Pre-Appointment Checklist and Work Queue Function Guides for 1.2

**Purpose:** the electronic management tool used to manage the tasks that need to be accomplished and documented before the patient clinic appointment.

**Initial Set Up and Configuration Process**

1. From a Clinical Workstation (CWS), click on the Star Panel icon on the desktop. From an Administrative Workstation (AWS):
   
   A. Click on your internet browser and enter the following address: www.mc.vanderbilt.edu/employees/
   B. Scroll down to the Star Panel link and click on it to select.

   *Another option is to click on your internet browser, click on the web address field and type the words, Star Panel, and press enter.

2. Login to Star Panel using the RACF ID which is the same ID and password used for the CWS (Fig. 1.1).

3. Click on **Dashboards** and select **PreAptWQ-not done** by clicking on the option in the black tool bar on the left side of the screen (Fig. 1.2).

   **Pre-Apptiont Work Queue Options**

   **PreAptWQ-not done**: displays list of patients whose checklist is not complete.

   **PreAptWQ-all**: displays list of patients whose checklists are complete with those who are not complete.

   The PreAptWQ Summ options are links to the manager reporting tool for the work queue checklist, and are clinic specific. Access to these reports are security based.
4. Next, click on the blue link for change Visits Selection (?) (Fig. 2.1).

![Figure 2.1](image)

Clicking on the question mark will bring up (in a separate window) instructions on how to use the Change Visits Selection feature.

5. Star Panel provides three options for setting up the work queue: Provider(s), Location and Provider(s), or Location. Select the appropriate option by clicking on the radio button beside the one you wish to use (Fig. 2.2).

![Figure 2.2](image)

A. **Provider and Location** - this option allows you to pull appointments by provider and Epic department. This would be beneficial if some of the providers in your department also work/have patients scheduled under multiple department numbers, allowing you to specify the department number for your clinic area.

B. **Provider(s)** - allows you to enter provider numbers or names for individual providers. Enter the ID number or last name, first name of the provider in the Add a provider field and press enter. When you select this option, the search box for Location(s) will disappear.

C. **Location** - by entering the Epic department number or name of the Epic department specific to your clinic area, appointments scheduled with providers in those departments will display. To enter multiple numbers simply press the Space Bar after each entry. When you select this option, the search box for Provider(s) will disappear.

“What do I do if I enter the wrong provider name/number (or department name/number)?”

To remove a department or provider entered in error, simply click on the name/number of the one you want to remove. You will then be asked if you want to remove the name selected. Click Yes to remove the name or No to go back to the Outpatient Visits Selector.
If you enter multiple providers and/or department numbers, the text will wrap around so you will see all the items entered (Fig. 3.1).

6. Filter the work queue to display the visit types and appointment statuses you will be working by clicking on the checkboxes beside Filter by appointment type and Filter by appointment status & select the appropriate visit type(s) and statuses (Fig. 3.2).

7. Select the date range for appointments to display (Fig. 3.3). By date will default, which will display the current date’s appointments. To specify a date range beginning with the current date, enter an ending date in the Ending on field. To view the next three, seven, or fourteen days, select Today and the next (Fig. 3.4).

8. You can create and save multiple work queues. To name the work queue you just created, click on the link labeled delete/rename/create (Fig. 3.5) and on the next screen select the option to Rename this selection (Fig. 3.6). The name assigned to the work queue will be “undefined” if no name is created for the queue.

Clicking on the delete/rename/create link also provides the opportunity to delete a work queue or create a brand new work queue. If you create multiple work queues and you need to find a specific one, click on the drop down arrow and select the work queue you wish to view (Fig. 3.7). The work queues created will be listed in alphabetical order.
9. After naming the work queue, click **Apply** (this will also save your preferences/filters just created) in the upper right corner (Fig. 4.1). If you click the X in the left corner, no settings will be saved. Clicking the — will minimize the Outpatient Visit Selectors box. After clicking **Apply**, Star Panel will refresh and the framework of the work queue will display.

10. Next, add the Pre-Appointment Checklist and Indicator columns to the display by clicking **Customize** (Fig. 4.2), then select **Columns** (Fig. 4.3).

11. Select **Pre-appt** and **Indic** from the list of columns by clicking on each item, then click **Apply** to add the columns to the work queue.

