Department: Dental **Policy Number:** HHS-5126-D
Attachments:

Policy Title: Making an Appointment

Date: February 2012 **Revised:**

Approved by: [signature] **Date:** 5/1/13

Policy Statement:

It is the policy of the MLBHHS to provide guidance and procedure for day to day processes.

Purpose:

To provide written procedures for staff in scheduling dental appointments

Procedure:

Ask the patient his/her last name and first name. Always verify you are selecting the correct patients when asking for the patient's date of birth.
To select a patient from the family file (or any other patient-specific module):

1. From the file menu, click Patient. The select patient dialog box appears.
2. Set the following search criteria:
   - List for – to search only in the current clinic's patients database, click this clinic.
   - Select whether you want to search for the patient by name, chart #, SS #, home phone #, and birthday.
3. If searching by name, type the first few letters of the patients last name, in the enter last name field. If necessary, you can type the patient's full last name, a comma, and then the patient's first name. Or if searching by any other option, type the correct digits in the enter search option field.
4. Click the search button >>
   A list of patients that match the search criteria appears.
5. Select the name of the patient. (**always verify you have correct patient by asking the date of birth.)**
6. Click ok to access the new appointment information box.
   If the patient has broken or unscheduled appointments follow instructions from step # 7. If not continue to follow instructions from step # 8.
7. If an appointment book notification pops up. (this patient has an unscheduled or broken appointment. Would you like to view the patient's appointment list?) Select YES.

The family appointment list will pop up. The < unscheduled appt> will be in the middle dialog box.

- Select the <unscheduled appt> then select view appt.
- The appointment information will pop up use these appointments before creating new appointments.
- Correct the provider, description, pin board the appointment.
- Pull appointment from the pin board window (upper right) and move to wanted time slot. Pin boarding the appointment will automatically fill in dialog boxes for Op:, Date:, and Time:.
- There may be three more sets of pop ups, if so select YES to all three.
- Verify the length of time for the appointment is correct.

If patient have no broken or unscheduled appointments continue to make new appointment.

8. New appointment information box will pop up.
   - You will need to verify patients scheduled appointments by selecting other appt(s) button. If patient already has the necessary appointment scheduled remind them of the date and time and ask if they would like an appointment reminder card.
   - To schedule an appointment you must complete the following: Select the correct provider in the Prov: dialog box, list a reason in the Desc: dialog box, select appointment status in the Status: dialog box, select length of time for appointment in the Length: >> box. If patient is placed on the ASAP list:
   - **ASAP** - An ASAP appointment indicates that the patient want to be seen earlier if an appointment time becomes available. Patients cannot be added to the <u>ASAP List</u> without first assigning them an appointment time. This ensures that the patient is seen regardless of whether or not the office has an opening before the scheduled date.
   - Select ASAP in the Scheduled: dialog box.
   - Insert dateline into the notes dialog box, and then ask patient for their contact number and how much notice they will need and type those into the notes dialog box after the inserted date, then type your first initial and full last name.
   - Once all necessary information is completed then select OK.

- Verify that the patient's appointment is the correct date, time, provider, and operatory.

- Give patient a completed reminder card.

Making an appointment for new patients:

- Follow instructions from steps 1-4 if no list of patients that match the search criteria appear. The patient may or may not be a new patient. Verify this by asking the patient if they have ever been seen at our facility. If they say yes use another means of search criteria such as birth date or SS#. If still no matching criteria pops up continue with next step.

- Inform the patient that they will need to become a registered patient before we schedule an appointment. Inform the patient they will need to bring tribal ID, (if not a MLBM) 3 months proof of residency this needs to be a utility bill lease agreement ect. and any insurance cards they may have. Once the patient is registered we can schedule an appointment.

Scheduling - quick start

This topic will explain the simplest way to schedule an appointment, inputting the minimum amount of information necessary.

To quickly schedule an appointment

1. In the Appointment Book, locate an available time in the schedule.

2. Double-click in the desired operatory at the appropriate time.

The **Select Patient** dialog box appears.

3. Select a patient.

The **New Appointment Information** dialog box appears.

4. The **Provider** field defaults to the patient's primary provider. If necessary, click the search button to select another provider for the appointment.

5. Select a reason for the appointment, using any of the following methods:

- **Initial** - If the patient is being seen for work that would be done on an initial visit, such as an exam or cleaning, click **Initial**. The **Select Initial Reasons** dialog box appears. Select the reasons for the appointment, and then click **OK**.

- Tx - If the patient is being seen for work that was previously treatment-planned, click Tx. The Treatment Plan dialog box appears. Select the reasons for the appointment and click OK.

- **Misc.** - If the patient is being seen for treatment that has not been treatment-planned, click **Misc**. button. The **Procedure Codes** dialog box appears. Select a procedure code **Category** to see a list of procedure codes, select the desired procedure code, and then click **OK**.

