Scheduling Calendar in IBHIS

- ✓ What it is used for / What goes on it
- ✓ What it looks like
- ✓ Scheduling an appointment
- ✓ Writing progress notes to the appointment
- ✓ Updating the appointment status

LACDMH Quality Assurance Unit – Policy and Technical Development Team 6/23/20

Scheduling Calendar

(what it is used for & what goes on it)

Used to: manage appointments, view practitioner availability, and write progress notes

All individual & group direct service appointments

(with service codes or placeholder codes)

*A placeholder code is used when you are:

- unsure of the specific service code for that appointment
- scheduling a new client with only a Pre-Admit – use 'Intake Placeholder'

*Placeholders for assessments & treatment

- Intake
- Initial Medication Evaluation (IME)
- Individual
- Group

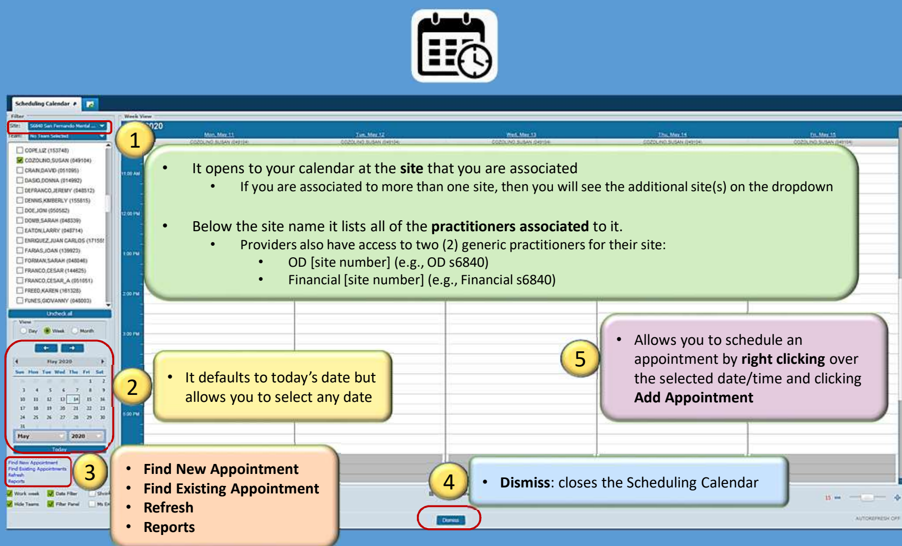
Block Appointment Slots

(block off practitioners' availability or unavailability)

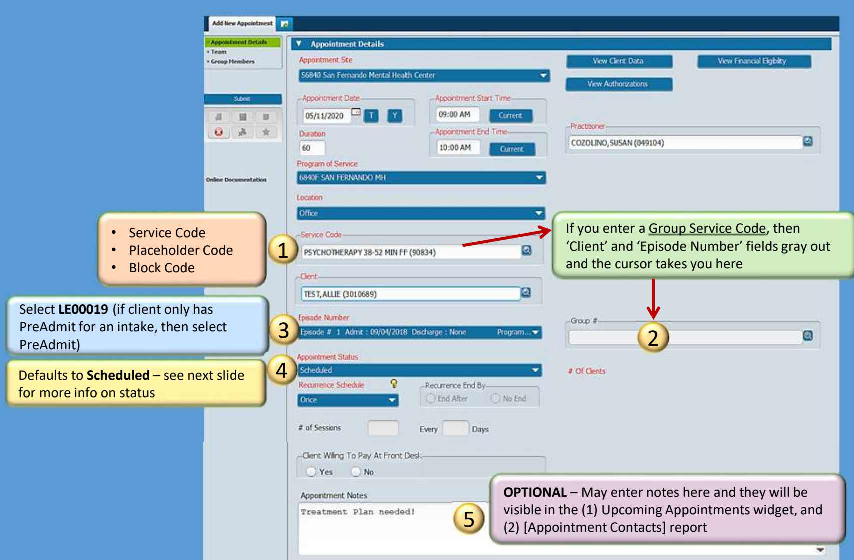
- Block for Intake
- Block for IME
- Block - Officer of the Day
- Block - Meeting/Supervision
- Block - Training
- Block - Approved Time Off
- Block - Priority ACCESS Adult
- Block - Priority ACCESS Child
- Block - Other (see comments)

