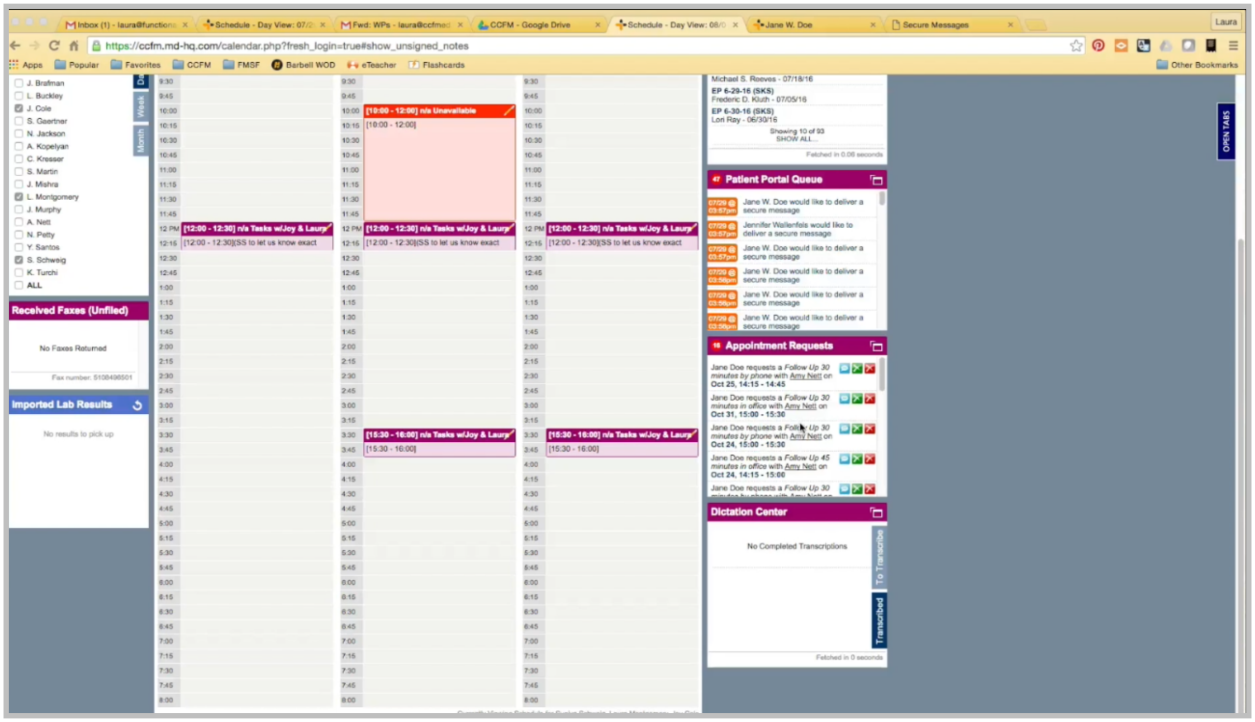
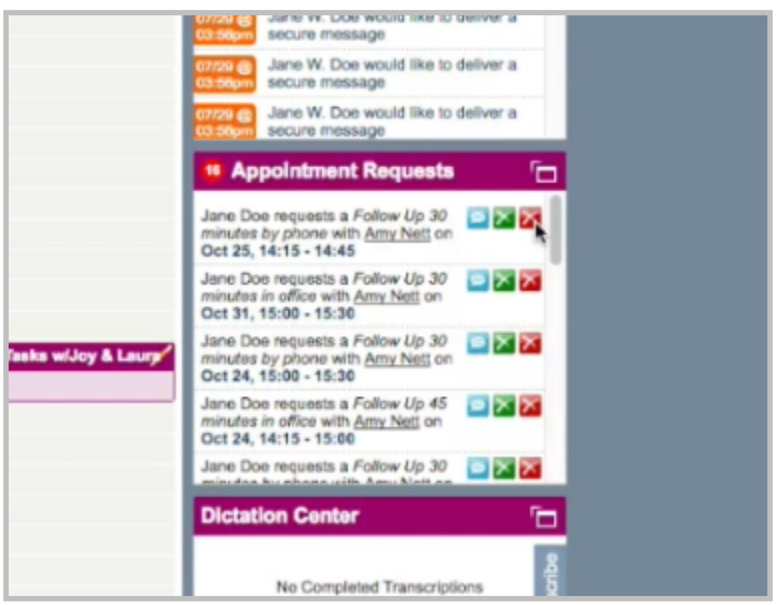
KRESSER INSTITUTE FOR FUNCTIONAL AND EVOLUTIONARY MEDICINE

