Open Scheduling Setup and Support Guide

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Epic | 1979 Milky Way | Verona, WI 53593 | Voice: 608.271.9000 | Fax: 608.271.7237 | www.epic.com | documentation@epic.com

Your Responsibilities for Safe Use

This documentation will help guide you through the available software configuration options so you can decide the right configuration for your organization. Of course, safe and compliant use of the software in any configuration requires you and your users to use good judgment and perform certain responsibilities, including each of the following: enter and read information accurately and completely; be responsible for configuration decisions; ensure compliance with laws and regulations relevant for your organization; confirm the accuracy of critically important medical information (e.g., allergies, medications, results), just as you would with paper records; actively report suspected errors in the software to both Epic and affected personnel; thoroughly test the software to ensure it's accurate before using it; and use the software only according to standards of good medical practice. You also are responsible for training your personnel and other users to perform these responsibilities. Not performing any of these responsibilities may compromise patient safety or your compliance with applicable requirements.

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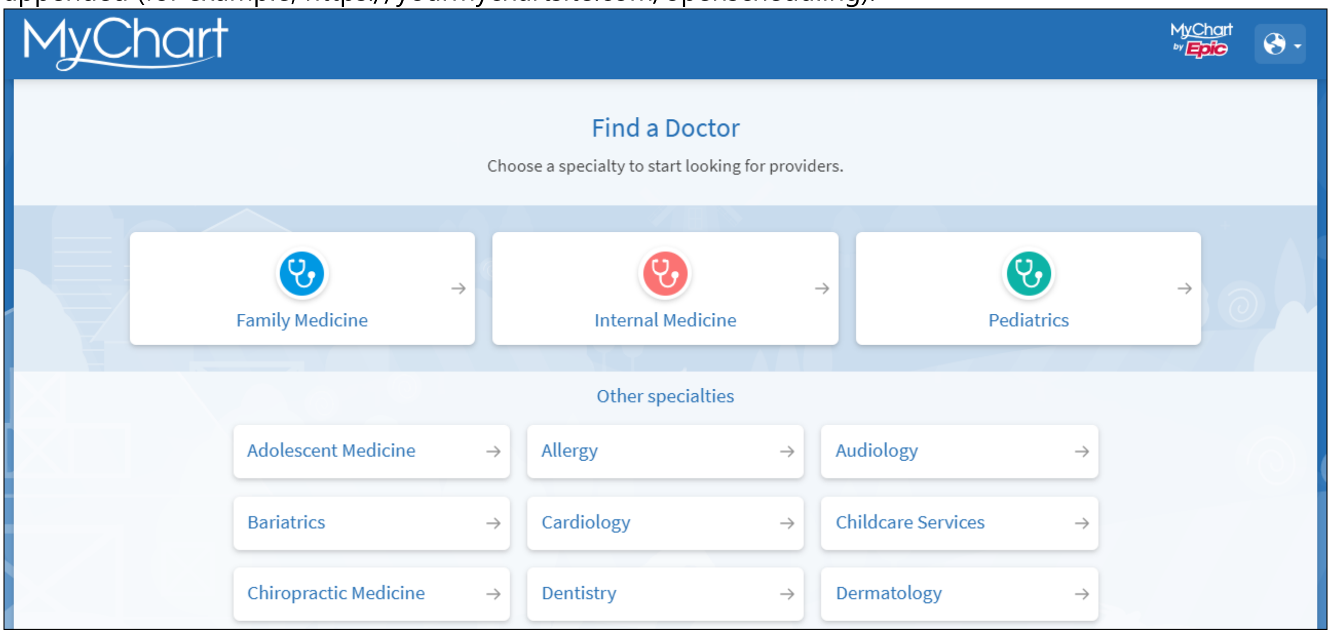
Open Scheduling Setup and Support Guide

