

# Guide for Creating High-Quality Scheduling Templates

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**Instructions:** Cancer programs should use this guide to evaluate and revise existing scheduling templates and protocols or to inform the creation of new scheduling templates and protocols.

The portion of the guide below identifies key characteristics of high-quality scheduling templates. Cancer programs can use the check boxes next to each element to track the presence of each in a newly developed or existing template.

## What is a scheduling template?

Templates outline the amount of time that should be scheduled for a specific type of appointment. Ideally, they take into account multiple factors, such as treatment times for specific chemotherapy regimens in the infusion center, patient characteristics, and physician preferences.

## What are the benefits of using a scheduling template?

- Streamlines scheduler training
- Enables non-clinical experts to perform scheduling
- Standardizes the scheduling process
- Increases scheduling efficiency
- Helps schedulers to right-size appointment lengths, reducing the likelihood of delays
- Enables benchmarking
- Increases physician and staff satisfaction with the scheduling process

## What should I consider when creating a scheduling template?

- Pharmacy mixing times for specific treatment regimens in the infusion center
- Administration times for specific chemotherapy treatment regimens in the infusion center
- Unique patient characteristics (e.g., new patient, previous adverse reactions, support needs)
- Patient education needs
- Associated ancillary services (e.g., lab testing, imaging)
- Pre-infusion clinic visit with the oncologist
- Physician preferences in the medical oncology clinic and radiation therapy center
- Staff and other key stakeholder input

## How do I implement my scheduling template?

- Include relevant references to provide context for scheduler (e.g., clinical guidelines, clinical trial protocols, articles, abstracts)
- Embed template into scheduling system
- Revise template as needed (updated at least annually)
- Provide staff training
- Use template in conjunction with scheduling protocols

Source: Oncology Roundtable interviews and analysis.

# Guide for Creating High-Quality Scheduling Protocols

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The portion of the guide below identifies key characteristics of high-quality scheduling protocols. Cancer programs can use the check boxes next to each element to track the presence of each in a newly developed or existing protocol.

### What is a scheduling protocol?

Scheduling protocols are detailed documentation of the steps in the scheduling process, including instructions on how to use the scheduling template and how to handle deviations from the scheduling template (e.g., the patient's treatment regimen is not included in template, the patient has comorbidities requiring additional appointment time) or unexpected and/or urgent scheduling requests (e.g., sick patient needs same-day consult).

### What are the benefits of using a scheduling protocol?

- Improves consistency
- Enables flexibility
- Serves as a resource for schedulers and clinicians
- Improves physician and staff satisfaction with the scheduling process
- Reduces staff and physician time spent answering scheduling questions
- Increases scheduling efficiency

### Sample scenarios cancer programs should address in a scheduling protocol

- Patient's exact treatment regimen is not included in the scheduling template
- Sick patient needs same-day consult
- Patients with comorbidities
- Referring physician requests an immediate consult for a seemingly late-stage patient
- Patients with unique schedule constraints (e.g., inflexible work schedules, not available during day)

### What are the characteristics of a high-quality scheduling protocol?

- Incorporates key stakeholder input
- Revised as needed (updated at least annually)
- Includes "escalation steps" for various scheduling challenges
- Includes reasoning and a short guide
- Embedded into scheduling system
- Balances standardization and flexibility
- Accompanied by staff training and scripting to use with patients and clinicians
- Used in conjunction with a scheduling template

Source: Oncology Roundtable interviews and analysis.