

Schedule Case Review

PURPOSE:

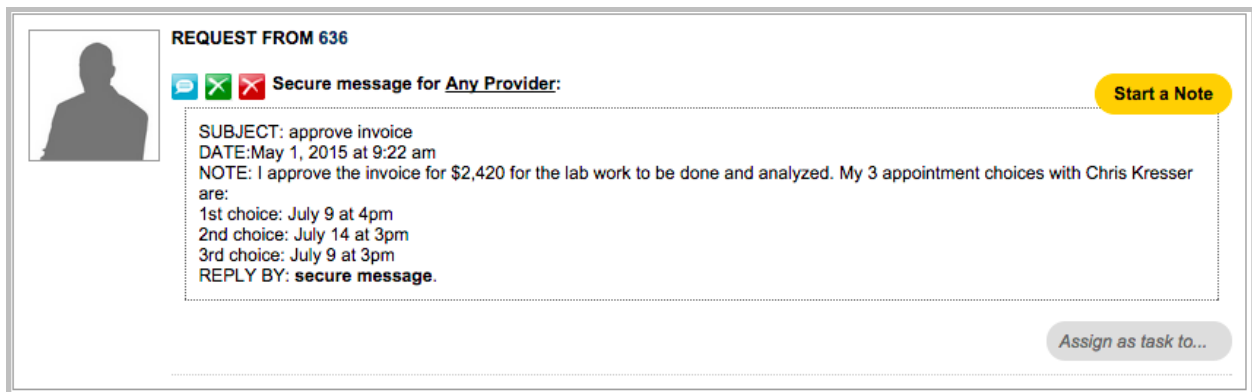
1. Move encounters quickly and efficiently through the flow of the practice.
2. Provide information and documentation to patients so they have a clear understanding of what happens next and when.
3. Reduce number of errors and omissions.
4. Create continuity with labeling and processing.
5. Improve the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

PROCEDURE:

Schedule CR Appointments (patient sent appointment preferences and appointment was available)

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

Example of an incoming message:

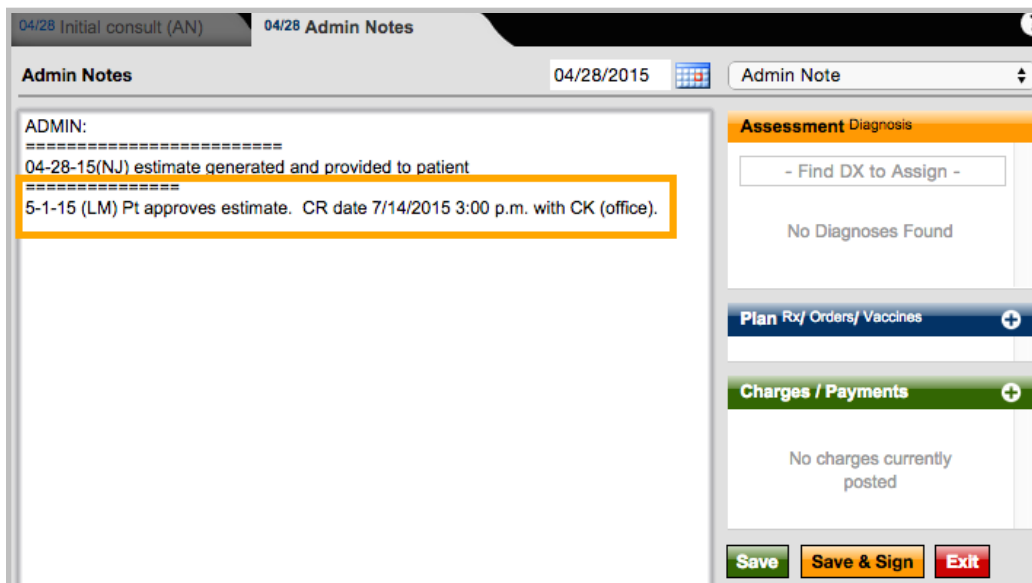



The screenshot shows a secure message interface. On the left is a silhouette of a person. To the right, the text reads: "REQUEST FROM 636" followed by "Secure message for Any Provider:". Below this, the message content is: "SUBJECT: approve invoice", "DATE: May 1, 2015 at 9:22 am", "NOTE: I approve the 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: "Start a Note" (yellow) and "Assign as task to..." (grey).

