

# Scheduling Appointments

## Guidelines to Follow

- **Screen for COVID-19 on every call**
- Schedule according to slot
- Attempt to schedule with patient's PCP first, if not available or too far out, can schedule with someone else for patient's primary care needs
- Follow telephone guidelines when scheduling for telephone visits
- GVHC does not schedule for DMV physicals. Refer patients back to DMV for resources.
- TPHC (Turlock Pediatrics) – We don't schedule for this site at this time. Advise to call 209-667-0905
- Do not schedule procedure appointments. Send task via EHR to provider's care team
- Do not schedule/reschedule any psychiatry appointment. Send task to provider's care team.
- Any unused slot can be converted a same day the day of only. EXCEPT for: Provider slot, procedure slot
- In order to be seen by a GVHC specialty, patients must be established with a primary care provider at GVHC.  
Exception: Women's Clinic, both Merced & Modesto on Florida Ave. Patients can self refer to this specialty.

# Appointment Event:

**Long:** In-person appointment for CPE (complete physical exam); Dental Clearance; Surgery Clearance

**Short:** In-person appointment for DM checks; HTN follow up; back pain; thyroid follow up; medication refills; pretty much anything that doesn't fall under a long slot.

**Same day:** In-person appointment for can only be used the day of, do not use prior. Acute visits and anything in the short event

**TCM:** In-person appointment for ER follow up & Hospital admission follow up

**TCM Telephone Visit:** Telephone appointment for ER follow up & Hospital admission follow up

**Hospital Follow up:** ER follow up & Hospital admission follow up

**WCC:** Well Child Check of any age

**WCC 2&under:** In-person appointment for Well Child Check for children 2 years old & under

**WCC 3&above:** In-person appointment for Well Check Check for children 3 year old & older

**WCC 12&above:** In-person appointment for Well check Check for children 12 years old & older

**Gynecology:** In-person appointment for Female related issues

**OB Appt:** In-person appointment for OB checks (pregnant patients)

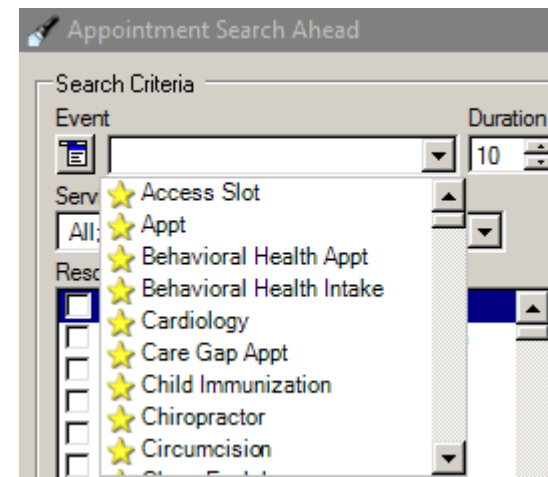
**New Patient:** In-person appointment for a patient who has never been seen by GVHC or it's been 3 years or more since last seen with primary care provider

**New Patient Telephone Visit:** Telephone appointment for a patient who has never been seen by GVHC or it's been 3 years or more since last seen with primary care provider

- New patient will receive a text/email with patient consent form & HiPAA notice, must fill out and submit prior to appointment. If not received by appointment day, appointment will be cancelled.

**Sick Clinic:** In-person appointment. Acute Visit – Cough, fever, sore throat

**TG Care:** In-person appointment for Transgender patients. Merced County: FNP Melody Castillo has these slots at Merced Women's



## Appointment Event, continued:

**Video Visit:** Can schedule anything except procedures. Patients must be able to download the zoom app in order to take advantage of this type of appointment.

**Any TPHC event:** Do not schedule, refer patients to call 209-667-0905

**Behavioral Health Appt:** Telephone appointment Existing GVHC patients, who have seen BHC in 6 months or less

**Behavioral Health Intake:** Telephone appointment Existing GVHC patients who have never seen a BHC or it's been more than 6 months since last seen by BHC.

