



## **BJHCHS Preplanning Guidelines**

Use these guidelines to review the schedule and prepare for the next day. Please ensure that these guidelines are reviewed for each patient. On the schedule write down any pertinent information.

This is to be completed for the next day before close of business on that day. (Example: Tuesday's schedule is to be completed before close of business on Monday.)

1. Determine what the scheduled visit is for.
2. Follow up on any pending information for the patient: labs, referrals, ER visits, recent hospitalizations, etc. Please print any needed information, i.e. referral or ER visit notes, discharge summaries, etc.
3. Determine if any screening tests need to be completed or patient information needs to be given at the scheduled visit.
4. Determine if medication refills are needed.
5. Determine if immunizations are up to date.
6. Determine if physicals/well child checks are up to date.
7. Determine if there are any conflicts in the schedule, such as lengthy back to back appointments. If so, discuss these with the provider when you discover them.