

## APPENDIX B-1: Primary Care Clinic, Client Appointment Booking Guide

Description	Instructions	Length <sup>1</sup> (Minutes)	Type <sup>2</sup> (from drop-down box)	Reason (from drop-down box)	Appointment Details Notes <sup>3</sup>
Complete Exam (with MD/NP)			Complete Physical	(n/a)	
Complete Exam (with PCN)	Book before MD/NP; alternate between PCN's on duty; do not book with Float PCN		Complete Physical	(n/a)	
Case Conference	Case conferencing is a more formal, planned, and structured event separate from regular contacts about a specific patient		Long / Short Visit	Case Conference	See Appendix C
Diabetic Review (PCN)			Long Visit	Diabetes Review	
Dietitian (follow-up visit)			Long Visit	(n/a)	Follow-up
Dietitian (new referral)			Long Visit	(n/a)	New referral
Forms Completion	EIA Disability, General, Insurance, MPIC, WCB		Long Visit	Form (choose form from list)	
Home Visit	Booked by or with direction from Provider		Off Site	Home Visit	
Hospital Discharge			Long Visit	Hospital Discharge	Approx. discharge date
Immunization (with PCN)	Book <b>after</b> Well Baby/Child appointment with MD or NP		Long Visit	Immunization	
Medication Refill			Short Visit	Prescription Refill	
Meeting	If non-client, select "No Patient"		Meeting	(n/a)	
New Client (MD)	Tasked to PCA to book appt		New Client	New Client MD/NP Meet & Greet	
New Client (NP)	Tasked to PCA to book appt		New Client	New Client MD/NP Meet & Greet	
New Client History (PCN)	Booked by Clinic Coordinator or delegate		New Client	New Client Initial PCN Intake	
Pap test			Long Visit	PAP	
PEP	Booked with NP		Long Visit	(n/a)	PEP
Pregnancy test (MD)			Long Visit	Prenatal	
Prenatal (first visit with MD/NP)	Book on <b>same day but after</b> PCN		Long Visit	Prenatal	
Prenatal (first visit with PCN)	Book on <b>same day but before</b> MD/NP; alternate between PCN's on duty; do not book with Float PCN		Long Visit	Prenatal	
Prenatal (follow-up visit)			Short Visit	Prenatal	Follow-up

Description	Instructions	Length <sup>1</sup> (Minutes)	Type <sup>2</sup> (from drop-down box)	Reason (from drop-down box)	Appointment Details Notes <sup>3</sup>
Pre-Op (with MD/NP)	Includes pre-op form completion		Pre-Op	Form – Pre-op	
Pre-Op (with PCN)	<b>Book before MD/NP;</b> alternate between PCN's on duty; do not book with Float PCN		Pre-Op	Form – Pre-op	
Procedure Assist (with PCN)	Do not book with Float PCN		Long Visit	(n/a)	(as needed)
Psychiatrist (initial)			Long Visit	(n/a)	Initial
Psychiatrist (follow up)			Short Visit	(n/a)	Follow-up
RaY Client	Booked by or as directed by NP		Off Site	RaY Clinic	
Rounds	Representatives from all disciplines of the care team gather to discuss treatment plans for multiple patients under their care		Long Visit		(See Appendix C)
Shared Care Counselor	Initial or follow up		Long Visit	(n/a)	Initial or Follow-up
Social Work	30 minutes or longer		Long Visit	(n/a)	
Standard Appointment	1 specific concern or follow-up visit		Short Visit Long Visit	(n/a)	Details of concern
STI check (female)	15 minutes if Urgent		Short Visit Long Visit	(n/a)	STI check
STI check (male)			Short Visit	(n/a)	STI check
TB New Client (PCN)	For NEW TB Client (book MD appointment in last 30 minutes with PCN)		New Client	New Client Initial PCN Intake	TB New Referral
TB New Client (MD)			New Client	New Client MD/NP Meet & Greet	TB New Referral
Telephone consultation/visit	Used by the MD or NP		Short Visit Long Visit	Telephone Visit	
Well Baby/Child (with MD/NP)	Book <b>Immunization with PCN after</b> Well Baby/Child		Long Visit	(n/a)	

#### Appointment Types

Type	Colour
Complete Physical	Red
General Office Visit	Green
Long Visit	Blue
Meeting	Brown
New Client	Pink
Pre-Op	Orange
Short Visit	Cyan
Walk-in	Light Green
Off Site	Purple

<sup>1</sup>Refer to **Global Comments** for booking times for certain clients otherwise use length (as per clinic)

<sup>2</sup>An appointment **must always include a Type**

<sup>3</sup>Free text **pertinent information** into the Appointment Details Notes box

#### When a client calls in requesting to see a doctor urgently:

- check if their Office Provider is available and offer appointment
- if client's Office Provider is not available, offer the client an appointment with a Provider (doctor or NP) who is available
- if no doctor or NP available, take message and send an Urgent Task to all PCN's
- if client feels he/she can wait to see their own Provider, offer next available appointment