**Chiropractor:** In-person appointment for existing GVHC patients wanting to see chiropractor

### Do not use any of the following Events:

- Access Slot
- Procedure
- Provider
- Any of the MAT events
- Cardiology
- Ortho New Patient
- Ortho New Fracture
- Ortho Procedure

# Setting Expectations

## **After every appointment scheduled, remind patients of the following:**

- Please bring insurance or Medi-Cal card
- If your insurance requires a co-pay, it will be due at the time of your visit
- Bring your child's immunization(shot) record (for WCC & IZZ appointments)
- If you need to cancel or reschedule your appointment please text or call us back in advance to do so
- If between now and the day of your appointment you are exposed to COVID-19 and/or present symptoms, please let us know as we may have to reschedule your appointment(mainly for in-person appointments)

## COVID-19 CALL CENTER SCREENING Questions:

1. Have you had any symptoms of COVID-19 in the past 48 hours? (fever, cough, shortness of breath, sore throat, new loss of taste or smell, nausea, vomiting, or diarrhea)
  - If YES, proceed to question #3.
  - If NO, proceed to question #2.
2. Have you had close physical contact with a person with confirmed COVID-19 or with symptoms of COVID-19 in past 10 days?
  - If YES, offer patient COVID-19 screening clinic, OR schedule as Telemedicine, OR at Prompt Care if desires in-person appt.
  - If NO, proceed to question #4.
3. Have you tested positive for COVID-19 within the past 10 days?
  - If YES, schedule as Telemedicine.
  - If NO, direct patient to COVID-19 screening clinic, schedule as Telemedicine, OR at Prompt Care if desires in-person appt.
4. Have you tested positive for COVID-19 for the first time within the past 10 days?
  - If YES, schedule as Telemedicine.
  - If NO, may schedule at Well Site.

### Important

- Follow the screening questions on every appointment you schedule & reschedule
- If COVID cleared to visit clinic, add to the appointment details in Detail Box “**Covid-19 screened & cleared to visit clinic**” no matter the appointment type. See [examples below](#)
- If you schedule an in person appointment, advise patient they will be screened again before entering the building.
- Advise patients to wear a mask when going to their appointment
- Advise only one other person may go to clinic with patient and they must wear a mask as well. No more than one additional person.

### Examples:

Details WCC - COVID-19 Screened & Cleared to Visit Clinic	Details NP/CPE - COVID-19 Screened & Cleared to Visit Clinic
Details OB Check - COVID-19 Screened & Cleared to Visit Clinic	Details BH Intake - COVID-19 Screened & Cleared to Visit Clinic

# Guideline when scheduling a patient for Telephonic Visit according to Specialty

The list includes what is considered as appropriate visits for Telephonic visit and not appropriate for telephonic visits

SPECIALTY	APPROPRIATE	NOT APPROPRIATE
FP/IM 18 years old and above	<ul style="list-style-type: none"><li>• Diabetes</li><li>• Medication refills</li><li>• Abnormal labs /x-ray/CT scan discussion</li><li>• Depression /anxiety</li><li>• Fatigue or tiredness</li><li>• Asthma</li><li>• Allergy</li><li>• Irregular period/Menstrual concerns</li><li>• Hypertension</li><li>• Chronic pain management months</li><li>• Joint pain(knee , shoulder, back pain)</li><li>• Abdominal pain</li><li>• Headache</li><li>• Vomiting</li><li>• Nose bleeding</li><li>• Medical advise</li><li>• ER follow-up</li><li>• Hospital discharge follow up</li><li>• Follow-up visit of any of the above</li><li>• Fever</li><li>• Ear pain</li><li>• Rash</li></ul>	<ul style="list-style-type: none"><li>• Annual Physical/Female exam</li><li>• Pap Smear</li><li>• Preoperative visits/surgical clearance</li><li>• Dental clearance</li></ul>

## Guideline when scheduling a patient for Telephonic Visit according to Specialty, continued

SPECIALTY	APPROPRIATE	NOT APPROPRIATE
<p>FP/Pediatrics &lt;18 years old</p>	<ul style="list-style-type: none"> <li>• Asthma</li> <li>• Allergy</li> <li>• Nose bleeding</li> <li>• Joint pain</li> <li>• Constipation</li> <li>• Irregular Period or menstrual problem</li> <li>• Feeding problems</li> <li>• ADHD if last visit was within the past 3 months and stable</li> <li>• Joint pains (knee , shoulder, back pain)</li> <li>• Abscess</li> <li>• Follow-up of any of the above</li> <li>• URI (cough and cold)</li> <li>• Diarrhea</li> <li>• Vomiting</li> <li>• Abdominal pain</li> <li>• Fever</li> <li>• Ear pain</li> <li>• Urinary symptoms</li> <li>• Vaginal discharge</li> <li>• ER follow up</li> <li>• Follow up of the above</li> <li>• Rash or any skin lesions</li> <li>• Hospital discharge follow up</li> </ul>	<ul style="list-style-type: none"> <li>• Well child visits</li> <li>• Immunization</li> <li>• Hospital discharge follow up</li> <li>• Dental clearance</li> <li>• Preoperative evaluation /surgery clearance</li> </ul>

