

Schedule Case Review

PURPOSE

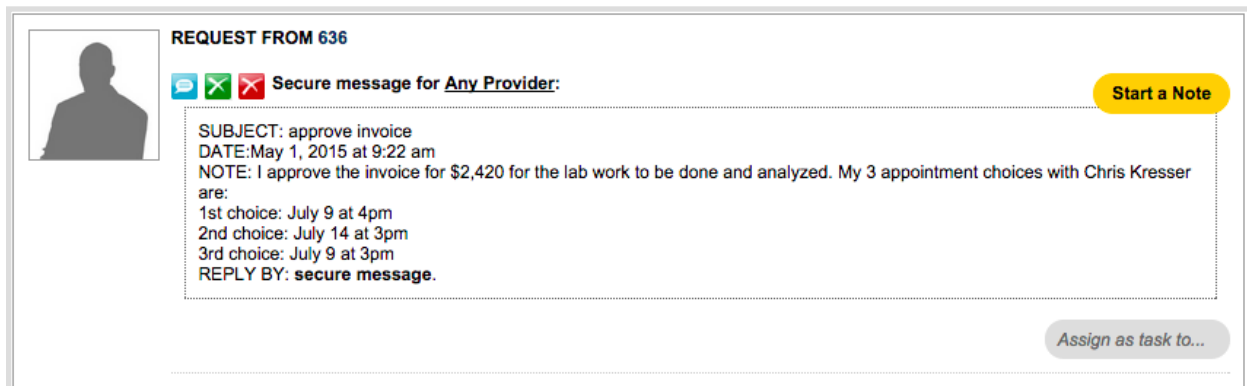
1. Move encounters quickly and efficiently through the flow of the practice.
2. Provide information and documentation to patients so they have a clear understanding of what happens next and when.
3. Reduce number of errors and omissions.
4. Create continuity with labeling and processing.
5. Improve the quality of work within our clinic.

PROCEDURE

Schedule CR Appointments (patient sent appt. preferences and appt. was available)

Expected time frame: Within 48 hours of when the patient sends a Secure Message to the PPQ

Example of an incoming message:

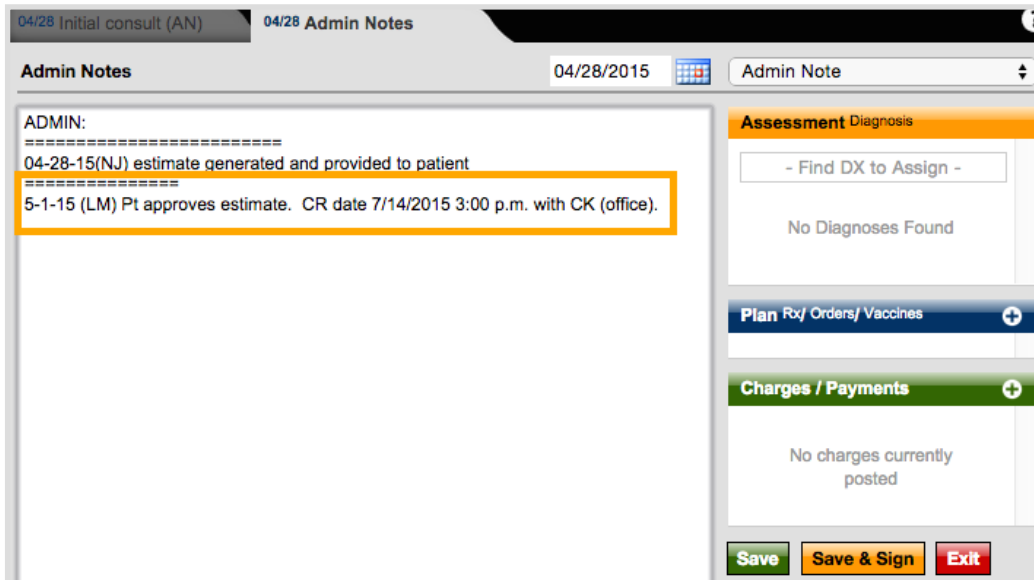


The screenshot shows a secure message interface. On the left is a silhouette of a person. To the right, the message header reads "REQUEST FROM 636" and "Secure message for Any Provider:". Below this, the message content is: "SUBJECT: approve invoice", "DATE: May 1, 2015 at 9:22 am", "NOTE: I approve the invoice for \$2,420 for the lab work to be done and analyzed. My 3 appointment choices with Chris Kresser are:", "1st choice: July 9 at 4pm", "2nd choice: July 14 at 3pm", "3rd choice: July 9 at 3pm", and "REPLY BY: secure message.". There are two buttons: a yellow "Start a Note" button and a grey "Assign as task to..." button.

1. Go to the patient's chart and check the clinician.
2. In Google Drive, open the Case Review Opportunities document and click the appropriate clinician tab at the bottom.
3. Find patient's top appointment choice and put their name. If not available, go to their second or third choice for appointment.
4. Highlight the first three columns (day, date, time) and right-click to copy.
5. From the patient dashboard, click to open the Admin Notes for the encounter.

Note: If the Admin Notes for this encounter have already been signed, open the Admin Notes, click "append a comment" and title the comment "CR Appt.," then continue with the next step (although do not put a line at the top of your message).

6. Put a line and your date/initial stamp, then one of the following messages:
 - a. "Pt approves estimate. CR date [paste appt. date & time only, delete the day] with [clinician initials (office)]."
 - b. "CR date [paste appt. date & time only, delete the day] with [clinician initials (office)]. Holding for estimate approval."
7. Save the note and close it. Example below **outlined in orange**:



The screenshot shows a software window titled "Admin Notes" for the date "04/28/2015". The main text area contains the following text:

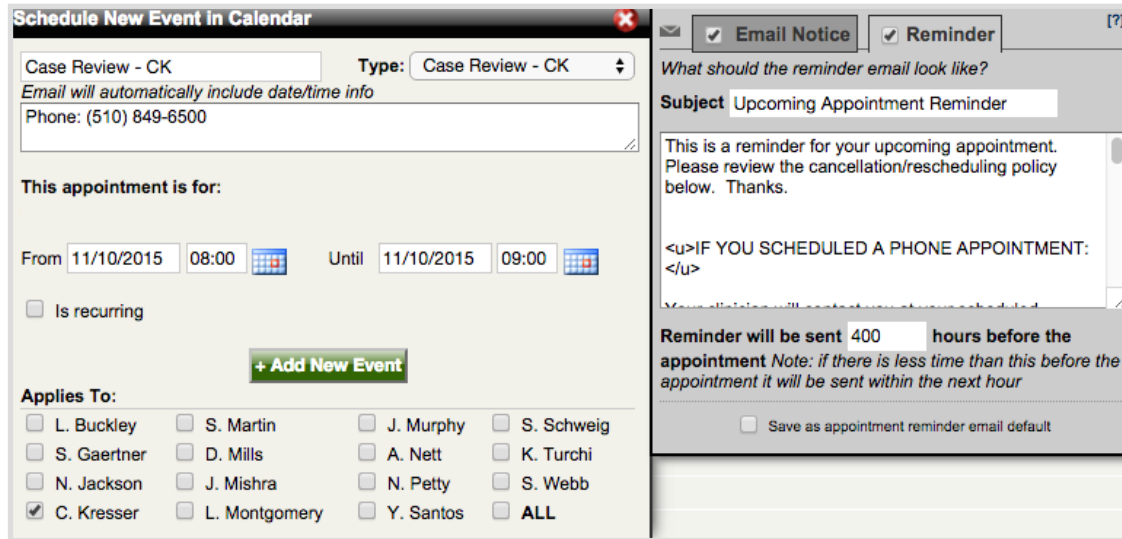
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ADMIN:
=====
04-28-15(NJ) estimate generated and provided to patient
=====
5-1-15 (LM) Pt approves estimate. CR date 7/14/2015 3:00 p.m. with CK (office).
  