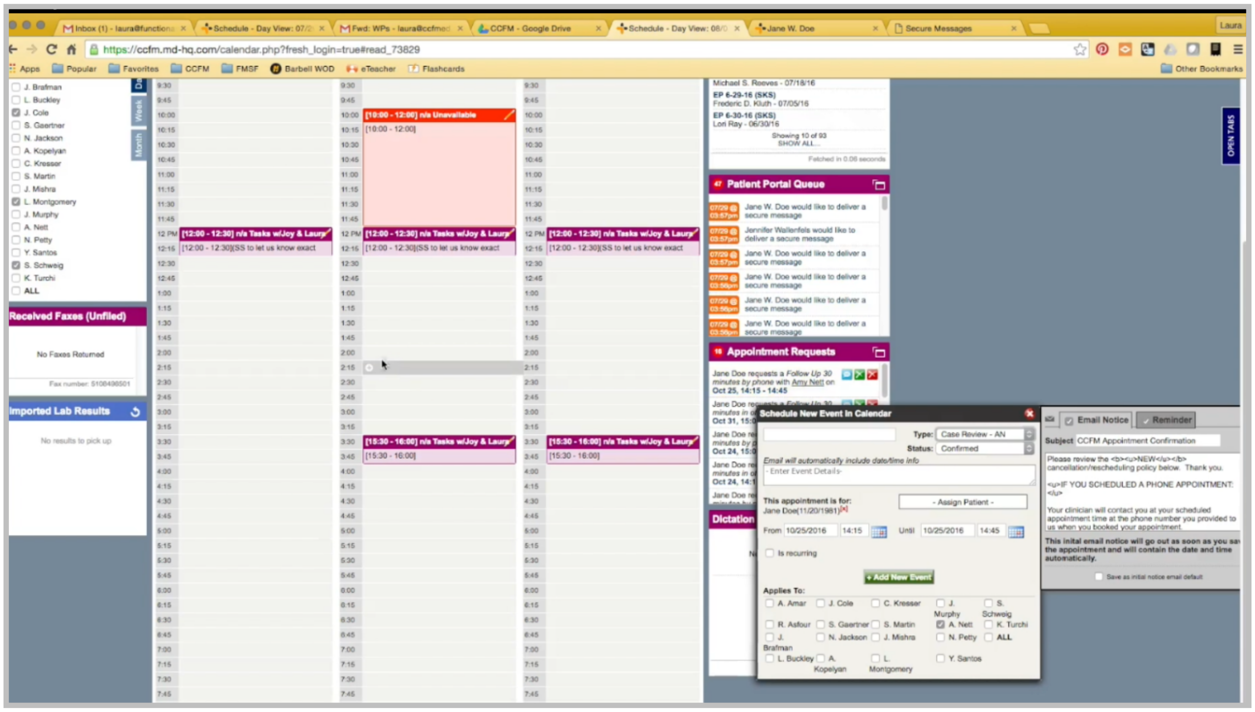
Scheduling (Part Two) - Existing Patient Appointments



