

MUST DO CHECKLIST
Scheduler/Scheduler Lead

Scheduler:

- a. 60 schedulable events a day-utilize provided scheduling guidelines. ____
- b. Outbound Calls when down time permits. ____
- c. Make appropriate notes in Medinformatix (MI). ____
- d. CRITICAL that the insurance is entered correctly and it is classified correctly per the VRC contracts. ____
- e. Contact Scheduling manager when encountering a difficult patient or referring office staff. ____
- f. Notate unusual encounters with patients or referring offices in provided logs and submit to scheduling manager on weekly basis. ____
- g. If booking an event <48 hours from scan time, then notify a “closer” to check eligibility
 - i. CRITICAL: Appointments must be booked out far enough in advance to ensure we can get Auths/Elig done. ____

Scheduler Lead:

- a. Breaks and lunch management on white board daily
 - i. No more than one scheduler at once on a break or lunch
- b. Manage Outbound Calls to patients to notify order received to call back VRC
- c. Manage Outbound Calls to patients for appointment reminders 2 days prior to exam.
- d. Daily Reports to Operations manager/COO [efax queue, # robo calls by modality, Incoming call volumes with Agent Group Performance by Account Code].
- e. As requested cleanup
- f. Ensure that all schedules are filled for following business day to meet company daily targets by modality.
- g. Every morning reviews the Analyst’s reports for scheduled events for the day before, the present day and next day. Supplement this with review of Scheduler Module in MI.
- h. Update the Scheduling (closer) staff for achieving targets based on information learned from section i. Update the white board in attempt to focus the staff toward the daily target goals.
- i. Every evening, prior to leaving office, repeat step i
- j. Help fill schedule gaps