
APPENDIX H

**STANDARD APPOINTMENT TYPES OPERATIONAL DEFINITIONS
WITH ACCESS STANDARDS**

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This appendix documents the appropriate usage of each of the *ten* standard appointment types. Sites should adhere to these guidelines when creating templates and schedules and booking appointments. The appointment type definitions and scenarios are followed by a table documenting the access standards and booking directions for each appointment type.

1. PCM (Initial Primary Care Appointment):

1.1. Definition: The PCM appointment type is designed for the initial primary care visit with the PCM to collect health data, family history, readiness data, etc. A PCM visit may or may not be the patient's first visit to the PCM since an acute or routine appointment may precede a PCM visit. Sites can use this appointment type to track whether the PCM has completed this initial visit as defined by the TRICARE benefit. This appointment type is not designed to meet acute or routine health care needs.

1.2. Where used: Only in primary care clinics.

1.3. ATC Category and Standard: For all appointing information system booking methods except Referral Booking, appointing agents will use the Wellness ATC Category or information system search function to book PCM appointments. To meet the Wellness ATC Standard, the PCM appointment type needs to be booked within 28 days or 40,320 minutes from the patient's request.

1.4. Scenario: Mrs. Snuffy, spouse of Lieutenant Snuffy, who has recently made a Permanent Change of Station move, is enrolled in TRICARE Prime at the local MTF to PCM Dr. Brown. She is not experiencing any acute health problems. Mrs. Snuffy wishes to set up an appointment with her PCM, Dr. Brown to tell her about her longstanding medical conditions. Mrs. Snuffy calls the 1-800 MTF appointment line. Mrs. Snuffy asks the appointment clerk for an appointment at the clinic. The appointment clerk asks Mrs. Snuffy for the appropriate demographic information to establish her identity. Upon seeing the appropriate demographic information (Health Care Delivery Program Code, Enrolled Clinic, PCM, etc) the appointment clerk confirms that Mrs. Snuffy is a TRICARE Prime Enrollee at the MTF with Dr. Brown. The appointment clerk (1) Asks Mrs. Snuffy if this is the first time she has asked for an appointment with her PCM or (2) Notices by viewing previous appointments that Mrs. Snuffy has not had an appointment with the PCM before. The appointment clerk asks Mrs. Snuffy if she has any acute health conditions that require that she see a doctor within 24 hours. Mrs. Snuffy replies that she does not, so the appointment clerk schedules her for a PCM appointment.

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2. ROUT (Routine Appointment):

2.1. Definition: The ROUT appointment type is designated for patients who require an office visit with their PCM or mental health provider for a new healthcare problem that is not considered urgent. Routine mental healthcare is defined as an initial request for a new mental health condition or exacerbation of a previously diagnosed condition for which intervention is required but is not urgent.

2.2. In the case of healthcare that is not characterized as mental health, appropriate clinical personnel can offer other appropriate alternatives for care, such as self-care. In locations where Nurse Triage is not in place, the concept of "prudent lay-person terminology" will be used to determine whether a patient should be given a routine or acute appointment. Appointing staffs need to be aware that these routine mental healthcare requests need to be appointed within 7 days, and can be appointed to the patient's Primary Care, Behavioral Health, or Mental Health Clinics.

2.3. Where used: Only in primary care and mental health clinics.

2.4. ATC Category and Standard: Appointing agents will use the Routine ATC Category or information system search function to book ROUT appointments. To meet the Routine ATC Standard, the appointment needs to be booked within 7 days or 10,080 minutes from the patient's request.

2.5. Scenario 1: Mrs. Jones has been experiencing a pain in her shoulder joint area for a couple of days and decides to call the 1-800 MTF Appointment Line to schedule a visit with her provider. The appointment clerk, in accordance with local guidelines or scripts, determines the patient's needs and reaches the decision point to transfer Mrs. Jones' call to the Triage Nurse. The Triage Nurse, using approved protocols, rules out self-care and determines that an acute appointment is not necessary, but that a routine (ROUT) appointment should be scheduled with her provider within 7 days. Using the Order of Search Precedence for Appointments Business Rule, the Triage Nurse books the appointment and gives the patient appropriate instruction.

2.6. Scenario 2: Sergeant Jones, recently redeployed from a combat area, is experiencing first time problems with sleeping, and is feeling anxious. He does not need to see someone immediately. He calls the Mental Health Clinic to ask for an appointment. The mental health technician determines that Sergeant Jones has an initial request for a new mental health condition for which intervention is required but is not urgent. The technician books

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Sergeant Jones into a routine (ROUT) appointment with a mental health professional within 7 days.

