

## Visit Rescheduled

Used to document when a previously scheduled visit is unable to be completed **and** was rescheduled during the contact.

**Note:** If the visit was canceled, you will be documenting in Visit Canceled, **NOT** Visit Rescheduled

### Session Requires:

- Click on “Reschedule” in the alerts on the right hand side of screen in Function Portal
- Answer all questions in the session

The screenshot displays the Function Portal interface. The main content area shows a list of sessions under the 'Sessions' tab. The top session, ID 1720357, is titled 'Visit Rescheduled' and occurred on 11/2/2023 from 3:38 pm to 3:39 pm. It is marked as 'Active' and 'Submitted successfully'. The session was scheduled by 'Incoming Call Received'. Below the session details are dropdown menus for 'Visit State (1)', 'Contact (17)', and 'Details (5)'. The bottom session, ID 1720322, is also titled 'Visit Rescheduled' and occurred on 10/31/2023 from 10:33 am to 10:34 am. The sidebar on the right contains several alerts and actions: '0 of 2 Face to Face Visits This Year' (2 visits remaining), 'CAO Recertification' (Due on 6/5/2022), 'NPO Date' (Completed on 8/9/2022), 'Annual Contact' (Due on 9/9/2023, Scheduled for 11/2/2023 12:00 pm, Scheduled by Incoming Call Received), and 'HRA/DSNP' (Due on 10/30/2023). A red overlay menu is visible over the 'Annual Contact' alert, containing options: 'DOCUMENT', 'RESCHEDULE', and 'CANCEL'.

### Process:

- 1) When an SC has contact with the participant/POA and they want to reschedule the visit at the time of the call (ie. The participant forgot they have a doctor’s appointment at the same time they scheduled the visit and they reschedule the Annual visit for the next day).
- 2) Service Coordinator must document the specifics of the contact in a Function Portal Session.

### Documentation:

- 1) The alerts on the right hand side of the Function Portal screen will show an option to “Reschedule” the visit.
- 2) Once you select the option to “Reschedule” the visit, Function Portal will populate questions based on whether the visit is past due or has an upcoming due date.

- 3) SC must specify how the contact took place
  - a) Telephonic
  - b) Face to Face
    - i) Example: If the SC went to the visit and the participant needed to reschedule due to feeling ill.
- 4) SC must specify who they spoke with to reschedule the visit, if it is not the participant, then the SC must also list their relationship to the participant (ie. POA, Guardian).
- 5) SC must select the most appropriate reason for the visit being rescheduled
  - a) Hospitalized
  - b) Nursing Facility
  - c) Feeling ill
  - d) Scheduling conflict
- 6) SC must then document the date and time the visit was rescheduled to take place.
- 7) If all of the participant/POA's issues were addressed during the contact, then the SC should select that no follow up is required. If the SC needs to do any follow up with the participant/POA, then the SC should select that follow up is required and enter the specifics of what follow up will be done, when, and by whom.

**Note: Visits should never be rescheduled due to an issue on the SC side (ie. SC double booked visits)**