



Med Software LLC
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Scheduling Details

User Instruction



Scheduling Details is where the patient's first visit scheduling information and status are displayed. To access Scheduling Details, select the desired patient in the Patient Explorer, then go to the Patient option in the main menu and select Scheduling Details. The Status section of the window displays patient and medical record statuses, and the First Visit and Scheduling Information sections of the window display the date and time of the initial consultation, the physician the appointment is scheduled with, the date the appointment was scheduled on, along with the coordinator who scheduled it, and the reason for cancellation, if applicable. You will also notice a section at the bottom of the window for any additional comments relating to the initial consultation.

Schedule Information - aaaa, bbbbbb T. (111-00-0173)

Status

Intake Status:

Patient Status:

Medical Records Received:

OK

Cancel

First Visit

Date:

Time:

Scheduling Information

Date Scheduled:

Scheduled Doctor:

Scheduled By:

Reason Canceled:

test

When scheduling the patient's initial consultation in the patient scheduler, the above scheduling information will be entered directly into the Patient Appointment form, along with the demographic info (in the scheduler). If, for some reason, the appointment is not scheduled in the scheduler, this information must be manually entered into this screen. When the intake and medical records are received in the office, that information can be entered via Scheduling Details, or via the actual appointment in the scheduler.

Intake Status

An intake is a detailed medical history form. Usually this is mailed out to the patient prior to her first appointment and it is asked that she return it to the office before her consultation. Because of this, we need to know what the status of the intake is, to ensure that it has been returned on time.

Patient Status

The Patient Status field reflects the status of the patient's initial consultation. Available statuses are:

Scheduled – when a patient first schedules her initial consultation, she is Scheduled

Cancelled – if a patient cancels her initial consultation, her status should be changed to Cancelled. The reason for cancellation must be entered in the Reason Canceled field.

No Show – if a patient does not show up for her initial consultation, her status should be changed to No Show

ReScheduled – when a patient reschedules her initial consultation, her status should be changed to ReScheduled

Seen – a patient becomes Seen when she signs in for her initial consultation. Upon a patient's first sign-in, RESource will automatically change her status to Seen

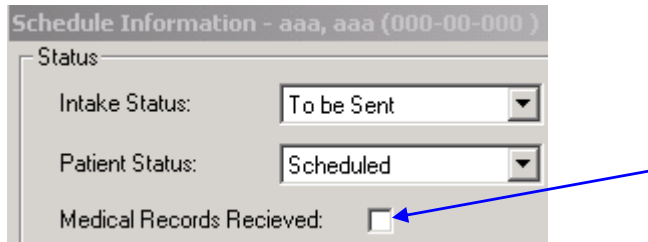
Inquiry – the status of Inquiry is reserved for individuals who have inquired about the practice (via phone, internet or in person), but who have not yet made an appointment with a physician.

Patient Letter Printed – as an option, you can choose to have this status assigned when the New Patient Letter has been printed and sent out to the patient. This option is currently not used, but is explained in "Letters".

Once the patient has had her consultation, her status will **not** change with the scheduling of following appointments – her status should remain Seen for the duration of her treatment. It is important that the Scheduling Details section accurately reflect information pertaining to the initial consultation only. This section captures two important dates: First Visit and Date Scheduled. These dates are used for query purposes to help determine scheduling rates, cancellation rates, etc. The dates are also used to generate the New Patient and Rescheduled Patient letters.

Medical Records Received

Along with the intake, we request that patients send us their previous medical records prior to their initial consultation. The Medical Records Received checkbox is used to indicate that the records have been received in the office.



Screenshot of a software form titled "Schedule Information - aaa, aaa (000-00-000)". The form has a "Status" section containing three fields:

- Intake Status: To be Sent
- Patient Status: Scheduled
- Medical Records Received:

A blue arrow points to the "Medical Records Received" checkbox.