

## **DAISY SCHEDULING: Appointment Limits and Guidelines**

### **Scheduling/Appointment Guidelines:**

- **Always** have the All Staff Scheduling Calendar open when looking at available times for appointments. This prevents scheduling an appointment in the system for someone who has an override, or when the max number of visits for the time slot has been reached.
- No more than a total of six appointments can be scheduled at the same time due to space and lab staff availability.
- Never schedule more than **five** appointments per clinic staff a day unless you have spoken with them and been given an OK to do so.
- There are 3 DAISY stocked rooms, and 3 TEDDY stocked rooms. 1 of those rooms can have a DAISY or TEDDY appointment.
  - Exam rooms 1-3 are DAISY
  - Exam rooms 4,5 & 8 are TEDDY
- **EVERY time** you speak to or email with a family, record the contact in the scheduling attempts section for the subject.
- Please be appropriate and sensitive when recording comments in the scheduling attempts. If sensitive information needs to be recorded, use the C-Log and direct staff members there for family updates.
- Always check if a family has requested a certain clinic staff so that you can look for their availability. If a specific person is requested for the visit, please include this in the comments of the scheduling system when making the appointment. This will prevent a family being moved to an alternate clinician on the same day.
- If a family calls and cancels for the day, or if you move a subject to another clinician, call the front desk and lab to notify them of the change.
- To have a comment show up on the scheduling system, write them on the “Visit Comments” section in the DAISY database (located right above the calling comments area). Always write in when a certain clinic staff needs to be scheduled with them, blood draw notes, etc.
- Try to only schedule on the hour (i.e. 8:00am, 9:00am, etc.) instead of the half hour so that more appointments can be scheduled per day.
- Schedule 1 hour appointments for each participant (TEDDY or DAISY)
- Clinic staff should update No-Show appointments within an hour of the scheduled visit time. This timely update allows the subject to update on the appropriate calling list.

### **Scheduling Guidelines for Lab staff availability: Maximum numbers**

<i>Time</i>	<i>Maximum appointments for Monday</i>	<i>Maximum appointments for Tuesday</i>	<i>Maximum appointments for Wednesday and Thursday</i>	<i>Maximum appointments for Friday</i>
8:00am	2 subjects	2 subjects	2 subjects	2 subjects
9:00	5 subjects	5 subjects	5 subjects	5 subjects
10:00	6 subjects	6 subjects	6 subjects	6 subjects
11:00	4 subjects	4 subjects	4 subjects	4 subjects
12:00pm	2 subjects	2 subjects	2 subjects	2 subjects
1:00	6 subjects	6 subjects	6 subjects	6 subjects

2:00	6 subjects	6 subjects	6 subjects	6 subjects
3:00	6 subjects	6 subjects	6 subjects	4 subjects
4:00	3 subjects	5 subjects	5 subjects	
5:00		3 subjects	4 subjects	
6:00pm			3 subjects	

### **Evening/Saturday/Offsite Appointments**

- When families arrive late for evening or Saturday appointments, both clinic and lab will accommodate and see the family
- If family is more than 30 minutes late for an appointment, clinic staff will try to perform blood draw earlier in visit. Cold spray can be used for immediate blood draw, rather than waiting for EMLA.
- **Please notify lab staff of last-minute evening or Saturday cancellations**
- The lab coordinator may periodically block time out in the scheduling calendar due to limited lab staff availability
- Late arrival families on Saturdays can disrupt the clinic flow since the visits are scheduled back to back, every hour between 8am and 12pm. Clinic and lab will do everything possible to accommodate the family, even if it means that clinic staff will get the next family started and have the late family wait. Each family will be dealt with on a case-by-case basis. If a family no-shows or is frequently late to a Saturday appointment, we cannot offer them future Saturday appointments. Note this in the database so that all attempts can be made to encourage the family to come during the week for future visits.