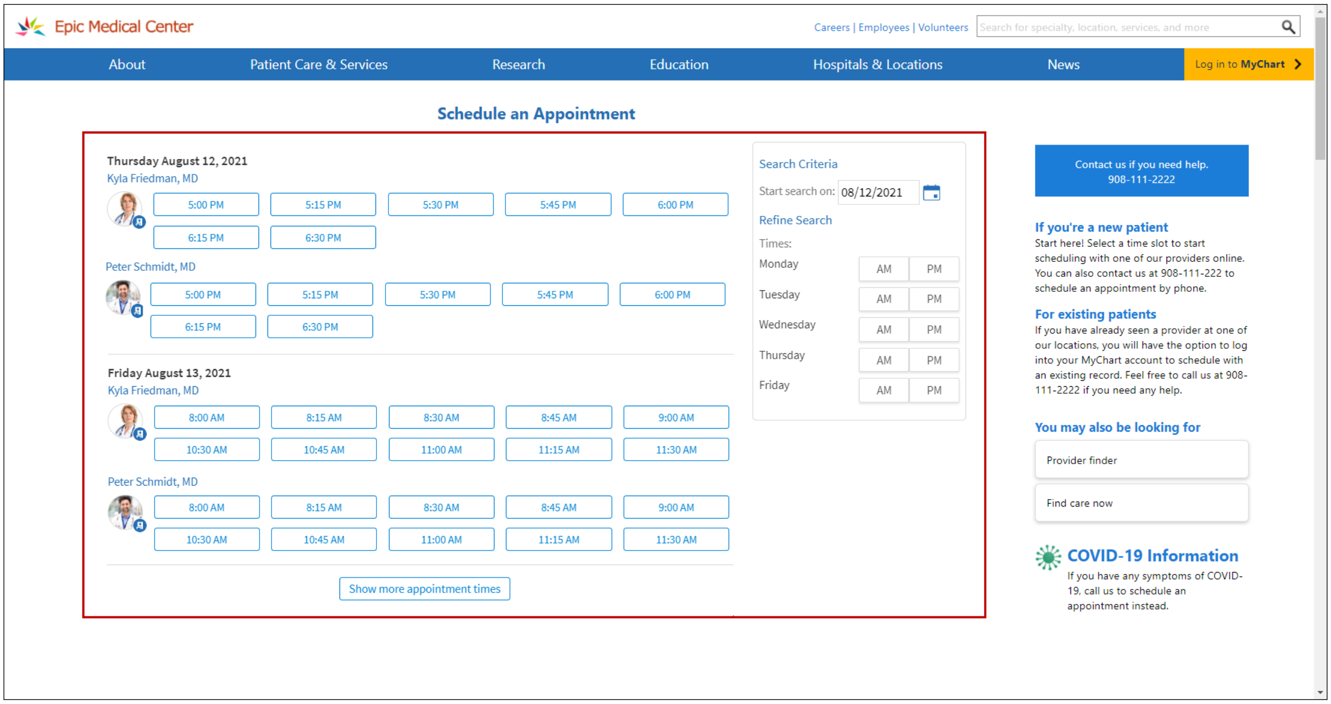
With open scheduling, patients who are new to your organization can view open appointment slots online by specialty and visit type and then directly schedule an appointment, even without a MyChart account. Existing patients can also use open scheduling to create appointments online with clinicians who might not otherwise be available to them through MyChart. Some features might require Interconnect to work. You can find open scheduling applications in Showroom to understand your opportunities for third-party scheduling integration with MyChart.

There are four different workflows you can configure for open scheduling:

