

Reschedule 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 the practice.

PROCEDURE:

Reschedule CR Appointments (more than two weeks prior to their original CR appointment)

Expected Time Frame: Within 48 hours of when the patient sends a Secure Message to the PPQ.

A patient sends in a message requesting to reschedule his or her CR, and the CR currently scheduled is at least two weeks away.

1. Go to the patient's chart and check the clinician.
2. In Google Drive, open the spreadsheet that lists available case review appointment times, and click the tab at the bottom for the appropriate clinician.
3. Find at least five new available appointment dates/times, taking into account any information the patient gave you (i.e., I would like an appointment in late January). (Remember that CR appointments should be scheduled a minimum of seven weeks out to allow enough time for test results to be received.) Highlight the first three columns (day, date, and time) for the appointments you would like to send to the patient and right-click to copy.
4. In the PPQ, click  to respond to the patient with a message requesting the information you need. Use one of the example messages below, depending on whether the patient wanted to reschedule due to labs being incomplete, or for other reasons:

Example message if the patient wanted to reschedule due to labs being incomplete:

Hi, *[patient name]*,

We received your request to reschedule your appointment. Please note that we do not advise rescheduling your Case Review appointment if you are missing a few of your lab results. It is common for some of the test

results to be unavailable at the Case Review, and in most cases (even when all results are available), the clinician will not address every single lab finding during your Case Review, in order to structure and layer your treatment. Any lab results that were not available for your Case Review will be reviewed by the clinician upon receipt, and [he or she] will send you a message about the results and any recommended adjustments to your treatment protocol. The results will also be addressed in detail at follow-up appointments.

If you would still like to reschedule your appointment, please provide us with your top three choices from the list below and we will do our best to accommodate your first preference. These choices may be offered to several patients, and we book the appointments on a first-come, first-served basis.

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*]

Example message if the patient wanted to reschedule for any reason other than labs:

Hi, [*patient name*],

We received your message requesting to reschedule your appointment. Here are some of our openings. Please provide us with your top three choices from the list below, and we will do our best to accommodate your first preference. These choices may be offered to several patients, and we book the appointments on a first-come, first-served basis.

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*]

5. Once a response is received from the patient, please continue with the steps below.

The patient below previously requested to reschedule the Case Review appointment. New dates were given as outlined above, and the patient has sent this message with the new chosen date.



REQUEST FROM

 Secure message for |

ID#: 1354

[Start a Note](#)

SUBJECT: Re: Re: Appointment
 DATE: November 12, 2015 at 12:33 pm
 NOTE: I'll take the 2/3 appointment at noon! Thank you!
 REPLY BY: **secure message**.

 ...Show complete message thread

[Assign as task to...](#)

1. Go to the patient's chart and check the clinician.
2. In Google Drive, open the spreadsheet that lists available case review appointment times, and click the tab at the bottom for the appropriate clinician.
3. Find patient's top appointment choice, and put his or her name. If not available, go to the second or third choice for appointment. **If one of the choices is available, proceed to step 8. If none of the choices is available, proceed to the next step.**
4. If none of the choices is available, find at least five new available appointment dates/times. (Remember that CR appointments should be scheduled a minimum of seven 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.
5. In the PPQ, click  to respond to the patient with a message requesting the information you need, such as:

