

Early on we had confusion with the process for scheduling in-person requests; staff have had re-training and IB message volume is monitored

Steps	Actions
Requesting appointment	<ul style="list-style-type: none">❑ Route all appointment requests to Suite Front Desk Pools❑ Requests that need to be scheduled within a week send request high priority and include “Urgent” in the subject line (if possible)❑ Include the following information:<ul style="list-style-type: none">– Date to be scheduled by– Schedule with: (PCP, NP Anchor, first available)– Reason for visit: (to be copied pasted into appointment notes)– Date of additional documentation that would clarify visit needs: (if applicable)– COVID symptoms: yes/no
Scheduling appointment	<ul style="list-style-type: none">❑ Front desk will attempt to call patient twice to schedule❑ The first attempt within 24 hours of receiving message and second attempt within 72 hours
Closing the loop	<ul style="list-style-type: none">❑ If unable to schedule appointment within requested timeframe escalate to Ops Managers❑ If unable to contact patient after second attempt send message to requesting provider<ul style="list-style-type: none">– “Two outreach attempts made but I am unable to make contact with patient to schedule an in-person appointment for (requested timeframe). Message left for patient requesting they call back (or unable to leave message – no voicemail set up or mailbox full).”