

Access Quality and Standards Team

Revised Date: 06/18/2024

Administrative Standard Operating Procedure

Saturday Lab Ticket Scheduling

Scope:

Ambulatory Access/Provider/Clinical Team Members

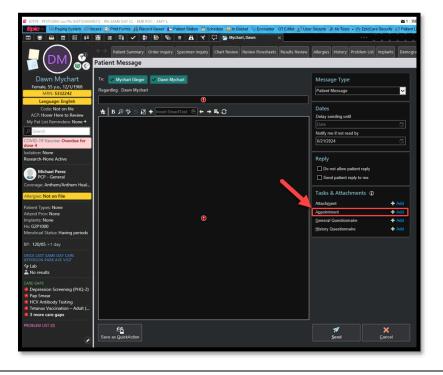
Purpose: Access Associate/Provider/Clinical Team member will use this document as a resource for sending lab scheduling tickets to patients via MyChart for urgent labs that cannot be done during normal working hours.

Background/ Rationale: Document will serve as a resource for providers/clinical team members to generate ticket scheduling task for patients needing to be scheduled for Saturday lab work. This document will also assist Access Team Members in scheduling Saturday labs sent by provider either by MyChart scheduling ticket or In-Basket request to Clerical Pool.

Procedure:

Sending Scheduling Ticket Through MyChart

- 1. Provider will place lab order into Epic prior to sending ticket to patient for scheduling.
- 2. Once order has been placed, Provider/clinical team member will navigate to In-Basket and select *New Patient Message*.
- 3. Subject of message should read, Schedule Labs
- 4. Body of message should read, "Please schedule for this Saturday."
- 5. When in the *New Patient Message* activity, select +*add* next to the patient appointment and fill in the department, visit type, and provider/resource.



- Department: Lab ECCC Cancer Center
- Visit Type: Lab Work
- Provider/Resource: Saturday Lab
- 6. Once all information is filled out, select *Accept* in lower right hand corner.

Patient Message			
To: 🗸 Tweety Mychart	Me	essage Type	
Regarding: Tweety Mychart	🚔 Appointment Request (Needs Scheduling) [11269704]		×
Schedule Labs	🛱 LAB WORK		
🜟 🛛 🕫 🦈 🗂 🔝 🕂 Insert Smart	Department		
Please schedule for Saturday.	LAB ECCC CANCER CENTER		
	Visit Type	Start Date	End Date
	LAB WORK [1170010] 9	Start 🛗	End 🟥
	Notes for Staff		
	Provider/Resource		
	Enter a Provider/Resource, Subgroup, Department, Specialty, or Center	t in the second s	+ PCP 🕅
	Provider/Subgroup		
	SATURDAY LAB in LAB ECCC CANCER CENTER		×
			M
			Accept X Delete

7. Once accepted, select Send in the lower right hand corner to send to patient.

٢	Tasks & Attachments ① Attachment Appointment General Questionnaire History Questionnaire	+ Add + Add + Add + Add
经入 re as QuickAction		< ncel

8. Once the message has been sent, the patient will follow the link within the attached task to schedule an appointment via MyChart. A Tip Sheet on what the patient will see when scheduling can be found <u>here</u>.

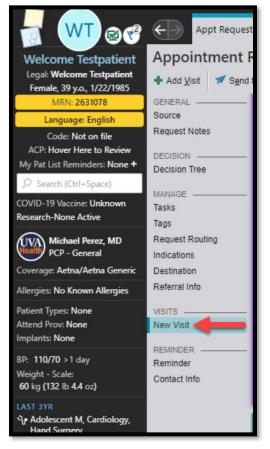
Saturday Lab Ticket Scheduling

Sending Scheduling Ticket Through Appointment Desk

- 1. Provider will place lab order into Epic before sending ticket to patient for scheduling.
- 2. Team member will navigate to patients *Appointment Desk* select *Request* and then *Appointment Request.*

