**Purpose:** Pre-visit prep for the patients who are scheduled to come into the office for a visit. Complete as much as you can and document in Appointment Notes so you can easily tell which patients you have prepped.

**Who:**  MAs

**Tools/Supplies Required:** EPIC access, DAR access

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| **#** | **What** | **How** | **Why** |
|  | ***Seven (7) Days Prior to Visit*** |  |  |
| 1 | Check on follow-up from last visit | * Review last visit note from MD or (Navigate to last visit using Multi-provider report) |  |
| 2 | Check that orders from previous office visits are complete and documented in Epic:   * 1. Labs   2. Tests   3. Imaging   4. Specialist visits or referrals | * Check for outstanding referrals and look for results/reports in chart * If results do not exist, request records/results from the specialists office * If information about labs, tests, and/or specialist visits is not available in Epic, call patient to ask if they had tests and labs done and ask if they went to the specialist visit * If not, remind them to complete tests/labs at least 48 hours prior to visit * If patient confirms they had labs/tests done, Fax Records Request from EPIC to facility * Once records are received, scan records, stamp “Scanned”, and give paper record to provider. * Put paper records into provider MD non-urgent in-basket. Document “Records/Results given to [provider name], [Date], [Initials] in Appt. Note. |  |
| 3 | Check that referral is in place, if needed (specialist) | * Make sure referral order, labs, medical records available |  |
| 4 | Pull up Immunization Records for children under 21  (New Patients) | * Pull up immunization records from CAIR Registry or other source * Update patient’s immunizations via immunization activity. |  |
| 5 | Follow up on Hospital and ER visits | * Obtain records from facility. * Once records are received, scan records, stamp “Scanned” * Put paper records into provider MD non-urgent in-basket. Document “Records/Results given to [provider name], [Date], [Initials] in Appt. Note. |  |
| 6 | Speak with MD regarding outstanding questions |  |  |
|  | ***One (1) Day Prior to Visit*** |  |  |
| 1 | Check Appointment Notes and complete missing items | * Check for Referral, Labs, Abstraction (RLA) Status * Attempt to obtain missing items. Anything not completed is noted in Appt notes. |  |
| 2 | Pend Health Maintenance Orders | * Pend needed HM orders * Example: Mammogram, referral to optho for diabetic eye exam |  |
|  | ***Day of Visit*** |  |  |
| 1 | Review Same Day “Reason for Visit” | * Attempt to obtain any missing items. |  |
| 2 | Check procedure kit availability | * Locate needed kit in lab * Ensure contents are complete * Prep room if necessary |  |