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The second line of text is highlighted with an orange border. To the right of the text area are several panels: "Assessment Diagnosis" with a search button "- Find DX to Assign -" and the text "No Diagnoses Found"; "Plan Rx/ Orders/ Vaccines" with a plus sign; and "Charges / Payments" with the text "No charges currently posted". At the bottom right are three buttons: "Save", "Save & Sign", and "Exit".

8. In the patient dashboard, highlight and right-click to copy the patient's preferred phone number.
9. Hover on "scheduling," then click on "schedule event for this pt."
10. Title: Case Review – clinician initials.
11. Type: Case Review – clinician initials.
12. Event details: "Phone: [right-click to paste phone number]"
13. Change the from/to dates and times to match the appointment type. Each clinician may have a different length for their Case Reviews.
14. Applies to: make sure to un-check your name and check the correct clinician.
15. Click on the Reminder tab in the gray pop-up box next to the Schedule New Event window.
16. Change the "reminder will be sent" to 400 hours before the appointment.

17. Click . Example below:



18. Close patient’s chart.

19. In the PPQ, click  to respond to the patient with one of the following messages:

Hi, [patient name],

Thank you for your estimate approval. We will be in touch shortly with all the information and instructions you will need in preparation for your Case Review appointment. Once available, this information will be in the “Encounter History” section of your Patient Portal.

We have scheduled your Case Review appointment for [right-click to paste the appt day/date/time] with [clinician’s name at his/her office].

Please keep in mind that in order to perform a thorough Case Review, determine the underlying cause of your health problems, and construct a treatment plan, [name of clinician] will need the results from the labs ordered during the Initial Consult as well as your completed Case Review documents (in the questionnaires section of your portal). If [name of clinician] does not have this information prior to your Case Review appointment, [he/she] will not be able to provide a Report of Findings. This is the only opportunity to get a thorough Case Review in your work with [name of clinician]. For these reasons, we urge you to begin to complete the labs and paperwork right away so that you can get the most out of your time with [him/her] during the Case Review. Thank you!

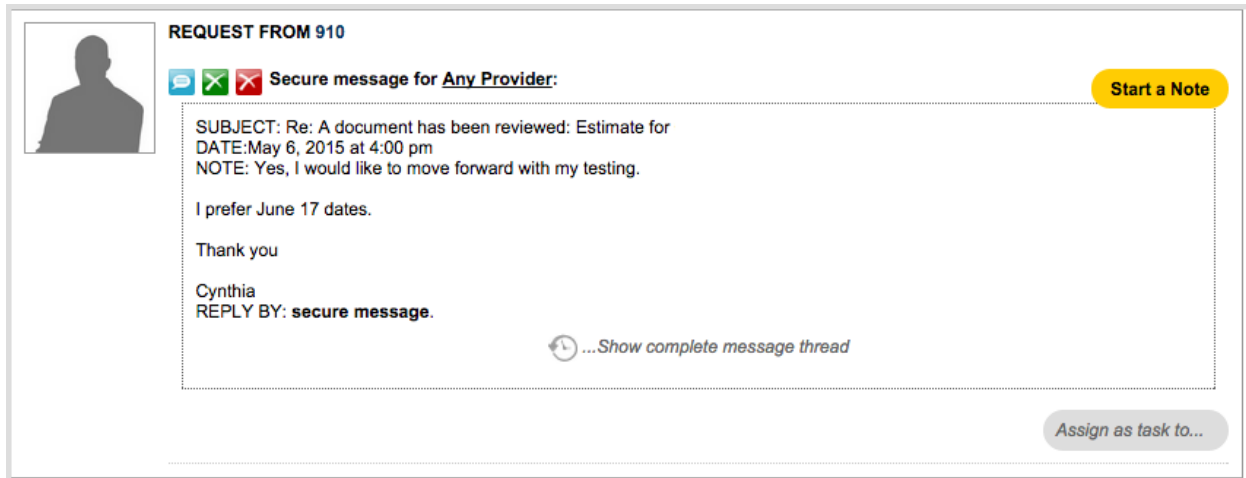
[your signature]

Schedule CR Appointments (requested appointments were not available)

Expected time frame: Within 48 hours of when the patient sends a Secure Message to the PPQ

Example of an incoming message:

The patient below responded to approve the estimate, but it has been three weeks since it was sent to her and now the appointments she wants are booked and need to be pushed further out since she has not begun testing:



REQUEST FROM 910

Secure message for Any Provider:

SUBJECT: Re: A document has been reviewed: Estimate for
 DATE: May 6, 2015 at 4:00 pm
 NOTE: Yes, I would like to move forward with my testing.

