

Procedures: Scheduling Patients

Date Written: 08/07

Date Revised: 08/09

Sumlar Therapy Services, Inc.

Individual Therapists' Schedules

Each therapist should complete a schedule form and turn into the Executive Director and OA (Office Administrator) the first week of every month.

The weekly schedule form has one slot for every thirty minutes Monday through Friday.

- ✓ You may use last names or initial codes to record your schedule.
- ✓ Record your expected patient visits to the nearest thirty minutes.
- ✓ More than one name can be written in a slot to indicate group therapy, or to indicate patients that share an every-other-week slot.
- ✓ When more than two patients are sharing a time slot, such as once-per-quarter students and once-per-month students, use a symbol * to mark the time slot and provide a key in the margin with the appropriate patient names listed.
- ✓ If more than one such time slot is required, choose another symbol ** and create another key.
- ✓ Travel times should be noted, as well as expected lunch breaks.

Therapists should adhere to their planned schedule as closely as possible. Parents, teachers, paraprofessionals, fellow therapists, and the children all are anticipating that you will be on schedule, and appreciate as few changes as possible.

School Schedules

Therapists will be assigned school caseloads each fall prior to the beginning of the school year. During the first week of school, each therapist will gather information regarding each of their students' daily schedules, and will devise a working schedule and choose the day of the week they plan to provide services at each school.

Therapists are expected to maintain consistency in the schools by following the daily and weekly schedule that they have created. There may be times that changing the day of the week will be advisable and preferable to improve the quality of service (i.e., when a holiday falls on your regularly scheduled school day, or for supervisory visits).

Early Intervention Schedules

Therapists schedule their EI patients for evaluations and for therapy visits, giving equal consideration to the availability of the therapist's schedule, as well as the family's requests.

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Therapists are expected to maintain consistency for their EI patients by following the daily and weekly schedule that they have created. There may be times that changing the day of the week will be advisable and preferable to improve the quality of service (i.e., when a holiday falls on your regularly scheduled day, rescheduling secondary to patient illness, or for supervisory visits).

Clinic Schedules

The master clinic schedule is reorganized at least twice per year by one individual or a group that determines the most effective layout, taking into account patient and family requests and availability of therapists, hippotherapy, and aquatic therapy. From that point on, the OA maintains the schedule in the computer system.

Therapists can make permanent changes to the schedule by noting the change on the *Clinic Schedule Change* forms, which are located on a clipboard in the OA's office.

When a therapist receives an e-Referral, the therapist should consult any other therapists involved to organize the evaluation schedule if possible (i.e., a new referral for OT and ST) and call the parents to schedule the evaluation. The time should then be noted on the master schedule as well as the therapist's personal calendar.

Following the evaluation and determination of frequency for each involved discipline, a time should be agreed upon by the therapist(s) and the family. The therapist(s) are to initiate this discussion with the family, ideally within just a few days of the evaluation(s). The therapist is then to note the time on the current master schedule, as well as note the time on the *Clinic Schedule Change* form.

It is the therapist's responsibility to respond to their patients' arrivals in the clinic. The office staff will not notify therapists of their patients' arrivals and cancellations. Cancellations will be noted on the master scheduling board posted in the hallway.

Reorganizing the Clinic Schedule—Summer and Fall

The clinic schedule is reorganized each summer and fall to accommodate issues with hippotherapy, aquatic therapy, the weather, and the children's school schedules. The process begins six weeks prior to the anticipated change date.

WEEK ONE, TWO, AND THREE—Gathering Information

- Office Administrator makes *Schedule Request* forms available to families, and posts signs to alert the families and therapists.
- Therapists and office personnel assist each family to fill out their request forms, explaining that younger children generally need to come in earlier in the day.

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- OA monitors active clinic patient list to ensure every family has filled out a *Request* form. The OA will identify those families who have not completed the form, and call the family (or select another individual to place the call) to complete the form over the phone.
- The OA will place the patients' forms in a central location convenient for therapists.
- Therapists fill out the bottom of each form, identifying their desires for their patients' schedules for OT, PT, and speech. Therapists may make notes on the forms to clarify their requests. Therapists will add the initial codes to the top of each form.

WEEK FOUR—Creating the Proposed Schedule

- Two to four therapists will work together to review the *Request* forms and prepare the Post-It "tabs," designating one color each to represent Speech, PT, and OT, noting initial codes for each patient on the correct tab, circling the initial code for hippotherapy, and designating aquatic therapy and "every other week-ers" with a unique symbol. The tabs will be kept on the patients' *Request* forms.
- The schedule poster boards will be posted on the wall, and available schedule "lines" will be designated for therapists by using the designated color tabs, noting PT, OT, or ST on each tab, heading the columns. (Therapists will not be assigned to lines yet.)
- Therapists will start scheduling the most complex patient schedules (i.e., three therapies) first, ending with the simplest schedules (i.e., one therapy). Tabs with initial codes will be used to reserve time slots on the poster schedules. The following may be used as a guideline:
 - Three therapies
 - Very specific time requests
 - Hippotherapy
 - Two therapies
 - One therapy
- Consideration will be given to working parents, military parents, students with homework and academic classes late in the day, long-term patients, etc.
- Therapists may need to contact parents during the process to clarify requests or to inquire about alternate suggestions.
- When all of the tabs have been placed, therapists will review the *Request* forms and compare the suggested schedule with the parent's request. Discrepancies will be resolved.
- Suggested days and start/end times are recorded on the *Request* forms. As times are transferred to the *Request* forms, a mark is made on the tabs.
- Any tabs unmarked are checked against the *Request* forms to catch errors.
- Tabs are taped down on the poster schedule.
- Times are transferred from the poster schedule to a handwritten copy, and presented to the OA.

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- OA, or designated employee, prepares notification letters for parents.

WEEK FIVE—Communication of New Schedules

- OA posts signs to notify parents of impending schedule change and that their new schedule is available for pick-up.
- Any forms that are not picked up are mailed to parents by OA.
- OA and other designated employees field parents' requests for time changes.

WEEK SIX—Finalization of New Schedule

- Therapists and Executive Director meet to assign therapists for clinic therapy.
- Any changes are noted and presented to the OA, along with the therapist assignments.
- OA inputs completed schedule into the computer to finalize.
- Selected employee compares computer schedule to poster schedule.
- Tabs are removed from posters and posters are stored.
- OA insures that all parents are knowledgeable regarding new schedule. Phone calls may be necessary to ensure a smooth transition.