Policy Statement.

Clinics will use standardized clinical guidelines and procedures to establish patient care sessions (appointments) to meet the needs of our patients and optimize clinic scheduling.

All patients seen in the group practice will be scheduled in the OAS Gold/SMS Signature Resource Scheduling Module.

Application of Policy.

All UNTHSC faculty and staff.

Definitions.

None.

Procedures and Responsibilities.

1. Designated clinical personnel will create scheduling templates using Siemens Signature software. These templates will be created using standardized activity types and time slots.

   Trained personnel appointed by the Executive Director will perform maintenance of schedules.

   Responsible Party: Clinic Supervisor.

2. Appointments will be made according to the CSR/Call Center Training Manual general scheduling and clinic specific protocols. Same day appointments (e.g. walk ins, acute appointments, open access) will be scheduled in Signature according to established protocols prior to the patient being seen.

   Patients must be scheduled with the provider they will see. If a substitute provider will see the patient, the patient will be rescheduled with the substitute provider.

   Double booking is allowed according to established clinic protocols.

Patients will be advised of their appointment time; established patients will be asked to arrive 15 minutes prior, new patients will be asked to arrive 30 minutes prior.

Responsible Party: Front Desk and Call Center Staff/Clinic Supervisor.

3. Altering of appointment schedules by physician request:

   Notification must be made by the physician in written format (schedule change form/leave request), to the Department Chair or his/her designee and forwarded upon approval to the Executive Director, prior to any changes being made. All faculty and staff must follow The Leave Request Process and Coverage of Clinical Assignment Policy (14.101).

   Responsible Party: Front Desk and Call Center Staff/Clinic Supervisor/Physician or Provider.

4. Altering of appointment schedule by request of the patient:

   Appointments can be rescheduled or canceled upon the patient's request. The appropriate reason code should be entered into the OAS Gold System.

   If an established patient cancels an appointment or procedure, the clinic nurse is notified, per clinic guidelines.

   Responsible Party: Front Desk and Call Center Staff/Clinic Supervisor.

5. Scheduling Error:

   If an appointment is scheduled in error, that appointment should be cancelled using the AE (administrative error) code.

   Responsible Party: Front Desk and Call Center Staff.

References and Cross-references.

UNTHSC 14.101 Leave Request Process and Coverage of Clinical Assignment Policy
UNTHSC 14.102 Customer Service and Telephone Etiquette
CSR and Call Center Training Manual

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