

**CHAPTER 12**

# Scheduling Appointments and Maintaining the Physician's Schedule

## REVIEW

### Vocabulary Review

#### Matching

Match the key terms in the right column with the definitions in the left column by placing the letter of each correct answer in the space provided.

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|---|------------------------------|
| _____ 1. A type of scheduling in which patients arrive at their own convenience, with the understanding that they will be seen on a first-come, first-served basis.                                       | a. advanced scheduling       |
| _____ 2. A type of scheduling that works best in large offices that have enough departments and personnel to provide services to several patients at the same time.                                       | b. underbooking              |
| _____ 3. A scheduling system in which several patients are given the same appointment time but are taken as they arrive so that the office schedule remains on track each hour even if patients are late. | c. matrix                    |
| _____ 4. A type of scheduling in which a patient is booked months ahead of time.  | d. referral                  |
| _____ 5. Using double-booking scheduling and clustering scheduling at the same time is an example of this type of technique.  | e. legal record              |
| _____ 6. A patient who does not come to his appointment and does not call to cancel it.   | f. wave scheduling           |
| _____ 7. A term that describes a patient who has not been established at the medical practice.  | g. modified wave scheduling  |
| _____ 8. A term to describe a patient who is being sent to another physician for a second opinion.  | h. time-specified scheduling |
| _____ 9. A term used to describe a patient who comes to see the doctor without an appointment.  | i. no-show                   |
| _____ 10. Another name for stream scheduling.   | j. walk-in                   |
| _____ 11. Leaving large, unused gaps in the schedule.   | k. open-hours scheduling     |
| _____ 12. The appointment book is an example of this type of document.  | l. new patient               |
| _____ 13. Contacting a patient to confirm an appointment.   | m. combination scheduling    |
| _____ 14. The basic format for an appointment book.   | n. tax schedule and payments |
| _____ 15. An item that should be discussed with the physician during regularly scheduled meetings.  | o. reminder notice or call   |

## Content Review

### Multiple Choice

*In the space provided, write the letter of the choice that best completes each statement or answers each question.*

- \_\_\_\_\_ 1. A system used typically in emergency centers rather than in private practice is
- A. wave scheduling.
  - B. double-booking.
  - C. modified-wave scheduling
  - D. cluster scheduling.
  - E. open-hours scheduling.
- \_\_\_\_\_ 2. What is the purpose of a matrix?
- A. It automatically informs patients of their appointments.
  - B. It serves as a basic format for scheduling.
  - C. It is used to obtain patient information.
  - D. It indicates a referral.
  - E. It reminds a medical assistant to call patients to confirm their appointments.
- \_\_\_\_\_ 3. If a patient comes in unexpectedly with an emergency condition, it is vital that
- A. the nearest hospital be notified immediately.
  - B. the patient be treated as quickly as the schedule will allow.
  - C. a physician see that patient ahead of patients who may already be waiting.
  - D. patients who have appointments at that time be given the chance to reschedule.
  - E. the patient wait his turn.
- \_\_\_\_\_ 4. A disadvantage of the open-hours scheduling system is that
- A. it assumes that two patients will actually be seen by the doctor within the scheduled period.
  - B. it increases the possibility of inefficient down time for the doctor.
  - C. patients become annoyed or angry when they realize their appointments are at the same time as other patients.
  - D. it always means the patient will have a long wait.
- \_\_\_\_\_ 5. What type of appointment scheduling system can be helpful if a patient calls and needs to be seen that day but no appointments are available?
- A. Stream
  - B. Wave
  - C. Modified-wave
  - D. Cluster
  - E. Double-booking
- \_\_\_\_\_ 6. Which appointment scheduling system determines the number of patients to be seen each hour by dividing the hour by the length of the average visit?
- A. Double-booking
  - B. Cluster
  - C. Wave
  - D. Advance
  - E. Open-hours