3. SPEC (Initial Specialty Care Appointment)

3.1. Definition: The SPEC appointment type is designed for the initial consult or referral appointment to a specialist or an initial self referral for specialty care by a patient to a specialist. Generally speaking, the appointing information system will assign the ATC Standard and Category that matches the referral priority entered by the requesting provider. A SPEC appointment may be booked for a consult or referral with any priority.

3.2. Where used: Only for specialty clinics and primary care clinics with specialty care, e.g. Family Practice Clinics that also provide Gynecology and Obstetrical Care.

3.3. ATC Category and Standard:

3.3.1. In Referral Booking: The Composite Health Care System/Enterprise Wide Scheduling Registration system (CHCS/EWSR) will automatically assign the correct ATC Category to the priority designated by the requesting provider, e.g. ASAP, Today, STAT, 48 Hrs, 72 Hrs, and Routine priorities. To meet the Specialty ATC Standard, the appointment needs to be booked within 28 days or 40,320 minutes from the time the referral was initiated. The appointment type booked is not required to match the ATC Standard. Any appointment type may be booked. If the Routine referral priority request is for a stated time period such as, "Patient to be seen in 14 days" the appointment is required to be booked in that time frame.

3.3.2. Self Referral Booking. In a Specialty Clinic that allows itself to be a self-referral clinic, "regular" booking functions are used by appointing personnel. In this instance appointing personnel will use the Specialty ATC Category/information system search function to book the SPEC appointment. To meet the Specialty ATC Standard, the appointment needs to be booked within 28 days or 40,320 minutes from the patient's request.

3.4. Scenario: Mrs. Snuffy's PCM (Dr. Brown) notices some abnormalities in a routine examination during her office visit. Dr. Smith is concerned about Mrs. Snuffy's examination and judges that an examination by a specialist is required. Her condition is such that it can wait 4 weeks to be seen. Dr. Brown orders a specific scheduled consult order and sends it to the Referral Management Center using the Routine referral priority. Mrs. Snuffy is instructed to go to the Referral Management Center on her way out of the hospital to allow

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them to book her initial specialty appointment in the requested specialty clinic. The clerk at the Referral Management Center clerk, who has access to Dr. Specialist Bone's schedule, pulls up the consult order on Mrs. Snuffy, understands the instructions in the consult order, and books Mrs. Snuffy an initial specialty care appointment with Dr. Bones within the 28 day timeframe specified.

4. ACUT (Acute Appointment)

4.1. Definition: The ACUT appointment type is designed for scheduling appointments for beneficiaries who have a need for non-emergent, urgent care that require treatment within 24 hours.

4.2. Where used: For both primary and specialty care clinics.

4.3. ATC Category and Standard: For all information system booking methods except Referral Booking, appointing agents will use the Acute ATC Category or information system search function to book ACUT appointments. To meet the Acute ATC Standard, the appointment needs to be booked within 24 hours or 1,440 minutes from the patient's request.

4.4. Scenario: Mrs. Snuffy is experiencing flu-like symptoms and feels that she is in need of prescription medication. She calls the 1-800 MTF Appointments line and explains that she needs an appointment to see a health care provider right away. She will be referred to nurse triage as appropriate. If Mrs. Snuffy, as a TRICARE Prime enrollee, reasonably feels, as a prudent lay person, that her condition needs attention within 24 hours every effort will be made to ensure she receives an appointment consistent with the order of search priority business rule or with local policy. If not an emergency, the appointment clerk pulls up Mrs. Snuffy's demographic information and verifies her identity and TRICARE enrollment status. The clerk verifies that Mrs. Snuffy is seeking an immediate visit with her PCM to get treatment for flu-like symptoms. The clerk transfers Mrs. Snuffy's call to a triage nurse who, using appropriately approved protocols and algorithms, determines whether (1) Mrs. Snuffy needs to have an office visit within 24 hours, (2) can wait for a "Routine" or "Established" patient appointment, or (3) can benefit from health care information or self-help instruction from the nurse. If the triage nurse determines that Mrs. Snuffy does need to be seen by a health care provider within 24 hours she will have access to the PCM clinic appointment schedule and can book an appointment immediately.

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5. WELL (Wellness or Health Promotion Appointment)

5.1. Definition: The WELL appointment type is designated for patients who require preventive, health maintenance care (e.g., physical examinations, periodic examinations, check-ups, screenings, etc.).