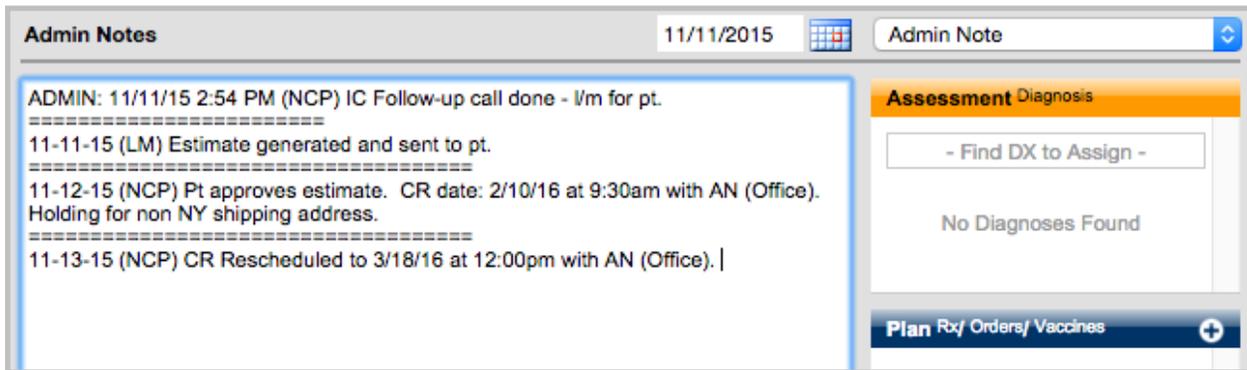
Hi, *[patient name]*,

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

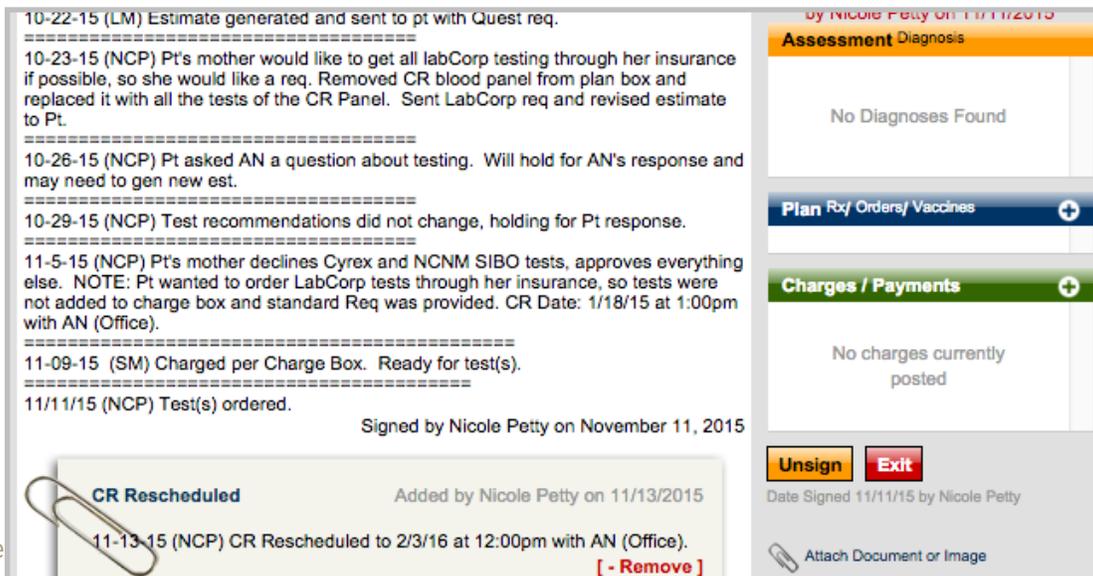
Wednesday	7/1/2015	9:30 a.m.
Wednesday	7/1/2015	1:00 p.m.
Monday	7/6/2015	12:30 p.m.
Monday	7/6/2015	2:00 p.m.
Wednesday	7/8/2015	9:30 a.m.

