

C H A P T E R **13**

RUTLEDGE JR LAB OFF-SITE LEARNING PACKET DAY 5

# *Patient Scheduling*

USE YOUR MED BOOK CH. 13 TO ANSWER THE QUESTIONS BELOW

## CHAPTER PRE-TEST

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*Perform this test without looking at your book.*

1. Circle the letter that lists correct types of scheduling systems:
  - a. Wave, modified wave, double booking, mile-a-minute
  - b. Open hours, wave, clustering, stream, double booking
  - c. First-come, first-served; open hours; clustering
2. Below are guidelines to scheduling. Which one is correct?
  - a. Urgent calls should be sent to the hospital, which is better equipped to handle them.
  - b. Urgent calls should be assessed before determining the best course of action.
  - c. Referrals by other providers need to be seen immediately.
  - d. Appointments for pharmaceutical and medical supply representatives should be referred to the provider.
3. Information that should be obtained from all new patients includes all but which one of the following?
  - a. The patient's full legal name
  - b. The patient's birth date
  - c. The patient's address and telephone numbers
  - d. The reason for the visit
  - e. The patient's insurance information
  - f. The patient's family health history
4. The appointment \_\_\_\_\_ provides a current and accurate record of appointment times available.
  - a. schedule
  - b. screening
  - c. matrix
  - d. referral

5. What type(s) of information are necessary for the patient to provide when scheduling their own procedure?
- Name of the provider
  - Insurance information
  - Social Security number
  - All of the above

## VOCABULARY BUILDER

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### Misspelled Words

*Find the words below that are misspelled; circle them, and correctly spell them in the spaces provided. Then insert the correct vocabulary terms from the list that best fit the scenarios below.*

clustering

modified wave scheduling

screening

double booking

no-show

stream scheduling

encryption technology

open hours

wave scheduling

matrics

practice based

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- \_\_\_\_\_ Inner City Health Care reserves 9 am to 12 pm on Thursday mornings for walk-in patients who are seen on a first-come, first-served basis within that time frame.
  - \_\_\_\_\_ At the clinic of Drs. Lewis and King, Ellen Armstrong, CMA (AAMA), schedules Mary O'Keefe for a 1:00 pm appointment for some blood work and Martin Gordon for a 1:00 pm appointment for a blood pressure check so Dr. King can assess whether his medication is at the proper level.
  - \_\_\_\_\_ Lenny Taylor, an older adult patient with mild dementia, forgets his third appointment with Dr. James Whitney.
  - \_\_\_\_\_ At Inner City Health Care, vaccinations are scheduled every 10 minutes from 10 am to 12:20 pm on Mondays; Tuesday office hours are reserved for new patients only.
  - \_\_\_\_\_ Three patients are scheduled to receive treatments in the first half hour of every hour.
  - \_\_\_\_\_ Dr. Elizabeth King prefers to see patients for regular gynecologic examinations in consecutive appointments scheduled from 8:30 am to 11:30 am and obstetric patients from 1:00 pm to 3:30 pm.
  - \_\_\_\_\_ When patient Herb Fowler calls to set up an appointment with Dr. Winston Lewis for his chronic cough, Ellen Armstrong, CMA (AAMA), asks Herb a series of questions to ascertain the nature, extent, and urgency of his condition.
  - \_\_\_\_\_ Dr. Winston Lewis prefers that each patient be assigned a specific time, scheduling at 30- or 60-minute intervals on a continuous basis throughout the day.
  - \_\_\_\_\_ An ophthalmologist schedules three patients at the beginning of each hour for comprehensive examinations, followed by single appointments every 10 to 20 minutes during the rest of the hour for quick, follow-up procedures such as removing eye patches or instilling eye drops.

10. \_\_\_\_\_ On the 15th day of each month, clinic manager Walter Seals, CMA (AAMA), who is responsible for efficient patient flow at Inner City Health Care, asks each of the urgent care center's five providers to confirm their scheduling commitments for the upcoming month to block off unavailable times in the appointment book.
11. \_\_\_\_\_ The medical assistant uses software to protect patients' confidentiality in electronic format.

## LEARNING REVIEW

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### Short Answer

1. Appointment books are legal documents recording patient flow. For a manual appointment system, where pencil is used for ease in rescheduling, what can the medical assistant do to ensure that a permanent record is secured?  
 \_\_\_\_\_  
 \_\_\_\_\_
2. For a computerized appointment system, what can a medical assistant do to ensure that a permanent record of patient flow is secured?  
 \_\_\_\_\_  
 \_\_\_\_\_
3. Name two primary goals in determining the best method for scheduling patient appointments.  
 \_\_\_\_\_  
 \_\_\_\_\_
4. What is the typical scheduling time for each of the following types of clinic visits for an internal medicine practice?
  - (1) Patient consultation:
  - (2) Established patient routine follow-up:
  - (3) New patient:
  - (4) Complete physical examination:
  - (5) Cold/flu symptoms:
  - (6) Vaccination:
5. What are six variables involved in the process of scheduling appointments for patients and other visitors to the ambulatory care setting?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
6. Patient flow analysis sheets help medical practices determine the effectiveness of patient scheduling and devise plans for improving a smooth patient flow through the ambulatory care setting. What kinds of issues can a study of these data reveal?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

7. What are the five steps of scheduling a specific appointment time for a patient?

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8. Two ways of reminding patients of upcoming appointments are to give the appointment card personally to the patient and to mail the card to the patient. Identify a third reminder system. What procedures must be observed to protect patient confidentiality when using this third method?

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9. Identify seven scheduling styles.

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10. Identify the best scheduling system for the examples below, and explain the reasoning behind your choice.

(1) Hospital emergency room: \_\_\_\_\_

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(2) Laboratory for blood testing: \_\_\_\_\_

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(3) Two or more patients are given a particular appointment time: \_\_\_\_\_

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(4) Best-known and widely used scheduling system: \_\_\_\_\_

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## CERTIFICATION REVIEW

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*These questions are designed to mimic the certification examination. Select the best response.*

1. Scheduling outpatient procedures:
  - a. is done at the end of each day
  - b. is best done with the patient present
  - c. will be easier with a calendar for visualization of days discussed
  - d. b and c
  
2. One principle above all else in scheduling for the clinic is:
  - a. flexibility
  - b. neatness
  - c. accountability
  - d. estimation