# Guideline when scheduling a patient for Telephonic Visit according to Specialty, continued

SPECIALTY	APPROPRIATE	NOT APPROPRIATE
<p><b>Psychiatry</b></p> <p><b>Women's Health</b></p>	<ul style="list-style-type: none"> <li>• Any visit type</li> <li>• Menstrual concerns</li> <li>• Breast complaints</li> <li>• Chronic pelvic pain</li> <li>• Endometriosis</li> <li>• Incontinence</li> <li>• Lichen sclerosis</li> <li>• Menopausal symptoms</li> <li>• Menstrual irregularities</li> <li>• Oral contraception management</li> <li>• Ovarian cyst &lt;5cm, simple cyst &lt;8cm</li> <li>• Osteoporosis</li> <li>• Vaginal discharge</li> <li>• Vulvodynia</li> <li>• Polycystic Ovarian Syndrome</li> <li>• Abdominal pain</li> <li>• Urinary symptoms</li> <li>• Hospital discharge follow up</li> <li>• ER follow-up</li> </ul>	<ul style="list-style-type: none"> <li>• Pelvic Prolapse</li> <li>• Annual Well Woman / Pap exams (except if under surveillance for high grade dysplasia – HGSIL)</li> <li>• <del>Cystocele</del></li> <li>• Others not listed on the Appropriate visits</li> </ul>
<b>OB</b>	<ul style="list-style-type: none"> <li>• Postpartum 3 weeks Normal delivery</li> </ul>	
<b>Podiatry</b>	<ul style="list-style-type: none"> <li>• Ingrown toenail</li> <li>• Foot pain</li> <li>• Heel pain</li> <li>• Ankle Pain</li> <li>• Follow up fungus in nail</li> <li>• Bunion</li> <li>• Discuss abnormal x-ray</li> <li>• Flat foot follow up</li> <li>• Athletes foot</li> <li>• Follow-up visit of any of the above</li> </ul>	<div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;">Guideline when scheduling a p...</div> <p>determined by the Podiatrist</p> <ul style="list-style-type: none"> <li>• Postoperative follow-up</li> </ul>



# Requesting an Interpreter

## Telephonic Interpreting

- Patient calls in requesting an interpreter in a language other than English or Spanish.
- Once you've established in which language patient is needing assistance, call:
  - 1-800-874-9424 or 1-800-523-1786
  - GVHC Account #: 201780
  - Department Code: 0099
- Schedule the appointment at least 5-7 business days in advance
- Before ending the call, ask patient if they will need an interpreter the day of their appointment.
- If yes, send EHR task to provider's care team based on the appointment scheduled and send email to call center leadership team

## Sign Language Interpreter

- You receive a relay call with Sign Language patient
  - Schedule the appointment at least 5-7 business days in advance
  - Confirm with patient that they will need a Sign Language Interpreter the day of appointment
  - If yes, send EHR task to provider's team based on the appointment scheduled and send email to call center leadership team