[your signature]

6. Once you receive a response from the patient, go to the patient's chart and check the clinician.
7. In Google Drive, open the spreadsheet that lists available case review appointment times, and click the tab at the bottom for the appropriate clinician.
8. Find patient's top appointment choice, and put his or her name. If not available, go to the second or third choice for appointment.
9. Highlight the first three columns (day, date, time) and right-click to copy the patient's new CR appointment time.
10. Go back to the patient's chart and open the Admin Notes of the Initial Consult encounter.
11. If the Admin Notes have not yet been signed, put a line, your date/initial stamp, and the following message:
 - a. CR rescheduled to [*paste appt. date & time only, delete the day*] with [*clinician's initials (Office)*]" Example below:



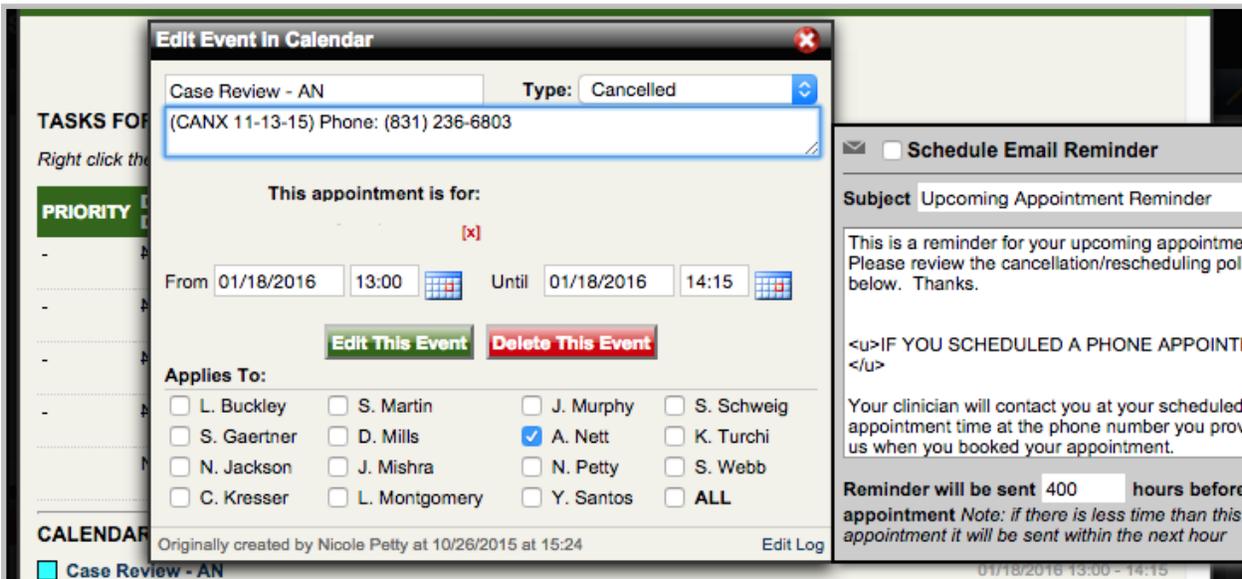
12. If the Admin Notes have been signed, select **+ Append a Comment**, title the comment CR Rescheduled, put a line in the body of the comment, and add your date/initial stamp and the following message:
 - a. CR rescheduled to [*paste appt. date & time only, delete the day*] with [*clinician's initials (Office)*]" Example below:



13. Save the note and close it if the Admin Notes are not signed, or just close the note if the Admin Notes are signed.
14. In the patient dashboard, highlight and right-click to copy the patient's preferred phone number.
15. Hover on "Scheduling," then click on "Show patient's task and schedule history."
16. Click on the patient's original case review appointment, as shown in orange below:



17. Leave the appointment title as is, but change the type to "cancelled."
18. In front of "Phone:" type (CANX [today's date]). Here is an example of what the appointment window will look like once you have completed these steps.



