

# Scheduling Follow-up Visits

## Challenges

- Keeping track of > 600 participants annually
- Contacting participants to schedule visits
- Following to ensure appointments are kept

## Efforts

- Computerized scheduling and tracking system, based on target dates and visit windows
- 'Appointments to schedule' list
- Annual letters sent when visit window opens
- Calling directly to schedule appointments
- Appointment reminder letters and phone calls
- 'Unable to reach you' letter

# Computerized scheduling and tracking system



Refresh

1-4701-RY Annual 10  
9:00 am - 10:00 am

1-4849-CR FDX 0  
10:30 am - 11:30 am

1-4850-EO FDX 0  
9:30 am - 10:30 am

1-4861-DK Initial 0  
8:30 am - 9:30 am

1-3154-BZ Annual 110  
1:00 pm - 2:00 pm

Scheduling/  
Tracking

Data Entry

Participant  
Profile

Consensus  
Conference

UNIVERSITY OF PITTSBURGH  
Alzheimer Disease Research Center

Data  
Management

Annual  
Research Update



Ancillary  
Studies

Imaging / Labs

Help Desk /  
Manual of Ops

Neuropathology

System Map

Close Database

Kristen	Thomas	Sarah	Patty
UVA	Amanda	Donna	Carolyn
Shelley	Missy	Lori	

### Missy's Task List

Applications to send:	0
Appointments to schedule:	98
Reminder calls to make:	1
Annual letters to send:	0
Initial packets to send:	0
Annual packets to send:	0
'Unable...' letters to send:	0
Open appointments:	0



# Computerized scheduling and tracking system



## Scheduling



Back to Scheduling & Tracking Menu

**Appointments To Schedule**

**Appointments By Participant**

**Appointments By Date**

**Search Appointment Communications**

**Reminder Calls**

**Still Unable To Reach**

**Long Overdue**



# Computerized scheduling and tracking system



## Appointments to Schedule


[Back to Scheduling Menu](#)

Search last name of participant (optional)

Need to be Scheduled								
Name	ID	Part. Type	Appt Type	Viseq	Days Until Target Date	Social Worker	See Psych	Last Contact ▲
[REDACTED]	1-1962-GF	Not Demented	Annual	170	-8	12-PLH	Not necessary	9/18/2013
[REDACTED]	1-4708-JH	FAD Not Demented	Annual	10	-6	12-PLH	Must see	
[REDACTED]	1-3065-EM	Not Demented	Annual POP	110	-6 Cancellation	12-TCB	Not necessary	10/7/2013
[REDACTED]	1-4271-IL	Not Demented	Annual	40	-3	12-PLH	Not necessary	9/25/2013
[REDACTED]	1-3263-WS	Not Demented	Annual	100	5	12-PLH	Not necessary	9/20/2013
[REDACTED]	1-4277-PC	Demented	Annual	40	FTD Dx 10	12-PLH	Not necessary	9/18/2013
[REDACTED]	1-4433-TM	Demented	Annual	30	FTD Watch 16	12-PLH	Not necessary	9/18/2013
[REDACTED]	1-0297-DA	Demented	Annual POP	250	30	12-TCB	Must see	9/17/2013
[REDACTED]	1-4441-JG	Demented	Annual POP	30	30	12-PLH	Not necessary	9/17/2013
[REDACTED]	1-4721-JB	Not Demented	Annual	10	33	12-TCB	Must see	9/20/2013
[REDACTED]	1-4292-ML	Demented	Annual POP	40	38	12-TCB	If possible	9/18/2013




# Computerized scheduling and tracking system

 **Annual Appointment** Visit: 20 Missing Data Words


Participant ID: 1-4478-RF [REDACTED] Appointment ID: 1101

Schedule | Details | Staff | Communication | FTD Watch; No FTD Dx yet

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	Big window opens: 8/10/2012	Small window opens: 11/12/2012	Target Date: <span style="color: red;">2/10/2013</span>	Small window closes: 5/11/2013	Big window closes: 8/10/2013
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 **Current Appointment Status:**


Pending     Scheduled     Cancelled     No Show

Occurred     No further participation     Skipped

If 'No further participation' or 'Skipped,' please provide details:

[Click here to view the list of appointments on the Outlook calendar](#)  
*Takes a few moments to load*

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 **Date of appointment:** 5/2/2013    **Start time:** 9:00 AM ▼    **End time:** 10:00 AM ▼

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**Participant is currently Demented**

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**Other Notes about this appointment:**

