CATEGORY: REPORTS ~ TASK: MISSING ENCOUNTERS

Missing Encounters Report

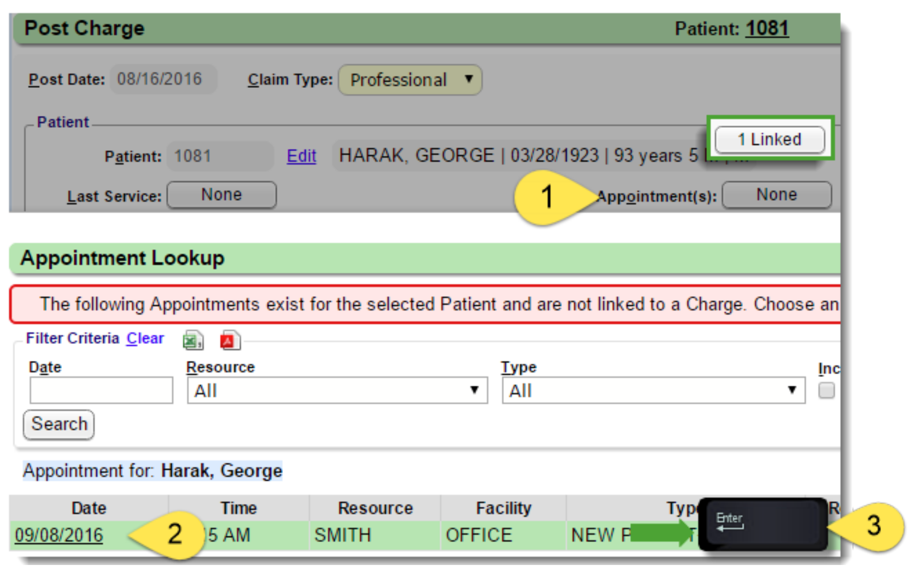
When using the scheduling module, we recommend running this report regularly - even daily. If a Patient Appointment is marked as checked in/out, we should expect to have a corresponding Encounter or charge for that appointment. This report helps audit for any 'missing' Encounters. These may have truly been missed or overlooked, not marked as 'No Show', or may simply have not been linked to an Encounter correctly. Find this on the Reports and Scheduling screens.

Front Desk staff should ensure all Appointments have been updated to the correct Status by the end of each day.

If we see 'Scheduled' statuses on this report, the appointment was not correctly updated, ie, marked as No Show, Cancelled, Rescheduled etc.

How do I link an Appointment to an Encounter during charge entry?

You are presented with a popup during charge entry to Link the charge to an appointment. If charges are coming in from EMR/EHR clinical documentation, we auto-select the appointment for you. This function ties the Appointment to the Encounter.



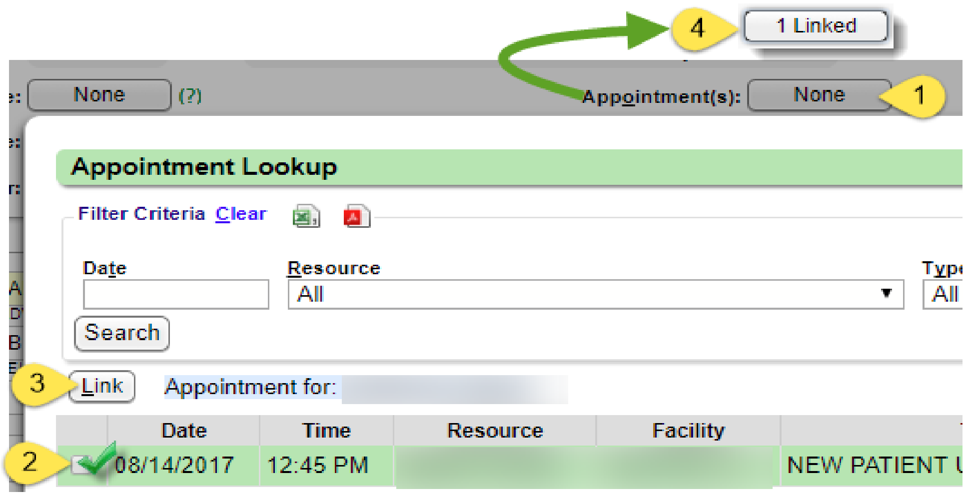
To link an appointment:

1. If there is no popup, Click [None]
2. Check the box next to the appointment you wish to link
3. Click [Link]

The 'Appointments' button updates from None to [1 Linked]

How do I link an Appointment to an *existing* Encounter?