19. Select **Edit This Event**, and you will now see that the appointment has turned to black, like this:



20. In the patient dashboard, hover on “Scheduling,” then click on “Schedule event for this pt.”
21. Title: Case Review – [clinician’s initials]
22. Type: Case Review – [clinician’s initials]
23. Event details: “Phone:[*right-click to paste phone number*]”
24. Change the from/to dates and times to match the appointment.
25. Applies to: make sure to un-check your name, and check the correct clinician.
26. To the right of the appointment window you will see a gray box with two tabs. Make sure you leave these boxes checked. Click on the Reminder tab in the gray pop-up box next to the Schedule New Event window.
27. Change the “Reminder will be sent” to 400 hours before the appointment.
28. Click “Add New Event.” Example below:

29. Close patient’s chart.
30. Go back to the spreadsheet that lists available case review appointment times and put an x in the column next to the patient’s name to show this has been scheduled in the EHR.
31. In the PPQ, click  to respond to the patient with the following message:

Hi, [patient name],

We received your message and have rescheduled your Case Review appointment. Your Case Review appointment is now scheduled for [insert new date and time] with [clinician’s name] at [his or her] office.

[*your signature*]

Reschedule CR Appointments (less than two weeks prior to their original CR appointment)

Expected Time Frame: Within 48 hours of when the patient sends a Secure Message to the PPQ.

Example of an incoming message:

A patient writes in asking to reschedule their CR, and their CR is less than two weeks away.

We can reschedule the appointment, but the patient will need to pay the full Case Review fee for the original CR and pay the clinician's hourly fee for the new CR per the policy in the Patient Guide.

1. Respond to the patient's message in the Portal. In the PPQ, click  to respond to the patient. Use one of the example messages below, depending on whether the patient wanted to reschedule due to labs being incomplete, or for other reasons:

Example message if the patient wanted to reschedule due to labs being incomplete:

Hi, [*patient name*],

We received your message. Please note that we do not advise rescheduling your Case Review appointment if you are missing a few of your lab results. It is common for some of the test results to be unavailable at the Case Review, and in most cases (even when all results are available), the clinician will not address every single lab finding during your Case Review, in order to structure and layer your treatment. Any lab results that were not available for your Case Review will be reviewed by the clinician upon receipt, and [he or she] will send you a message about the results and any recommended adjustments to your treatment protocol. The results will also be addressed in detail at follow-up appointments.

We also want to remind you that per the Patient Guide that you signed, if you reschedule your Case Review at this time you will be charged the full Case Review fee of \$[xxx.xx] because you are within the two-week window prior to your appointment. Then, if you want to have your Case Review at a later date, you will need to schedule a [number of minutes]-minute in-office appointment at [clinician name's] current fees, which would equal \$[xxx.xx].

The next available Case Review appointment dates are as follows:
[insert several appointment choices]

Please message us to confirm that you still want to reschedule. If so, please send your top three date choices from the list above.

[*your signature*]

Example message if the patient wanted to reschedule for any reason other than labs:

Hi, [*patient name*],

We received your message requesting to reschedule your Case Review appointment. We can reschedule this for you, but we want to remind you that per the Patient Guide that you signed, if you reschedule your Case Review at this time you will be charged the full Case Review fee of \$[xxx.xx] because you are within the two-week window prior to your appointment.

Then, if you want to have your Case Review at a later date, you will need to schedule a [number of minutes]-minute in-office appointment at [clinician name's] current fees, which would equal \$[xxx.xx].

The next available Case Review appointment dates are as follows:
[insert several appointment choices]

Please message us to confirm that you still want to reschedule. If so, please send your top three date choices from the list above.

[*your signature*]

2. Once you hear from the patient and if they still would like to reschedule the Case Review appointment, accept the fee and the new CR date: open the patient's chart.
3. In Google Drive, open the spreadsheet that lists available case review appointment times, and click the tab at the bottom for the appropriate clinician.
4. Find patient's top appointment choice, and put his or her name. If not available, go to the second or third choice for appointment. If one of the choices is available, proceed to step 8.
5. If none of the appointment choices is available, find at least five new available appointment dates/times, taking into account any information the patient gave you (i.e., I would like an appointment in late January). (Remember that CR appointments should be scheduled a minimum of seven weeks out to allow enough time for test results to be received.) Highlight the first three columns (day, date, and time) for the appointments you would like to send to the patient and right-click to copy.
6. In the PPQ, click  to respond to the patient with a message requesting the information you need, such as:

Hi, *[patient name]*,

We received your message requesting to reschedule your appointment. Unfortunately, the appointments you chose are no longer available. Please provide us with your top three choices from the list below and we will do our best to accommodate your first preference. These choices may be offered to several patients, and we book the appointments on a first-come, first-served basis.