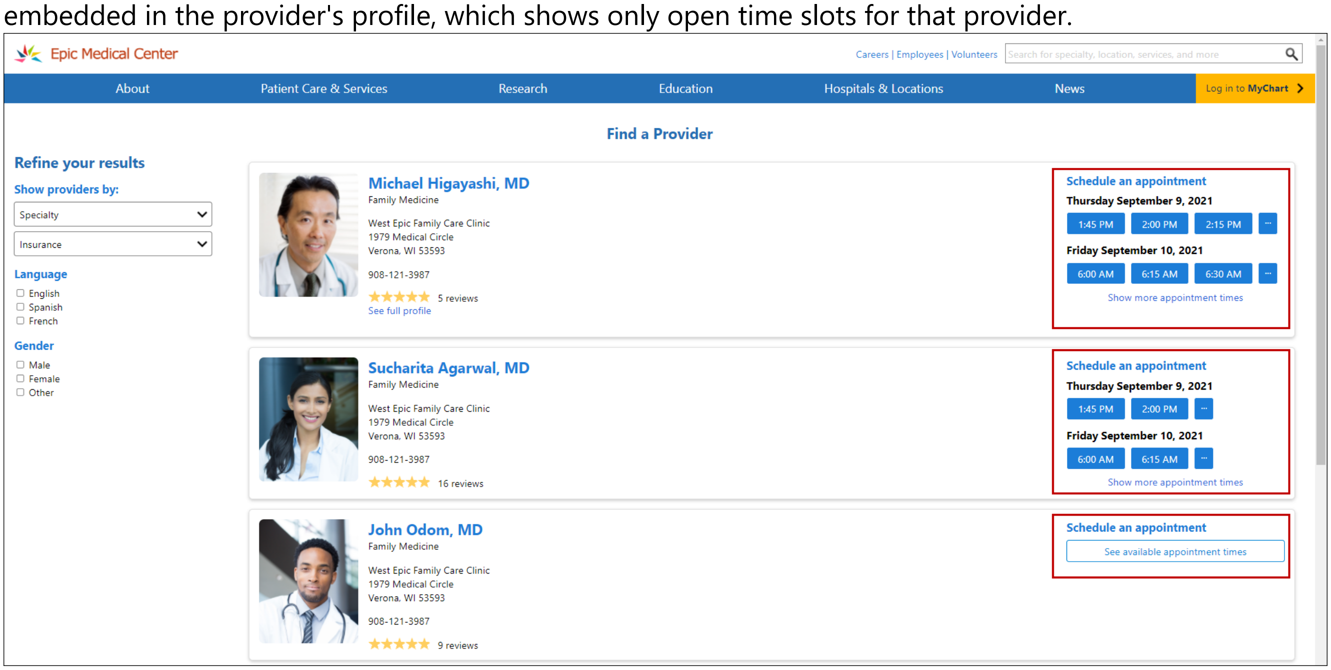
- With the open scheduling wizard, patients access a new website dedicated to open scheduling from which they can schedule an appointment by selecting a specialty, visit type, and appointment slot among available providers. The URL for this website is your MyChart website URL with "/openscheduling" appended (for example, https://yourmychartsite.com/openscheduling).



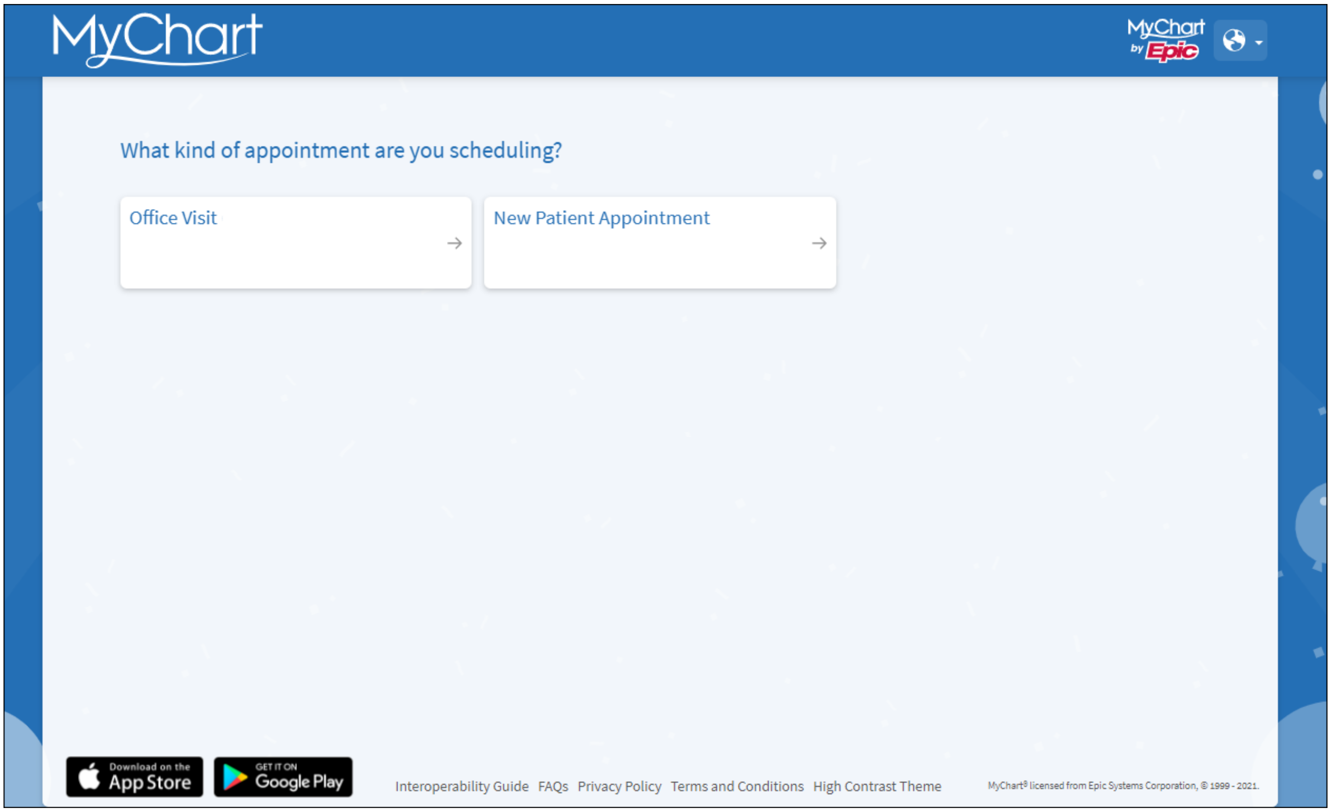
- With the embedded open scheduling widget, patients can easily schedule an appointment with a seamlessly embedded widget on your organization's website. You can show multiple providers at once to give patients more flexibility or limit appointment times based on a combination of visit types, departments, and providers.