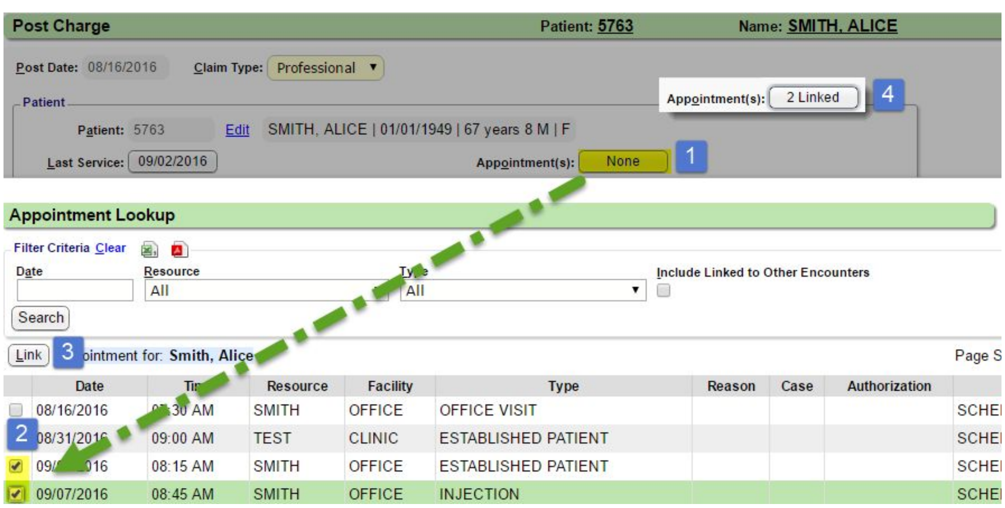
1. On the Encounter Dashboard > Click [Modify Charge]> Click Appointment(s) [None]
2. In the popup check the box(es) for the appointment(s)that should be linked to this encounter this Encounter
3. Click [Link]
4. [None] on the Encounter Dashboard will update to the number of appointments linked to the Encounter. Example: [1 Linked]
   - If you do not see an appointment to link, the DOS may be too old. Contact your client manager or Support for assistance



How do I link multiple Appointments to one Encounter?

From the Post Charge or Modify Charge Screen on the Encounter:

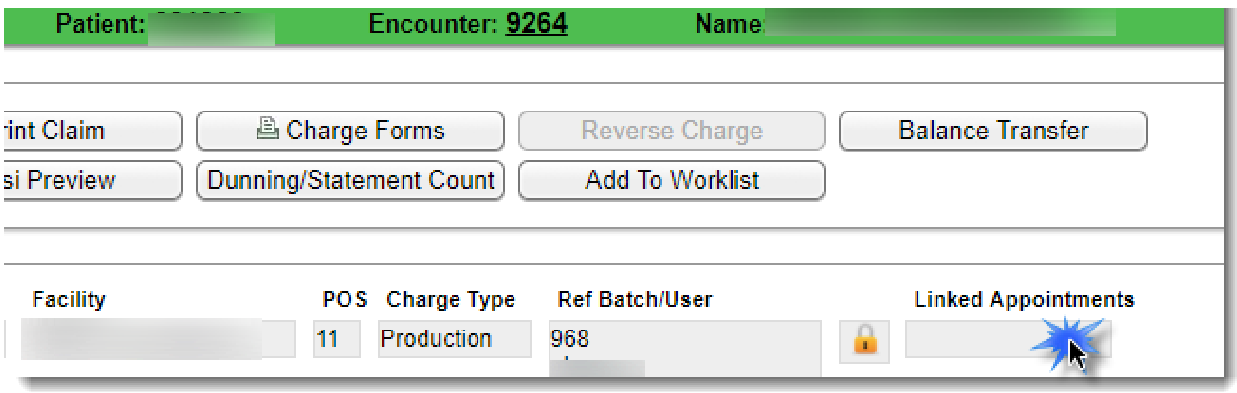
1. Click button next to 'Appointment(s)'
2. Check boxes next to the dates of service to Link to this charge



3. Click [Link]
4. The button next to 'Appointment(s)' updates to the number of appointments linked

How can I tell if an Encounter is linked to an Appointment?

