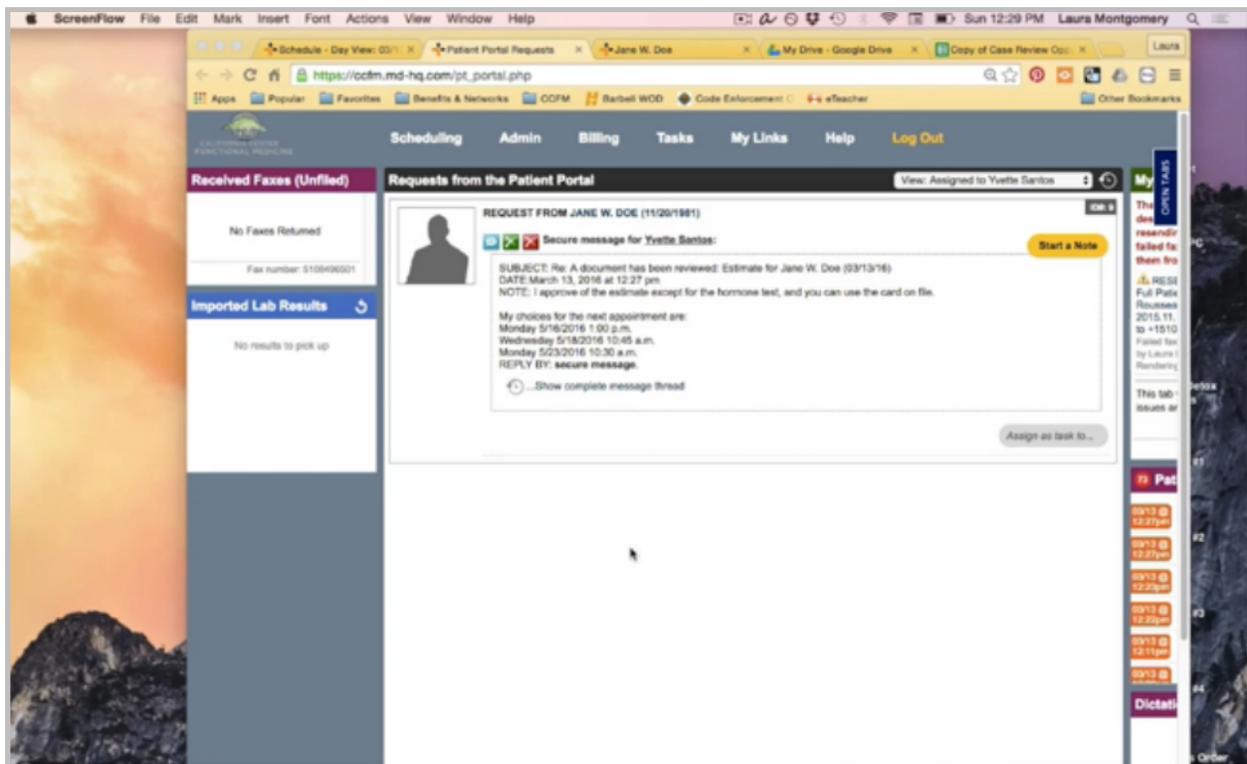


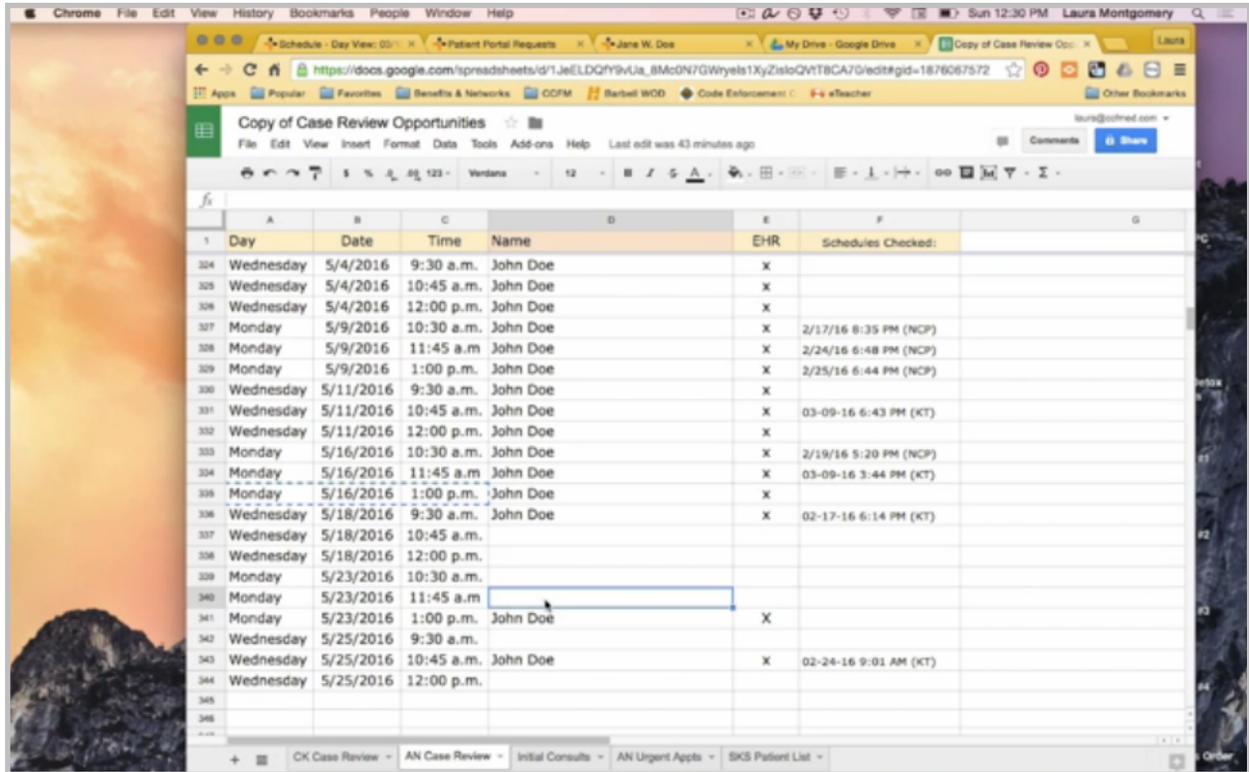
Processing Charts: Initial Consult Appointments - Part 2

The next step in processing the encounter will come when the patient responds to the estimate.



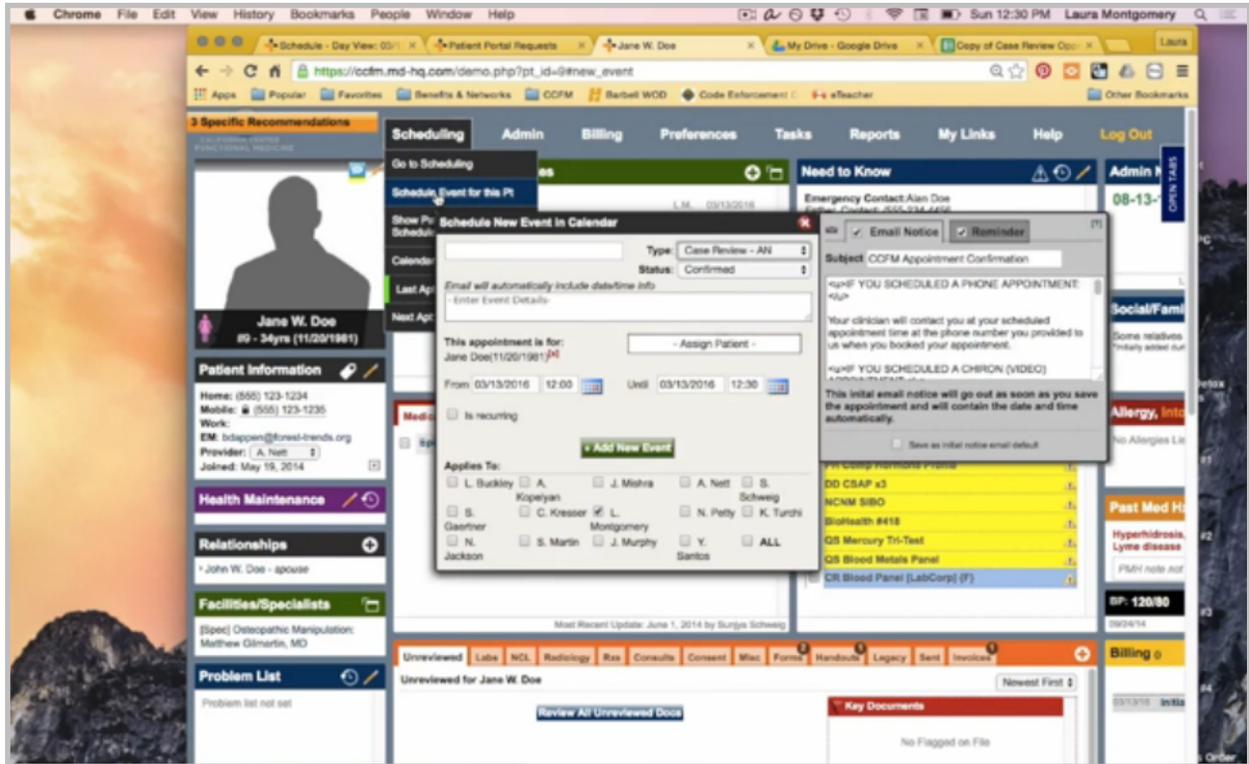
You want to look to see if they're approving the entire estimate or making changes. In this case, the patient wants everything on the estimate except for one test. We also want to make sure she says that we can use the card on file and when her next appointment will be.