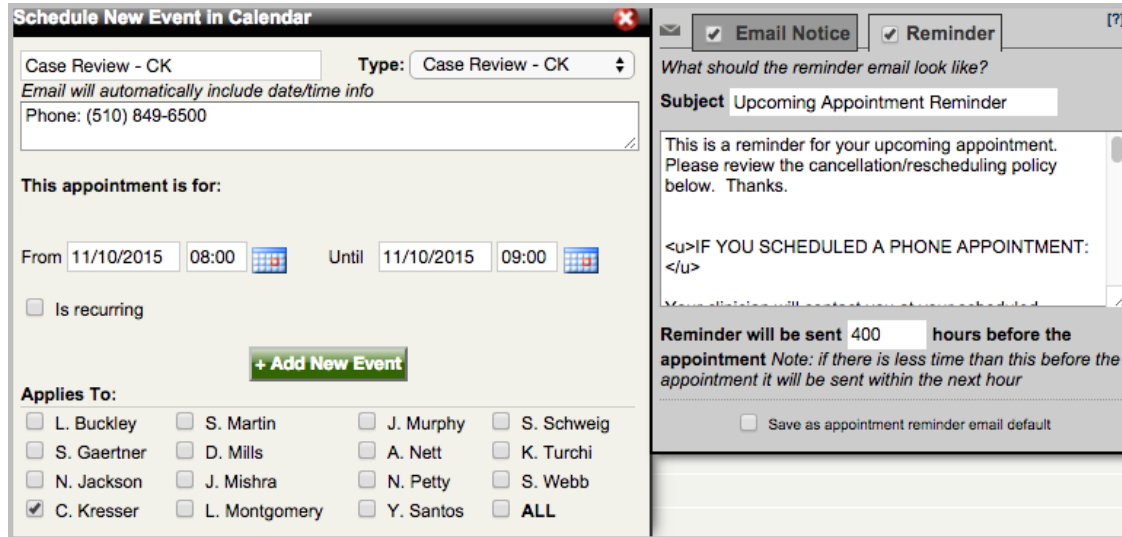
1. Go to the patient's chart and check the clinician.
2. In Google Drive, open the open the spreadsheet that lists available case review appointment times, and click the tab at the bottom for the correct clinician.
3. Find patient's top appointment choice, and put his or her name. If not available, go to the second or third choice for appointment.
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, 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's initials*]"
 - b. "CR date [*paste appt. date & time only, delete the day*] with [*clinician's initials*]. Holding for estimate approval."
7. Save the note and close it. Example below outlined in orange:



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's initials*]
11. Type: Case Review – [*clinician's initials*]
12. Event details: "Phone: [*right-click to paste phone number*]"
13. Change the from/to dates and times to match the appointment. Make sure that you block out the correct amount of time for each clinician's appointments.
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:



Schedule New Event in Calendar

Case Review - CK Type: Case Review - CK

Email will automatically include date/time info

Phone: (510) 849-6500

This appointment is for:

From 11/10/2015 08:00 Until 11/10/2015 09:00

Is recurring

+ Add New Event

Applies To:

<input type="checkbox"/> L. Buckley	<input type="checkbox"/> S. Martin	<input type="checkbox"/> J. Murphy	<input type="checkbox"/> S. Schweig
<input type="checkbox"/> S. Gaertner	<input type="checkbox"/> D. Mills	<input type="checkbox"/> A. Nett	<input type="checkbox"/> K. Turchi
<input type="checkbox"/> N. Jackson	<input type="checkbox"/> J. Mishra	<input type="checkbox"/> N. Petty	<input type="checkbox"/> S. Webb
<input checked="" type="checkbox"/> C. Kresser	<input type="checkbox"/> L. Montgomery	<input type="checkbox"/> Y. Santos	<input type="checkbox"/> ALL

Email Notice **Reminder**

What should the reminder email look like?

Subject Upcoming Appointment Reminder

This is a reminder for your upcoming appointment. Please review the cancellation/rescheduling policy below. Thanks.