If a date range was used when setting up the work queue, that information will display (i.e. today + 7 days).
Using the Pre-Appointment Checklist and Work Queue

1. To begin, click on the checklist link in the Pre-Appt column for the patient you will be working (Fig. 5.1).

2. The checklist will display patient and clinic pre-appointment specific tasks, broken down into five tabs: Administrative, Specific Clinic Information, Clinical, Contact Information and Comments. (Fig. 5.2).

   - **访客类型**
   - **预约具体信息**：提供者，Epic部门#，日期和时间。
   - **患者MRN，姓名和DOB**。

   - **预预约检查表标签**
   - **更改检查表到你的部门**，选择“选择你的诊所”并选择适当区域。

   - **历史编辑**
   - **显示历史**
Definitions of Pre-Appointment Checklist Tabs

1. **Administrative** - used to indicate whether or not the necessary administrative tasks (i.e. referral obtained, consult requested from referring physician, and/or call transferred to Central Registration to have insurance loaded in Epic) have been communicated/requested, received, and ultimately completed (Fig. 6.1).

2. **Specific Clinic Information** - this tab will display clinic specific needs that must be ready for the patient's appointment with the provider (Fig. 6.2). When the checklist and work queue are configured, you select the work queue that is specific to your clinic. The provider would need to review this information prior to the patient’s scheduled appointment in order to deliver the highest quality of care possible. Information can include imaging reports/films/CDs, pathology reports/results, and pathology slides.
3. **Clinical** - used to indicate whether or not any clinical issues have been discussed with the patient regarding the appointment such as patient history, clinic patient expectations, and medication reconciliation (Fig. 7.1).

<table>
<thead>
<tr>
<th>Administrative</th>
<th>Breast information</th>
<th>Clinical</th>
<th>Contact info</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Complete?</strong></td>
<td>Comm./Request.</td>
<td>Complete</td>
<td>Comments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Y</td>
<td>N/NA</td>
<td>Y</td>
<td>N/NA</td>
</tr>
<tr>
<td>Clinical pt. expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient History</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meds. Reconciliation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Problem list</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 7.1

4. **Contact Information** - displays patient demographics, primary care, and referring physician information from Epic (Fig. 7.2).

![Pre-appointment Checklist](image)

If there is more than one contact number for the patient, you have the option to indicate a preferred phone number.

Figure 7.2

5. **Comments** - a free-text box used to enter any general comments related to the patient’s appointment (Fig. 7.3).

![Comments](image)

Figure 7.3
A history of general comments is maintained in this tab. After a comment is entered, click the **Save and Close** button to exit the checklist. Click on the tab again and the previous comments will display below the text box (Fig. 8.1). If a comment has been entered, the most recent comment will display at the bottom of the check list (Fig. 8.2).

![Figure 8.1](image)

<table>
<thead>
<tr>
<th>Our comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient is moving in 2 wks. Will call with new address.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Previous comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speight, Meredith B 2009-08-12 14:52:12.</td>
</tr>
<tr>
<td>Contact patient once records received.</td>
</tr>
</tbody>
</table>

Each comment is time and date stamped. The name of the person who entered the comment also displays.

**Comment Alert**

If any general comments have been entered for a patient, this information will display at the bottom of the checklist upon opening. The comments should be reviewed for any instructions or other important information before proceeding with the checklist.

![Figure 8.2](image)

### Indicating the Status of a Task on the Checklist:

**Is the task complete?**

*The Pre-Appointment Checklist has three general columns for indicating the status of a task: **Communicated/Requested, Received**, and **Complete**. Within the columns, the question is implied, “Is this task complete?” The answers are, “Yes”, “No,” and “N/A” (Not Applicable).*
To select an option (i.e. to indicate that you have requested a referral from the referring provider):

1. Find the appropriate task (Fig. 9.1).
2. In the Comm./Requested column, click on the button under the option for Y, for yes, N for No, and N/A for not applicable (Fig. 9.2).

To deselect a task/option (i.e. selected Y instead of N):

1. Click on the Uncheck an answer link located at the bottom of the tab (Fig. 9.1).
2. Next, click on the button you want to deselect and the green dot will disappear.
3. The history for this task will display stating who deselected the task and when.
4. The Uncheck an answer feature is located at the bottom of each tab in the checklist.

