Scheduling, Checking In and Checking Out Patient Appointments

**Audience**
All personnel in the Pulmonary Laboratories: Pulmonary Function Clinic, Bronchoscopy Service and Center for Pulmonary Rehabilitation.

**Purpose**
To describe the procedure for scheduling patients in Epic and the proper steps to process patient appointments in order to obtain charge document labels and proper billing charges.

**Scheduling**
The following steps are taken by authorized personnel to schedule patients through Epic Cadence:
- Referrals and/or orders are received through Referral Workque and staff will check daily.
- Staff will make patient appointments and attach required referral, if available.
- Appointments are scheduled in Epic and based on availability and staffing.
- An appointment letter is mailed to outpatients, while inpatients are placed on the present schedule based on staffing.
- Staff will notify APO office immediately via email if outpatients’ appointment is with-in 7 days.
- The APO office is responsible for notifying the patients of any financial obligations prior to patients’ appointment.
- Pulmonary staff ensures that every patient receives a reminder call.

**Checking In**
The following steps are taken by personnel upon arrival of a patient:
- If payment is required, the payment is made at the reception desk and a Patient Estimate Letter is signed and the patient is given a copy.
- The patient is checked in through Epic, which generates charge labels for billing purposes.
- Charge labels are placed on all patient documents.

**Check Out**
The following steps are taken by personnel after testing procedures are complete:
- Billing form is properly filled out including departure time.
- Patient is Checked Out through Epic.
- Paperwork is completed and saved for billing checks before results are exported and part of patients’ Epiccare chart.

This form documents the approval and history of the policies and procedures for the Pulmonary Function Laboratory. The Medical Director signs all policies verifying initial approval. Annually thereafter, the Director and/or designee may approve reviews and revisions.

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