Appointment Desk							
Patient Summary (Rev Cas Create Appointment Request							
Test, Anne 4455 MAIN STREE CHARLOTTE NC : + New Walt List	MRN: DOB: SSN: Home: Email: Acct Sts:	5320573 5/17/1985 xxx-xx-8725 703-569-8787 maj3c@uvahealth.org C0 3, C0 3	Sex: Age: Lang: Work:	Female 39 yrs English 323-497-5481	Reg Sts: Pt Type: Intrpr: Mobile:	[№] 323-497-5481	НМ
Temporary Address: Confidential Address:							_

3. Once in the *Appointment Request* activity, team member will navigate to the left hand side and select *New Visit*.



- 4. Once in the *New Visit* activity, team member will fill in the department, visit type, and provider/resource.
 - Department: Lab ECCC Cancer Center
 - Visit Type: Lab Work
 - Provider/Resource: Saturday Lab

Saturday Lab Ticket Scheduling

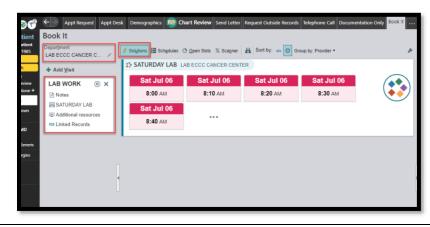
5. After information has been entered, team member will select *Send to MyChart* to send scheduling ticket to patient.

🕂 Add <u>V</u> isit 🖈 S <u>e</u> nd	d to MyChart 📋 Schedule 🚔 Schedule Egternally 🛛 🗳 Registration 🍁 Create and Open Referral 🔹 🏠 Audit Trail 🛛 🗶 Cancel Request	
GENERAL	C LAB WORK	† ∔
DECISION	_ Department	
Decision Tree	LAB ECCC CANCER CENTER	
MANAGE	Visit Type Start Date End Date	
Tasks	LAB WORK [1170010] P Start End	ä
Tags Request Routing	Notes	
Indications		
Destination	L rovider/Resource	
Referral Info	Enter a Provider/Resource, Subgroup, Department, Specialty, or Center	+ PCP 鰯
VISITS	Provider/Subgroup	
REMINDER	SATURDAY LAB in LAB ECCC CANCER CENTER	×
Reminder Contact Info		💼 Remove Visit
	1 Previous	↓ Next

6. Once message has been sent to patient, patient will follow link within task to schedule appointment via MyChart. A Tip Sheet on what the patient will see when scheduling can be found <u>here</u>.

Scheduling Patients without MyChart

- 1. Provider will place lab order into Epic before team member scheduling.
 - Orders will be placed on a Thursday or Friday for Saturday lab needs.
- The provider or clinical team member will send In-Basket message to <u>Ancillary Clerical</u> <u>Support Pool</u> to alert Access Team Member that a request for a Saturday lab is needing to be scheduled.
- 3. Access Team Member will then attempt to contact patient to schedule visit for lab work.
- 4. Access Team Member will navigate to "Book It" from the patient "Appointment Desk"
- 5. From the Book It screen team member will enter the department, visit type and provider/resource.
 - Department: Lab ECCC Cancer Center
 - Visit Type: Lab Work
 - Provider/Resource: Saturday Lab



Saturday Lab Ticket Scheduling

Always refer to the official online version. Printed copies are for temporary reference only.

Note: Team member should ensure that they schedule from the Solutions tab and not the Schedules tab.

- 6. Once patient has selected a time to be seen, team member will continue through registration as normal.
- 7. 3 contact attempts should be made before close of business on Friday.
 - Patients can return call at 434-297-4829 to schedule.
- 8. If the patient is unable to be reached after the third contact attempt, an In-Basket message should be sent to the ordering provider alerting them that the patient could not be contacted.

Note: If a patient calls in with ticket scheduling issues, team member can utilize the Epic Tip Sheet <u>here</u> to help guide through the process.

ADDITIONAL INFORMATION:

RESOURCES:

- MyChart for Scheduling Patients Tip Sheet
 - <u>https://ell.healthsystem.virginia.edu/mychart-scheduling-ticket-for-patients-tipsheet/</u>

REVISION HISTORY					
Version	Reason (new, cyclical, external)	Relevant Reviewers	Approved By	Date of Approval	
1.0	New	Sarah Mabe, Kelsea Garrison, Terri Solomon, Caitlin Jenkins			