



Scheduling Appointments (new, reschedule, confirm, cancel)

The screenshot shows a scheduling application interface. At the top, there are navigation tabs for 'Daily', 'Weekly', 'Monthly', and 'Search'. Below this is a calendar view for February 26, 2018. The main area is a grid with columns for 'Dean Reynolds', 'Lisa Harrison (Edwards)', 'Tracy Ho', and 'Contact Lens Department'. The rows represent time slots from 8:00 AM to 3:40 PM. A sidebar on the left contains a legend for appointment types and statuses, such as 'Available', 'OB/Lunch', 'EXAM - SRX', 'SHORT APPT', 'BOV', 'FITT', 'CLOCK', 'PUICK', 'CLDisp', 'RXPR', 'RXCK', 'DIAL', 'VSFD', 'OCT', 'OPTO', 'HOLD EMAIL R', 'REFR', 'VT', 'RES- Research', 'VTEV', 'PERS', 'OFF - DONT SC', and '30 Min/ck'. The bottom of the interface shows 'No Patient Selected' on the left and 'Dr. Ho, Tracy' on the right.

Appointments Typically Scheduled same day

FITT + DISP = 1st time contact lens wear

Testing + BOV = Testing with a consultation with the doctor to review them in person

NEVER schedule same day unless specified by doctor

EXAM + VSFD = cannot be billed

OPTOMAP + OCT = cannot be billed

Appointment Types for FULL exam slots (or 2 back to back SHORT slots)

EXAM – SRX	Comprehensive Exam (No Contacts)	92014+92015
EXAM – SRX + CL	Comprehensive Exam with Contact Lens Update	92014+92015+92103
VT	Vision Therapy	Full Exam slot - Dr. Harrison Only
VTEV	Vision Therapy Evaluation	Full Exam slot - Dr. Harrison Only

Appointment Types for Contact Lens Department

VSFD	Visual Field Testing	30-minute test, scheduled with technicians
OCT	Optical Coherence Testing	15-minute test, scheduled with technicians
OPTO	Optomap	10-minute test, scheduled with technicians



Appointment Types for SHORT slots

BOV	Basic Office Visit	Medical evaluation, Treatment, and Management of medical eye problems
FITT	Contact Lens Fitting, No Exam	92103 -patient must bring proof that an exam was conducted within the last 12 months
CLCK	Contact Lens Check	Typically patient comes in wearing their problem lens. No charge, included in initial 92103 price
PUCK	Pick Up & Check	Office has received a new lens that the patient needs checked before leaving No charge, included in initial 92103 price
CLDisp	Contact Lens Dispense	92103+Training – 60-minute training session on how to insert, remove, and care for lenses – required for first time lens wear
RXPR	Prescription Problem – Glasses	No charge if within 3 months of their exam (92015). If after 3 months, the doctor may choose to charge for a prescription modification
RXCK	Prescription Check	Often used for children who are adapting to their new glasses. Generally no charge.
DIAL	Dilation	Used for patients who were unable to dilate at their regular exam. Considered a continuation of their exam, no charge. Patients must come in 30 minutes before their dilation visit with their doctor to have drops put in. Schedule a DIAL in the doctor short slot AND in the Contact Lens Department 30-minute prior so that the patient receives a reminder to arrive at the earlier time frame.
REFR	Refraction Only	92015 – patient must provide proof of exam in last 12 months

