

- 1 **Appointment Scheduling**
Computerized vs. Book
A book is cheap but –
Can only be use by one person at a time.
Hard to read handwriting
Cannot be accessed remotely
Hard to provide copies of schedule
Can easily be damaged

- 2 **Time Management**
- Wave scheduling
 - Modified Wave scheduling
 - Double booking
 - Grouping procedures
 - Advance booking

- 3 **Guidelines for Scheduling**
- Socioeconomic status of area served
 - Purpose of visit
 - Age of patient
 - Require all MD time or other staff
 - Personal factors

- 4 **Appointment Scheduling**
- Courtesy and respect
 - Provide all necessary information
 - Schedule appointments immediately
 - Reserve sufficient time
 - Check in patients as they arrive
 - Note cancellations and no-shows

- 5 **New Patient**
- Full Name
 - Date of birth
 - Complete address
 - Daytime telephone #
 - Source of referral
 - Type of visit/exam required
 - Insurance coverage

- 6 **Return Appointments**
- In Person
 - Determine when needs to return
 - Offer options available

- Give appointment card
- **By Telephone**
 - Determine when need to return
 - Offer options available
 - If a long time since last visit, verify contact information

7 **Return Appointments**

- **Appointment Cards**
- **Reminders**
 - Sent in mail
 - Personal call
 - Automated call

8 **Other Callers**

- **Other MDs**
- **Pharmaceutical representatives**
- **Salespersons**
- **Miscellaneous**

9 **Cancellations & Delays**

- **When patient cancels**
- **When the MD is delayed**
- **When the MD has an emergency**
- **When the MD is ill or out of town**
- **Walk-in appointments**

10 **Preparing for Next Day**

- **Print chart pull list**
- **Review appointment reasons**
 - Is there anything that might preclude the patient from having a successful appointment

11 **Special Situations**

- **Late patients**
- **Rescheduling cancelled appointments**
- **Emergency calls**
- **Acutely ill patients**
- **Physician referrals**

12 **Failed Appointments**

- **Reasons**
- **No-show policy**
- **Charging for failed appointments**
- **Recording the failed appointment**