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)
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