5.2. Where used: both primary and specialty care clinics.

5.3. ATC Category and Standard: In all information system booking methods except Referral Booking, appointing agents will use the Wellness ATC Category or information system search functions to book WELL appointments. The WELL appointment type will map to the 28-day Wellness ATC standard. To meet the Wellness ATC Standard, the appointment needs to be booked within 28 days or 40,320 minutes from the patient's request.

5.4. Scenario: Mrs. Snuffy calls the 1-800 MTF appointment line to ask for an appointment for her periodic physical examination. The appointment clerk pulls up the appropriate screen with demographic information and enrollment status for Mrs. Snuffy. The clerk does a search keyed on WELL appointment types (other appropriate identifiers may also be used for the search; e.g., by time, detail code field information, Wellness Access-To-Care category, etc.) and finds the next available WELL appointment slot. The clerk books the appointments for the patient.

6. EST (Established Patient Follow-up with Designated Time Allotment)

6.1. Definition: The EST appointment will be used when a patient is scheduled for follow-up care per direction of a PCM or a Specialist. The EST appointment type is designated for patients who request a follow-up appointment with the PCM that is not for acute health care, routine primary care, initial PCM appointments, wellness care, or to have a procedure performed. The EST appointment type and Future Search will not be a substitute booking practice for patients requiring anything other than the described EST appointment needs. The EST is also designed for a patient who requests a follow-up appointment with a specialist for other than initial specialty care, acute health care, wellness, or to have a procedure performed. An established appointment should be scheduled with a provider per the initial provider's time designation.

6.2. Where used: For both primary and special care clinics.

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6.3. ATC Category and Standard: There is no ATC Standard. In all information system booking methods except Referral Booking, appointment agents will use the Future Search to book EST appointments.

6.4. Scenario. Mrs. Snuffy had been seen as an acute patient (using the ACUT) appointment type last week for a severe upper respiratory infection. She is instructed to get a follow-up appointment one week later to ensure that the antibiotics prescribed work effectively. The PCM may use a Consult Order to provide instructions. The instructions will be available for the appointment clerk to properly book Mrs. Snuffy's follow-up appointment.

6.4.1. One Alternative: The patient could call central appointments giving the clerk the appropriate information for accessing AOP in order to find the reviewed order and book the appointment.

6.4.2. Better Alternative: The simpler, patient centered method would be for the patient to simply relay the physicians instructions for a follow-up appointment next week to the front desk clerk who will book the patient's appointment using the EST appointment type before the patient leaves the clinic.

7. PROC (Procedure Appointment)

7.1. Definition: The PROC appointment type is designated for patients in need of medical procedures other than those performed in the Ambulatory Procedure Unit (APU - B**5 MEPRS Clinics). Procedures performed in APUs will be considered Ambulatory Procedure Visits (APVs) and will be scheduled using the ambulatory same day procedure appointing subsystem. A procedure appointment will be scheduled with a provider within 28 days or per the referring provider's designation. The provider's designation must not exceed 28 days. CHCS/EWSR will assign the appointment the ATC Standard and Category that matches the referral priority entered by the requesting provider. The appointment type that is booked, is not required to match the ATC Category or Standard.

7.2. Where used: For both primary and specialty care clinics.

7.3. ATC Category and Standard: To book a PROC appointment, personnel will use the Specialty ATC Category. To meet the Specialty Care ATC Standard, the PROC appointment needs to be booked within 28 days or 40,320 minutes from the patient's request or from when the referral request for the procedure is initiated.

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7.4. Scenario: Sergeant Snuffy had been referred to Gastroenterology. The Gastroenterologist decides that Snuffy needs to come back in one week for an Upper GI examination that will be performed in the clinic.

7.4.1. Alternative 1 – The Call Back: The physician enters a consult order into the system for the procedure to be performed. Instructions to be given to Sergeant Snuffy are included on the consult order. Sergeant Snuffy is instructed to call the central appointment line and inform them he has a consult for a procedure to be scheduled (or the appointment clerk calls Sergeant Snuffy). The appointment clerk is able to open the CHCS/EWSR AOP option and select the consult order (review marked - "appoint to MTF") to schedule an appointment for Sergeant Snuffy to have the procedure performed. The appointment clerk uses the information on the consult order to remind Sergeant Snuffy of the physician's instructions on how to be prepared for the procedure.

7.4.2. Alternative 2 – PROC Booked before the Patient Leaves the Clinic: SGT Snuffy is able to stop by the front desk of the clinic and get his PROC appointment scheduled before he leaves the clinic.

