

## Instructions for completion of the Schedule of Routine Appointments:

The schedule of appointments is a document that may be used by agencies to track when routine appointments are due for an individual. This document is filled out early in the calendar year for any appointments that are due within the calendar year. The document may also be used to notate when examinations that are less than annual are required.

It is important to assure that routine appointments are scheduled in a timely fashion. Typically, one must schedule an appointment two to three months in advance in order to assure that the appointment occurs when it is necessary. This is not necessarily true for emergent issues or health concerns.

In example 1 below, the schedule of appointments is for an individual who has the following timelines for appointments:

1. Annual physical is due in June.
2. Labs are due at the time of the physical.
3. Vision is to be completed every 2 years in September.
4. Hearing exam is on a six month basis and due in March and September.
5. Dental exam is done twice a year in February and August.
6. Nutritional is done quarterly based on the ISP term (ISP term starts on September 12).
7. The PCP has not ordered a bone density examination at this point and age does not indicate a need.
8. The individual is a male, so there is no need for a mammogram or pap smear.
9. The ISP meeting must be held in August for timeliness of the document.
10. Six month IDT would be six months after the ISP (thus in February).
11. The Healthcare Coordinator Quarterly Summary is due with the ISP term. Thus the report is due fifteen days after the end of the ISP quarter. In this case, the Quarterly Summaries are due on or before: September 29, December 29, February 29 and June 29.
12. The individual has had colon polyps, thus the PCP recommends a colonoscopy every two years in April.

As the appointments occur, it is possible to use this document to note the dates of the appointments. In that case, you would write over the lines in the boxes and note the date of the appointment. See example 2 below.

**EXAMPLE 1**

SCHEDULE OF ROUTINE APPOINTMENTS

YEAR:   2009  

APPOINTMENT:	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
ANNUAL PHYSICAL:						/						
SIX MONTH CHECK UP: <i>Not ordered by PCP</i>												
LABS:						/						
VISION: <i>Last done Sept. 2008. due in 2010</i>												
HEARING:			/						/			
DENTAL:		/						/				
NUTRITION:			/			/		/				/
BONE DENSITY: <i>Not ordered by PCP</i>												
PAP SMEAR: <i>N/A</i>												
MAMMOGRAM: <i>N/A</i>												
ISP								/				
IDT		/										
HCC QUARTERLY REPORT			/			/			/			/
COLONOSCOPY				/								

NAME:   Doe, Jon  

DOB:   08/26/49

**EXAMPLE 2**

SCHEDULE OF ROUTINE APPOINTMENTS

YEAR:   2009  

APPOINTMENT:	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
ANNUAL PHYSICAL:						6/2/09						
SIX MONTH CHECK UP: <i>Not ordered by PCP</i>												
LABS:						6/2/09						
VISION: <i>Last done Sept. 2008. due in 2010</i>												
HEARING:			3/21/09						9/12/09			
DENTAL:		2/3/09						8/31/09				
NUTRITION:			3/23/09			6/18/09			9/3/09			12/12/09
BONE DENSITY: <i>Not ordered by PCP</i>												
PAP SMEAR: <i>N/A</i>												
MAMMOGRAM: <i>N/A</i>												
ISP								8/17/09				
IDT		2/24/09										
HCC QUARTERLY REPORT			3/28/09			6/29/09			9/25/09			12/17/09
COLONOSCOPY: <i>Next due 4/11</i>				4/14/09								

NAME:   Doe, Jon  

DOB:   08/26/49