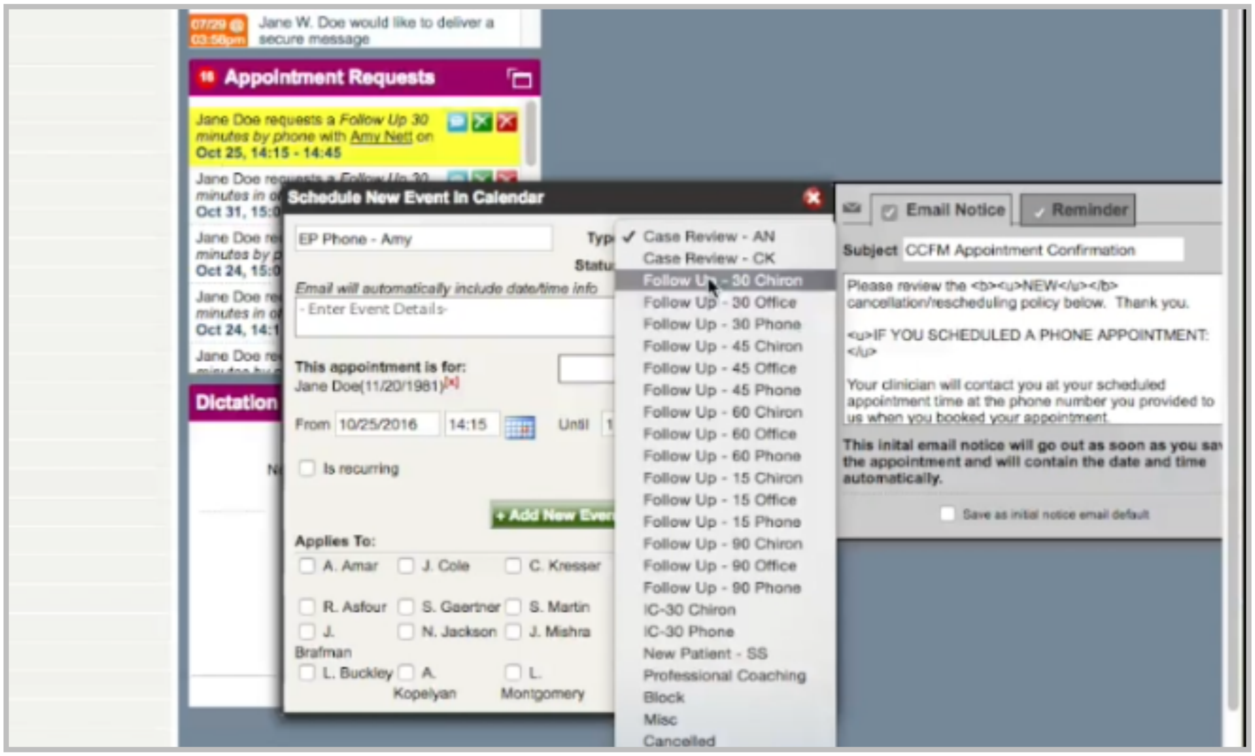
Incoming appointment requests made by patients will be here in the appointment queue. It will tell you the type of appointment; if they want phone, office, or video; the clinician; and then the date.



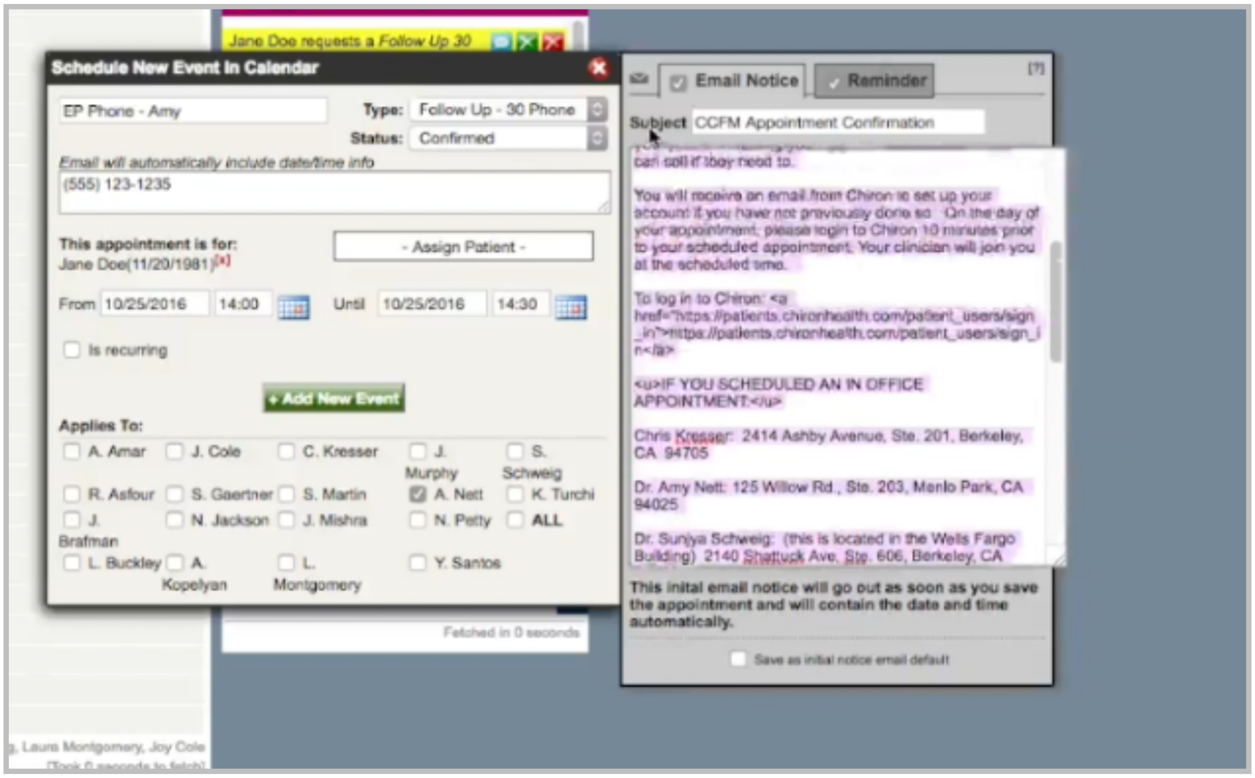
There should never be a time when you red X an appointment. If you want to accept it, you do so with the green box, or if you reject it or want to send the patient a message, we do that with the blue box.



