

Scheduling Addendum for Group and Concurrent

Each day:

Go into BI and print Group concurrent % report

Review all pts and identify (circle) all that have NOT met a % threshold-

**use 18% since doing schedule morning of**

**15% would be appropriate if doing schedule, the day before.**

Open appt book to get a quick visual of who does not have group on POC

Write a "C" next to any patient that does not have Group in their POC- but only those circled from previous step.

Cross off any of those patients not appropriate for G or C based on knowledge of the pts and discussions with primary staff.

**\*\*\*Go into projections and for each patient identified for group/concurrent move minutes from the individual row to the group row or concurrent row. (sometimes all the minutes for the day are moved to G and C and sometimes some of the minutes remain on individual). Projections will give you that verification that the % on the threshold report is accurate and that group minutes are available.**

Opens assignment Board

Hits auto assign and pts flow to primary therapist

Now you are to adjust the schedule for each staff member -manage 1 therapist at a time.

Check how many pts each therapist has for G/C and be sure the ratio will work. It is up to the therapist to assess who should be seen for concurrent together and group together and what group they should do.

If therapist only has only 1 patient for G/C, scheduler can move patient to another established group with another therapist

**\*\*\*An option at this point is to move group patients to therapists based on diagnosis or patient goals, rather than keeping patients on their primary therapist**

Once done for that therapist refresh assignment board.

Complete this for each therapist that has patients with available G/C minutes

Ensure projected time in facility and time with patient is appropriate for 8 hour day in assignment board

3/11/2020