8. GRP (Group Appointments with Multiple Patients)

8.1. Definition: The GRP (Group) appointment type will be used for patients who require therapy, counseling, or teaching sessions where a provider will perform the service in a group setting. The detail code fields can be used to provide further information about the care to be provided in the group appointment, (e.g., TOBCES, a Tobacco Cessation Class). A group appointment should be scheduled per self referral of the patient, or the clinic's or referring provider's policy or designation.

8.1.1. The GRP appointment type will NOT be used to book multiple patients into a single time slot for wellness (WELL), routine, (ROUT), acute (ACUT), established (EST), specialty (SPEC) care, procedures (PROC) or for open access (OPAC) appointments. These specific appointment types should be used with multiple overbooks to accommodate multiple patients being booked into one slot for these types of health care services.

8.2. Where used: For both primary and special care clinics.

8.3. ATC Category and Standard: There is no ATC Standard for the GRP appointment type. For all appointing information system booking functions or methods except Referral

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Booking, appointment agents will use the Future ATC Category search to book GRP appointments.

8.4. A group appointment should be scheduled per the referring provider's recommended time that the patient needs the care.

9. OPAC (Open Access (OA))

9.1. Definition: The OPAC appointment type will be used by those sites that offer patients same day acute, routine, wellness, or follow-up primary care services. Every effort will be made to allow patients to see their PCM on the same day they request an appointment. However, this practice does not open the clinic into a full "walk-in" type service. To the greatest extent possible, all of the patient's issues are addressed in a single visit to minimize the need for unnecessary future appointments or repeat visits. Guidance on performing Open Access appointment methodology is contained in Appendix J, Open Access Appointing.

9.2. Where used: Primary and Specialty Care Clinics.

9.3. ATC Category and Standard:

9.3.1. or all information system booking methods except Referral Booking, appointing agents will use the Acute ATC Category or information system search function to book OPAC appointments. To meet the Acute ATC Standard, the appointment needs to be booked within 24 hours or 1,440 minutes from the patient's request.

9.3.2. Other Services may apply specific ATC standards for booking OPAC appointments.

9.3.2.1. In the Air Force Medical Service (AFMS), appointments booked in designated Open Access clinics must be booked and the patient seen on the same calendar day. ATC standards for AFMS Open Access appointing for AFMS Open Access sites are computed by the Air Force Surgeon's General Office using an Ad-hoc report.

10. DROUT (Dental Routine)

10.1. Definition: The DROUT appointment type is designated for patients who require preventive or routine dental care (e.g., dental examinations, periodic examinations, check-ups, screenings, etc.)

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10.2. Where used: dental treatment clinics and facilities that book appointments using the CHCS/EWSR.

10.3. ATC Category and Standard: In all information system booking methods except Referral Booking, appointing agents will use the Dental Routine ATC Category or information system search functions to book DROUT appointments. The DROUT appointment type will map to the 21-day Dental Routine ATC standard. To meet the Dental Routine ATC Standard, the appointment needs to be booked within 21 days or 30,240 minutes from the patient's request.

10.4. Scenario: Sergeant Snuffy calls the dental clinic needing his periodic screening. The appointing clerk at the dental clinic, searches CHCS/EWSR using the Dental Routine ATC Category and finds Sergeant Snuffy and DROUT appointment in 2 ½ weeks and books the appointment.

11. Use of dollar sign (\$) suffix on appointment types:

11.1. MTFs can use appointment types with the dollar sign (\$) as the last character on all ten standard appointment types to indicate that these slots are to be booked by MTF staff only, e.g. PCM\$, ROUT\$. Through arrangements with local appointing contractors or in a multi-market service area with a regional, centralized appointing function, standard appointment types with the dollar sign (\$) will not be booked unless they have MTF approval. MTFs should minimize the use of the dollar sign (\$) on appointment types to 10% or less of their available appointment slots to allow supporting organizations the ability to book as many appointments as possible, since this is their contracted function.

11.2. MTFs will not use the dollar sign (\$) suffix to prevent MTF personnel from booking these appointments or to make it a provider book only slot. The Provider Book Only (PBO) detail code can be used to accomplish this function. Appropriate business rules should be utilized to minimize the usage of dollar signs (\$) since it restricts access to care for patients.

11.3. MTFs wanting to maximize the number of web-enabled appointments should not use the dollar sign (\$) as this prevents these appointments from being booked via the TRICARE Online appointing capability.