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]

7. Once you hear from the patient, repeat the process listed above beginning with step 3.
8. Highlight the first three columns (day, date, time) and right-click to copy the patient's new CR appointment time.
9. Go back to the patient's chart.
10. Create a new encounter, type: Admin Note, title: Cancelled Case Review (Clinician's Initials).
11. Put your date/initial stamp and explain why the appointment is being rescheduled if known. (If not known, simply put, "Pt requested to reschedule CR less than two weeks before it was originally scheduled.") Then, "CR rescheduled to :*[paste new appt. date & time only, delete the day]* with *[clinician's initials (Office)]*". Ready to charge per charge box.
12. Add the Case Review charge option to the green charge box and select . See the example below:

Cancelled Case Review (AN) 08/12/2015  Admin Note 

11-14-15 (NCP) Pt requested to cancel CR less than two weeks before it was scheduled. CR Rescheduled to: 2/3/16 at 1:00pm with AN (Office). Ready to charge per charge box.

Assessment Diagnosis

- Find DX to Assign -

No Diagnoses Found

Plan Rx/ Orders/ Vaccines 

Charges / Payments 

Case Review (AN)	\$750.00
TOTAL:	\$750.00

Save
Save & Sign
Exit

13. Hover on “Tasks,” then click “+Add New Task.”
14. Subject: [*patient name*] Cancelled Case Review ([*clinician initials*])
 Ex: John Doe Cancelled Case Review 4-30-15 (SS)
15. Task details: Put your date/initial stamp, followed by “Ready to charge per charge box.” Assign the task to your billing manager and “Add New Task.”
16. In the patient dashboard, highlight and right-click to copy the patient’s preferred phone number.
17. Hover on “Scheduling,” then click on “Show patient’s task and schedule history.”
18. Click on the patient’s original case review appointment, as shown in orange below:

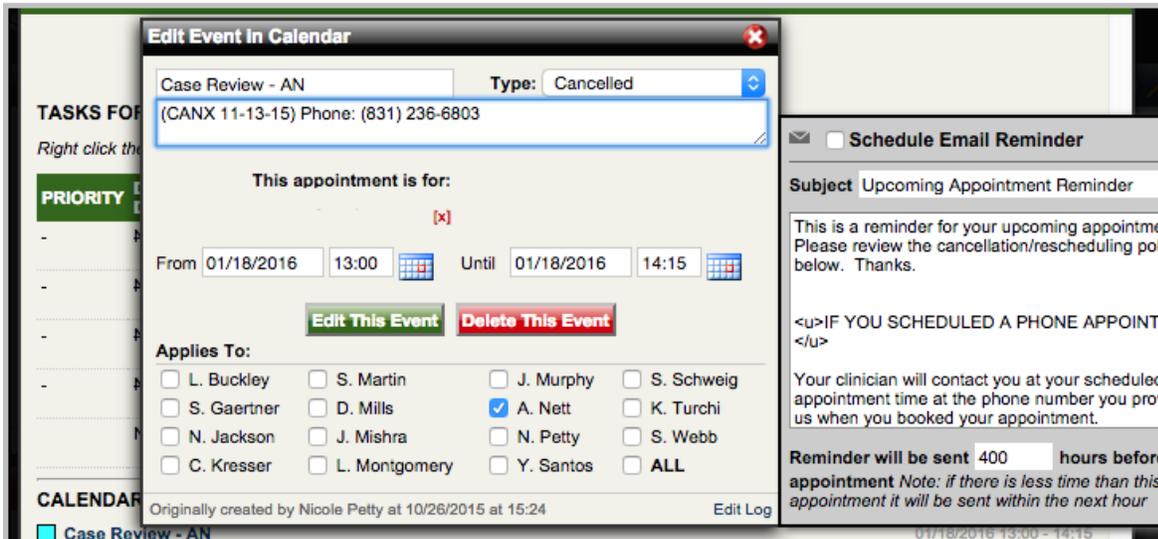
CALENDAR EVENTS SCHEDULED FOR THIS PATIENT

