTING:

1. Same-day Appointments for Routine and Urgent Care
 - a. Providers' schedules will be manually audited and/or a report will be generated on a quarterly basis to show the availability and use of same-day appointments for both urgent and routine care. Additional slots will be blocked on a provider's schedule if demand increases.
2. Routine and Urgent Care Appointments Outside Regular Business Hours
 - a. After hours clinic will be monitored on a quarterly basis to determine if the after hours of operation are adequate to meet the needs of our patient population. Hours of operation will be revisited to determine if additional hours are needed on certain days of the week.
3. Availability of Appointments
 - a. The Third Next Available is manually counted for each provider (short and long appointments) from eCW every Monday at 10:00 am. HealthPoint's short-term goal is to achieve an 85% success rate of timely appointment availability (i.e. short visits within 2 days and long visits within 5 days.) However, its long-term access goal is 0-1 days for both short and long appointments with an 85% success rate.

RELATED POLICY:

Continuity of Care P&P
New Patients and Assigning Rendering Provider P&P
No-Show P&P