So for her appointment, her first choice is Monday, May 16, at 1:00.



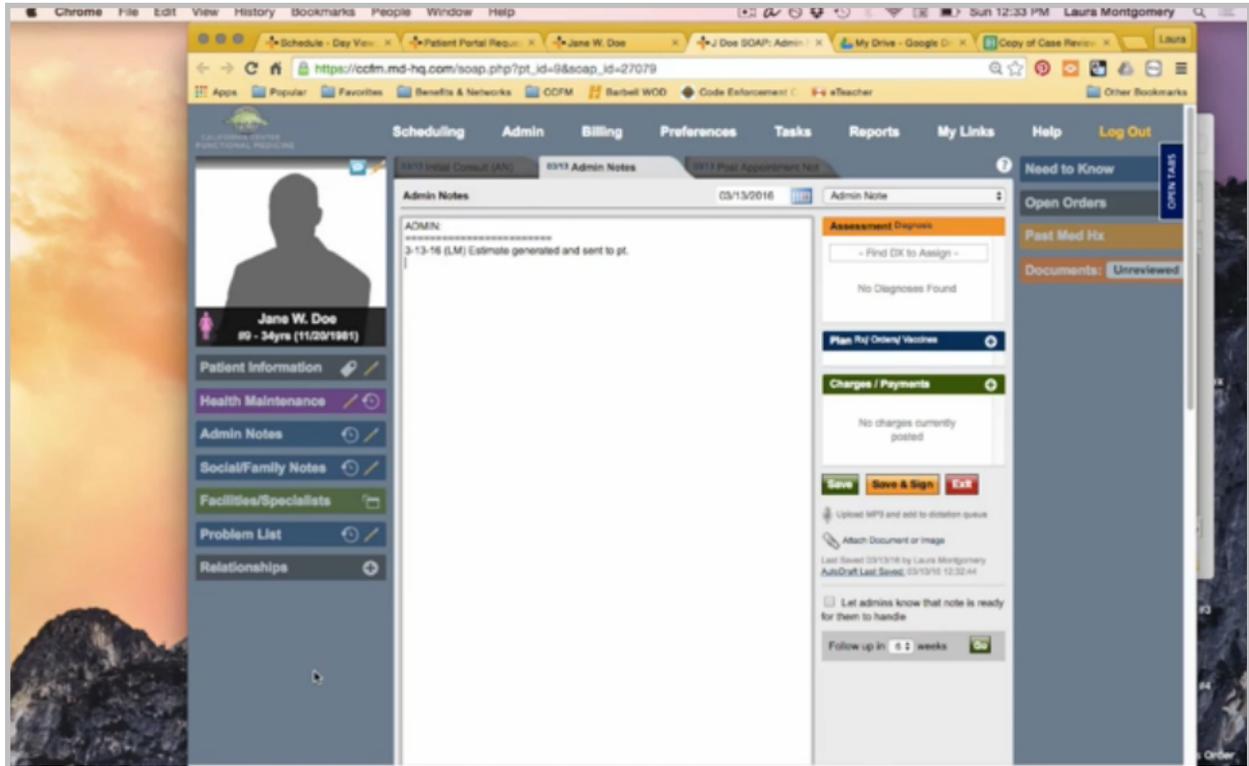
	A	B	C	D	E	F	G
1	Day	Date	Time	Name	EHR	Schedules Checked:	
324	Wednesday	5/4/2016	9:30 a.m.	John Doe	X		
325	Wednesday	5/4/2016	10:45 a.m.	John Doe	X		
326	Wednesday	5/4/2016	12:00 p.m.	John Doe	X		
327	Monday	5/9/2016	10:30 a.m.	John Doe	X	2/17/16 8:35 PM (NCP)	
328	Monday	5/9/2016	11:45 a.m.	John Doe	X	2/24/16 6:48 PM (NCP)	
329	Monday	5/9/2016	1:00 p.m.	John Doe	X	2/25/16 6:44 PM (NCP)	
330	Wednesday	5/11/2016	9:30 a.m.	John Doe	X		
331	Wednesday	5/11/2016	10:45 a.m.	John Doe	X	03-09-16 6:43 PM (KT)	
332	Wednesday	5/11/2016	12:00 p.m.	John Doe	X		
333	Monday	5/16/2016	10:30 a.m.	John Doe	X	2/19/16 5:20 PM (NCP)	
334	Monday	5/16/2016	11:45 a.m.	John Doe	X	03-09-16 3:44 PM (KT)	
335	Monday	5/16/2016	1:00 p.m.	John Doe	X		
336	Wednesday	5/18/2016	9:30 a.m.	John Doe	X	02-17-16 6:14 PM (KT)	
337	Wednesday	5/18/2016	10:45 a.m.				
338	Wednesday	5/18/2016	12:00 p.m.				
339	Monday	5/23/2016	10:30 a.m.				
340	Monday	5/23/2016	11:45 a.m.				
341	Monday	5/23/2016	1:00 p.m.	John Doe	X		
342	Wednesday	5/25/2016	9:30 a.m.				
343	Wednesday	5/25/2016	10:45 a.m.	John Doe	X	02-24-16 9:01 AM (KT)	
344	Wednesday	5/25/2016	12:00 p.m.				
345							
346							

When I come to the case review opportunity sheet, I can see that this appointment has already been scheduled by another patient, so I'll need to look at her second choice, May 18, at 10:45, which is still available. I can put her name here, mark it that I'm scheduling it in the EHR, and then in her chart for scheduling, I will want to schedule an event for this patient.

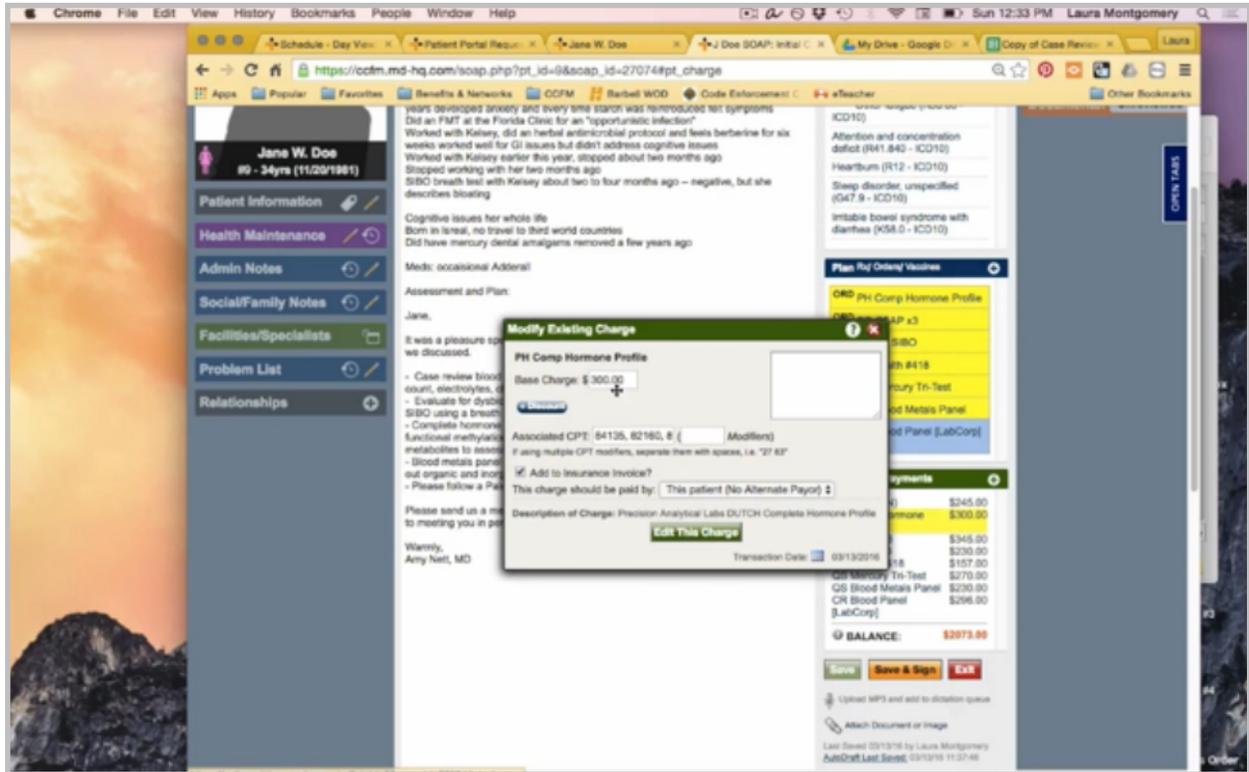


So it was May 18th at 10:45. Make sure the duration is correct. I do want to send an email notice that the appointment is scheduled and a reminder. I am not the clinician. Amy will be the clinician, and then I'll add a new event.