 **Case Review - AN**

Phone: (631) 236-0803

01/18/2016 13:00 - 14:15

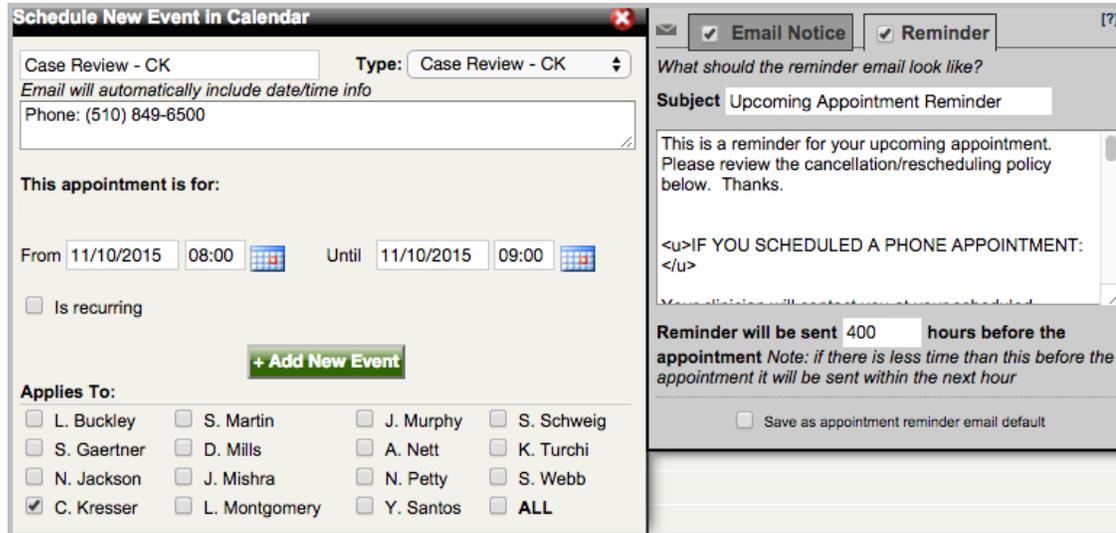
19. Leave the appointment title as is, but change the type to “Cancelled.”
20. In front of “Phone:” type (CANX [today’s date]). Here is an example of what the appointment window will look like once you have completed these steps.



21. Select **Edit This Event**, and you will now see that the appointment has turned to black, like this:



22. In the patient dashboard, hover on “Scheduling,” then click on “Schedule event for this pt.”
23. Title: Case Review – [clinician’s initials]
24. Type: Case Review – [clinician’s initials]
25. Event details: “Phone:[*right-click to paste phone number*]”
26. Change the from/to dates and times to match the appointment.
27. Applies to: make sure to un-check your name, and check the correct clinician.
28. To the right of the appointment window you will see a gray box with two tabs. Make sure you leave these boxes checked. Click on the Reminder tab in the gray pop-up box next to the Schedule New Event window.
29. Change the “Reminder Will Be Sent” to 400 hours before the appointment.
30. Click “Add New Event.” Example below:



31. Close patient's chart.
32. Go back to the spreadsheet that lists available case review appointment times, and put an x in the column next to the patient's name to show this has been scheduled in the EHR.

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

Hi, *[patient name]*,

We received your message and have rescheduled your Case Review appointment. Your card on file [or mention their new card if they gave you a new card] will be charged for the full Case Review fee for your cancelled appointment. Your new Case Review appointment has been scheduled for [insert new date and time] with [clinician's name] at [his or her] office.

[your signature]