Proper use of Visit Types in IDX

Visit Type Creation:
New and Established are actually categories in IDX, which are linked to visit types defined by your department. If your department sets up visit types of: E15, EST, U15, P60 etc... these are all linked to the established category in IDX. The new patient visit types are set up with the category of “NEW”. Examples of some new patient visit types are: N60, C60, NEW, BN4, etc...
The category the visit type is linked to is important because this is what is used to report on the number of new patients to your department. Departments, and the College as a whole, use these statistics to determine how much new business each department is attracting and to aid in making important business decisions. The category is also used to determine if a new patient letter is needed, to create various reports, to send Teleminder calls for departments utilizing this system, and for many other critical functions.

NOTE: New patient visits require a referring physician or referral source to be entered. This information is also critical to our organization!

New Patient Visit Type:
A "new" visit is to be used when the patient has never been seen in the department, or has not been seen in the department within the past 3 years.

Established Patient Visit Type:
An "established" visit is to be used if the patient has been seen in the department within the last 3 years.
The category is based upon the department, NOT the physicians within the department.

How to determine new vs. est:
Look at the appt. history screen to determine when, or if, the patient was seen in the department (use the guided filter action to single out the dept you will schedule in), before determining which visit type to use to schedule the visit. Do this by looking at the dept abbreviation on the appt. history (F9 A). If the patient was seen in the department (even if not seen by the provider) an established visit must be used. When looking at past appts it is important to also look at the status. If the patient no-showed or cancelled all previous appts in the department or their appt was bumped, you would still schedule the patient as new. If the provider wants more time because he/she has not seen that patient previously, the scheduler should use an established visit, that is longer in duration -or- if a longer visit is not defined for this, the scheduler should extend the visit (duration override). Check with your manager as to how this will be handled within your department.

Extending a visit type:
For example: E15,30 This extends a 15 minute visit to 30 minutes and would be put in the schedule where the provider has 2 E15 visits back to back. This would then take both 15 min. slots for this appt.
The other option would be to search for a new patient visit. For example: If the doctor uses N30 for his new patients: search for N30 and find a date and time that works for the patient. Then, go back to the search page, change the visit to
E15,30, detail the day in which the N30 was available, and schedule the E15,30 in the open N30 slot.
Your department would need to define which of the above options they want to use. If your department/physicians limit the number of new patients they want in a session, they may want your staff to follow the second example.

**Visit Type Messages:**
Each visit type should have brief instructions, which explain how to use the visit type.

**Sample messages:**
EST: Used for pts established with this physician and dept. Use EST,30 for pts new to the physician, but established in the dept. Search for NEW and override with EST,30 to schedule.
NEW: Pt MUST be new to the dept. Referring physician or referral source required. Instruct pts to bring all outside medical records, tests, x-rays, scans, etc. pertinent to their current medical condition. Also bring a list of all medications they are currently taking.