

Phreesia: Appointment Workflow

Last Modified on 06/08/2021 10:05 am EDT

About

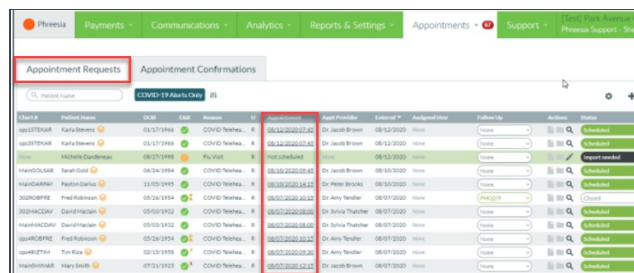
In order to schedule an appointment, a patient must have an active status. Below is a list of unacceptable (inactive) patient statuses and will not be supported if trying to self-schedule an appointment for a patient with one of these statuses. All other statuses other than the ones below are considered active/acceptable by OP.

- Inactive
- Transferred
- Merged
- Discharged
- Deceased
- Call Coverage
- Visitor
- Waiting List

Schedule an Appointment


1. The parent/patient navigates to the practice website for Phreesia scheduling.
2. Available appointment slots display. The parent/patient selects an appointment slot to schedule an appointment.
3. The parent/patient enters the following information to search for a patient record in OP: First name, Last name, DOB, Gender, Preferred phone number, and address.
4. The below will occur dependent upon the patient search.

- **New Patient:**
 - **OP:** Schedule the patient appointment.
 - **Phreesia:** Review the **Appointments HUB > Appointment Requests**.
- **Established Patient/Multiple Patient Matches:**
 - **OP:** Search for the correct patient record and schedule the appointment.
 - **Phreesia:** Review the **Appointments HUB > Appointment Requests**.
- **Established Patient/Single Patient Match:**
 - **OP:** The appointment is scheduled assigned a status of Unconfirmed.
 - **OP:** If the appointment is for a Well Visit, the correct template will be chosen on age and gender.
 - The scheduled appointment is saved in the **Appointments HUB**.



Patient ID	Patient Name	PMS	EHR	Branch	Appointment ID	Appointment Date	Appointment Time	Appointment Provider	Appointment Status	Action
100123456	John Doe	OP	OP	Branch A	100123456	06/08/2021	10:00 AM	Dr. John Doe	Unconfirmed	Cancel
100123457	Jane Smith	OP	OP	Branch A	100123457	06/08/2021	11:00 AM	Dr. Jane Smith	Unconfirmed	Cancel
100123458	Michael Johnson	OP	OP	Branch B	100123458	06/09/2021	09:00 AM	Dr. Michael Johnson	Unconfirmed	Cancel
100123459	Sarah Lee	OP	OP	Branch A	100123459	06/10/2021	08:00 AM	Dr. Sarah Lee	Unconfirmed	Cancel
100123460	Patrick Garcia	OP	OP	Branch A	100123460	06/11/2021	09:00 AM	Dr. Patrick Garcia	Unconfirmed	Cancel
100123461	Frank Robinson	OP	OP	Branch A	100123461	06/12/2021	10:00 AM	Dr. Frank Robinson	Unconfirmed	Cancel
100123462	David Wilson	OP	OP	Branch A	100123462	06/13/2021	11:00 AM	Dr. David Wilson	Unconfirmed	Cancel
100123463	Christina Brown	OP	OP	Branch A	100123463	06/14/2021	09:00 AM	Dr. Christina Brown	Unconfirmed	Cancel
100123464	Tim King	OP	OP	Branch A	100123464	06/15/2021	10:00 AM	Dr. Tim King	Unconfirmed	Cancel
100123465	Mary Green	OP	OP	Branch A	100123465	06/16/2021	11:00 AM	Dr. Mary Green	Unconfirmed	Cancel

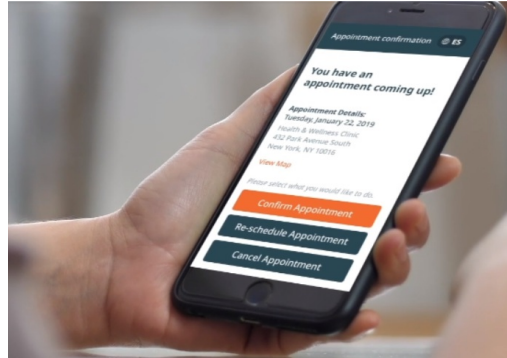
Confirm, Cancel or Reschedule an Appointment