*Note: the Clinic Specific tab may contain more options depending on the needs of that clinic, while the Clinical tab may only have two options.

For the New Pt. paperwork task, when Yes is selected, the user must indicate how the paperwork was sent: email or standard mail.
**Complete?**
The checklist provides a function called, Complete?, that will display any tasks that have been left blank. By clicking on this option, the checklist will cause any blank tasks to flash on the screen.

The Complete? function is only available in the Administrative, Clinic Information, and Clinical tabs. If you need to indicate there is any work left to do or that needs to be completed, leave the Completed or Received columns BLANK. This will make the indicator RED on the WQ telling the person responsible that work needs to be done.

**Saving Work on the Checklist**
The checklist provides two options for saving work: (both options are located on the upper right corner of the checklist and are available at all times)

1. **Save** - clicking on this button will save any changes made to the tasks, while keeping the checklist displayed on the screen.
2. **Save and Close** - this button will save any changes made to the tasks, and will close the checklist for the patient.
**Show History** will display what has been updated or edited by user and date. This information will be displayed in the panel below the checklist. Each time the checklist is saved, the changes are added to the history with the most recent changes displaying first.

To view the history for an individual task, simply click on the task and the history for that task will display in the panel below the checklist. The example below displays the history of changes to the Release of Information task.

**This function is very helpful when reviewing previous/past task specific comments.**
Exiting the Checklist

*To exit without saving any changes (i.e. the wrong checklist was accessed), simply click on the X in the upper left corner of the checklist.*

Minimize and Maximize

To minimize the checklist, click on the — in the upper left corner.

To maximize, simply click on the + to expand the patient’s checklist.
Indicators

Once a checklist has been accessed and work has begun, the Pre-Appointment Work queue will display the overall status of the pre-appointment tasks in the Indicator column for each indicator that was selected during initial configuration.

- **Red** - tasks not started.
- **Yellow** - tasks in progress.
- **Green** - tasks completed.

**NOTE:** if there are no colors/indicators, a checklist has not been started.

Accessing the Checklist from a Patient’s Medical Record Number

1. Copy (Ctrl-C) the MRN in Epic (Fig. 13.1).
2. Paste (Ctrl-V) the MRN in the Patient Lookup box in Star Panel and press Enter or Click the magnifying glass to access the medical record (Fig. 13.2).

**NOTE:** using right click to copy and paste MRNs from Epic to Star Panel does not work on a CWS.
3. Click on the link for Apptm. in the yellow area of the patient’s chart (Fig. 14.1).

4. A list of the patient’s appointments will display along with a link to the checklist (Fig. 14.2). Use this link to begin the checklist (Fig. 14.3). NOTE: Checklists from ALL appointments, past and future are available, but past checklists cannot be edited and/or saved.
How Registration Information is Sent from Epic to the Checklist in Star Panel

The registration information that appears in the Contact Information tab (i.e. demographics, PCP and referring provider information) in the checklist is sent from Epic to Star Panel when a user exits the patient record/Appointment Desk. If the Appointment Desk for a patient is left open after scheduling the appointment, the registration information will not appear in StarPanel until the patient is closed the Appointment Desk.

Canceling and Rescheduling Appointments/Copy Forward

If a patient schedules an appointment and a checklist is started, and the patient cancels the appointment, the information collected in the original checklist can now be copied from a past/cancelled appointment to a future appointment. If the checklist for the cancelled appointment is 30 days old or greater, the information cannot be copied into a new checklist.

To copy one checklist into another, follow the steps outlined below.

1. Select the checklist from which you want to copy pre-appointment information.

2. Open the checklist, and click on the link that reads, “Copy data to another appt.” (Fig. 15.1).

3. The next screen will display all the future appointments for the patient (Fig. 15.2).

Click on the appointment in which the opened checklist is to be copied.
4. A warning will display (Fig. 16.1) asking you to verify that you want the data from that checklist into the appointment selected. Click **Ok** to confirm and copy the checklist, or **Cancel** to prevent the checklist from copying into the selected appointment.

![Figure 16.1](image)

**Important points to remember about copying checklists:**

- Copying is only permissible to a future appointment and not a past appointment.

- Show History will display who copied the checklist, from which appointment it was copied, and the appointment to which it was copied.

- If the appointment date is older than 30 days, the checklist will not be available for copying forward.