

OLS: Scheduling Patients from the Center for Autism Services and Transition (CAST) Using the IHIS SmartPhrase

OVERVIEW & BACKGROUND

This tip sheet outlines the process for adding CAST patient scheduling information to appointment notes in IHIS. CAST patients may have unique needs or previous experiences that can affect how they prepare for and complete a lab draw. Capturing key scheduling comments in advance helps the lab team anticipate needed accommodation, prepare for the visit, and support a safer, smoother, more individualized lab draw experience for both the patient and the healthcare worker. This process is being piloted at OCNA and Hilliard Labs to standardize communication before CAST patient appointments.

PROCESS

1. Click **Epic > Scheduling > Appts.**
2. Enter information in the **Patient Lookup** window and select the correct patient.
 - If you cannot find the patient in the IHIS database, send the patient to Registration to complete registration
3. Select **Book It.**
4. In **Visit Type**, type **One Click.**
5. In **Add Provider**, type **CAST.**
6. Select **Notes** and enter the SmartPhrase **.CASTLABSCHEDULINGPROMPT.**
 - Tip: the SmartPhrase should populate after typing **.CAST.**
7. Follow the prompts and ask **all** the questions that populate. Select the appropriate responses from the dropdown menus.

Have you had a successful lab draw in the past? **CASTLABSCHEDULING**

If yes, what has helped in the past to allow for the successful lab draw?
CASTLABSCHEDULINGACCOMMODATIONS

If no, what accommodations or supports might be helpful?
CASTLABSCHEDULINGACCOMMODATIONS

Would you be interested in using either numbing or counting down to the needle stick for your lab draw? If so - please reach out to your PCP to schedule.

- noise cancelling headphones, fidgets, sunglasses (remind to please bring from home)
- playing music
- watching a video
- counting down to the needle stick
- explaining each and every step
- other - ***

Due on _____
Date _____ Time _____
Expire on _____

8. Select an appropriate available time slot, shown in green.
9. Review the appointment details and complete scheduling per standard workflow.

These steps help protect our patients and each other by ensuring important scheduling information is captured before the visit. Skipping any part of this process may limit the lab team's ability to prepare for the patient's needs.