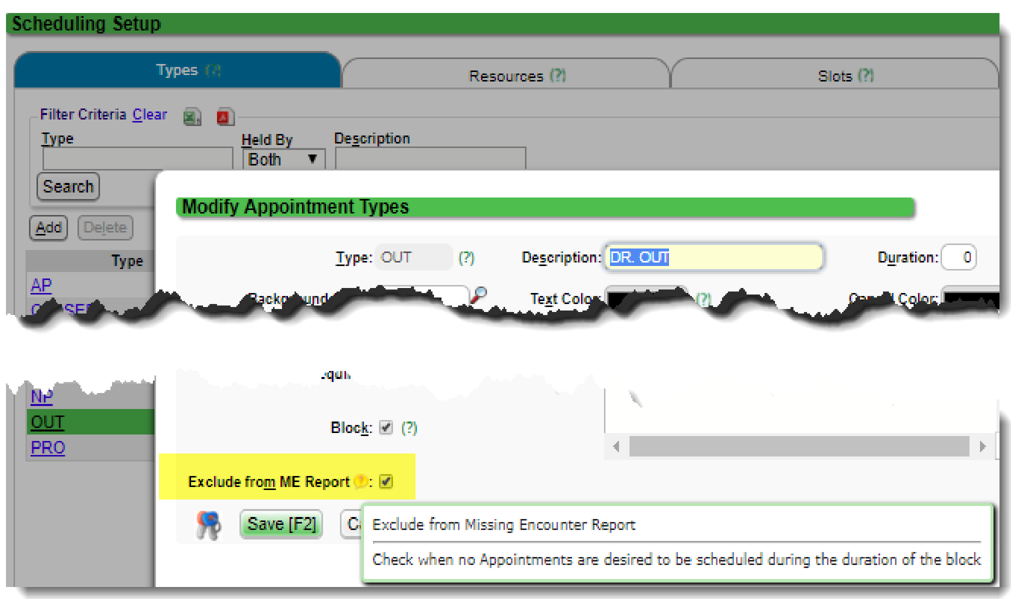
On the Encounter Dashboard > 'Linked Appointments' field, if it is blank, no appointment has been linked to this Encounter



What if there is an Appointment Type that I do not want on the Missing encounters report?

See Appointment 'Types' in Scheduling Setup to control which appointments are expected to produce Encounters.

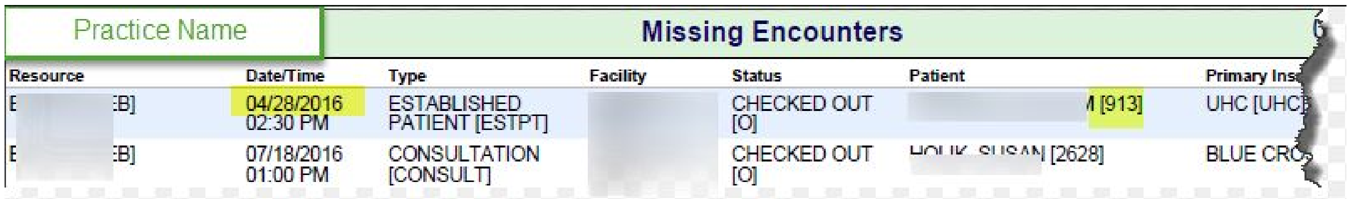
- Check 'Exclude from ME report' (Missing Encounter report) do not show on the report