I prefer June 17 dates.

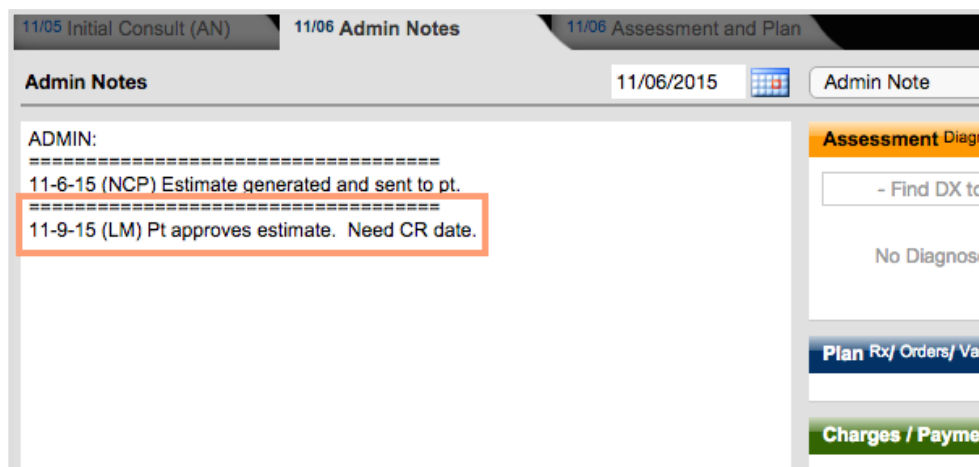
Thank you

Cynthia
 REPLY BY: **secure message.**

...Show complete message thread

Assign as task to...

1. Go to the patient's chart and check the clinician.
2. From the patient dashboard, click to open the Admin Notes for the encounter.
3. Put a line and your date/initial stamp, followed by "Pt approves estimate. Need CR date," then save and close the note. Example below **outlined in orange**:



11/05 Initial Consult (AN) | 11/06 Admin Notes | 11/06 Assessment and Plan

Admin Notes | 11/06/2015 | Admin Note

ADMIN:
 =====
 11-6-15 (NCP) Estimate generated and sent to pt.
 =====
 11-9-15 (LM) Pt approves estimate. Need CR date.

Assessment Diagn
 - Find DX to
 No Diagnose


Plan Rx/ Orders/ Vac
 Charges / Paymen

4. From the patient dashboard, hover on "tasks," then click "show patient's task and schedule history."

5. Open the task that matches this encounter. Put your date/initial stamp, followed by “Pt approves estimate. Need CR date,” then a line. Assign the task to the biller and

Accept Edits to this Task

6. In Google Drive, open the Case Review Opportunities document and click the appropriate clinician tab at the bottom.
7. Find at least five new available appointment dates/times. CR appointments should be scheduled at least seven to eight weeks out to allow enough time for test results to be received. Highlight the first three columns (day, date, and time) of an available appointment and right-click to copy.

8. In the PPQ, click  to respond to the patient with a message requesting the information you need, such as:

Hi, [patient name],

Thank you for your estimate approval. Unfortunately those appointment slots have all been booked now. Please respond with your top three choices from the following list of currently available appointments:

Wednesday	7/1/2015	9:30 a.m.
Wednesday	7/1/2015	1:00 p.m.
Monday	7/6/2015	12:30 p.m.
Monday	7/6/2015	2:00 p.m.
Wednesday	7/8/2015	9:30 a.m.

[your signature]

9. Once a response is received from patient, please go to the top section of the document and follow the steps to schedule the CR.