# K’ima:w Medical Center

**Appointment policy**

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## Policy & Procedure

# DM Department: Appointment/Referral Scheduling and Monitoring

**Purpose:** The scheduling and monitoring of the Diabetes Program participant appointment schedule is critical to the success of the DM Program. Close attention to the detail of this work is critical to the program’s overall performance. All program staff work collaboratively to schedule participant appointments. However, the primary responsibility is that of the program clerk and/or case manager assistant.  The following outlines process information for performing this work, which requires the utmost care and attention daily.

**Process for scheduling and monitoring appointments and referrals:** The following information outlines the process for scheduling and monitoring DM Program appointments.

1. The DM appointment lists for all staff are reviewed daily by appropriate staff.
2. Copies of the schedules are placed in the clinician’s (Nurse, Dietician, FNP) mailbox daily.  The copies should include information regarding who was contacted and what the participant indicated during contact.

1. Participants are notified/reminded of the appointment date and time in the late AM or afternoon one (1) day prior to the upcoming appointment and reminded of the appointment.
2. Appointments should be carefully scheduled during times when the clinician is available.  Clinicians should make every effort to work with appropriate staff to ensure that schedules are up to date. Any questions or changes in the clinician’s availability should be discussed between the clerk and/or case manager and the clinician.
3. Participants should be notified as early as possible if their appointment needs to be rescheduled because of changes to the clinician’s schedule. The case manager and/or clerk MUST ensure participants are rescheduled.
4. Participants who repeatedly miss scheduled appointments should be discussed with the clinician and a letter sent requesting the participant to contact the program to ensure their appointment is rescheduled. Copies of the letters should be sent to Medical Records for inclusion in the participant record and if possible a note entered into EHR.
5. Staff scheduling and notifying participants must ensure the appointment time is acceptable to the participant prior to scheduling the appointments.  If the participant cannot be reached by telephone, a letter/notice is sent via mail with the appointment date and time.
6. The Referral tracking binder and appointment schedule is monitored daily to ensure that all participants are scheduled and rescheduled as needed.  Referral forms should be utilized to note all work completed related to appointment scheduling for participants.