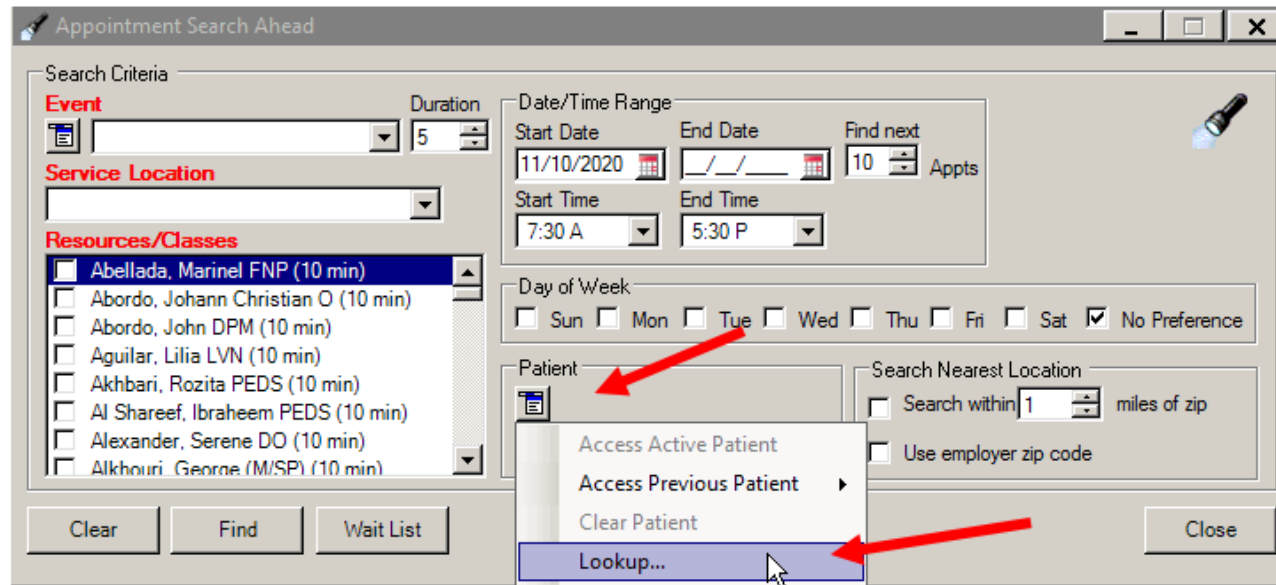
If patient is needing an appointment they day of or sooner than 5-7 business days, advise we will request interpreter but they should bring in their own as we cannot guarantee one will be available.

Follow the same 5 steps below when the call first comes in to search for a patient and verify & update demographics

1. From Appointment book, click on the flashlight



2. Appointment Search Ahead will come up. Click on patient >>click on Lookup



3. People Look Up will come up.

- a. Enter date of birth & click find
- b. Look for patient's name, last & first
- c. Highlight patient and double click

Note: If patient not found with date of birth, search by name, phone number, and/or address

Search Criteria

Last First / Nickname Middle Previous Last City Address Line 1 Zip Mother's Maiden Name

Social Security Birth Date Sex Phone Med Rec Nbr Policy Nbr

View By External System External ID

All Patients Exclude Expired Patients

Matching Records

Name	Patient Portal	Nickname	Maiden Name	Address	Sex	Birth
PATIENT, TEST	Y	Twilight Spa...		1050 Bill Street Modesto, CA 95855 USA	Female	08/

Records Found: 43

Clear Find New Open Close

IMPORTANT: If it's a new patient & patient does not have a chart – follow the steps on how to register a patient.

4. After you double click on patient, the Update Patient Information will appear along with the Nextgen Alerts box.
  - d. Make sure to review alerts as there may be important information
  - e. Ask patient to verify address and phone number
    - i. Is there an alternate number patient wants to add?
  - f. Ask patient for an email address
  - g. Update address & phone number if needed

Click on the x to exit

Alert box may tell you to verify a password before allowing anyone access, or not to schedule with a specific provider, or patient may be a Code Jane.

Click ok once update or verification is complete

5. The patient' name will now appear in the "Patient" section.

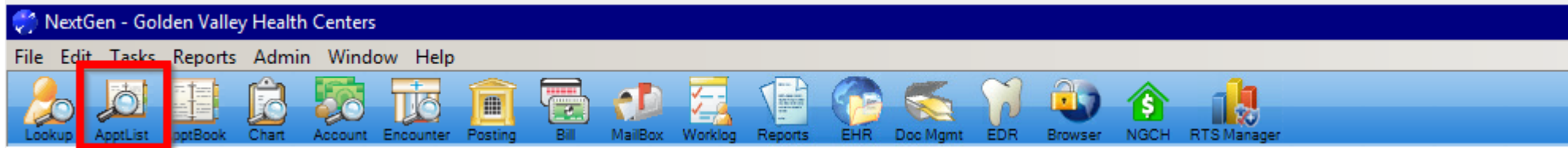
The screenshot shows a software window titled "Appointment Search Ahead: TEST PATIENT". The window contains several search criteria sections:

- Event:** A dropdown menu and a "Duration" spinner set to 5.
- Service Location:** A dropdown menu.
- Resources/Classes:** A list of providers with checkboxes, including "Abellada, Marinel FNP (10 min)".
- Date/Time Range:** Fields for "Start Date" (11/10/2020), "End Date", "Find next" (10 Appts), "Start Time" (7:30 A), and "End Time" (5:30 P).
- Day of Week:** Checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat, and "No Preference" (checked).
- Patient:** A field containing "TEST PATIENT" and a "Zip Code" field with "95855". A red arrow points from the text "TEST PATIENT" to the "Patient" label above the field.
- Search Nearest Location:** Checkboxes for "Search within 1 miles of zip" and "Use employer zip code".

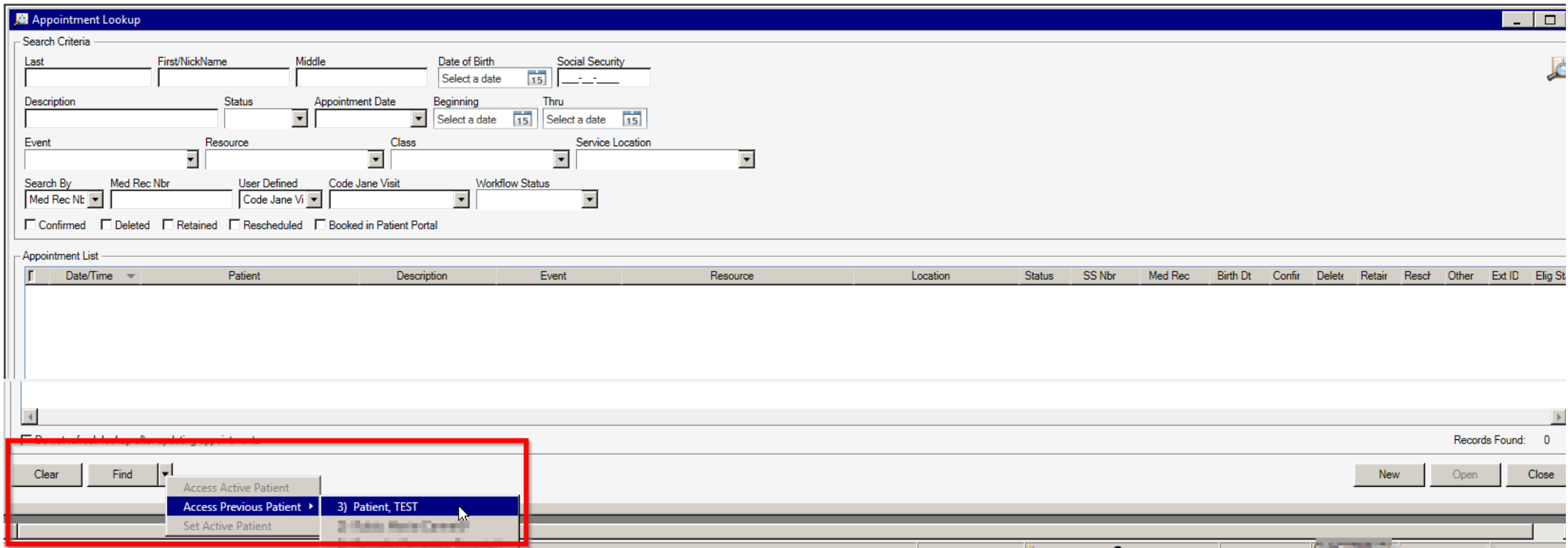
At the bottom of the window are buttons for "Clear", "Find", "Wait List", and "Close".

At step 5, will you be scheduling, rescheduling or cancelling an appointment? Will you be sending a task for patient's provider care team with a specific request from patient?

Before scheduling or rescheduling an appointment or to cancel an appointment, go to the ApptList



From the Appointment Lookup window click on arrow by Find at the bottom of the window. Click Access Previous Patient and if you followed the first 5 steps, your patient will come up. Click on patient to bring up their appointment history



- If you are scheduling an appointment you want to check when was the last time patient kept an appointment. If more than 3 years since last appointment, they are considered new and will need to establish care as new patients.
- If you are rescheduling an appointment, you can highlight future appointment right click, and select cut.
- If you are cancelling an appointment, you can double click appointment and cancel.