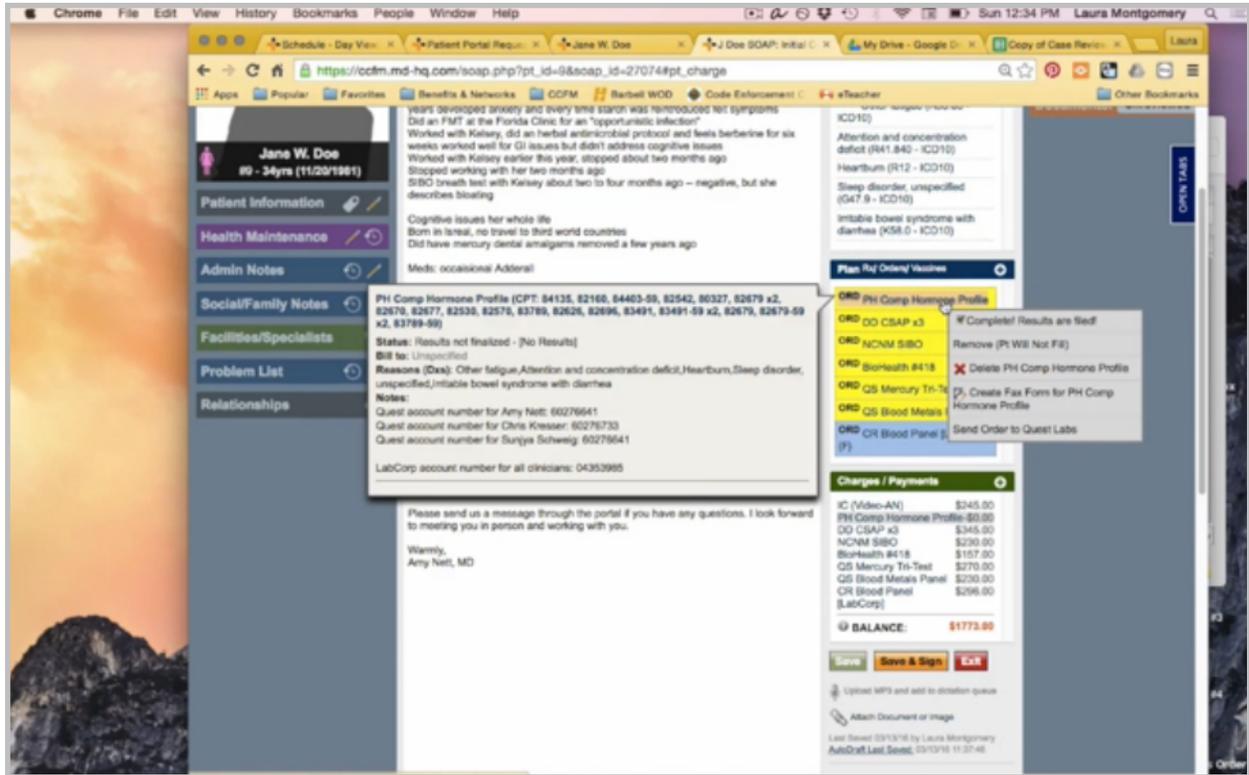
Okay, so I have it documented here that her appointment was scheduled. I did put it in the EHR. Now I need to process everything she is saying except for the hormone test.



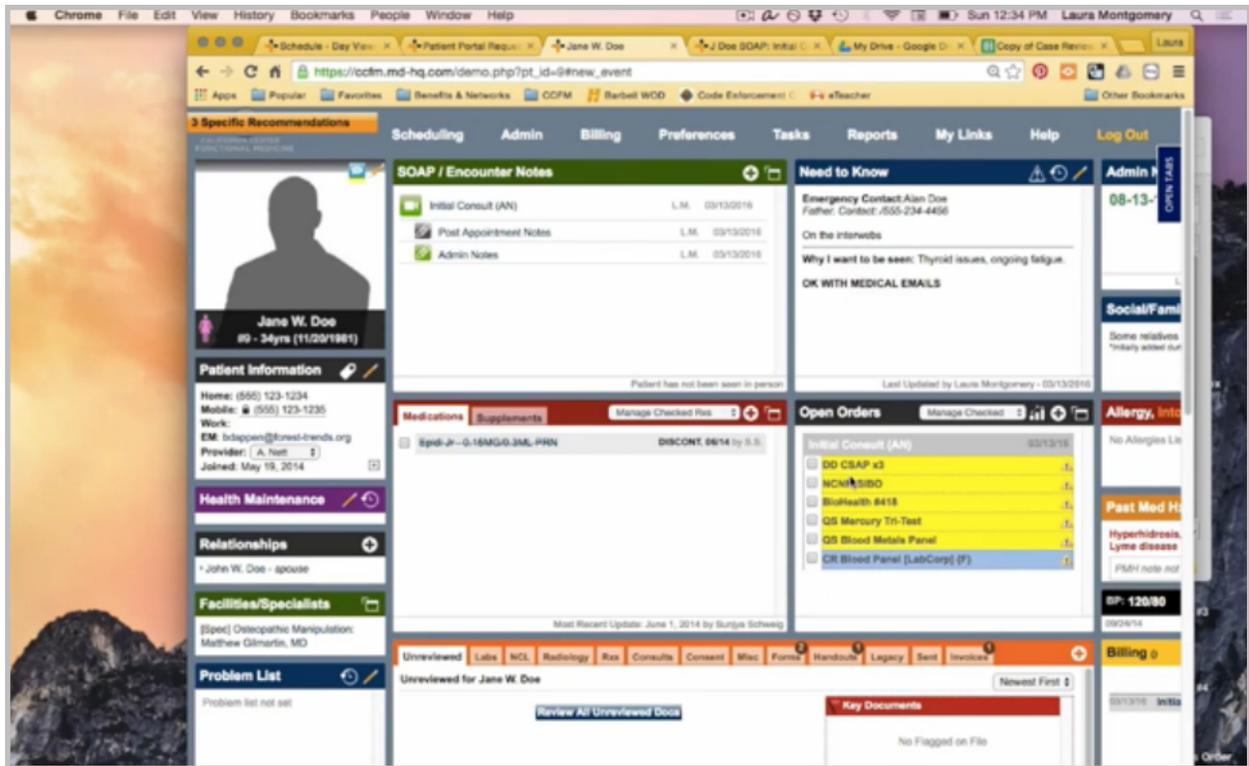
In the admin notes, I want to document what the patient is saying and that I scheduled her appointment, and I can copy and paste this. I'll save the note. Go back to my encounter.