6. Once a reason has been entered, Dentrix Enterprise will automatically assign a length of time to the appointment. Verify that the appointment length is correct. To change the length, click the **Length** search button, indicate the amount of time needed, and then click **OK**. (To increase the number of minutes needed, click the right arrow. To decrease the number of minutes needed, click the left arrow.)

7. Click **OK** to schedule the appointment.

Viewing appointment notes

A blue musical note in the upper-right corner of an appointment in the Appointment Book indicates that a note has been added to that appointment.

You can view that appointment note.

To view the appointment note

1. In the Appointment Book, click the blue musical note icon in the upper-right corner of an appointment.

The **Medical Alerts/Notes for** dialog box appears.

Any medical alerts attached to the patient, any patient notes from the Family File, any guarantor notes from the Ledger, and the appointment note.

2. Click **OK**.

It is a priority to keep the schedule full. If a patient cancels, reschedules, or fails a scheduled appointment. You will need to utilize the ASAP list to fill the open appointment time.

Using the ASAP List

Many times patients call wanting an appointment sooner than your next available time. In these situations, it can be useful to offer to call the patient if an appointment time becomes available. With Dentrix Enterprise, you can flag scheduled appointments as ASAP (As Soon As Possible).

Once an appointment has been flagged as ASAP, it appears on the ASAP List. This satisfies the patient's request for a sooner appointment, while benefiting the office at the same time, by providing a list of patients who can fill holes in an otherwise full schedule.

In addition to providing you with names of patients who can fill open appointment times, the interactive nature of the ASAP List makes it simple to contact a patient and then create or move an appointment as needed.

To use the ASAP List

1. In the Appointment Book, from the **Appt Lists** menu, point to **ASAP List**, and then click **Current Clinic** to view appointments for the clinic currently being viewed or **All Clinics** to view appointments for all clinics.

The **ASAP List View** dialog box appears so that you can filter the appointments in the list.

2. Make your selections, click **ASAP**, and then click **OK**.

The ASAP List window appears, displaying all appointments scheduled that have been flagged as ASAP.

3. Perform any of the following functions:

- **Double-click** - To see more information regarding an appointment or to make changes to an appointment, double-click that appointment to open the **Appointment Information** dialog box. Once the appointment has been displayed you are able to utilize the appointment notes section where you should have documented the patients current contact number and amount of notice they requested.

- **View** - To filter the list, on the menu bar, click **View** to open the **ASAP List View** dialog box.

You have the following options:

- **By Provider** - If a provider is selected, only the appointments assigned to that provider will be shown in the list. **<u>This is the ideal option.</u>**
- **By Operatory** - If an operatory is selected, only the appointments assigned to that operatory will be shown.

- **View All** - If this option is selected, you will see appointments for all providers in all operatories for the displayed date range.
- **Span of Search** - Type a number in the **Days** field to specify how many days worth of appointments into the future you want Dentrix Enterprise to display on the list.

- **Type of Search** - To view ASAP appointments, click **ASAP**.
- **Appt** - From the **Appt** menu, select an option:
- **Refresh** - If an appointment has been changed in another module or at another workstation, on the menu bar, click **Refresh** to update the ASAP List to reflect the most recent changes.
- **Status** - When confirming a selected appointment, from the **Status** menu, select the appropriate status type to indicate the last contact with the patient.
- **Office Journal** - With an appointment selected, on the menu bar, click **Office Journal** to open the corresponding patient's Office Journal. Every contact made with patients has to be documented in office journal, and labeled as appropriate to contact description.

Moving an appointment

Whether a patient needs to reschedule or the office needs to lighten the schedule, from time to time you will need to move an already scheduled appointment to a new date or time:

- **On the same date** - The most efficient way to move an appointment in the Appointment Book is to click and drag the appointment to a new time or operatory. When a confirmation message appears, click **OK**.
- **To a different date** - You can move an appointment to a different date:

1. In the Appointment Book, click and drag an appointment to the pin board.

An appointment square appears on the pin board.

2. Find a new date and time for the appointment. Click and drag the appointment to the new date/time.

A confirmation message box appears.

3. Click **OK** to move the appointment.

Note: When an appointment is on the pin board, the appointment stays where it was originally scheduled until you move the appointment from the pin board to a new date and/or time on the schedule. That way, if you get interrupted and forget that the appointment is on the pin board the original date and time are not lost. Also, you can return an appointment on the pin board to its original date and time, by clicking **Refresh** from the **File** menu.

- **By Double-clicking an appointment** - If you know the exact date and time to which you want to move an appointment, you can change the existing date and time of that appointment:

1. In Appointment book, double-click an appointment.

The **Appointment Information** dialog box appears.

2. Type the new **Date** and **Time**.

3. If necessary, select the appropriate **Op**.

4. Click **OK**.

The appointment is moved to the new date and time.

When moving appointments for any reason the reason is required to be documented within the patients Office Journal.