Best Practice Recommendation: Because Phreesia practices are likely going to want all of their patients to always receive a Phreesia pre-registration/patient intake link usually a couple of days ahead of the patient’s scheduled visit, and this pre-registration link simultaneously acts as an Appointment Reminder that captures appointment Confirmations, Reschedule requests, and Cancellations, it is our **best practice recommendation for the Phreesia practice to fully**

disable their Appointment Reminders via OP Notify or Patient Message Exchange (PMX) so that their patients are not receiving multiple channels of appointment confirmations that will confuse the patient/parent, and complicate the front office staff workflow.

1. Click the pre-registration/patient intake link to open the Appointment confirmation window.



2. Review the appointment details and select an action.

- **Confirm Appointment**

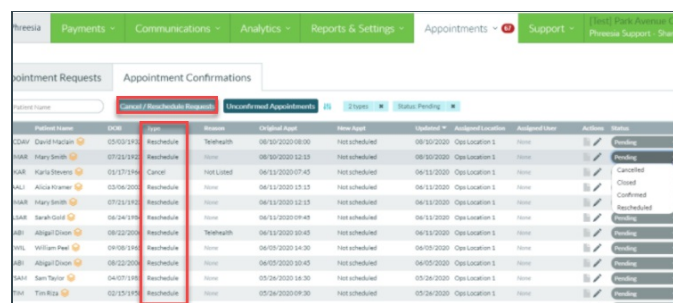
- **Phreesia:** Places the appointment in the Appointment Confirmations tab of the Appointments HUB. The pre-registration/patient intake workflow is initiated.
- **OP:** The Confirm Status of the appointment is set to Confirmed.

- **Re-schedule Appointment**

- **Phreesia:** Places the appointment in the Cancel / Reschedule window in the Appointment Confirmations tab of the Appointments HUB.
- **OP:** The Billing Status of the original appointment will change to Cancelled. A new appointment will be created with a Confirm Status of Unconfirmed.

- **Cancel Appointment**

- **Phreesia:** Places the appointment in the Cancel / Reschedule window in the Appointment Confirmations tab of the Appointments HUB.
- **OP:** The Billing Status of the appointment will change to Cancelled.



Patient Name	Date	Action	Reason	Original Appt	New Appt	Updated	Assigned Location	Assigned User	Action	Status
DAF David Hagan	03/03/19	Reschedule	TenHealth	06/30/2020 08:00	Not scheduled	06/30/2020	Class Location 1	None	🗑️	Pending
MAR Mary Smith	07/21/19	Reschedule	None	06/30/2020 12:13	Not scheduled	06/30/2020	Class Location 1	None	🗑️	Pending
MAR Karla Stevens	03/17/19	Cancel	Not Listed	06/13/2020 07:45	Not scheduled	06/13/2020	Class Location 1	None	🗑️	Cancelled
ALI Alicia Kramer	03/04/20	Reschedule	None	06/13/2020 12:13	Not scheduled	06/13/2020	Class Location 1	None	🗑️	Confirmed
MAR Mary Smith	07/21/19	Reschedule	None	06/13/2020 12:13	Not scheduled	06/13/2020	Class Location 1	None	🗑️	Rescheduled
JAR Sarah Gurd	06/24/19	Reschedule	None	06/13/2020 09:48	Not scheduled	06/13/2020	Class Location 1	None	🗑️	Pending
MAR Abigail Chinn	06/22/20	Reschedule	TenHealth	06/13/2020 09:45	Not scheduled	06/13/2020	Class Location 1	None	🗑️	Pending
MEL William Paul	04/08/19	Reschedule	None	06/03/2020 14:38	Not scheduled	06/03/2020	Class Location 1	None	🗑️	Pending
MEL Abigail Chinn	06/22/20	Reschedule	None	06/03/2020 10:42	Not scheduled	06/03/2020	Class Location 1	None	🗑️	Pending
MAM Sam Taylor	04/07/19	Reschedule	None	05/24/2020 14:38	Not scheduled	05/24/2020	Class Location 1	None	🗑️	Pending
THA Tim Riza	02/15/19	Reschedule	None	05/24/2020 09:38	Not scheduled	05/24/2020	Class Location 1	None	🗑️	Pending



Note: Always follow your practice policy when an appointment is canceled for a patient.