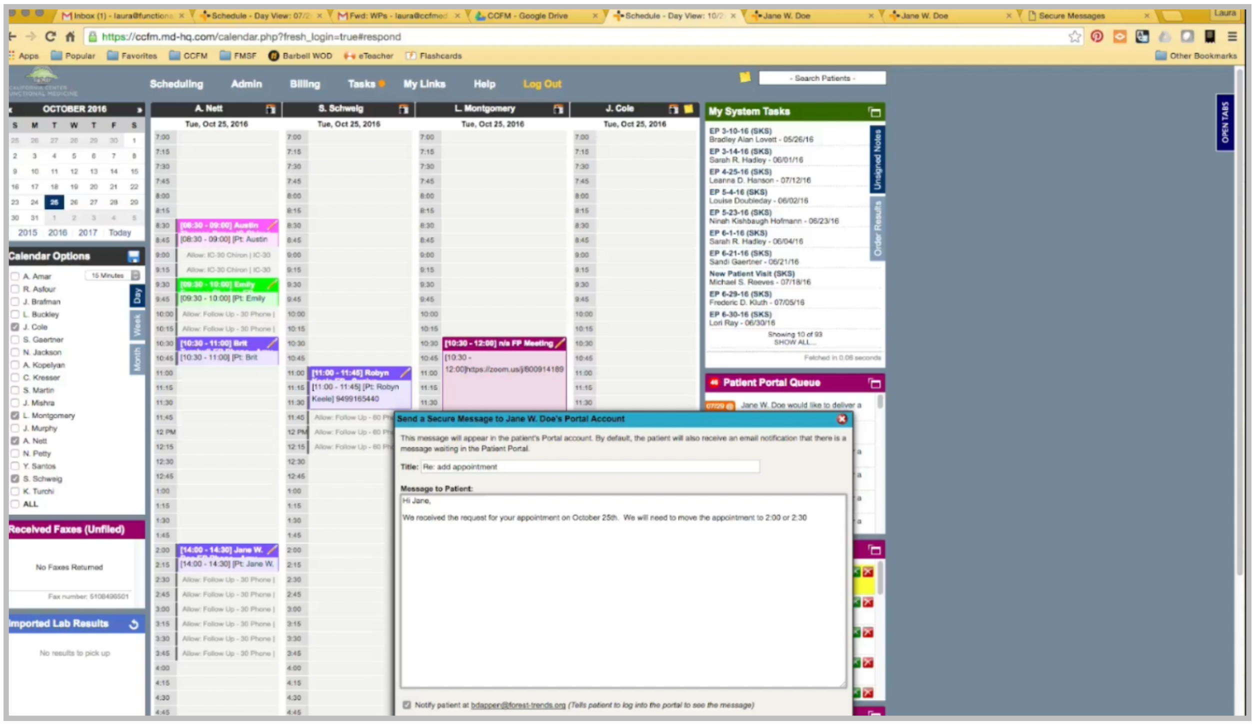
Clicking on the date brings up the appointment. It's usually a good idea to go to that day on the schedule. Look at the time the patient wants, and see if there are any changes that need to be made. For example, this patient is requesting the appointment to start at 2:15, which would block out 15 minutes of time.



Here, we put EP for established patient, that it is a phone appointment, and the clinician. The patient wants a half-hour phone appointment. In this case, I also need to go into her chart to get her phone number. I copy the preferred phone number and paste it into the body of the appointment. It's already assigned to this patient for the time she wants, but I want it to start at 2:00. Default clinician should already be marked, and here is the confirmation notice and the reminder.

