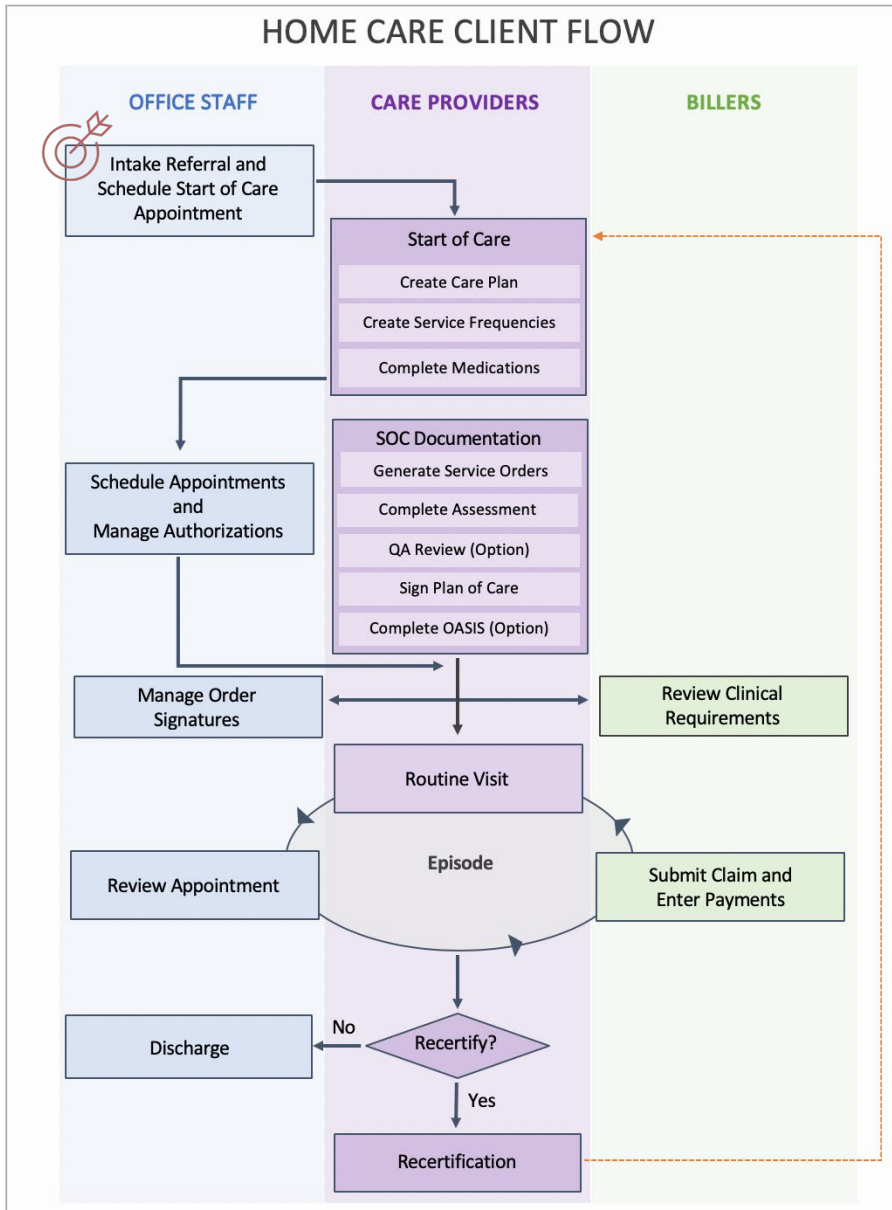# Session Guide:
Intro to Scheduling and Scheduling the Start of Care Appointment

After this session, office staff in charge of scheduling will be able to:

- Understand how scheduling determines clinical documentation and insurance pay rate.

- Use the scheduling tools.

- Create a Start of Care appointment.

- Assign an employee to a Start of Care appointment.