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Update Outlook    Close



# Computerized scheduling and tracking system


 **Annual Appointment** Visit: 20 Missing Data Words

Participant ID: 1-4478-RF [Redacted] Appointment ID: 1101

Schedule | Details | Staff | Communication **FTD Watch; No FTD Dx yet** Currently Assigned To: 17-MXP


Date annual letter was sent: 11/2/2012 Date visit packet was sent: 4/1/2013 Date reminder call was made: 4/25/2013


**Primary Contact on file**

 Name: [Redacted]  
Relationship to Participant: Spouse/partner specify: Wife  
Address: [Redacted]  
City: [Redacted] State: PA Zip: [Redacted]  
Phone 1: [Redacted] Ext.: \_\_\_\_\_  
Phone 2: \_\_\_\_\_ Ext.: \_\_\_\_\_


**Who should be contacted regarding this appointment?**  Participant  Study Partner  Other  
Specify other: \_\_\_\_\_ Phone for appt contact: \_\_\_\_\_

Unable to reach Date 'Unable to Reach You' letter was sent: \_\_\_\_\_

 Date: 4/25/2013 Time: 10:30 AM Type:  Phone  In person  Other (specify): \_\_\_\_\_  
Who contacted whom? ADRC contacted study partner (specify): \_\_\_\_\_  
Outcome:  No answer  Left message  Made contact  
Notes/Additional Info: s/w [Redacted] rescheduled annual to 5/2/13 9a (mrr) also reminded her of need for study partner - she will be with him (mrr)


 Date: 1/31/2013 Time: 9:45 AM Type:  Phone  In person  Other (specify): \_\_\_\_\_  
Who contacted whom? Study partner contacted ADRC (specify): \_\_\_\_\_  
Outcome:  No answer  Left message  Made contact  
Notes/Additional Info: s/w [Redacted] scheduled annual for 5/23/13 9a (mrr)

# Computerized scheduling and tracking system

 **Annual Appointment** Visit: 20 Missing Data Words

Participant ID: 1-4478-RF [Redacted] Appointment ID: 1101

Schedule | Details | Staff | Communication | **FTD Watch; No FTD Dx yet**


	Big window opens: 8/10/2012	Small window opens: 11/12/2012	Target Date: <b>2/10/2013</b>	Small window closes: 5/11/2013	Big window closes: 8/10/2013
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**Current Appointment Status:**

Pending     Scheduled     Cancelled     No Show  
 Occurred     No further participation     Skipped

Click here to view the list of appointments on the Outlook calendar  
*Takes a few moments to load*

If 'No further participation' or 'Skipped,' please provide details:

 Date of appointment: 5/2/2013    Start time: 9:00 AM    End time: 10:00 AM


**Participant is currently Demented**

Other Notes about this appointment:




# Computerized scheduling and tracking system

 **Annual Appointment** Visit: 230 Missing Data Words


Participant ID: 1-0437-PL Appointment ID: 77

Schedule | **Details** | Staff | Communication

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 **Big window opens:** 8/13/2011    **Small window opens:** 11/15/2011    **Target Date:** 2/13/2012    **Small window closes:** 5/13/2012    **Big window closes:** 8/13/2012

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 **Current Appointment Status:**


Pending     Scheduled     Cancelled     No Show  
 Occurred     No further participation     Skipped

**If 'No further participation' or 'Skipped,' please provide details:**

Patient still in rehab. Broke shoulder and bone below knee. Spoke with study partner and she thinks its best to skip this year and come early in the window in the fall, Nov.

[Click here to view the list of appointments on the Outlook calendar](#)  
*Takes a few moments to load*

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 **Date of appointment:** 5/13/2012 2:00 PM

**Participant is currently Demented**

**Other Notes about this appointment:**

**Email to SW**

An email will be sent to the appropriate Social Worker with the details of the participant's decision to skip this visit.

Is that okay?  
(If you say No, you will be returned to the form.)



# Computerized scheduling and tracking system



## Scheduling

[← Back to Scheduling & Tracking Menu](#)

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**Long Overdue**



# Scheduling Follow-up Visits

## Challenge

- Participants sometimes need to skip a visit

## Efforts

- Allow an appointment status of 'Skipped'
- Reasons must be recorded and an automatic email is sent to the assigned social worker
- **Submit Skipped Visit forms to the NACC**

# Scheduling Follow-up Visits

- Computerized scheduling and tracking system, based on target dates and visit windows
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- Calling directly to schedule appointments
- Appointment reminder letters and phone calls
- ‘Unable to reach you’ letter
- Allow an appointment status of ‘Skipped’, with reasons recorded and an automatic email to the social worker
- Submit Skipped Visit forms to the NACC?