

Firm Faculty Coaching Topic PGY2 #5

Managing Clinic Schedule

1. Have resident look at schedule for the next few months to see when they have openings. EPIC->Scheduling->View Schedules (a)
2. Search resident name, arrow thru weeks (or use calendar) to remind resident when they are in clinic next. Double click on one day to pull up schedule (b-e)

a. Open EPIC->Scheduling->View Schedules

b. Enter resident last name and Search

c. View how full each upcoming clinic is (i.e. 8/4 is 33% full)

d. Use arrows or calendar to tab thru upcoming schedule

e. Double click on a specific day to open up schedule for that day, see openings. (i.e. for 8/10 double click on 17% to open schedule for that day)

View Schedules

Department: DCAM INTERNAL MEDICINE [690]

Visit type:

Provider or resource: **clarke**
CLARKE, MICHAEL JOSEPH, M.D. [87457] in DCAM INTE

Schedule Scanner:

Provider/Resource	Thu 8/4	Fri 8/5	Sat 8/6	Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10
CLARKE, MICHAEL JOSEPH [87457]	33%	No Sch	No Sch	No Sch	40%	No Sch	17%

Display

Search Clear Cancel

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Managing Clinic Schedule (cont'd)

1. Click on one day schedule
2. Examples of open in-person templates and virtual templates are below (b-c)
3. Discuss best practices of scheduling patients:
 - a) Looking for open appt at the beginning of every +2 block and sending message to pcg_orders with patients to schedule
 - b) Forward any refill request to pcg_orders to schedule follow up
 - c) Forward any ADT to pcg_orders to schedule follow up appointment
 - d) Forward any test result to pcg_orders to schedule follow up
 - e) Look through EPIC healthy planet list (see Coaching Topic PGY2 #3) and sort by LAST or NEXT PCP appointment to find patients that have not been seen in a while
 - f) Every open slot will generally be filled with urgent/overflow patient so best to fill with patients known to resident

Schedule Scanner:

Provider/Resource	Thu 8/4	Fri 8/5	Sat 8/6	Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10
CLARKE, MICHAEL JOSEPH [87457]	33%	No Sch	No Sch	No Sch	40%	No Sch	17%

a. Double click on a specific day to open up schedule for that day, see openings. (i.e. for 8/10 double click on 17% to open schedule)

b. Blank in person template

c. Blank virtual template

Scheduling Reports

Provider Schedule

CLARKE, MICHAEL JOSEPH [87457] in DCAM | View: All Times, Single Provider

0% Thu 9/15/2022

Time	Pri?	MRN	Name	Visit Type	Len	Appt Notes
1 1:15 p						
1 1:45 p			PER MD/CLINI			
1 2:15 p						
2 2:45 p			END			
1 3:00 p						
1 3:30 p			PER MD/CLINI			
1 4:00 p						
4 4:30 p			END			

Day | Week | More Providers | Restrictions

September 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Today

Scheduling Reports

Provider Schedule

CLARKE, MICHAEL JOSEPH [87457] in DCAM | View: All Times, Single Provider

0% Mon 8/15/2022

Time	Pri?	MRN	Name	Visit Type	Len	Appt Notes
1 1:15 p			Vir Vis Rt			
1 1:45 p			Vir Vis Rt			
1 2:15 p			Vir Vis Rt			
1 2:45 p			Vir Vis Rt			
1 3:15 p			Vir Vis Rt			
1 3:45 p			Vir Vis Rt			
4 4:15 p			END			

Day | Week | More Providers | Restrictions

August 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today