Scheduling Calendar

(what it looks like)



Scheduling an Appointment

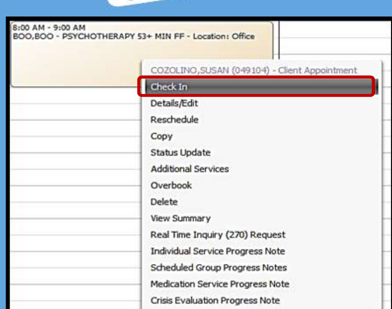


Appointment Status
(When putting the appointment on the Scheduling Calendar)

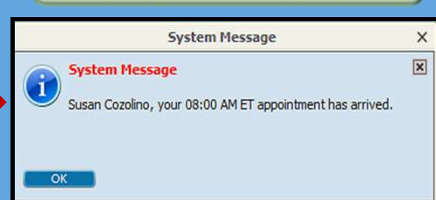
Appointment Status	Situation
Scheduled	Appointment scheduled in advance
Scheduled – No Appointment Reminder	Appointment scheduled in advance **AND** you do <u>not</u> want it pushed to the Client Portal (e.g., team meeting w/o client present or home visits)
Unscheduled	<u>Walk-Ins/Call-Ins</u>: client walks in or calls for a service at that time without a scheduled appointment <u>Emergency Field Response</u>: (e.g., PMRT / LET / MET)

Checking In a Client
(OPTIONAL)

Front Desk staff can check in clients for the purpose of alerting the practitioner that their client has arrived

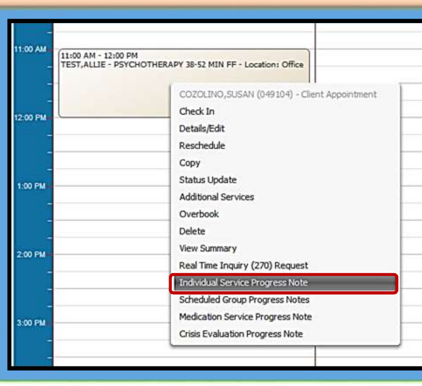


Below is the pop up message that will automatically be sent to the practitioner



Writing a Progress Note to the Appointment

Right click over the appointment and select the appropriate progress note form



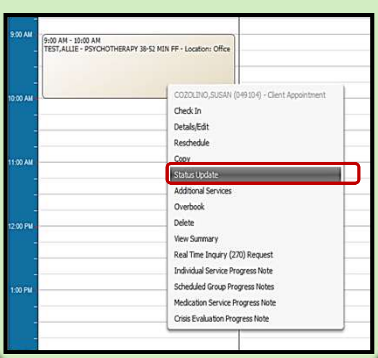
Several fields pre-populate into the Progress Note from the appointment

Updating the Appointment Status

(No Shows / Cancellations)

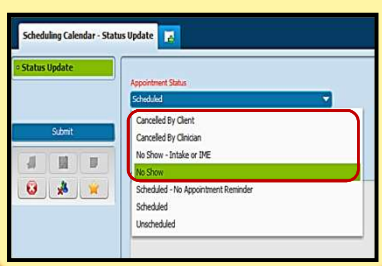
When a client ‘no shows’ or ‘cancels’
make sure to update their appointment status

Right click over the appointment and select **Status Update**



Select the appropriate updated Appointment Status:

- **Canceled By Client**
- **Canceled by Clinician**
- **No Show – Intake or IME**
- **No Show**



