



Scheduling

Scheduling the appointment in PT Everywhere

1. Find the time block in the therapist's schedule and click on it.
2. A New Appointment table will pop up. To schedule a new patient click the **+New Patient** button below the third line. Ask the patient for the following information and fill it out as you go.
 - a. Enter **First Name** and **Last Name**. If the name is hard to pronounce or the patient says they go by a shortened or other name enter it in the **Preferred Name** field 4 lines below their name.
 - b. Enter **Email** carefully. This is required to send them paperwork, their receipts, and sometimes exercises from their therapist.
 - i. If the patient states they do not have an email or refuses to give it, this link will explain how to set up the account.
 1. <https://help.pteverywhere.com/kb/logging-into-the-patient-portal-without-using-email>
 - c. Add the patient's **Date of Birth**.
 - d. Complete the contact information section by entering their **Address Line 1**, **City**, **State**, **Zip Code**, and **Phone No**.
 - e. Ask the patient how they heard about our clinic or enter that information if you already know. Enter that in the **Referral Source** field. Then click the **Next** button.
 - f. In the Emergency Contact field we would like a **First Name**, **Last Name**, their **Relationship** to the patient, and a **Phone No**. Then click the **Create** button.
 - g. The New Appointment screen will return. Choose the **Service** in the drop down box. This should be an Initial Evaluation if it is a new patient. The exception being a patient who is coming in because they have mastitis or a clogged duct. In this case their doctor has likely already diagnosed them and they just need to be seen for a **Lactation Clogged Duct Evaluation/Treatment**. If the patient wants to be seen for **Dry Needling Only**, they must have an initial evaluation to establish care and make sure it is an appropriate treatment for them.
3. If you are scheduling an existing patient for an appointment you will need to know who they want to see and what the visit is for. Find the time block on the therapist's schedule, click on the top line of the appointment time (so the correct time shows up), enter the patient's name, and the service being scheduled. Click **Create Appointment**. If there is anything the therapist or other staff members need to know you can include a **Private Note** for the therapist. Examples would be if the patient is scheduling with a discounted



rate or if the patient voiced concerns that the therapist should know about. If you need a note that the patient will see, that can go in the **Note to Patient** box.

- a. Follow Up Visits are the most common appointment type. On rare occasions it can be a Telehealth Follow-Up Visit but that should be discussed with the therapist so they can decide if that works for the specific patient's treatment.
 - i. The cost of a Follow Up Visit is \$174.
 - ii. The duration of this visit is 50 minutes.
- b. Dry Needling Only visits are for established patients only.
 - i. The cost of a Dry Needling Only visit is \$116.
 - ii. The duration of this visit is 30 minutes.
- c. Lactation Clogged Duct Evaluation/Treatment.
 - i. The cost of this visit is \$174.
 - ii. The duration of this visit is typically an hour.

Cancellation/Rescheduling Policy

A late cancellation or missed visit leaves a hole in the therapists' day that could have been filled by another patient. Because of this, Luna Physio's cancellation policy is that a cancellation or rescheduling of an appointment with fewer than 3 business days' notice will result in a \$100 fee. If an appointment is missed without notice, the full charge will incur. If the patient reschedules the same day the fee can be waived. If it is an emergency or illness, the therapist may also waive the fee.

If the patient calls late notice to cancel but reschedules during the phone call, there will be no cancellation fee.

To Reschedule an Existing Appointment

1. Find the current appointment on the schedule. You can do this by going to the date of the appointment on the schedule or by searching the patient's name in the top right corner of PT Everywhere. Once you have searched you can look to the left side of the screen and see Upcoming, Previous, and Cancelled Appointments. Once you have found the date, use the calendar on the top left to go to that date.
2. Right click on the block scheduled for that patient and click **Reschedule**. You can adjust **Date** and **Start Time** then click save. It is helpful to have a second PT Everywhere screen pulled up so you can easily find future availability.
3. **Save** and the appointment will disappear from the previously scheduled block to the new appointment time. The patient will receive a "New Appointment" email and text almost immediately.

To Cancel an Appointment



1. Find the current appointment on the schedule. Right click on the block scheduled for that patient and click **Cancel Appointment**.
2. A box will pop up telling you to enter the reason for the cancellation. Leave a brief note with enough information that anyone else in the clinic will understand the reason. Some examples would be, "Patient is sick" or "Scheduling conflict".
3. If the patient does not reschedule let them know that we will check up on them in a few days or weeks.
 - a. Add the patient to the Call List/CRM in Google Sheets. Enter the patient's name, phone number, and pertinent information so they can be easily contacted by any employee to follow-up with them later.
 - b. In column C, the Original Source would be Cancel/No Show. Complete columns D-G leaving details in the Notes column. Ex., "Patient canceled due to stomach bug. Told her we would check on her next week to reschedule."
 - c. When contact is made, fill in columns H and I with when and how contact was made. If there is no response use your best judgement for when and how to contact them again. It is a good idea to try contact in multiple ways so they have a contact option that is easy for them. If there is no response after 3 attempts change the Status in column G to "Completed Not Scheduled". If they do respond and reschedule, change the status to "Completed Scheduled".