- \_\_\_\_\_ 7. The appropriate procedure to follow for a patient who misses an appointment is to
- A. document the no-show in the appointment book and in the patient's chart.
  - B. notify the patient that she will be charged for the missed appointment and interest will be applied.
  - C. refuse to reschedule an appointment for the patient.
  - D. schedule another appointment for the patient but tell her she must call the day before or the appointment will be canceled.
  - E. only reschedule the patient with the doctor's approval.
- \_\_\_\_\_ 8. What should you do when a regular patient comes to the office without an appointment?
- A. Ask him how you can help him and notify the physician as needed.
  - B. Ask him to leave and you will call him later.
  - C. Take him directly to see the physician.
  - D. Tell him he can't see the physician without an appointment.
  - E. Tell him you can't make appointments for walk-ins.
- \_\_\_\_\_ 9. Obtaining patient information for an appointment should include which of the following?
- A. Marital status
  - B. Religion
  - C. Age
  - D. Occupation
  - E. Purpose of the visit
- \_\_\_\_\_ 10. If you are asked to take minutes at a medical meeting, you will need to
- A. create the agenda for the meeting as well.
  - B. mail a notice to every person to notify them of the meeting.
  - C. know how many people are expected at the meeting.
  - D. prepare a report of what was discussed and decided at the meeting.
  - E. call everyone and remind them of the date and time of the meeting.
- \_\_\_\_\_ 11. What does the abbreviation CP stand for?
- A. Canceled procedure
  - B. Complains politely
  - C. Check progress
  - D. Chest pain
- \_\_\_\_\_ 12. Most minor medical problems, such as a sore throat, earache, or blood sugar check, usually require how many minutes?
- A. 10 to 15
  - B. 15 to 20
  - C. 20 to 30
  - D. 30 to 45
- \_\_\_\_\_ 13. The abbreviation Rx stands for?
- A. X-ray procedure
  - B. Treatment
  - C. Prescription
  - D. Immunization

- \_\_\_\_\_ 14. Which of the following is the correct abbreviation for injection?
- A. INJ
  - B. inj
  - C. I & D
  - D. INJECT
- \_\_\_\_\_ 15. Appointments that are anticipated to require more time should be scheduled
- A. at the beginning of the hour.
  - B. at the end of the hour.
  - C. with another patient's 10-minute time slot.
  - D. during a 10-minute time slot.
- \_\_\_\_\_ 16. The appointment book is a legal record and should be kept at least
- A. 1 year.
  - B. 10 years.
  - C. 5 years.
  - D. 3 years.

## Sentence Completion

*In the space provided, write the word or phrase that best completes each sentence.*

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|--|-----------|
| 17. The abbreviation "NP" stands for _____.  | 17. _____ |
| 18. To save time when entering information in the appointment book, you could use the standard abbreviation CPE to stand for _____.                      | 18. _____ |
| 19. A _____ is a way to remind patients to book an appointment in 6 months.  | 19. _____ |
| 20. _____ scheduling systems can be programmed to lock out selected appointment slots, which can be saved for emergencies.                               | 20. _____ |
| 21. It is important to document a patient who is a no-show in the appointment book and in the _____.   | 21. _____ |
| 22. To see a referral on relatively short notice is a matter of _____ to the referring physician.  | 22. _____ |
| 23. Scheduling more patients than can reasonably be seen in the time allowed is called _____.  | 23. _____ |
| 24. Appointments are often made outside the medical office for surgeries, consultations with other physicians, and various _____ tests.                  | 24. _____ |
| 25. In general, it is good practice to avoid scheduling diabetic patients for appointments at this time of day: _____.                                   | 25. _____ |
| 26. Making travel arrangements for a physician may include securing airline reservations, requesting _____ of room reservations, and picking up tickets. | 26. _____ |

## Short Answer

*Write the answer to each question on the lines provided.*

27. Why is it important to not throw away an old appointment book?

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28. How can having a list of standard procedures and the time required for each procedure help you be an efficient scheduler?

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29. What three pieces of information must you obtain to properly schedule a patient appointment?

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30. How does time-specified scheduling work?

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31. How would you select a scheduling appointment system for a medical practice?

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32. Give three examples of special scheduling situations that would require you to adjust the schedule for patient needs.

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33. Which takes more time and why: An established patient visit or a new patient visit?

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34. Why is it beneficial to involve the patient in scheduling his outside appointments?

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35. When using advanced scheduling, it is still advisable to leave a few appointment slots open each day. Why?

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36. What is an agenda?

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37. If a physician in your office refers a patient to another doctor, what is your first step?

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38. Define locum tenens.