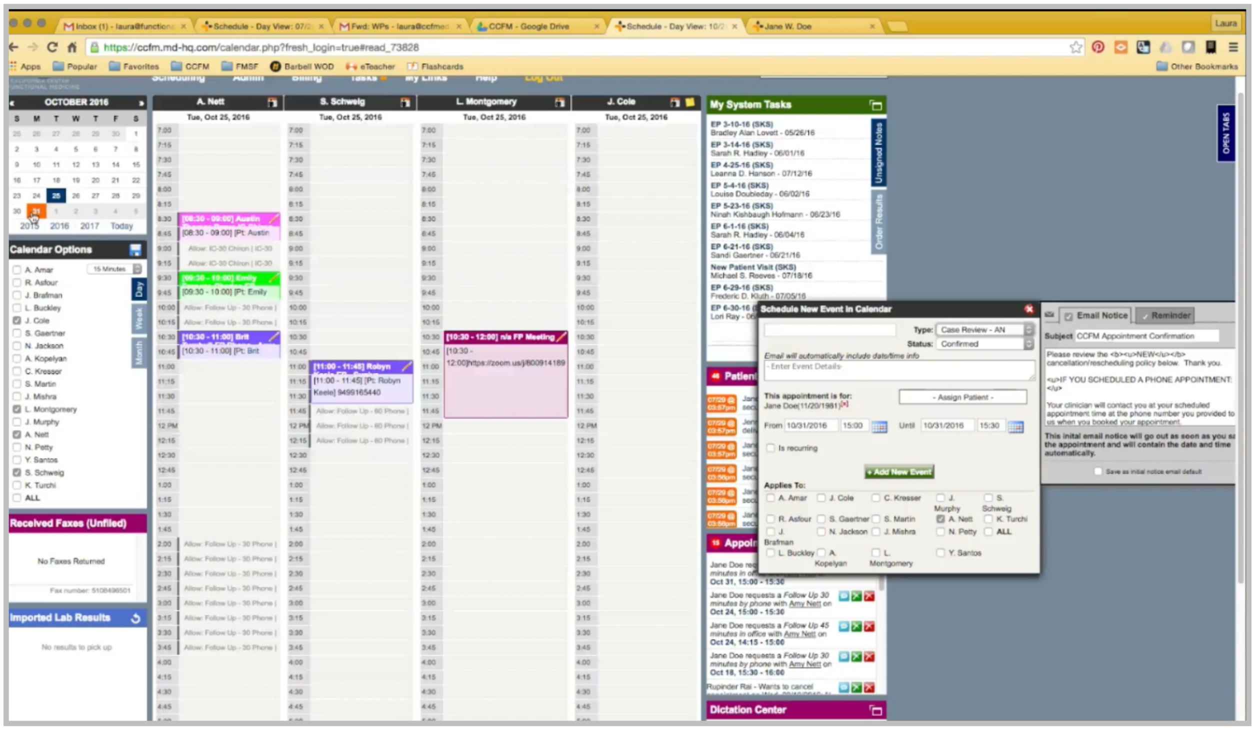


Since this is a phone appointment, I can take off the messages about office and CHIRON. This is not an initial consult or a case review, so I can take that off the message. She is left with the instructions for the phone and the cancellation policy.