When to Schedule the Start of Care Appointment

HOME CARE CLIENT FLOW

OFFICE STAFF	CARE PROVIDERS	BILLERS

Intake Referral and Schedule Start of Care Appointment

Start of Care
- Create Care Plan
- Create Service Frequencies
- Complete Medications

Schedule Appointments and Manage Authorizations

SOC Documentation
- Generate Service Orders
- Complete Assessment
- QA Review (Option)
- Sign Plan of Care
- Complete OASIS (Option)

Manage Order Signatures

Review Clinical Requirements

Routine Visit

Episode

Review Appointment

Submit Claim and Enter Payments

Discharge ← No — Recertify? — Yes ↓

Recertification

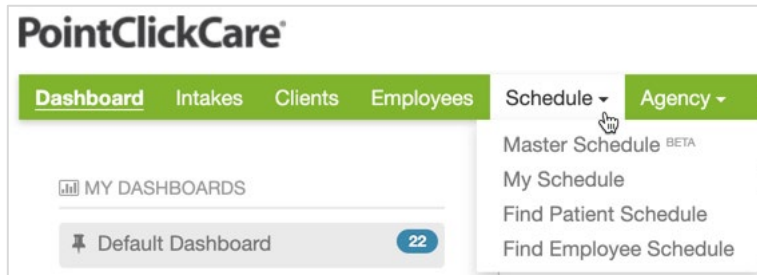**You are a Scheduler. How do you fit into the agency's work flow?**

Your agency has accepted a new intake.

The Intake Coordinator contacts you to schedule a Start of Care appointment.

You open the new client's record, add the appointment, and assign a clinician.

Overview of Scheduling Tools

Click the Schedule tab to access schedules.

Home Care Scheduling Tools

Master Schedule	Shows all appointments on the agency's schedule.
My Schedule	Shows all appointments for the person logged into the system.
Patient Schedule	Shows all appointments for a selected patient.
Employee Schedule	Shows all appointments for a selected employee.
Care at Home Scheduling	An add-in for the Care at Home mobile application that lets providers move appointments on their schedule. Your agency may not use this option.
Auto-Appointment Generation	An option that places compliant appointments on a client's schedule when services are generated. Schedulers need only assign a care provider and an exact time.

Tip: Care at Home Scheduling and Auto-Appointment Generation may not be available at your agency. Check with your supervisor.

Appointment Statuses and Color Coding

Colored tiles indicate the status of appointments on schedules.

|	
Open (default status) (Blue)	Appointment scheduled, but not yet completed.
Missed – Reschedule (Yellow)	Appointment missed and must be rescheduled.
Cancelled (Yellow)	Appointment canceled and not rescheduled
Reviewed (Green)	Appointment completed as scheduled and is now billable.
Held (Purple)	Appointment completed but held. Held reasons might include: • Incorrect authorization. • Not completed at the correct location or time. • Entered time card note.
Scheduled, no employee assigned (Red)	Scheduled but no employee assigned.

Associated Dashboards

Preliminary Authorizations	<mark>Check Daily</mark>
Pending Authorizations	<mark>Check Daily</mark>
Ending Authorizations	Check Weekly
Unassigned Appointments	Check Daily
Patient Unreviewed Appointments	Check Daily

Associated Reports

Unassigned Appointments Calendar	Shows appointments that have not been staffed in calendar form.
Appointments Detail	Shows individual appts for a given date range. Run for pre-payroll processing.
Patient Unreviewed Appointments	Shows appointments in Open or Held status for dates prior to the current day.
Nonbillable Appointments	Shows appointments using a non-billable service type.

