


CHAPTER Service Delivery	CHAPTER 02	SECTION 003	SUBJECT 20
SECTION Access to Services		DESCRIPTION Reception Desk Procedures and Appointment Scheduling	
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APPLICATION:

<input checked="" type="checkbox"/> CMH Staff	<input type="checkbox"/> Board Members	<input type="checkbox"/> Provider Network	<input checked="" type="checkbox"/> Employment Services Providers
<input type="checkbox"/> Employment Services Provider Agencies	<input checked="" type="checkbox"/> Independent Contractors	<input checked="" type="checkbox"/> Students	<input checked="" type="checkbox"/> Interns
<input checked="" type="checkbox"/> Volunteers			

POLICY:

Each outpatient clinical staff will assume full responsibility for scheduling appointments with the people they serve. It is the responsibility of each clinical staff to track their own appointments throughout the working day, enter their appointments in the OASIS calendar, and to inform the reception desk staff if a person served has cancelled. This process is intended to minimize any complications that may arise regarding scheduling, as well as to keep the reception desk staff aware of last minute appointment modifications.

All physician appointment scheduling will be the responsibility of the scheduling support staff.

PROCEDURES:Clinical Staff Appointments:

- A. Appointments for initial clinical assessments will be scheduled for the clinical staff by a scheduling support staff. A copy of the referral will be forwarded to the front desk support staff, customer service staff, the clinical staff completing the initial

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assessment, and the supervisor of the clinical staff. All other appointments will be scheduled by the clinical staff and entered into the OASIS calendar.

- B. When an individual comes in for the initial appointment, he or she will be asked to complete either an adult or child personal information form, and an insurance form. The front desk support staff will ask the individual for insurance cards, photo identification, and social security card. The front desk support staff will obtain copies of each and scan into the electronic health record of the person served.
- C. The customer service worker will see every person served on their initial appointment if a fee assessment is indicated, after the front desk support staff verifies their insurance.
- D. When an established person served arrives for their appointment, the front desk support staff will obtain the individual's name, appointment time and clinician's name. The front desk support staff will confirm the address, telephone number, and insurance information has not changed. In the event of a change, the individual will be asked to complete a change of information form. If the individual has an ability to pay or an insurance co-pay, the front desk support staff will ask for payment. The front desk support staff will enter the payment in the computer and print out a receipt for the individual. If the individual is due for an annual ability to pay determination, the front desk support staff will contact the customer service staff. The front desk support staff will notify the clinician when their appointment has arrived.
- E. At the end of the session, the clinician will re-schedule with the individual, enter the appointment in the OASIS software and escort the individual to the lobby.
- F. When a person served misses an appointment without canceling, the clinician will contact the individual either by telephone or letter to inquire about the missed appointment and (when appropriate) reschedule. An entry will be made in the electronic record to document the call or letter. If the appointment is rescheduled, the clinician will enter the new appointment in the OASIS calendar.

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- G. It is the clinical staff's responsibility to sign out if they won't be in for the day, or if they leave for a home visit or to transport a person served, etc. When a clinician does not come in due to illness or other emergencies, it is his / her responsibility to call the office to inform his or her supervisor as well as the front desk support staff. The front desk support staff will be given information regarding the rescheduling of their appointments. It is the front desk support staff's responsibility to cancel the clinician's appointments for the day. Confidentiality must be maintained and it is important to speak directly with the individual if at all possible. Front desk support staff will enter appointments cancelled by the case holder in the OASIS calendar.

Physician Appointments:

- A. When an individual arrives for an appointment with a physician, the front desk support staff should obtain the individual's name, appointment time and doctor's name. The front desk support staff will confirm the address, telephone number, and insurance information has not changed. In the event of a change, the individual will be asked to complete a change of information form. If the individual has an ability to pay or an insurance co-pay, the front desk support staff will ask for payment. The front desk support staff will enter the payment in the computer and print out a receipt for the individual.
- B. If the individual is due for an annual ability to pay determination, the front desk support staff will contact the customer service staff.
- C. The front desk support staff will notify the scheduling support staff the individual has arrived.
- D. The scheduling support staff will notify the case holder and the physician the individual has arrived and enter the information in the OASIS software.
- E. If the case holder cannot keep the scheduled appointment, he or she needs to contact the scheduling support staff prior to the appointment time regarding other arrangements they have made.

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- F. At the end of the session, the case holder (or physician) will walk the person served to the scheduling desk. The support staff will schedule the next appointment per the physician's instruction and enter the appointment in the OASIS Calendar.
- G. When an individual misses an appointment with a physician without canceling, the primary case holder will contact the person (either by telephone or letter) to inquire about the missed appointment, and when appropriate, reschedule. An entry will be made in the individual's clinical record to document the call or letter. The clinician will contact the scheduling support staff to reschedule the appointment and the scheduling support staff will enter the appointment in the information software.
- H. When a physician does not come in due to illness or other emergencies, it is his or her responsibility to call the front desk support staff or scheduling support staff. The physician should give instructions regarding rescheduling appointments. It is the scheduling support staff's responsibility to notify primary case holders the physician has cancelled for the day. The scheduling support staff, along with the primary case holder, will reschedule the appointments for that day according to the physician's instructions and scheduling support staff will enter rescheduled appointments in the computer system.

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This policy supersedes
#11/09048 dated 11/19/2009.