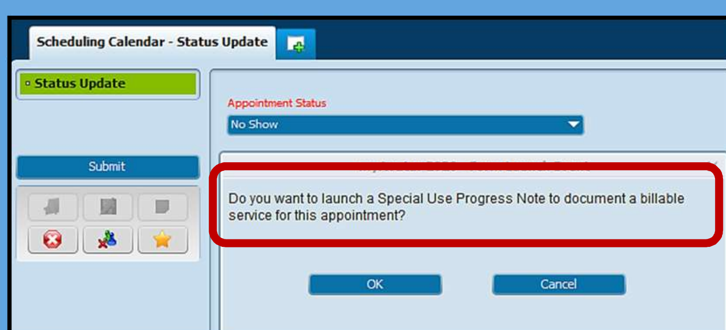
Updating the Appointment Status

Pause the video if you want to review this

Appointment Status Update	Situation	Notes / Claiming
No Show	• Client does not show up for scheduled appointment	**Will NOT create a billable service** • Non-Billable note – write a note to the appointment • Billable note – use a Special Use Note (e.g. reviewed chart prior to no show in preparation of visit)
No Show – Intake or IME (IME=Initial Medication Evaluation)	• Client/Potential Client does not show up for scheduled INTAKE or Initial Medication Evaluation (IME) appointment	**Will NOT create a billable service** • Non-Billable note – write a note to the appointment
Canceled by Client	• Client calls to cancel prior to scheduled appointment • Client shows up for scheduled appointment but unable to wait and cancels / walks out • Clients walks in and requests an appointment (unscheduled) but unable to wait and cancels / walks out	**Will NOT create a billable service** • Non-Billable note – write a note to the appointment • Billable note – use a Special Use Note (e.g. reviewed chart prior to no show in preparation of visit)
Canceled by Clinician	• Practitioner has to cancel the client's scheduled / unscheduled appointment (e.g., practitioner is sick / emergent issue arises)	**Will NOT create a billable service** • Non-Billable note – write a note to the appointment

Selecting 'No Show' or 'Canceled by Client'

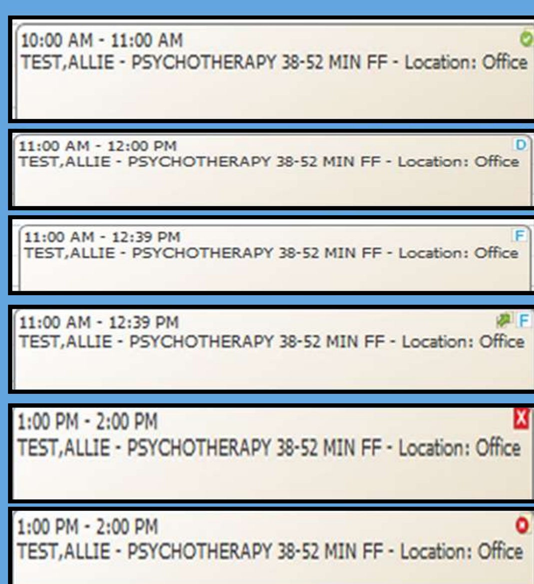
triggers this pop up message



If you select **OK**, then it opens a Special Use Progress Note…

After submitting the note, it takes you back here…click SUBMIT

Icons on Appointments



Checked In

DRAFT Note

FINAL Note

FINAL Note & Posted

No Show

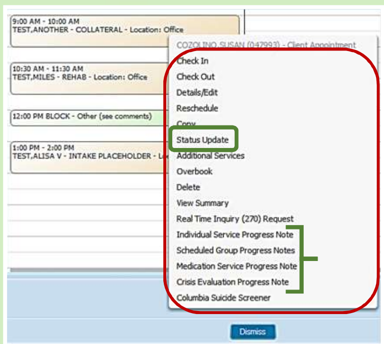
Canceled

Scheduling Calendar vs My Calendar

Scheduling Calendar

Form

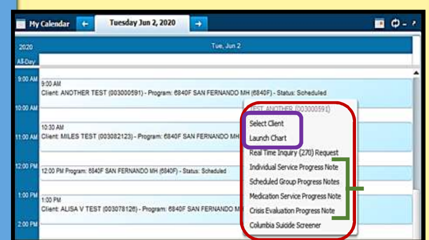
Add appointments



My Calendar

Widget

CANNOT add appointments



Select Client: (puts the client 'in context') - widgets populate with that client's info

Launch Chart: opens that client's chart

Let's go into IBHIS…

Add an Appointment

Write a Note to the Appointment

Update the Appointment Status

Create a Block Appointment

Use the Find Existing Appointments