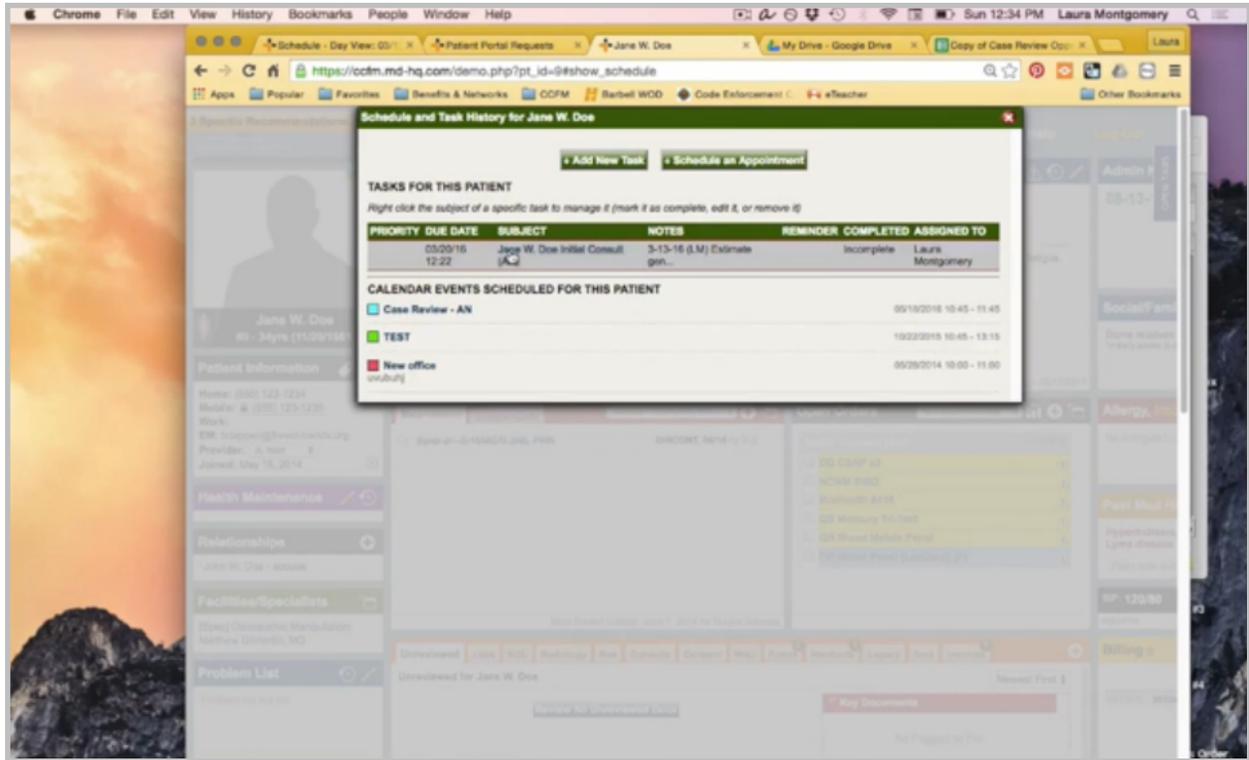
Here I want to click on this charge and zero it out. We still want to leave it listed here. That way we know it was offered to the patient, but she declined it.



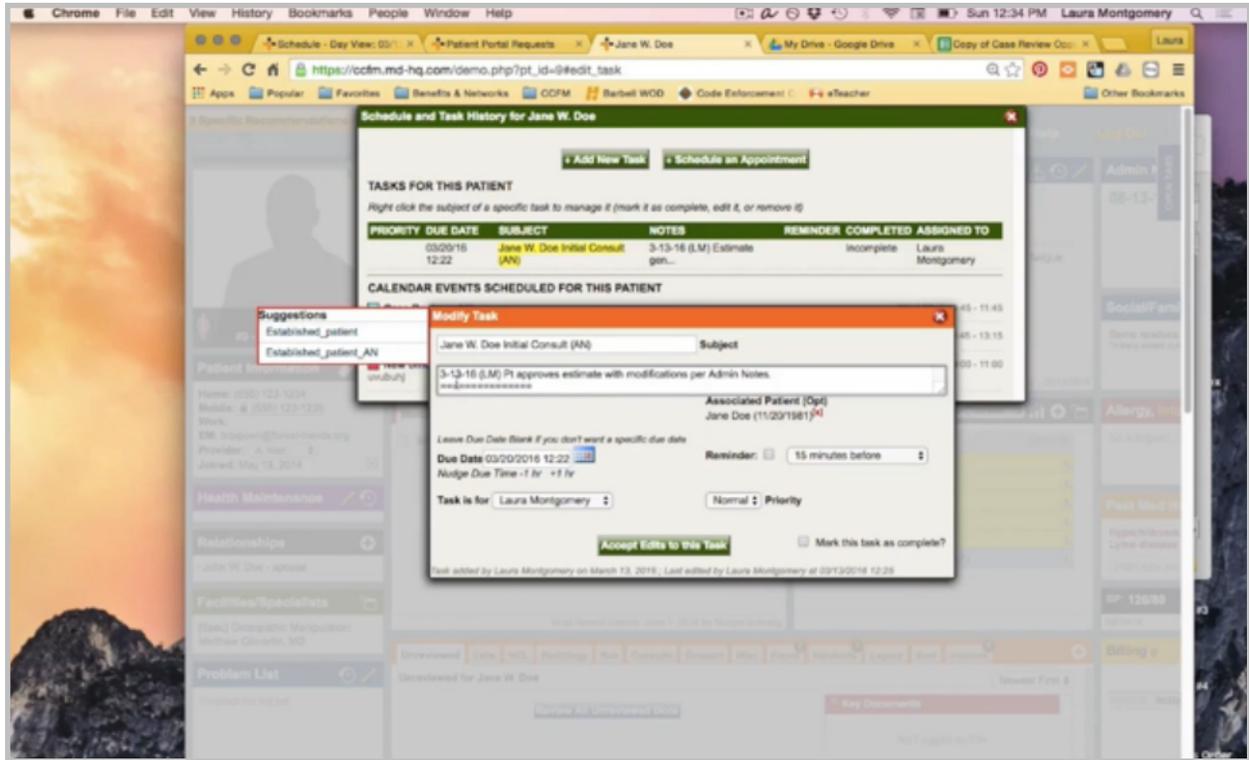
You also want to right-click on this test and remove it so that we understand not to wait for the results of the test. You don't want to delete it from the charge box or the plan box because Amy was still recommending it. You just want to mark it that the patient won't fill it.



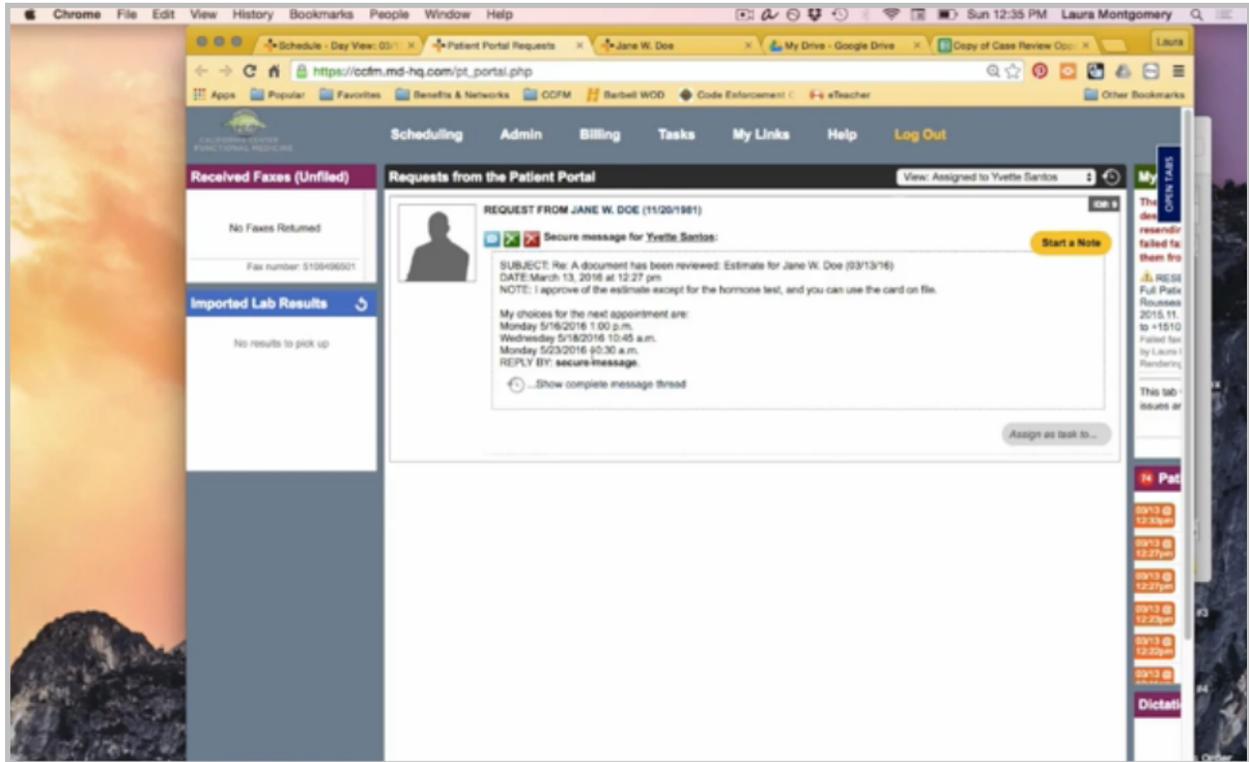
Otherwise, when you look at the chart, it will be listed here in the open orders, and we'll try to follow up with the lab on the results. That's everything you need to change on the encounter, so I can go ahead and close it.