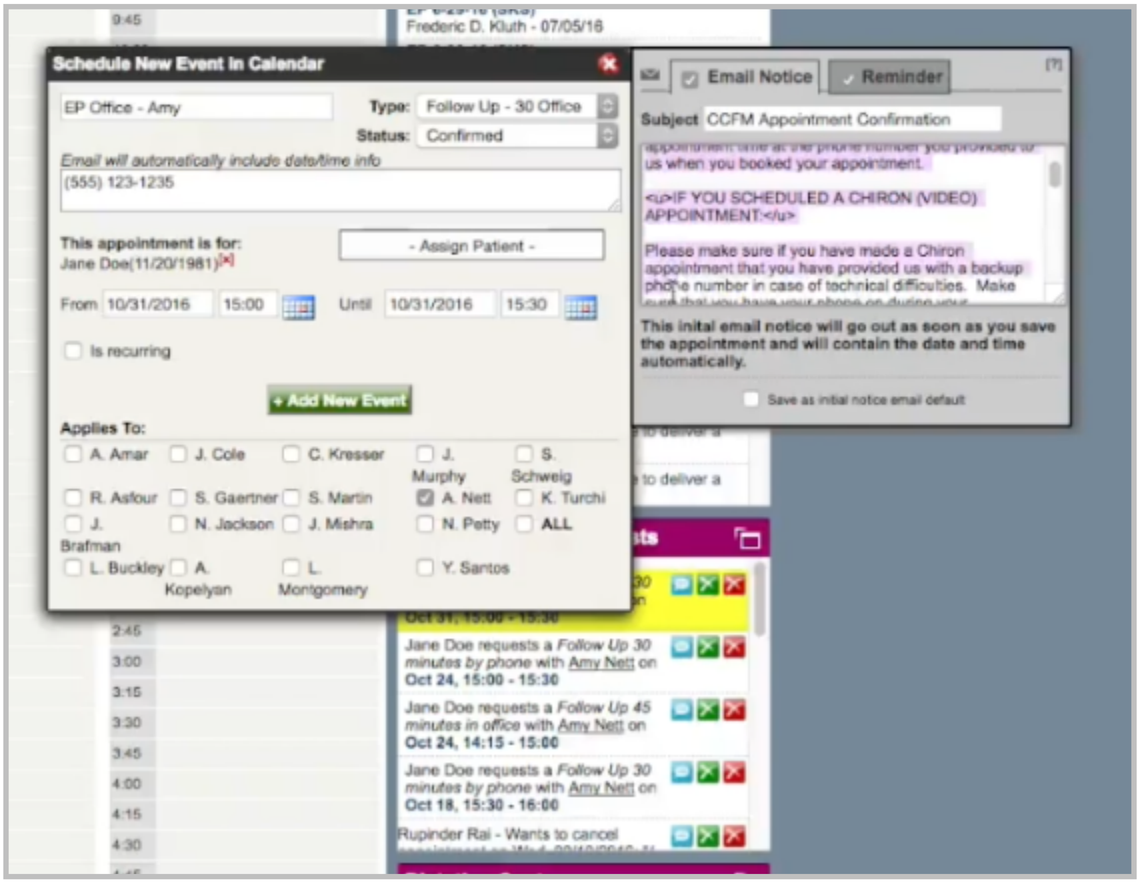


Then, I click Add New Event. Now, I do want to let her know that I changed the time. I'll also offer her the 2:30 slot in case she wants it later, and I can manually move the appointment if she responds, and then send the message.

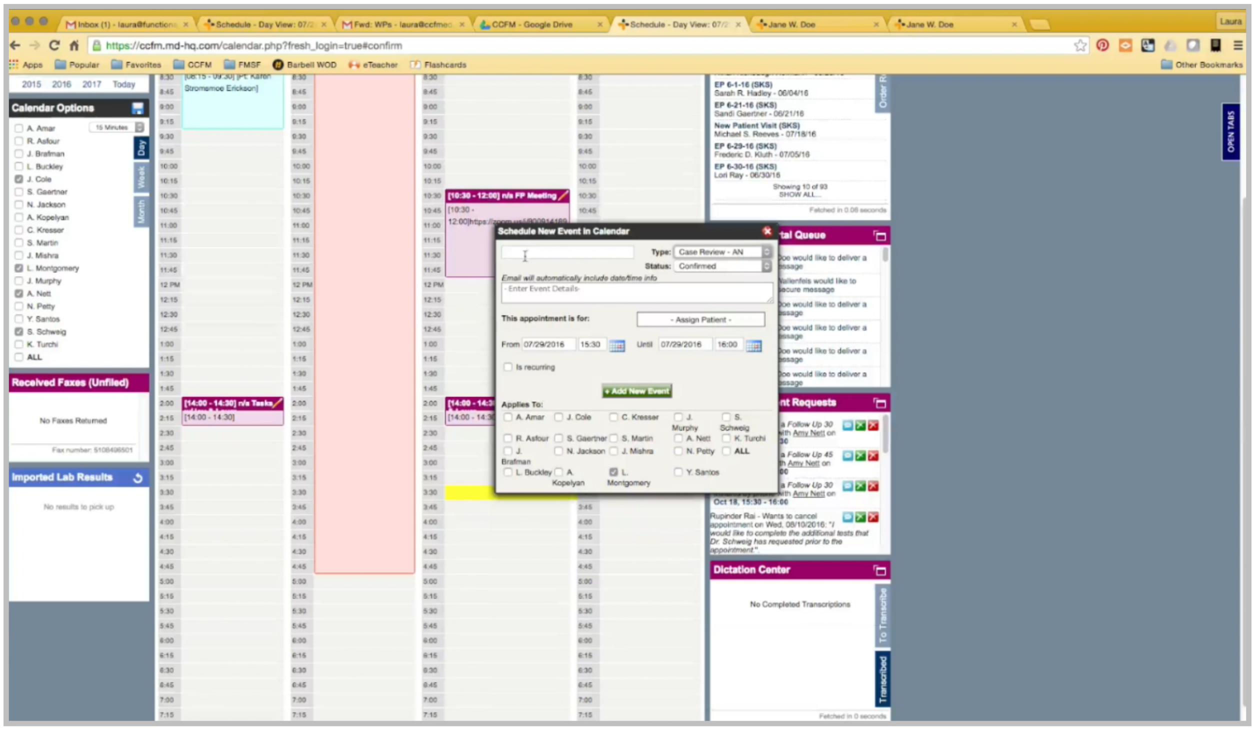
Now I can go ahead and green X this appointment request out of here.



