

# Overdue Spreadsheet Rules

Last Modified on 11/20/2019 1:00 pm EST



## Overdue Spreadsheet Rules

- **RIS:**
  - Do NOT call if patient has been seen within the last year
  - Do NOT call if there is an order pending from the same month we are working.
    - Example: Today is 05/15/2017. Order pending from 05/10/2017.
  - Do NOT call if patient is already scheduled
  - Do NOT call if patient was called within the last week
  - Do NOT call if DNC or Deceased is in the address field
  - Do NOT call if patient is under 40 or over 90 years old
  - Do NOT call male patients
  - Do NOT call if notes state patient went elsewhere
  - Do NOT call if records were transferred to outside facility
- **Calling:**
  - Dial cell phone and home phone only!
    - Do NOT dial emergency contact or work number
- **Spreadsheet:**

- Do NOT alter spreadsheet
  - Do NOT rename spreadsheet!
  - Do NOT delete columns or rows
  - Do NOT add colors to cells
  - Do NOT reorganize listed
  - Do NOT filter columns

**If you accidentally delete or alter a spreadsheet, STOP and get Manager or Supervisor involved asap!**

- Do NOT add your own notes in columns
  - Use dropdown to select approved notes
  - If needed, use Comments column
    - Limit the amount of notes added
    - Abbreviate if necessary
- Get supervisor assistance if spreadsheet is not correct or needs to be updated

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Edited: 5/24/2017

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