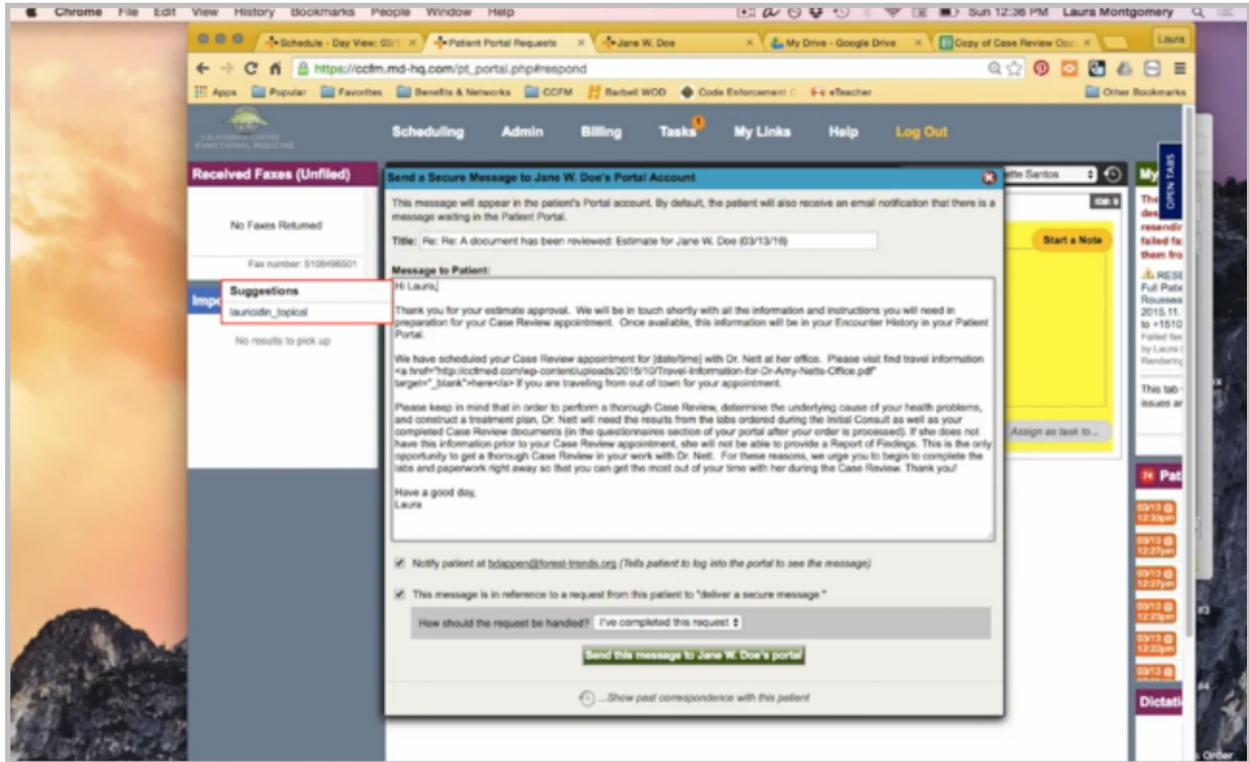
I'm going to go to Tasks, Show Patient's Task and Schedule History, and open the task for this initial consult encounter.



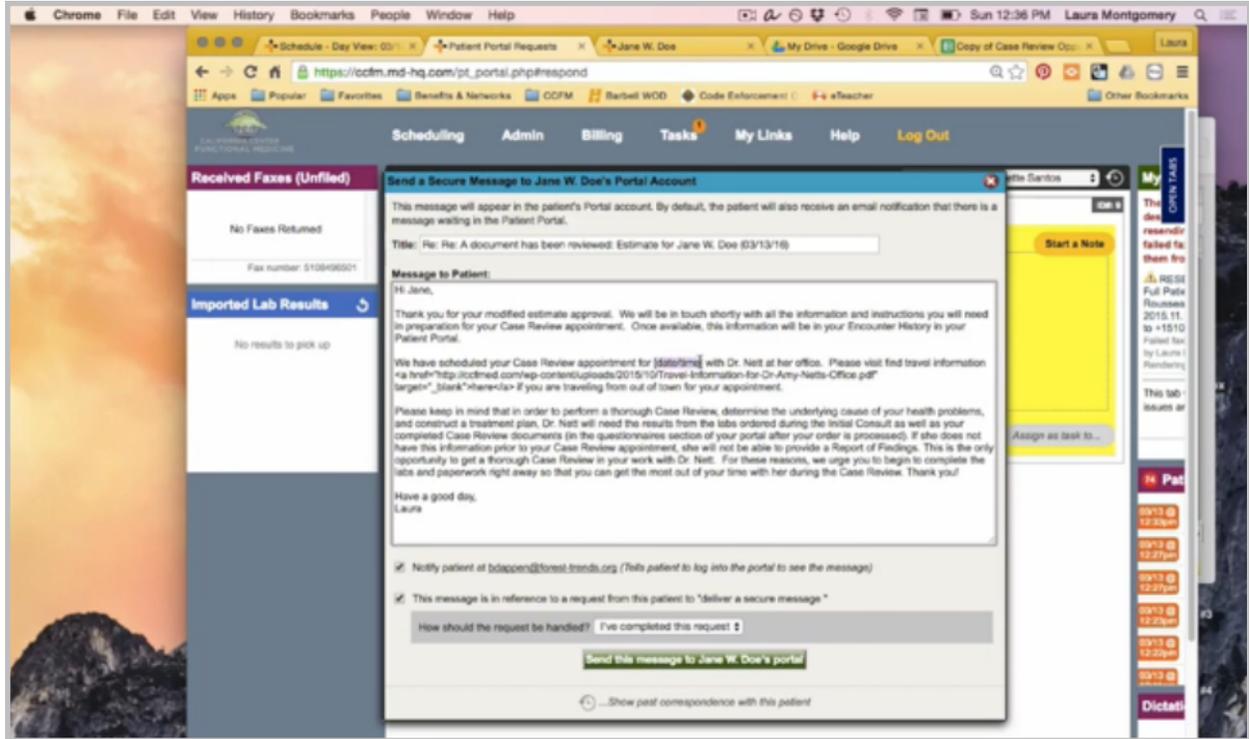
I'm going to send it on to our billing department and just make a note that she approves the estimate with modifications as listed in the admin notes. I want to take off the due date, so it becomes a standing task, and I'll send it to billing.



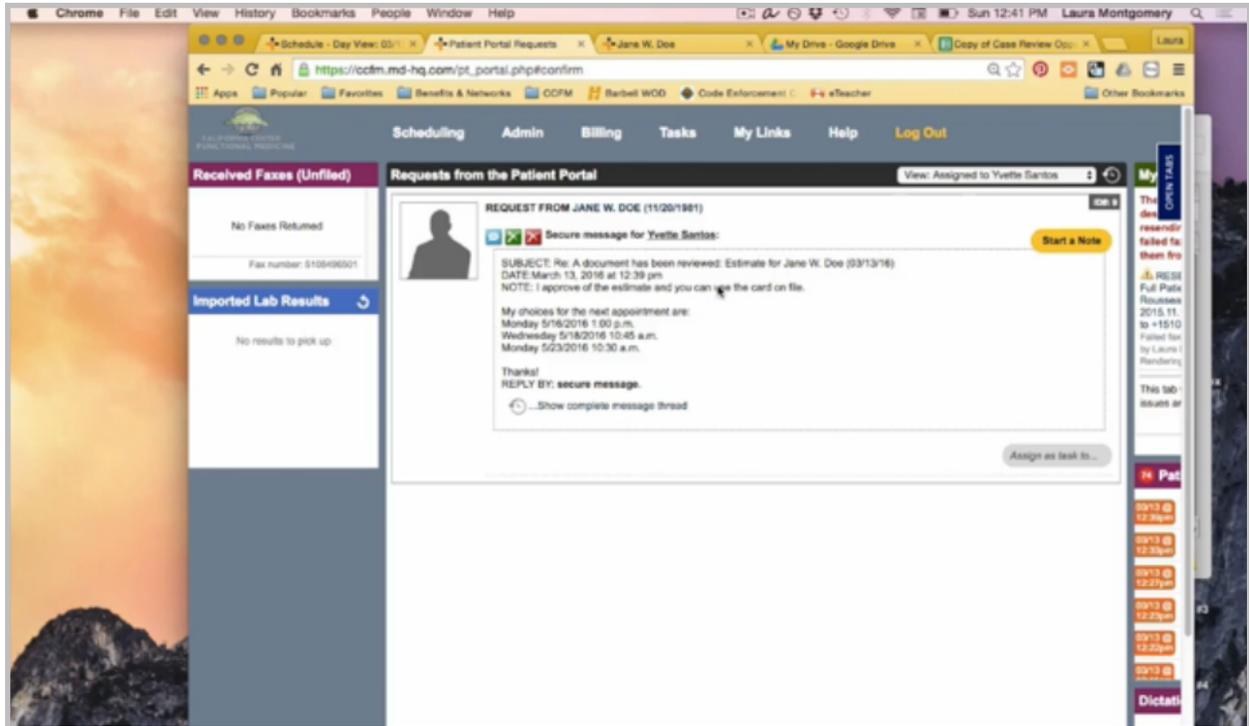
Then I'm going to respond to the patient in the portal. I'm going to click on the blue bubble and respond to the patient.