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39. What does the abbreviation NS stand for?

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40 What does the abbreviation GI stand for?

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## Critical Thinking

*Write the answer to each question on the lines provided.*

1. Who is impacted when a patient is late for an appointment?

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2. Why might physicians prefer to schedule new patients first thing in the morning?

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Name \_\_\_\_\_ Class \_\_\_\_\_ Date \_\_\_\_\_

3. Why is it important to document a no-show in the appointment book and the patient chart?

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4. What types of practices may require more than one locum tenens on call to cover during a physician's absence?

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5. Why is it important for the medical assistant to stock the physician's bag carefully? What could be the consequences of a medical bag that is not properly stocked?

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6. What time of day should fasting patients be scheduled for appointments? Why?

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7. If the physician is running behind in the schedule for the day, how might you be able to help?

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8. List the information you need to book a patient's appointment.

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9. Describe the proper way to document a cancellation or a no-show in the appointment book.

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# APPLICATION

Follow the directions for each application.

## 1. Scheduling Appointments

Schedule your classmates for appointments at a medical practice.

- Choose the type of specialty for the practice and the days and hours that the office will be open to see patients each week. Select a scheduling system for your office to use.
- Determine five procedures (checkups, minor in-office surgeries, and so on) to be performed at the practice. Estimate the typical length of time for each procedure.
- Schedule the students in your class for appointments, making sure that there is enough time for the procedures to be performed. For each appointment, record the patient's full name, home and work telephone numbers, purpose of visit, and estimated length of visit. Use abbreviations where helpful.
- Evaluate the schedule for overbooking or underbooking. Share your schedule with another student and ask for comments. Revise the schedule as necessary.

## 2. Developing a Travel Itinerary

A physician in your practice is attending the American Medical Association's annual conference, to be held at the Hyatt Regency Hotel in Chicago. Develop a travel itinerary that you can give to the physician and also keep a copy of in the office for reference.

- Determine the dates of the conference and the dates of the physician's departure and return. Choose the airline that the physician will fly and note the flight times.
- Record the itinerary in chronological order. Include telephone numbers and addresses of each location where the physician can be reached as well as the dates and times that the physician can be reached there.
- Evaluate your itinerary. Are you able to contact the physician at every point during the trip? If not, is there additional information you can list on the itinerary?
- Examine itineraries developed by your classmates. Is there something they included in their itineraries that you can add to yours?
- With your classmates, discuss the value of having an itinerary.

# CASE STUDIES

Write your response to each case study on the lines provided.

### Case 1

You are new in the office but you feel that the type of scheduling system used in the medical practice is not working well to meet the patient's needs. What could you do?

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### Case 2

A female patient becomes upset when a man who just arrived at the office is taken to see the doctor immediately. The woman has been waiting for almost an hour and was supposed to be seen next. What should you do?

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### Case 3

A medical assistant informs waiting patients that the physician will be delayed. She shares details about the emergency appendectomy the mayor's daughter needs, which will take at least an hour. She asks patients whether they prefer to wait, reschedule, or run errands and come back later. Has the medical assistant handled this situation appropriately? Explain.

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### Case 4

You have been asked to create a cluster schedule for the office. In your own words, describe the steps you would take to set up this new system.

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## Procedure Competency Checklists

### PROCEDURE 12.1 CREATING A CLUSTER SCHEDULE

#### Procedure Goal

To set up a cluster schedule

#### Scoring System

To score each step, use the following scoring system:

1 = *poor*, 2 = *fair*, 3 = *good*, 4 = *excellent*

A minimum score of at least a 3 must be achieved on **each** step to achieve successful completion of the technique. Detailed instructions on the scoring system are found on page x of the Preface.

#### Materials

Calendar, tickler file, appointment book, colored pencils or markers (optional)

#### Procedure

Procedure Steps	Total Possible Points - 24	Time Limit: 5 minutes	Practice #1	Practice #2	Practice #3	Final
1. Learn which categories of cases the physician would like to cluster and on what days and/or times of day.						
2. Determine the length of the average visit in each category.						
3. In the appointment book, cross out the hours in the week that the physician is typically not available.*						
4. Block out one period in midmorning and one in midafternoon for use as buffer, or reserve, times for unexpected needs.						

(continued)