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12. Other Embedded Appointment Types:

12.1. Five fixed appointment types, used for processing by CHCS/EWSR, will continue to be supported as follows.

12.1.1. APV. Ambulatory Procedure Visit. This appointment type is used for outpatient same day surgery visits. Same Day Surgery clinics may have a location type of C (Clinic) or S (Same Day Surgery). If the clinic location type is S, then all ambulatory visits (APV appointments) for the clinic will be picked up in the VAP (Ambulatory Visits) option in order to record minutes of service.

12.1.2. EROOM. The Emergency Room may use EROOM or any standard appt. type.

12.1.3. N-MTF. A downtown appointment logged into CHCS/EWSR. This appointment type must be added to the Non-MTF Place of Care's (Clinic) profile and to the individual provider profiles for each provider linked to that non-MTF place of care. When a HCF logs a non-MTF appointment, the system will automatically populate the appointment type field with the N-MTF appointment type.

12.1.4. T-CON*. A telephone consultation that needs to be answered. This non-searchable appointment type must be added to an individual provider's Provider Profile and the provider must be a User in the User file before telephone consults may be entered for the specified provider.

12.1.5. RNDS. Used by providers to account for inpatient rounding. Cannot be placed in outpatient appointment schedules.

13. Appointment Booking.

13.1. Appointing information system booking options other than Referral Booking or Appointment Order Processing (AOP) require booking clerks to match the ATC Category to the appointment type, per the business rules built into the appointment information system.

13.2. Appointment personnel are required to book the appointment within the appropriate time to meet the ATC Standard in which the care should be provided. These ATC Standards have been established by law in 32 CFR 199.17. The appointment information system automatically tracks if the booked appointment was provided within the ATC Standard. The appointing personnel establish the ATC Standard by choosing the ATC Category to begin the searching for appointments that matches the patient's request/need for health care services.

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These ATC Categories with ATC Standards are as follows:

ATC Category/ Search Option	ATC Standard (to the minute)
Acute	within 24 Hours or 1440 minutes
Routine	within 7 days or 10,080 minutes
Wellness	within 28 Days or 40,320 minutes
Specialty	within 28 Days or 40,320 minutes
Future	No Standard
Dental Routine	within 21 Days or 30,240 minutes

13.3. Appointment personnel may select any appointment type, but must correct the appointment type to match the ATC Category, per appointment information system business rules, or the appointment cannot be booked. The appointment must also be booked within the appropriate time (ATC Standard) to meet the time standard requirements for the care requested by the patient. Appointment personnel will follow the chart below to book appointments.

ATC Category/ Search Option	Standard appointment type that should be chosen/booked	ATC Standard (time in which the appointment type needs to be booked)
Acute	ACUT and ACUT\$ OPAC and OPAC\$	24 Hours/1440 minutes Same Calendar Day
Routine	ROUT and ROUT\$	7 Days/10,080 minutes
Wellness	WELL and WELL\$ PCM and PCM\$	28 Days/40,320 minutes
Specialty	SPEC and SPEC\$ PROC and PROC\$	28 Days/40,320 minutes, or per Provider Designation not to exceed 28 days
Future	EST or EST\$ GRP or GRP\$ APV	No Standard or per Provider Designation
Dental Routine	DROUT or DROUT\$	21 Days/30,240 minutes

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13.4. In Consult (AOP) and Referral Booking appointment personnel are not required to choose a certain appointment type to match the ATC Category. They can choose any appointment type to book the appointment. However, they should change the appointment type to the care that best describes the care provided to the patient. The appointing information system automatically assigns the ATC Category and applicable ATC Standard to the referral priority assigned by the provider's referral request. Appointment personnel will select appointment types that are in the Clinic and Provider Profile and within ATC Standards. Appointment personnel will use the below chart for guidance in booking appointments requiring a referral.

Consult/ Referral Priority Entered by Provider	ATC Category/ assigned by MTF information system	ATC Standard assigned by MTF information system	Standard appointment type that can be booked
STAT, ASAP, Today, 24 HRS	Acute	within 24 Hours or 1440 minutes	All Types
48 HRS, 72 HRS	Routine	within 7 calendar days or 10,080 minutes	All Types
Routine	Specialty	within 28 calendar days or 40,320 minutes	All Types
For 2 nd , 3 rd , etc. appointment on a consult, user selects ATC	Any ATC Category including the Future ATC Category	No Standard	All Types

13.5. MTFs will ensure all MTF appointing personnel are trained and understand the procedures for booking appointments in appointing information systems.