Scheduling, Canceling, or Rescheduling a Visit in Function Portal

1. Scheduling
   a. When scheduling a visit the SC will document this interaction with the participant/POA through an "Incoming Call" or "Outbound Call" session in Function portal.
      i. Both the "Incoming call" and "Outbound call" are found in the "Sessions" tab in a participants file in FP, by click on the pink "+" at the bottom of the screen.
      ii. Reference the "Incoming Call" or "Outbound call" in the Function Portal Session Manual that is housed in Knowledge Base, for details on how to complete these sessions appropriately.
   b. If the SC is calling the participant to try to schedule a visit and the participant is not available, refuses the visit, or if the <u>visit is already past due</u>:
      i. An "Unsuccessful session" is used to document the interation
2. Canceling
   a. When a previously scheduled visit needs to be canceled **AND** can not be rescheduled at that time. Ie. A participant is deceased or a participant is in the hospital and discharge date is not yet known.
      i. Once a visit is scheduled for a participant, the option to "Cancel" can be found on the right hand side of the participant's file, in the Alerts.
      ii. Reference the "Canceling a Visit Guide" found in Knowledge Base, for details on how to complete this session appropriately.
3. Rescheduling
   a. When a visit can not be completed at the time it was previously scheduled to take place **AND** is able to be rescheduled at that time. Ie. A participant forgot they had a doctor's appointment on the day of the visit and the participant wants to move the visit to the next day.
      i. Once a visit is scheduled for a participant, the option to "Reschedule" can be found on the right hand side of the participant's file, in the Alerts.
      ii. Reference the "Rescheduling a Visit Guide" found in Knowledge Base, for details on how to complete this session appropriately.