

Appointment Requests from Patients

PURPOSE:

1. Address patient requests promptly.
2. Move requests quickly and efficiently through the flow of the practice.

PROCEDURE:

Expected Time Frame: As requested.

Established Patients:

1. In the PPQ, click  to respond to the patient with the following message:

Hi, [*patient name*],

Now that you are an established patient, you can actually schedule follow-up appointments yourself in your Patient Portal by clicking on “Appointments” to check availability for appointments. The calendar is currently open for patients to schedule appointments through the end of [*name of month*].

[*your signature*]

2. If patients are having difficulty finding an appointment time that works for them, you can assign the task to the clinician’s patient coordinator so that they can be put on the cancellation list for that clinician.

New Patients:

1. Click on “Assign as task to...” and choose the patient coordinator for the clinician you need to make an appointment with.
2. Task Subject: Appt
3. Message: date/initial stamp followed by a message such as “please contact pt to schedule appt” or “please see patient’s response to you.”
4. Click “assign.”