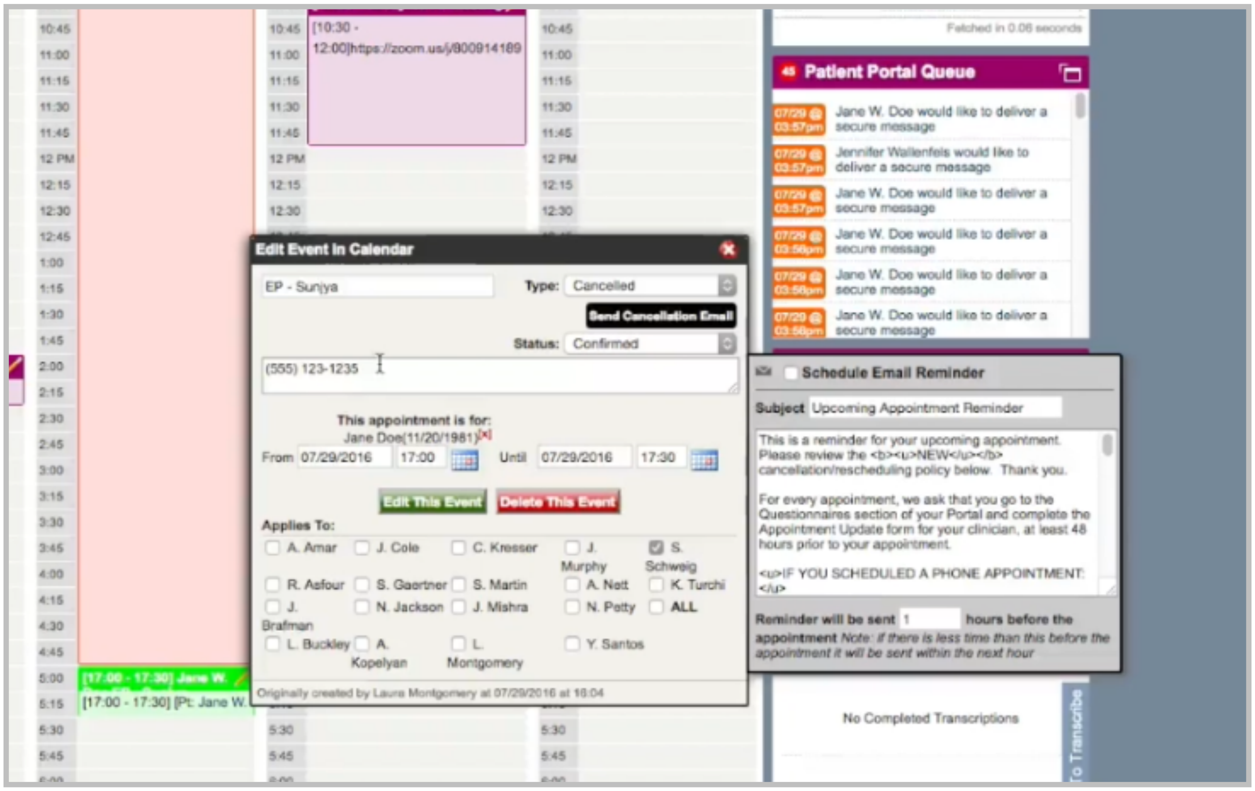
Second example: You can click on the date. Again, it should show the date on the calendar here. This is a 30-minute follow-up in office. I still want to open the patient's chart and get her phone number to put on there in case she needs to be contacted, if she doesn't show up, or for any other reason. The date, duration, and patient should all default, as well as Amy, the clinician.