In this example, patient has not kept any appointments. Would need to be scheduled as a new patient.

**Appointment Lookup**

Search Criteria

Last:  First/NickName:  Middle:  Date of Birth:  Social Security:

Description:  Status:  Appointment Date:  Beginning:  Thru:

Event:  Resource:  Class:  Service Location:

Search By:  Med Rec Nbr:  User Defined:  Code Jane Visit:  Workflow Status:

Confirmed  Deleted  Retained  Rescheduled  Booked in Patient Portal

Appointment List

Date/Time	Patient	Description	Event	Resource	Location	Status	SS Nbr	Med Rec	Birth Dt	Confir	Delet	Retair	Resch	Other	Ex
05/07/18 12:00 PM	Patient, TEST	Patient, TEST	Appt	Spence, Suzarie FNP	GVHC Turlock Monte Vista	Cancelled			05/23/2005						
05/25/18 08:00 AM	Patient, TEST	Florida	Provider Slot	Lee, Heather MD PEDS(NO RASH)	GVHC Florida Medical	No Show			05/23/2005						
08/22/18 01:00 PM	Patient, TEST	Patient, TEST	CPSP Birth Control Couns	Nieves, Mercedes CPSP	GVHC Modesto Womens	Cancelled			05/23/2005			✓	✓		
09/14/18 03:00 PM	Patient, TEST	Patient, TEST	Appt	TEST ***** (Generic PV Account)	GVHC Merced Suites	No Show			05/23/2005				✓		
04/25/19 10:20 AM	Patient, TEST	Patient, TEST	Appt	Maruthachalam, Ramaa MD	GVHC North Merced Medical	Cancelled			05/23/2005				✓		
05/01/19 10:10 AM	Patient, TEST	Patient, TEST	Access Slot	Maruthachalam, Ramaa MD	GVHC North Merced Medical	No Show			05/23/2005			✓	✓		
09/12/19 01:00 PM	Patient, TEST	Patient, TEST	Appt	Farhat, Laura FNP (Locum)	GVHC Robertson Rd Medical	Cancelled			05/23/2005						

Once you're ready to search for an appointment you can navigate back to the Appointment Search Ahead Window by clinic on the ApptBook

Date/Time	Patient	Description	Event	Resource	Location
05/07/18 12:00 PM	Patient, TEST	Patient, TEST	Appt	Spence, Suzarie FNP	GVHC Turlock Monte Vista
05/25/18 08:00 AM	Patient, TEST	Florida	Provider Slot	Lee, Heather MD PEDS(NO RASH)	GVHC Florida Medical
08/22/18 01:00 PM	Patient, TEST	Patient, TEST	CPSP Birth Control Couns	Nieves, Mercedes CPSP	GVHC Modesto Womens
09/14/18 03:00 PM	Patient, TEST	Patient, TEST	Appt	TEST ***** (Generic PV Account	GVHC Merced Suites
04/25/19 10:20 AM	Patient, TEST	Patient, TEST	Appt	Maruthachalam, Ramaa MD	GVHC North Merced Medic
05/01/19 10:10 AM	Patient, TEST	Patient, TEST	Access Slot	Maruthachalam, Ramaa MD	GVHC North Merced Medic
09/12/19 01:00 PM	Patient, TEST	Patient, TEST	Appt	Farhat, Laura FNP (Locum)	GVHC Robertson Rd Medic



Date/Time	Resource(s)	Location(s)	Distance	Location Address
Thursday, December 10, 2020 at 01:30 PM	Navarro, Hope LVN	GVHC Newma...		637 Merced Street Newm
Monday, December 14, 2020 at 01:00 PM	Lopez, Laura RN	GVHC Turlock...		1141 North Olive Avenue
Monday, December 14, 2020 at 03:00 PM	Navarro, Hope LVN	GVHC Newma...		637 Merced Street Newm
Tuesday, December 15, 2020 at 01:30 PM	Navarro, Hope LVN	GVHC Newma...		637 Merced Street Newm
Tuesday, December 15, 2020 at 03:00 PM	Navarro, Hope LVN	GVHC Newma...		637 Merced Street Newm
Wednesday, December 16, 2020 at 09:30 A...	Lopez, Laura RN	GVHC Turlock...		1141 North Olive Avenue

The Appointment Search Ahead window should still have your patient listed