<u>IF YOU SCHEDULED A PHONE APPOINTMENT:</u>

Reminder will be sent 400 hours before the appointment Note: if there is less time than this before the appointment it will be sent within the next hour

Save as appointment reminder email default

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 name and office location]*.

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, the 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 the clinician does not have this information prior to your Case Review appointment, they 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 *[clinician's name]*. 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 or her]* during the Case Review. Thank you!

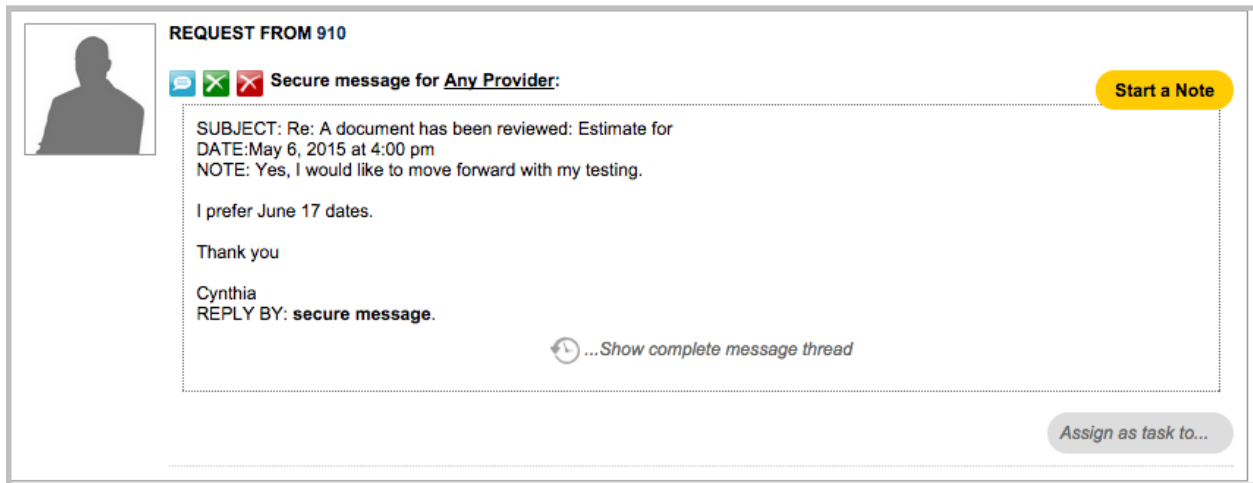
[your signature]

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: Start a Note

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.

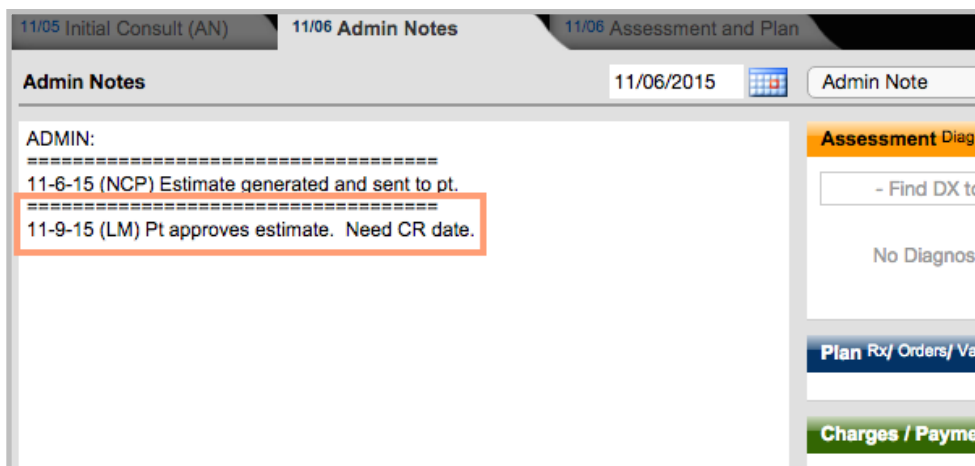
Thank you

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 your billing manager and .
6. In Google Drive, open the spreadsheet that lists available case review appointment times, and click the tab at the bottom for the appropriate clinician.
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 the patient, please go to the top section of the document and follow the steps to schedule the CR.