

OFFICE POLICY AND PROCEDURE
CHECKLIST #3
FOLLOW-UP OF MISSED OR CANCELLED APPOINTMENTS

A missed or cancelled appointment and the failure to follow up with or contact the patient may result in a serious delay in diagnosis or treatment. A well-defined process that includes provider notification and follow-up procedures in this situation will help ensure continuity of care and enhance patient safety.

| | YES | NO |
|--|--------------------------|--------------------------|
| 1. A process is in place for the follow-up of patients who have missed or cancelled appointments. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Providers are notified of all missed or cancelled appointments on a daily basis. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. The provider assesses the clinical importance of the appointment, the severity of the patient's medical condition, and the risk(s) associated with the missed or cancelled appointment to determine the appropriate follow up. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. A reminder telephone call from the office staff may suffice for patients at minimal risk. The telephone call and the content of the message or conversation are documented in the patient's record. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. A telephone call from the provider may be indicated for patients at higher risk. The provider should emphasize the importance of follow-up care and the risks inherent in failing to comply. This conversation is also documented in the medical record. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. If there is no response from the patient or the patient develops a pattern of not keeping or missing appointments, a letter with a certificate of mailing is sent to the patient to advise him/her of the risk of non-compliance. A copy of the letter is maintained in the patient's medical record. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. All efforts to contact the patient, either by telephone or in writing, are documented in the medical record. This provides evidence that the patient was made aware of the importance of continuous medical care. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Staff is educated regarding patient follow-up processes in your practice. Periodic record reviews are conducted to evaluate the effectiveness of the established processes for patient follow-up. | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Continued failure of a patient to keep appointments may be deemed non-compliance with treatment. Consideration is given to discharging the patient from your practice. | <input type="checkbox"/> | <input type="checkbox"/> |

The attorneys at Fager Amsler Keller & Schoppmann, LLP are available to assist you in determining how and when to properly discontinue a physician-patient relationship due to patient noncompliance. They may be reached at **(855) FAKS-LAW** (855-325-7529).