Schedule, Edit, and Cancel Existing Patient Appointments
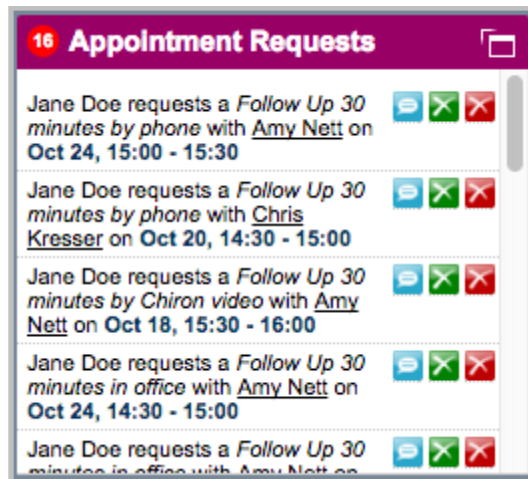
PURPOSE:

1. Handle appointment requests quickly and efficiently.
2. Reduce number of errors and omissions.
3. Create continuity with labeling and processing.

PROCEDURE:

Schedule a New Appointment

Expected Time Frame: Within 24 hours of when the patient sends a request.

Example of an incoming appointment request:

1. Click on the bolded date in the appointment request.
2. Click to display that date on the schedule.
3. Make sure the appointment will not conflict with any other scheduled events and is not scheduled in the middle of an open time frame (so that it blocks other requests). For example:

If a patient wanted to schedule a 30-minute phone call starting at 2:15, that would force the clinician to lose 15 minutes of appointments that day (because there would be 15 minutes of time from 2:00 to 2:15 that no one else could use). In this case, schedule the appointment for 2:00 instead, and send the patient a message by clicking the blue button to respond to the request:

4. Title: EP [type of appt] - [clinician first name]

> Examples:
>
> EP Office - Amy
>
> EP Phone - Chris
>
> First F/U - Sunjya

5. Type: match based on appointment request.

6. Status: always leave as "confirmed."

7. Event details: put the patient's primary phone number, regardless of the appointment type.

8. Assign patient: this will already be assigned from the appointment request.

9. Date & time: should default correctly from request.

10. Applied to: should default correctly from request.

11. In the pop-up box to the right for the email notice: remove the information that does not apply:

    a. Remove any other clinicians' office addresses.

    b. Remove the IC/New Patient and Case Review cancellation policies.

    c. Note: leave the information for the other types of appointments in case the patient changes his or her mind (i.e., do not remove the information about Chiron and office appointments if the patient scheduled a phone appointment, in case he or she decides later to switch appointment types).

12. In the pop-up box to the right for the reminder: remove the information that does not apply:

    a. Remove any other clinicians' office addresses.

    b. Remove the IC/New Patient and Case Review cancellation policies.

    c. Note: leave the information for the other types of appointments in case the patient changes his or her mind (i.e., do not remove the information about Chiron and office appointments if the patient scheduled a phone appointment, in case he or she decides later to switch appointment types).

13. Click **+ Add New Event**.

14. Click the ✕ to remove the appointment request from the queue:
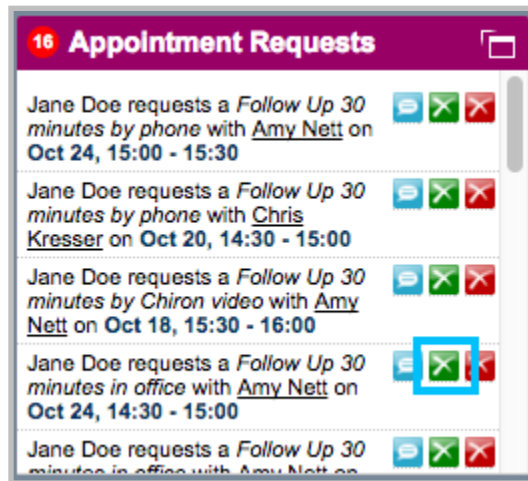
15. For Chiron appointments, make sure to schedule the appointment next in Chiron (**Schedule Video Appointments in Chiron**).

Edit an Existing Appointment

Expected Time Frame: Within 48 hours of when the patient sends a request.

1. Click to display the appointment date on the schedule.

2. Click the pencil to open the appointment for edits.

3. Make the requested changes.

4. Click **Edit This Event**.

Cancel an Existing Appointment

Expected Time Frame: Within 24 hours of when the patient sends a request.

1. From the patient's chart, hover on Scheduling, then click Next Appointment (or, if the appointment to be edited is not the next appointment, click Show Patient's Task and Schedule History, then click on the appointment).

2. Type: change to cancelled.

3. Event details: Canx [*reason*]

   Examples:

   Canx per pt request

4. Click **Edit This Event**.

5. If this clinician has a patient waiting list, check the cancellation list for patients to contact to fill the spot.

6. Click to display that date on the schedule.

7. Title: HOLD

8. Type: block.

9. Status: always leave as "confirmed."

16. Event details: date/initial stamp [patient's name]

17. Assign patient: leave blank.

18. Date & time: fill in based on appointment spot.

19. Applied to: should default correctly from clicking on the schedule.

10. Click **+ Add New Event**.