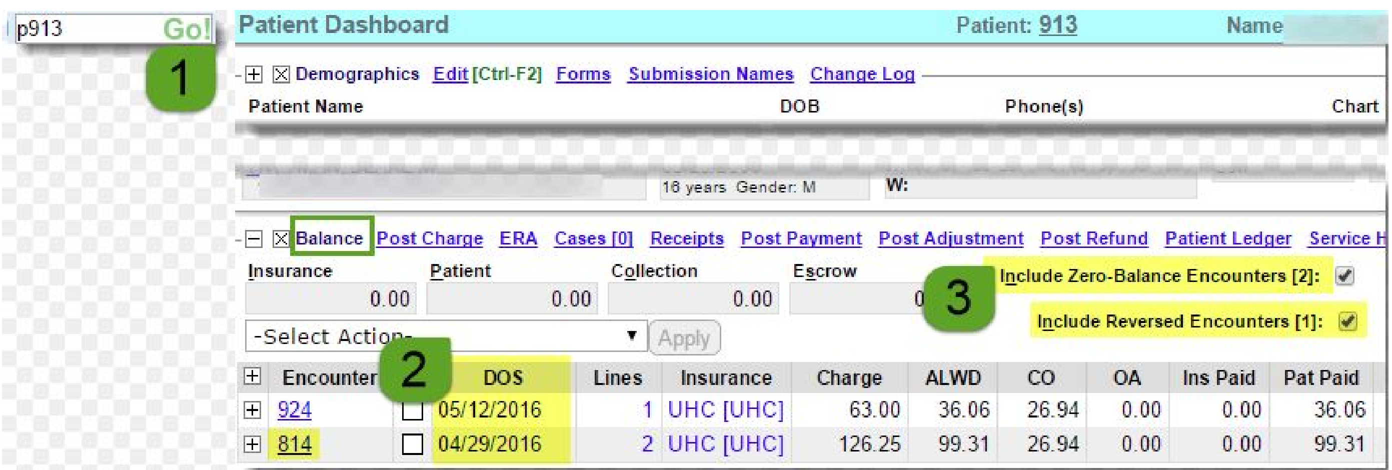
How do I work the Missing Encounters Report?

After you have entered all the Encounters (charges) for a date range, provider, facility etc., run the report.

In the report, take note of the DOS (Date Of Service) and Patient ID



1. Use the 'Go-Cut' - in this example P913 (P+ the Patient ID) to access the Patient Dashboard
2. On the Patient Dashboard, in the 'Balance' section, look for the DOS



- **If the DOS exists > Click the Encounter ID and 'Link' the appointment to the Encounter**
- **If no Encounter exists (and *should*) for this DOS > manually create it and 'Link' it to the appointment**

3. It is good practice to select the options to Include Zero-Balance and Reversed Encounters on the Patient Dashboard, so you are able to see all Encounters.

FAQ: Should this report show any visits that do not have an encounter or charge?

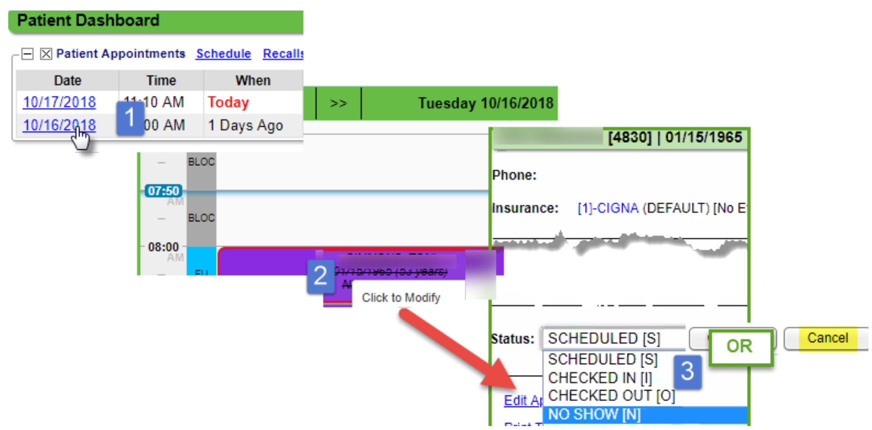
Did the front desk mark the patient as 'no show'? If not, the appointment will show on this report. This report can be run to excel, filtered by 'scheduled' and that list could be passed back to the front desk to work, by changing the status to reflect that the patient did not attend their appointment, mark 'No Show' or if they should have been checked in - mark 'Checked In'.

Did the encounter get 'linked' to the correct appointment?
After the report is 'worked' i.e. we answer these questions, then you can say 'these encounters still need to be billed'.

How do I mark an appointment 'No Show' or 'Cancelled'?

There are times a record shows on our missing encounter report because our Front Desk staff has not accurately marked an appointment as No Show or Cancelled.

1. From the Patient Dashboard > In the 'Patient Appointment' section > click on the date
2. On the Calendar > Click to Modify the appointment
3. Use the status Dropdown > No show OR Click to [Cancel]



How can we use the 'Appointment List' report to find potential 'No Show'?

Use the 'Status' filter for 'Scheduled', and if your group has call reminders, 'Confirmed' and 'Reminded'

We recommend you save the report filters and run this report the following morning or running it day of, at the end of the day. This will provide the front desk, a list of potential no show appointment.