In this case, this is an office appointment, so I can remove the information about phone appointments and videos. I can also remove the IC and case review language for the cancellations, since this is a follow-up. Add New Event, and she is on the schedule. Now I can green X her request.

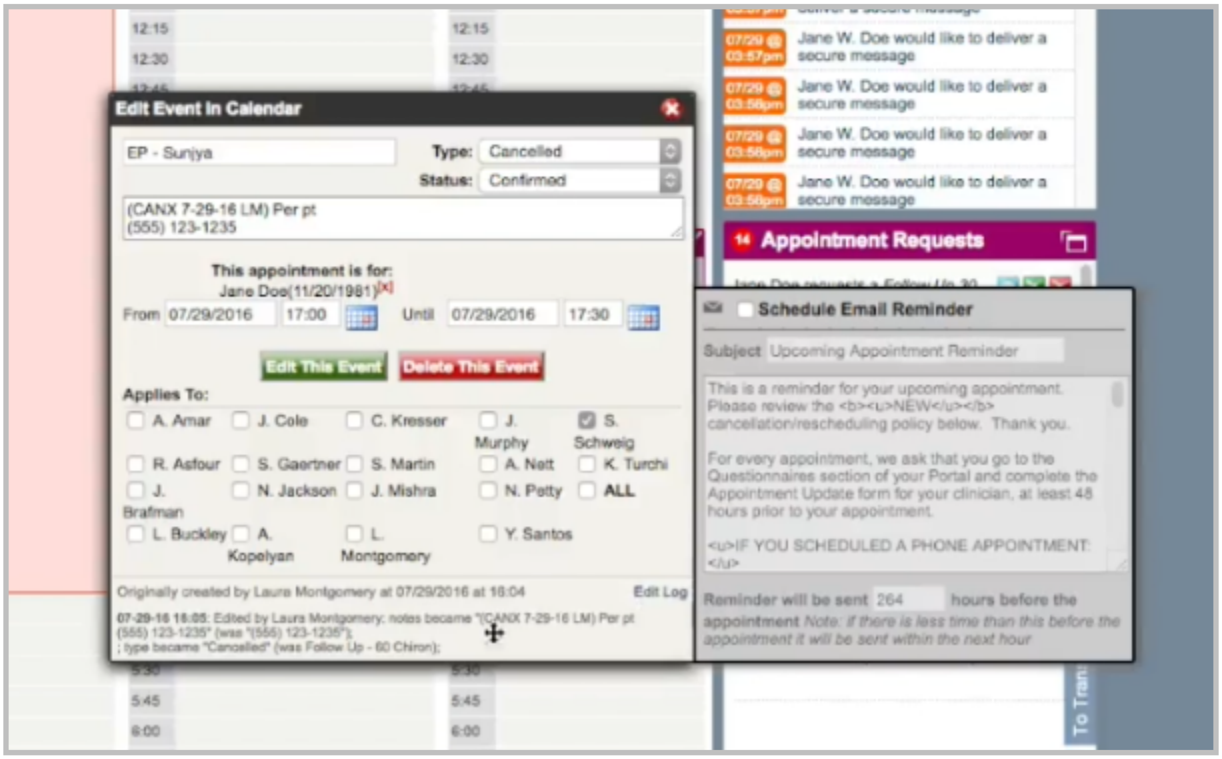


If you want to manually schedule an appointment, you can go to any date on the schedule, select the time, and type in your title. You would still put the patient's phone number, assign him or her here, and you would follow the same steps. Whoever's schedule that you click on to schedule the event will be the default here, but you can easily change to a different clinician, and that is scheduled.



To cancel an appointment, you can click on it to either edit it or mark it as cancelled. When we cancel the appointment, we do put a note here: the date we're canceling it and why.

Edit the event, and now you can see on the schedule it is only a small sliver. If you hover on it, it will show you the original appointment.



If you ever needed to check anything, you can also click the Edit Log to see who created the task, when they changed it, and what changes they made.