

Treatment Plan Follow Up Policy

- At the end of the consult with a patient, the treatment plan coordinator needs note what happened with the patient and any follow up that is needed. They should put notes in the appointment screen and note if there is anything that needs to be remembered for their next visit, such as the amount to collect, etc.
- Fill in the auto note called “Consult Note” and follow the outline displayed. At the end of the notes, the treatment plan coordinator should put amount presented, the dollar amount accepted and the date that they scheduled so that the doctor can go into the notes from the treatment plan coordinator at any point, review what happened, and see when they are scheduled.
- The doctors should also make sure that they put in their notes regarding the appointment, send out any appropriate referral letters or follow up with treatment plan coordinator on anything outstanding.
- If there are notes on the treatment plan, it should then immediately be scanned in. This process will help to avoid having to track down the treatment plan, the treatment plan coordinator, the doctor, etc... all notes and stats needed by the doctor should be documented in the notes.
- There are multiple people doing handling consultations with patients within our office and the policy of how to do a consult should be followed by the treatment plan coordinators. However, after the consultations are done and notes are put in, a manager should review them on a daily basis to ensure everything is being done correctly and look for any red flags. This second set of eyes helps to ensure that policies are being followed, patients that get scheduled will show up and anything that might be an issue can get handled sooner than later.
- The easiest way to do this is to print a copy of the daily schedule for each treatment plan coordinator and throughout the day, circle the consults that you were involved in. Then at the end of the day, ensure that all notes were put in for your consults as well as all necessary follow up was done.
- Once everything is completed by the treatment plan coordinator, the copy of the circled schedule needs to go into the manager’s box to be reviewed.
- The manager is then responsible to review all the notes re: consultations, double check when patients were scheduled, etc.... If there are corrections or suggestions by the manager regarding that patient or how things were handled, it is the manager’s responsibility to circle around with the appropriate treatment plan coordinator to make sure everything is handled correctly.

Weekly Treatment Plan Meetings

- On a weekly basis, each doctor should have a meeting with the treatment plan coordinator regarding the status of the past week's patients. The Outstanding Treatment Plans Tracking Sheet should be used to track the patient name, overview of the treatment plan/situation, date the patient was called if not yet, and any notes. Once the doctor and treatment plan coordinator review the patients, the treatment plan coordinator takes the Tracking Sheet and works through the tasks to be accomplished for those patients. Throughout the week, the treatment plan coordinator tracks notes as to when patients were called, as well as notes on that sheet, and makes thorough notes in the chart.
- At the next weekly meeting, the treatment plan coordinator brings back the previous week's sheet to update the doctor on what happened with last week's patients. This should be done for 3 weeks total, with a phone call going out to the patients once a week after their initial visit if they did not initially book an appointment.
- Each week a new sheet is started for the most recent patients and the oldest 3 week old report is taken out since the patients have been contacted 3 times.
- After the 3rd week, the sheet gets then put into the office manager's box with the initial on the bottom of both the doctor and treatment plan coordinator.

Monthly Treatment Plan Meetings

- Monthly, the treatment plan coordinator and the doctor should go review all the outstanding treatment plans found on the report in EagleSoft. The Treatment plan coordinator is responsible for contacting each one of those patients monthly minimally, unless a greater frequency is necessary.