

April 26, 2019

AMENDMENT TO VHA DIRECTIVE 1230, OUTPATIENT CLINIC SCHEDULING RESOURCES

1. The purpose of this Veterans Health Administration (VHA) notice is to outline policy related to outpatient clinic scheduling resources and the information herein will be incorporated as an amendment to VHA Directive 1230, Outpatient Scheduling Processes and Procedures, dated July 15, 2016.

2. Each member of the clinic team plays a key role in the care of the Veteran. To facilitate timely access to care, VA advocates staff working up to the full level of their license. Scheduling staff are specifically trained to schedule and manage clinic appointments. Clinical staff are uniquely qualified to provide health care services. As such, scheduling staff time is to be directed to the management of appointments and clinical staff time directed to the provision of patient care.

3. The following must be enacted within 30 days of the publication date of this VHA Notice:

a. The VA medical facility director must ensure that each VA medical facility assesses scheduling resource levels no less than yearly. This review is intended to ensure appropriate staff are scheduling appointments. Monthly monitoring is recommended.

b. Scheduling staff are responsible for scheduling and managing appointments and facilities are expected to have appointments scheduled by scheduling staff.

c. Clinical staff scheduling activity is to be restricted to unlicensed technical staff (Electrocardiogram (EKG) technicians, etc.) on a limited basis. **NOTE:** *Clinical staff is defined as an individual at any level of professional specialization who requires the official or legal permission to practice in an occupation as evidenced by documentation issued by a State in the form of a license and/or registration, or facility scope of practice.*

4. To operationalize this policy and provide transparency into scheduling staff resources allocated at the station and division levels, a Scheduling Resource Assessment – Clinical Staff activity report was developed. The report identifies both clinical and other staff who schedule appointments. Clinical staff are identified in the report when listed as a primary or secondary provider on an encounter (workload, count clinic) AND have scheduled or cancelled appointment (scheduling activity) during the same month.

a. All facilities are expected to assess the number of appointments made by clinical staff no less than yearly and make action plans to reassign clinical staff from scheduling to patient care where appropriate. Monthly monitoring is recommended.

b. Facilities with high levels of clinical scheduling activity will submit an action plan to the Office of Veterans Access to Care (OVAC) and will be followed until scheduling resources are aligned appropriately.

c. The clinical staff appointment activity detail report is used to quantify staffs' scheduling activity levels and assist the VAMC in analysis of the appropriate allocation scheduling staff resources. The detailed report displays the provider scheduling activity levels at each division per stop code and location name, and identifies staffs' names and associated provider types. The Scheduling Resource Assessment – Clinical Staff reports are available at the following link:

<https://biooffice.pa.cdw.va.gov/default.aspx?bookid=12ed351f-dfd0-4232-b86b-116ba73b1142|ispasFalse|report78224851-6a49-481a-a3f6-80fafe186541|ws1|wsb0|isDisabledAnalyticsFalse|isDashboardPanelOnTrue> **NOTE:** *This is an internal VA Web site that is not available to the public.*

5. National training on the policy change and reporting tool will be offered via one-hour webinar on June 3rd at 3:30pm Eastern Time (ET) and will be repeated on June 4th at Noon ET, and June 6th at 3:30pm ET. Meeting Details are below:

a. **Webinar Link:** <http://va-eerc-ees.adobeconnect.com/r6nnx5xica7/> **NOTE:** *This is an internal VA Web site that is not available to the public.*

b. **Audio:** VANTS 1-800-767-1750 Participant code 67526.

6. The VHA Office of Veterans Access to Care (10NG), is responsible for the content of this VHA notice. Questions may be addressed to Dawn Smith, Office of Veterans Access to Care at Dawn.Smith4@va.gov.

7. This VHA notice will be archived as of April 30, 2020. However, the amendment information will remain in effect.

CERTIFIED BY:

BY DIRECTION OF THE UNDER SECRETARY FOR HEALTH:

/s/ Renee Oshinski
Acting Deputy Under Secretary for
Health for Operations and Management

/s/ Renee Oshinski
Acting Deputy Under Secretary for
Health for Operations and Management

DISTRIBUTION: Emailed to the VHA Publications Distribution List on May 2, 2019.

NOTE: *All references herein to VA and VHA documents incorporate by reference subsequent VA and VHA documents on the same or similar subject matter.*