Provider – Schedule Grooming

The default in the near term is to convert all appointments to video visits. If your practice does not have a standard workflow for physician instructions, here is a potential option. The provider should make an appointment note for any visits that meet the following exceptions to video:

- “keep” (urgent – cannot be postponed)
- “cancel – semi-urgent” (cannot be postponed more than 1-3 months)
- “cancel - elective” (can be postponed 3+ months)

1. Highlight patient on Schedule
2. Click Notes from activity toolbar
3. Enter text in the Appointment Notes pop up window

NOTE: It’s important to use the standard text so anyone accessing the schedule can see that provider review is complete and for reporting purposes.

Scheduler – Updating appointments

Scheduler or practice designee adjusts the schedule based on provider review outcomes

1. From the DAR, review the Appt Notes for upcoming appointment

2. For those appointments without an exception, convert to a Video Visit.
   a. Refer to scripting below when speaking to patient
NOTE: Call scripting for converting to Video Visit below. If doing outreach via MyChart, please use the COVID19VIDEO dot phrase for defaulted text.

Hi *** you have a visit scheduled with Dr *** on ***. In order to help protect patients from the coronavirus, we are converting appointments to video visits. The Doctor thinks it’s important to perform your visit via video so that you can remain at home.

Video Visits are just like a regular appointment in many ways except that, using a smartphone, you connect with the doctor through an application called Zoom. If you have significant concerns about making this change I can notify your doctor.

[if elective] If you prefer to wait rather than change to a video visit, I can schedule you for a visit in 3 months, or we can put you on a re-call list.

[if semi-urgent] If you prefer to wait rather than change to a video visit, I can schedule you for a visit in 1-3 months.

[if agreement to change to video] I will send more information about how to set up your phone or tablet for the video visit. [Follow your practice standard work to orient patient to video visit].

3. If converting the appointment to a video visit, follow the following steps.
   a. Right click and select Change. Change Appointment activity opens
      a. This can be done from the DAR or Appt Desk
   b. Change the visit type to the appropriate Video Visit visit type
   c. Add a Change reason (Shuffle)
   d. Click Change
e. Remember to send the patient the Video Visit information

4. For those appointments with a reason to cancel, contact the patient.

**NOTE: Scripting for canceling appointment**

Hi *** you have a visit scheduled with Dr *** on ***. In order to help protect patients from the coronavirus, we are working to reduce the total number of people in the offices and waiting rooms at UCSF as much as possible. The Doctor believes that your visit should be scheduled for a later date so that you can remain at home.

5. Then, to cancel the appointment:
   a. Right click and select Cancel. Cancel activity opens
      i. This can be done from the DAR or Appt Desk
   b. Review the list of appointments. Be sure to cancel the appropriate appointment.
   c. Add a Cancel reason
   d. Click Cancel
Scheduler – Rescheduling Appointments

Patient calls back to reschedule appointment

1. Open the patient’s Appointment Desk
2. Navigate to the past tab and locate the cancelled appointment
3. Double click on the appointment to review the cancellation reason used
   a. Appointment notes are also viewable from this view to see providers notes added
4. Verify rescheduling in the appropriate time frame
Actively calling patients for rescheduling

1. Open the Follow Up report
   a. Epic > Reports > Scheduling Reports > Follow Up

2. Enter the report criteria, include cancellation reason
   a. Enter Appointment Status of Canceled
   b. Enter Date Range
   c. Enter Cancel Reason(s)
   d. Click Run