Appointing Process Steps & Scripts (CSR I)

Purpose	Script
CSR receives assigned tasks list from Supervisor (Assignment process may vary)	N/A
CSR uses Authorization number to find Vet info in CareRadius	N/A
CSR reviews 'Documentation' tab in CareRadius to determine appointing information. Review to understand appointing requirements.	N/A
CSR searches the list of potential network providers suggested to the Vet in CareRadius.	N/A
CSR calls provider to schedule an appointment	"Hi, this is [name] from TriWest and we have a Veteran who would like to make an appointment with Dr. [name]."
Decision Point: Determine if the provider is able to schedule an appointment within 30 days. [Attempt to schedule an appointment with the provider based on the Veteran's preferred date and time saved in VPA]	"When is the earliest time and date you are able to schedule the appointment?" [Ensure that the appointing is within 30 days] [If it's non-service connected, advise the provider of this determination and the requirement to bill the Veterans OHI before billing VA]
Decision Point: [Provider is unavailable to schedule within 30 days] CSR identifies the next network provider within the searched list.	N/A
If CSR cannot find any available network providers, task it to CSR II 'Searchers' team in CareRadius.	
Decision Point: [Provider is available to schedule within 30 days] Does the provider require additional information prior to the appointing?	N/A
If provider doesn't require additional information, CSR updates authorization and completes the appointment assessment.	N/A
CSR notifies the Vet of the appointment information via the Vet's communication preference.	N/A

CareRadius sends out an automated appointing reminder to the Vet via 72 and 24 hours prior to the appointing.	N/A
Updated authorization is automatically notified to VA via portal.	N/A
CSR notifies the updated authorization to the provider via Fax Browser.	N/A
If the provider requires additional information, determine if the provider wishes to speak with the Vet prior to the appointing.	N/A
CSR reaches out to the Vet to inform that the provider will be contacting the Vet for additional information.	"I have talked with Dr.[name] to schedule your appointment. You can expect a phone call from the provider to ask you for additional information."
CSR waits for the provider to call back within 5 business days. If provider doesn't follow-up, CSR actively reaches out to the provider after five days.	"I am calling to follow-up on the appointing schedule confirmation for [Vet's name] requested on [date]?"
Decision Point: Is the provider willing to accept and appoint the Vet for a visit? If yes, then update the authorization in CareRadius. If no, start with the next network provider search [APPT-007].	N/A
If the provider requests to review the Vet's medical documentation, determine if pertinent information can be pulled in CareRadius and/or Fax Browser.	N/A
Decision Point: Determine if the requested documentation is available.	N/A
If CSR can track requested documentation, task it to the Med Doc team in CareRadius to fax the relevant documents to the provider's office.	N/A
Determine if the provider requests for additional medical documentation.	N/A
If additional medical documentation is not available, CSR requests them to VA through portal. Upon receipt, VA will directly send the documentations to the provider's office.	N/A