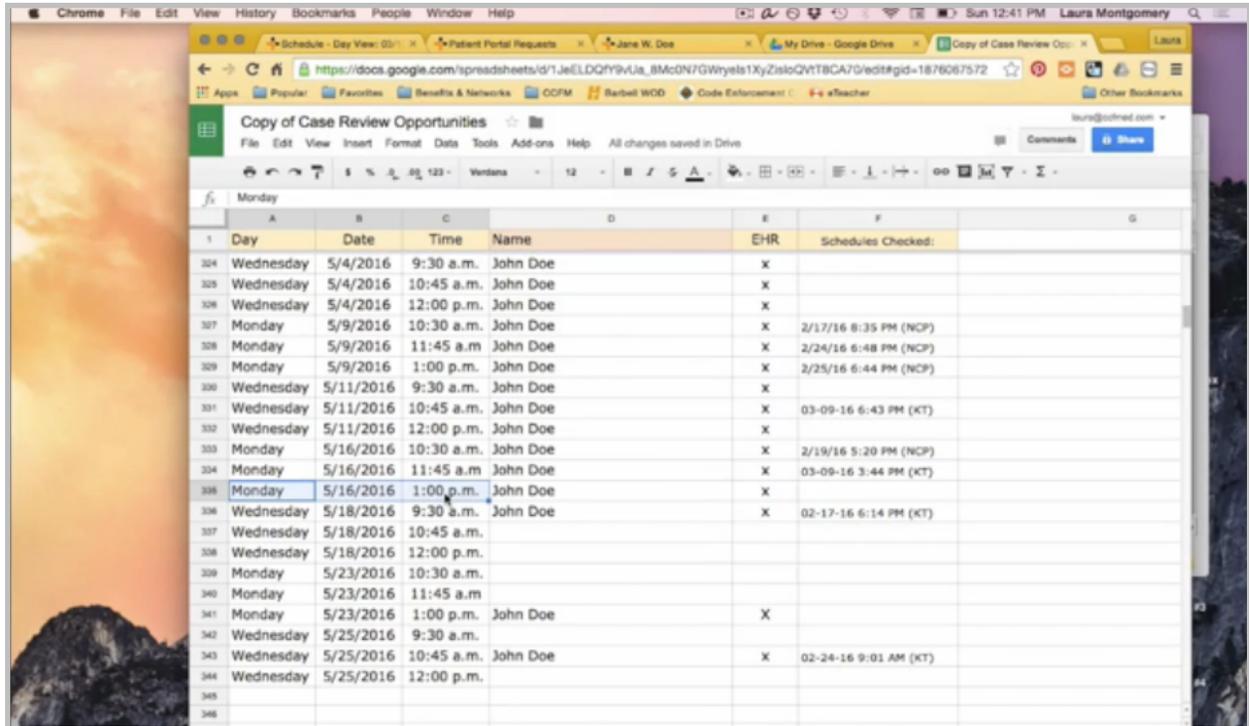
I want to thank her for her modified estimate approval, since she did remove one of the tests, and let her know that we'll be in contact with her shortly so she understands the next steps.



I want to make sure I list here when I scheduled the appointment. Then here I have a link to the travel document with also some instructions about completing the lab work and how the case review process plays out. Then I'm going to send the message to the patient, and the encounter has been processed.



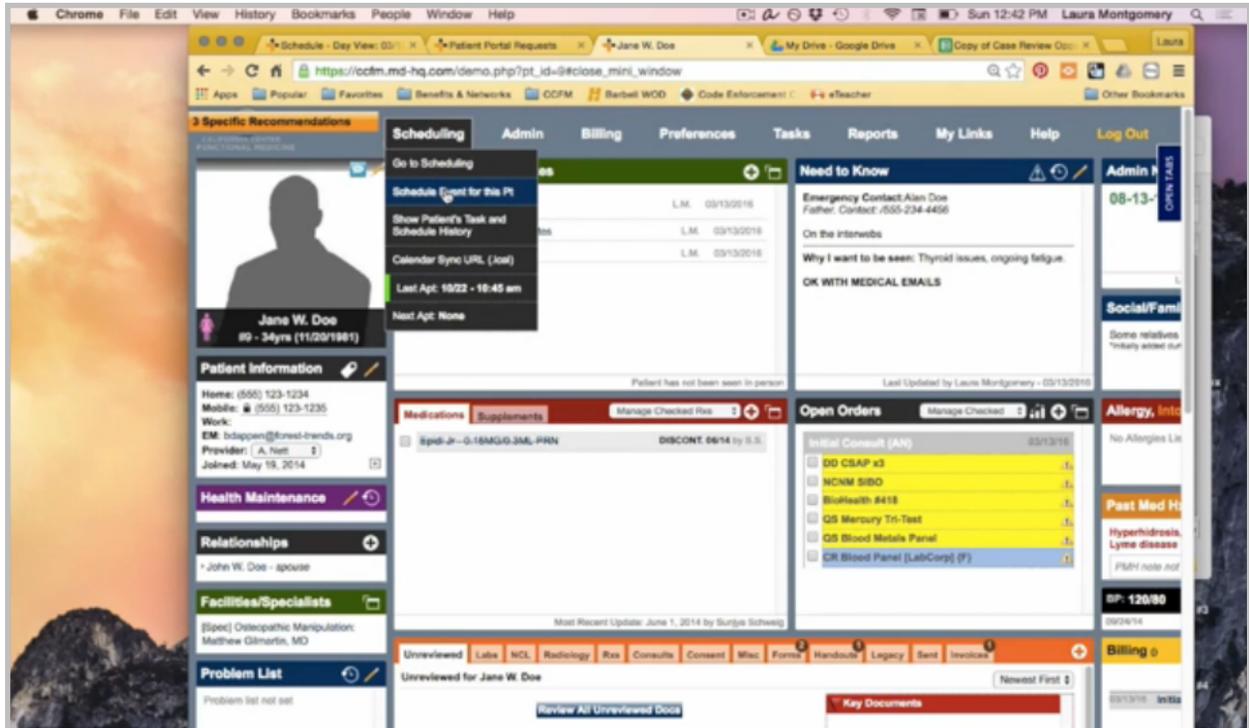
If the patient sends a message that she approves of the entire estimate, you can use the card on file in her next appointment dates. The first thing to do will be to schedule the appointment, so her first choice is May 16 at 1:00. I'm going to go to my case review opportunities sheet, but notice May 16 at 1:00 has already been scheduled with another patient.



