Practice Policy & Guidelines

Policy: Secure Electronic System for Appointment, Prescription Refills, and Test Result Requests	Developed by:	Approved by:
Updated:	Signature:	Signature:

PURPOSE:
To ensure patients have access to physician support 24 hours/day, 7 days/week.

GOALS AND OBJECTIVES:
The practice has a secure electronic system for patients to request appointments, prescription refills, referrals and test results. Using a secure electronic messaging system in the office requires monitoring of response times to requests that include but are not limited to e-mail messages, appointment requests, and non-urgent requests.

RESPONSIBILITY:
All Staff

DETAILS:

1. Response to patient/family inquiries are provided within 24 hours. This includes requests for appointments, general service questions (such as directions), clinical questions, prescription refills, test results, referrals, billing questions, etc.

2. Emails from patients/families should be directed to the appropriate individual within 4 business hours. Clinical messages should be forwarded to clinical staff, and insurance messages should be forwarded to billing staff.

3. All e-mails that *you take action on* should be logged into the patient's chart as a message. If you forward an email to another individual to take action on, it is that person's responsibility to log the message in the patient's chart. Do not edit or truncate the content of the message in any way. The message should be identical to the content of the e-mail message and your reply.

4. Patients/families have the ability to request appointments through the practice website or the patient portal. When they do so, the practice receives this message via email.

5. Emails received after hours are reviewed no later than 8:30am the following morning.

6. If an appointment request, staff will identify an appropriate appointment slot as close to the desired date/time with the selected provider as possible.

    a. If the patient/family's first choice is available, the appointment will be made accordingly.

    b. If the patient's first choice is unavailable, two or three possible slots that might work for the patient are identified and offered, including desired date/time with a different provider, if available.

    c. Prepare an email response as follows by **Replying** to the patient/family email. If there are multiple requests from the same account (e.g. two siblings who both need appointments), a combined response will be provided in one email:

i. For patients/families whose request is made without changes, write:

Good morning! We have booked an appointment for [patient's name] with [provider] on [date] at [time]. We'll call you to confirm the appointment one day in advance, as we usually do. If this date/time won't work for you, please call us at (555) 555-555 or email us at Yourdoc@doctor.com.

ii. For patients whose requests can't be accommodated perfectly, write:

Good morning! We have received your appointment request for [patient's name]. Unfortunately, we do not have any slots on that exact date/time with [requested provider's name], but we do have the following options available:

1. [date] at [time] with [provider]
2. [date] at [time] with [provider]
3. [date] at [time] with [provider]

Will any of this work for you? Please let me know by email, or you can call me at (555) 555-5555.

d. Sign the email message with your name and contact information.

e. Send the email message to the patient's email address, and cc: a copy to yourself. <u>Be sure that you are sending the email message to the patient</u> – if the email address was forwarded to you from the Office account, just hitting reply will reply to the Office account.

f. When you receive your CC of the email, copy and paste the entire message into the patient's EHR to document the communication. If you do not receive the CC, check your mail to be sure that the message was sent.

7. From time to time, the practice sends out appointment reminders to patients/families by e-mail. These reminders include patients who the practice has not seen in a long time; therefore, may include some patients who have transferred care to another physician, those who have moved away, etc. Patients may notify the practice online that they need to have their chart inactivated and/or their records transferred.

a. If the family has indicated their new physician, you can use the email message to document a records request. Complete the Release of Records form; in the line for parent signature, write "See attached email."

b. After sending the records to the new physician, scan the Release of Records form as well as the email request.

c. Email the family with a brief response that summarizes your actions:

i. We have received your notice of transfer. I have inactivated John and Mary's charts and we will be sending their records to Dr. Newdoc tomorrow. There is no balance on the account.

ii. We have received your notice of transfer. We've inactivated John and Mary's charts; when you find a physician in Wisconsin, let us know, and we can send their new doctor a copy of their records. I show a balance of $xx.xx on their accounts; please contact our billing office (555) 555-5555 or to arrange payment.

8. Patient emails will sometimes “bounce back” as undeliverable. This could be because the email address was typed incorrectly into the system, because the email address has been deleted, or because the patient wrote down their email address incorrectly. When checking an email address that has “bounced back”:

    a. Find out which patient(s) the family email address belongs to.

    b. Check to make sure we entered the email address properly.

    c. Check to see why the email bounced back. Mailing systems will give a reason, like:
        i. User unknown in virtual mailbox table
        ii. Recipient unknown
        iii. Does not like recipient
        iv. User unknown

    In these cases, the email address has probably been deleted, and you *can delete/remove this email from the patient’s register*.

    Some messages, though, will bounce back because the user’s mail box is full. This means that the email address is actually correct and should not be deleted. Examples include:
        i. Mailbox full
        ii. Delivery timed out to mailbox

MONITORING:
The practice administrator monitors compliance to this policy and monitors response times by conducting a sample retrospective analysis of patient charts and documented response times every 6 months. This data is shared with providers.

This policy shall be reviewed at least every 2 years.

Approved Date: _____/_____/_____

APPROVALS:

Physician Partner: __________________________ Date: _____/_____/_____

Administrative Partner: ______________________ Date: _____/_____/______