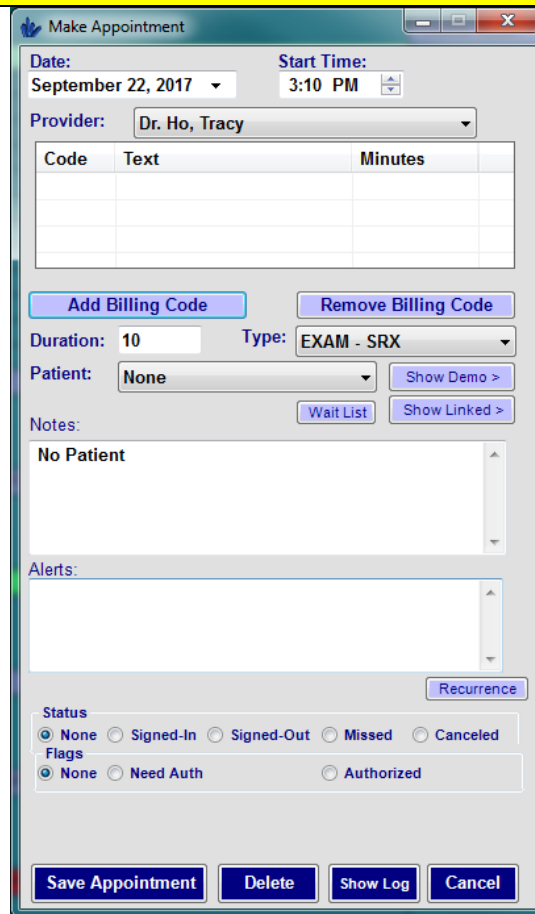
Scheduling Minors

Patient will need a release form signed if they will be accompanied by anyone other than their guardian.

Scheduling Families

Families may schedule a maximum of 2 exams in a day. They are not allowed to schedule more to allow a fair scheduling for other patients. Families should be scheduled with the same doctor to avoid confusion between exam rooms when seeing 2 different doctors simultaneously.

Scheduling a new appointment



1. "Have you been seen here before?"
 - a. YES – "May I get your name and date of birth?"
 - i. <find account> "is your address still ____ and phone number ____?"
 - b. NO – "May I get your name and date of birth?"
 - i. <add account> What is your mailing address and phone number?
2. Determine what type of appointment the patient needs (BOV? Exam? Exam + Contacts?)
3. Determine their eligibility (insurance type)
 - a. If patient is not primary the insurance, need subscriber's name and DOB.
 - b. if Medicaid, Are they on one of the Centennial plans?
 - c. If patient is a minor, verify responsible party (add under "Is billing address different?").
 - d. If a household family member is a prior patient, "link to" on the patient info page.
4. Determine their doctor preference (same as last time, disease doctor (Ho), pediatric (Harrison), fastest (Andreatta))
5. Determine their preferred day of the week and morning/afternoon
6. Verify date of birth & phone number
7. Set Appointment

Type: EXAM - SRX

- a. Select Type of exam
- b. Double check name
- c. ALERTS: indicate year of last exam (to assist in chart locating) and insurance (to assist in authorization pulling)



- i. Example: "REX 2014 VSP" = Return Exam, last seen in 2014, VSP insurance
- ii. Example "NEX Cent" = New Exam, never seen with COV before, Centennial insurance

Alerts:
 REX VSP 2016

- iii.
- d. ALERTS: if scheduling a medical visit, please make a note as to the reason for their visit
 - i. Example: glaucoma check
 - ii. Example: red eyes x 2 weeks
 - iii. Example: got a piece of metal stuck in eye
 - iv. Example: review testing results with doctor
- e. Flag – select Need Auth

Flags
 None Need Auth Authorized

- 8. Inform patient that they will receive a reminder email, text, or phone call approximately 1 week prior to their appointment.

Changing an appointment

None	Default Status
Signed-In	Update when patient comes into the office
Signed-Out	Update when patient leaves the office
Missed	Patient did not show up or cancelled within 24 hours (please make note of their reason for cancellation in the CPM chart)
Cancelled	Anytime a patient reschedules >24 hours, please mark as cancelled to maintain record

Save Appointment	Saves any changes made
Delete	Erases all record of the appointment (avoid deleting appointments unless truly necessary to remove the record from their account)
Show Log	Log of all changes to the appointment including date stamp, time stamp, employee, and action completed
Cancel	Cancels any changes made