Optimized Workflow for Scheduling Follow Up Visits
Children’s Specialty Clinics

This process is optimized for communicating In-Person and Virtual Visit follow-up needs so the Administrative Associates can contact the patient for follow-up scheduling. Additionally, it allows the AA’s to easily know the patient needs to be checked in for Virtual Visits.

Note: Steps 1-2 will only need to be completed once. Step 3 should be completed for every visit.

1. From the Follow-up activity, Click the Wrenches to customize A) Return in Intervals & B) For reason speed buttons.

2. Type all of the follow up reasons found in the red box to the right below. Once you’ve added all listed buttons, Click Accept.
   * These are the 7 standard recommendations for the children’s specialty workflow, please customize other options as needed for your division.

Add the below speed buttons:
* In-Person
* Video – AmWell
* Video – Doximity
* Video - WebEx Teams
* Phone
* Chapel Hill Clinic
* Blue Ridge Clinic
3. Now that you have created your speed buttons:
   
   a. Chose the “Return in” interval.
   
   b. **Click** the speed button to choose the type of return visit.
      * Note: if no follow up is needed or is as needed, utilize the PRN button
   
   c. The Check-out note found under **Expand** can be used if more detailed information needs to be shared with the admin specialist.
4. Use the box titled “Send Chart Upon Closing Workspace”
   - Enter scheduling pool information on the first line
   - Enter instructions within the comments section. Be sure to include:
     - Time period for follow up (ex. 3 months)
     - Visit type (video, phone, or in person)
     - Imaging/Labs or other additional needs at follow up.
   - The message will send once you close the chart or you can choose “Send Now”.

   ![Send Chart Upon Closing Workspace](image)