

General Client Scheduling Procedures

- » Care Coordinators should schedule client appointments during intake to address urgent medical needs.
- » Patient Navigators and Care Coordinators should carefully document and monitor each client's scheduled Care Plan activities, such as medical provider appointments and HIV self-management sessions.
- » Patient Navigators should report their daily schedule to the responsible supervisor (usually the Care Coordinator).

Before the Client's Appointment

- » STEPS staff should remind clients that they are expected to attend all scheduled clinical appointments and patient navigation meetings. STEPS staff should inform clients that they are expected to call to reschedule if they are not able to attend.
- » The Patient Navigator should make sure that clients are aware of the following well in advance of each scheduled medical provider appointment:
 - Time, date, and location
 - Transportation means
 - Childcare, if applicable
 - Information and resources (such as forms or questions they have for the medical provider)
- » The Patient Navigator should work with their clients to establish a reminder system for upcoming appointments:
 - Recommended for clients receiving high-intensity (at least weekly) services:
 - Remind the client 3 days before and on the day of the scheduled appointment in person or on the phone.
 - If the STEPS staff members are not able to reach the client, an attempt should be made to visit the client's home and accompany the client to the appointment.
 - Recommendations for clients receiving lower-intensity services (more than one week apart):
 - Remind the client 7 days before, 3 days before, and on the day of the scheduled appointment.
 - Each time the client is sent a reminder, STEPS staff should also offer to accompany the client to the appointment.

During and After the Appointments

- » Patient Navigators should accompany clients receiving high-intensity services to every routine primary care appointment.
- » Patient Navigators should follow up with client appointments to ensure attendance and correct any deficiencies in attendance by rescheduling.
- » Care Coordinators should meet with clients after each HIV primary care appointment to review and update the Care Plan.

Working with Other STEPS to Care Staff

- » Patient Navigators and/or Care Coordinators should schedule formal and informal Care Team meetings with medical providers to discuss client cases.
- » Care Coordinators should schedule formal and informal meetings with Patient Navigators and/or medical providers to discuss client cases.