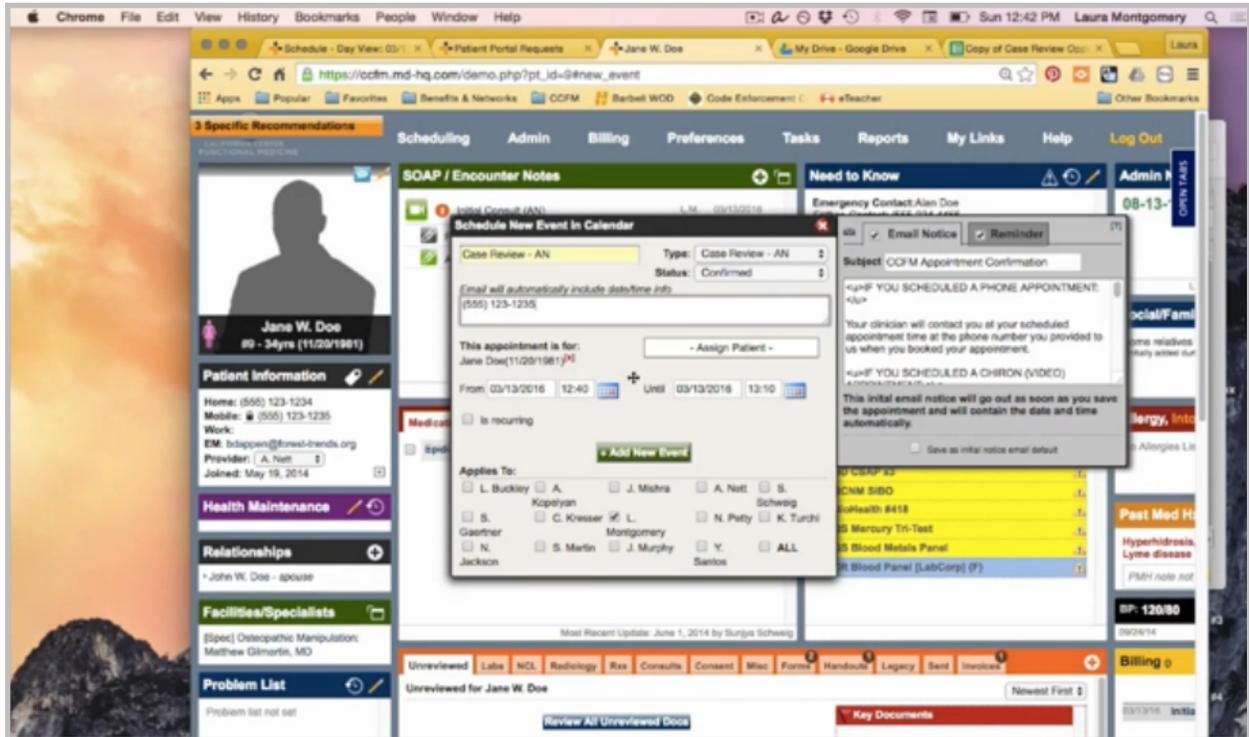
1	Day	Date	Time	Name	EHR	Schedules Checked:
304	Wednesday	5/4/2016	9:30 a.m.	John Doe	X	
305	Wednesday	5/4/2016	10:45 a.m.	John Doe	X	
306	Wednesday	5/4/2016	12:00 p.m.	John Doe	X	
307	Monday	5/9/2016	10:30 a.m.	John Doe	X	2/17/16 8:35 PM (NCP)
308	Monday	5/9/2016	11:45 a.m.	John Doe	X	2/24/16 6:48 PM (NCP)
309	Monday	5/9/2016	1:00 p.m.	John Doe	X	2/25/16 6:44 PM (NCP)
310	Wednesday	5/11/2016	9:30 a.m.	John Doe	X	
311	Wednesday	5/11/2016	10:45 a.m.	John Doe	X	03-09-16 6:43 PM (KT)
312	Wednesday	5/11/2016	12:00 p.m.	John Doe	X	
313	Monday	5/16/2016	10:30 a.m.	John Doe	X	2/19/16 5:20 PM (NCP)
314	Monday	5/16/2016	11:45 a.m.	John Doe	X	03-09-16 3:44 PM (KT)
315	Monday	5/16/2016	1:00 p.m.	John Doe	X	
316	Wednesday	5/18/2016	9:30 a.m.	John Doe	X	02-17-16 6:14 PM (KT)
317	Wednesday	5/18/2016	10:45 a.m.			
318	Wednesday	5/18/2016	12:00 p.m.			
319	Monday	5/23/2016	10:30 a.m.			
320	Monday	5/23/2016	11:45 a.m.			
321	Monday	5/23/2016	1:00 p.m.	John Doe	X	
322	Wednesday	5/25/2016	9:30 a.m.			
323	Wednesday	5/25/2016	10:45 a.m.	John Doe	X	02-24-16 9:01 AM (KT)
324	Wednesday	5/25/2016	12:00 p.m.			
325						
326						

So we'll go to her second choice, which is Wednesday, May 18, at 10:45. That is still available, so I'll put the patient's name here.

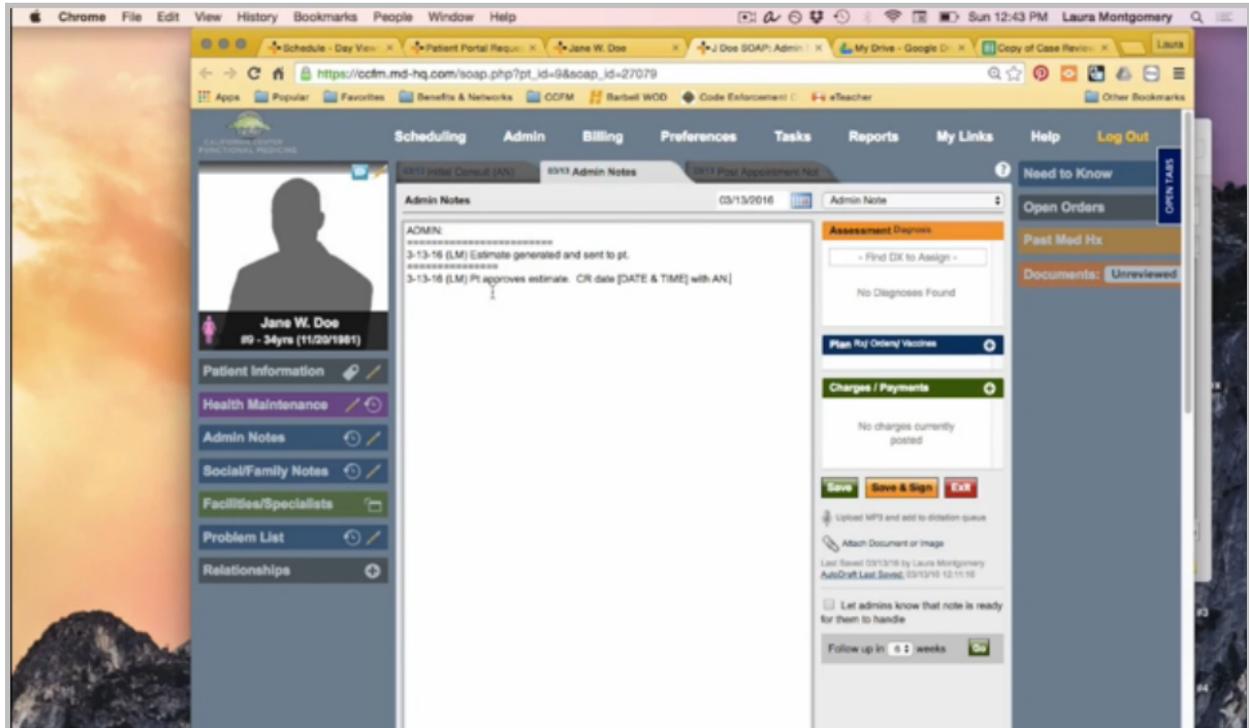
I'm going to go to her chart. You want to click on scheduling.



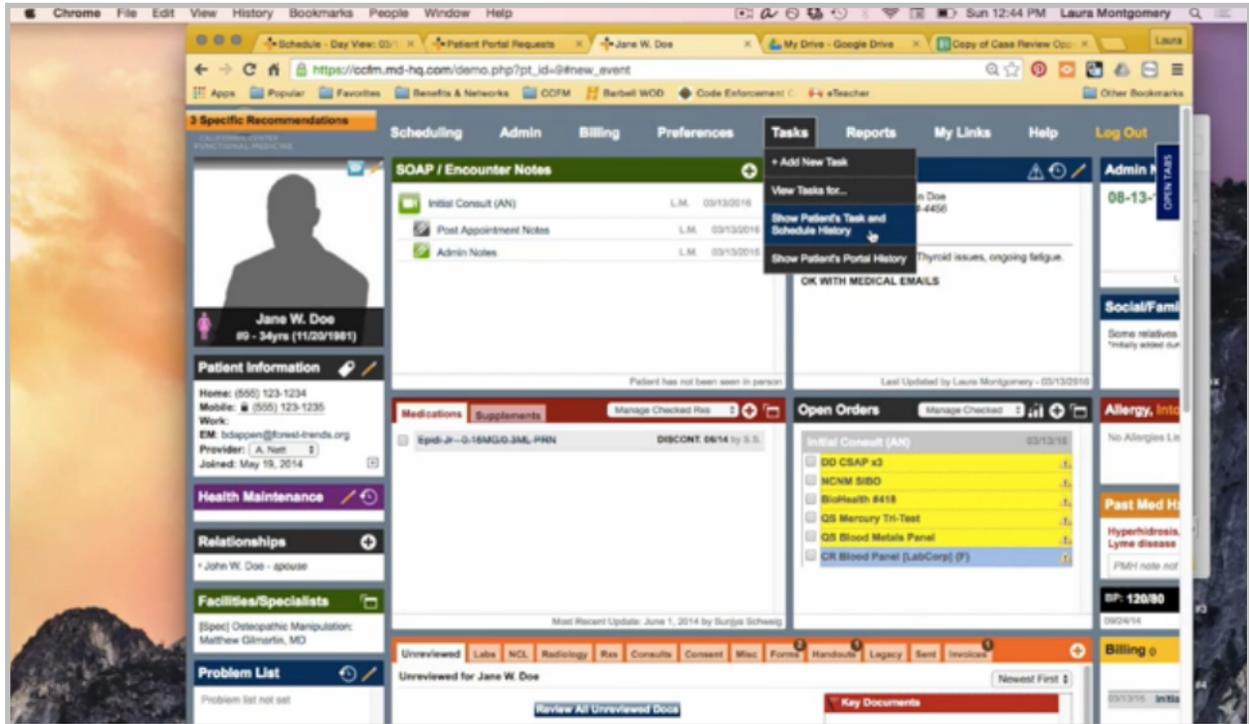
Schedule an event for this patient. Title it as a case review. The type is a case review. You want to put her preferred phone number here.