Understanding How Scheduling Affects Agency Success

Reimbursement rates for services are configured for every payer/plan in your database during implementation. In addition, the documentation that populates the Care at Home application during visits is dependent on the service that you schedule. Your selections while scheduling appointments determine the rate charged for the visit AND the documentation created.
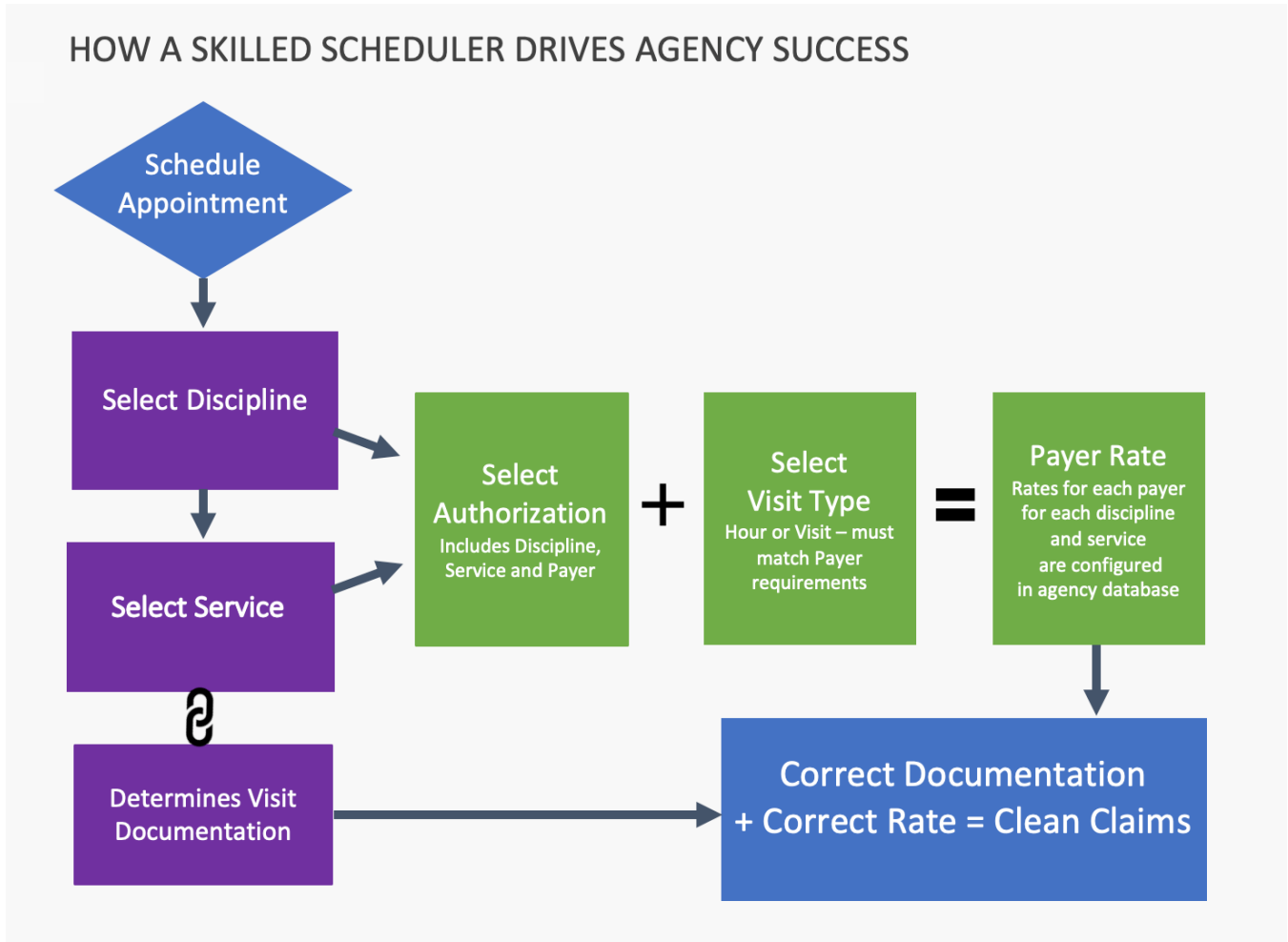
Scheduling the Start of Care Appointment

Start of care (SOC) appointments are scheduled immediately after Intake. During this appointment, a clinician will determine what services the client requires. In most agencies the Intake Coordinator contacts the scheduler when a SOC appointment must be scheduled.

Procedure

1. From the **Schedule** menu select **Find Patient Schedule**.

2. Enter your search criteria in the **Select Patient** dialog, select the patient from the list of matches, and click **Accept**.

3. To add an appointment for the current date, click **Add Appointment**. To add an appointment on another date, double-click the calendar date cell to open the **Add Appointment** dialog box.

4. In the **Add Appointment** dialog, enter the following:

   Service tab:

   - Select Case Record from list.

   - Adjust Start, End Date and Time as necessary.

   - Select Discipline from list.

   - Select Start of Care for Service type.

   Recurrence tab:
   Not required.

   Tip: For most appointments you must also select an authorization. However, start of care appointments do not require an authorization.

Employee tab:

To assign an employee:

1. Click **Assign Employee**. Begin entering information in the **Name Search** field.

Tip: You can create an appointment and assign an employee later.

2. Click an employee's name in the list.

3. Use the **Note** field to communicate details relevant to the appointment (such as patient special requests). These notes display on the Care at Home application.

4. Click **Accept** to complete the appointment.

Workflow Considerations

-   Who will notify you when you need to schedule a start of care appointment?

-   Start of care appointments are generally more time consuming than routine visits. How does your agency balance the workload?

-   Is there a clinical director that needs to choose the start of care clinician?

Notes