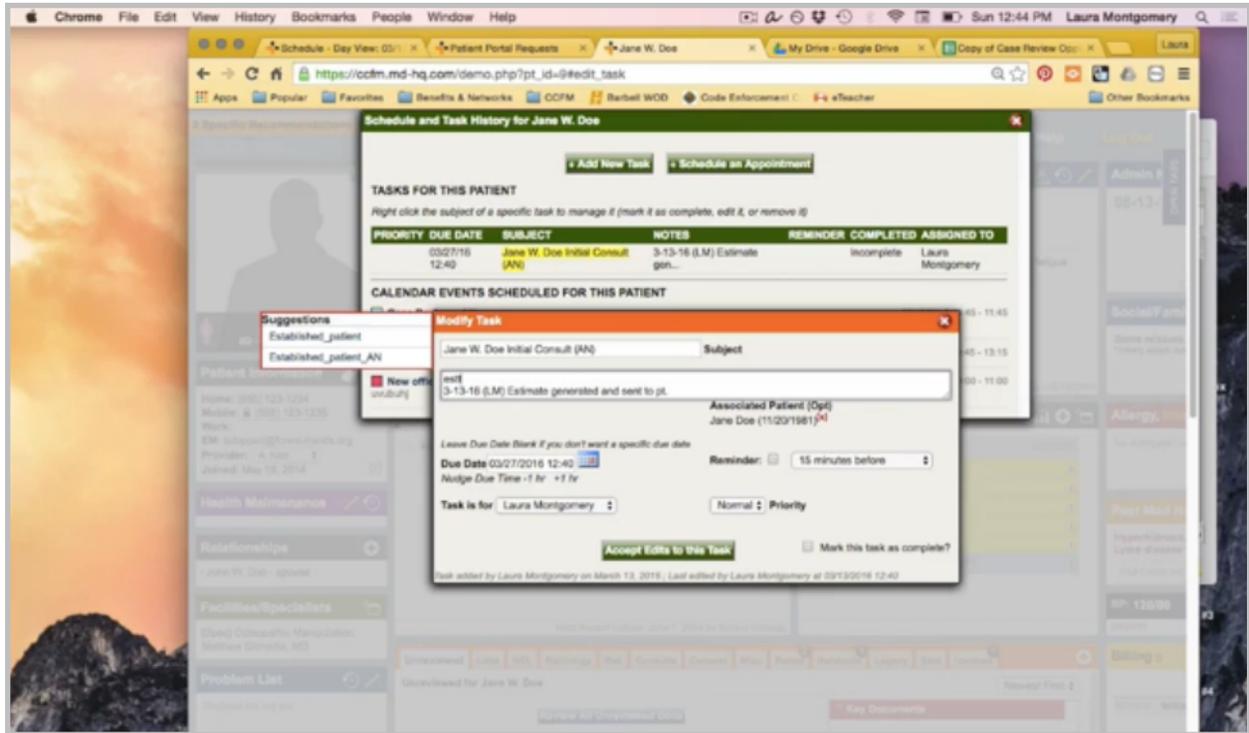
Select the date of the appointment. It was at 10:45, and make sure I choose the correct duration. Select Amy as the clinician, and I do want her to receive a notice that the appointment has been scheduled and a reminder before the appointment. Then I'll add a new event. On the case review opportunities sheet, I can mark here that I scheduled it in EHR. In the patient's message, she is approving the entire estimate.



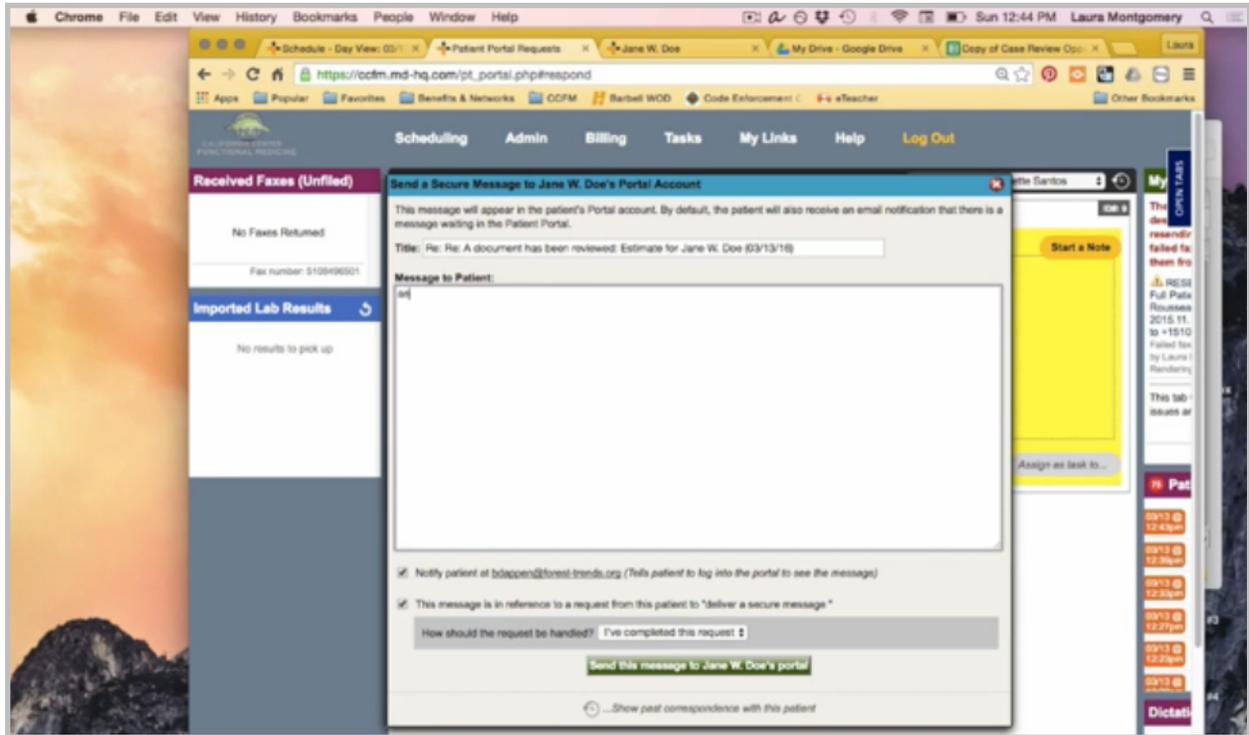
The next thing to do is open the admin notes. Document the date with my initials that the patient approves and the date and time of her appointment. Then I'm going to save this note and close it.



Next, I want to show the patient's task and schedule history, so I can find the task for the initial consult. Then I'll make a note here.



Again, my date and initials. Patient approves the estimate. A line to separate the two messages. I'm going to remove the due date, and I'll send it on to our billing department.



Back in the portal, I want to respond to the patient. I'm going to address her, thank her for her estimate approval, let her know that we'll be in touch with more instructions soon, and that we scheduled her a case review appointment for the date and time with Dr. Nett. This has a link to the travel documents and some information about making sure she starts working on the testing and sticks to her scheduled time. Then I'll send her the message. Then I need to wait for our billing department to send the tests back to me to let me know that everything has been charged.