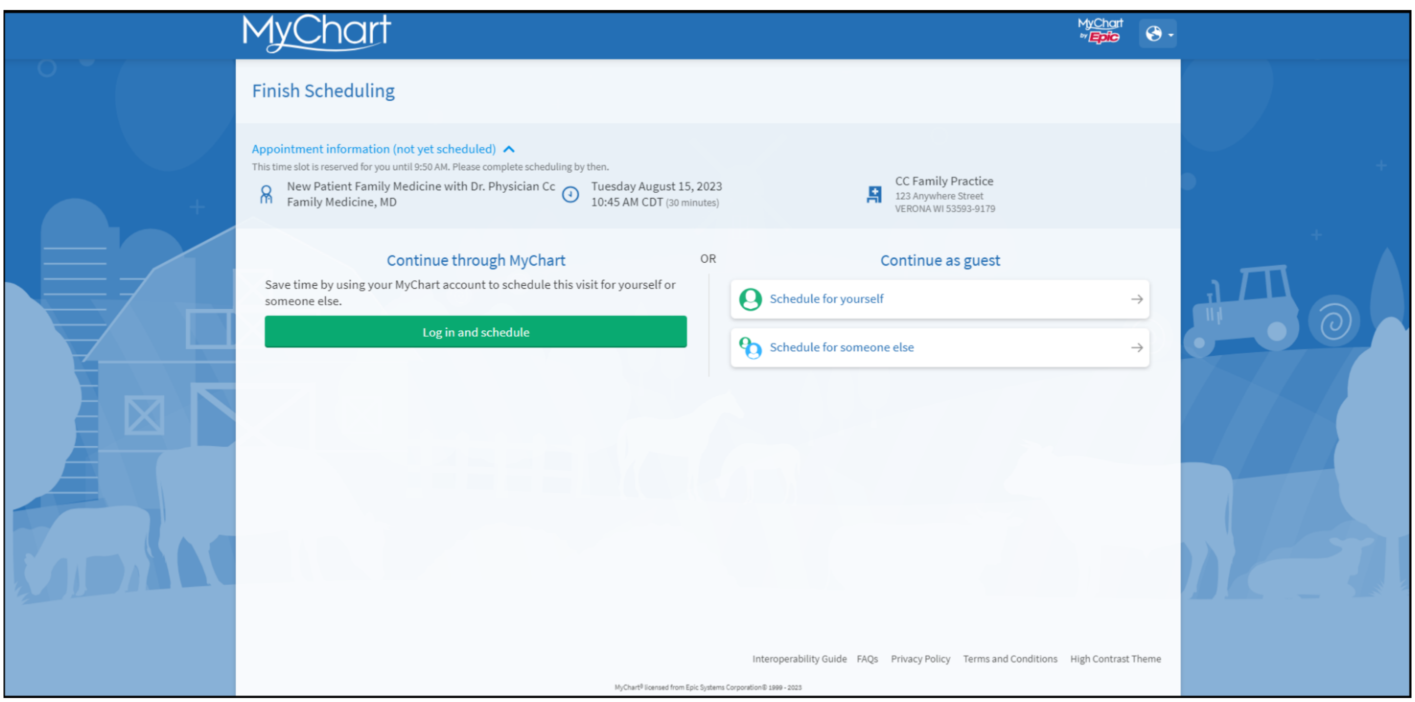
- With the simple open scheduling widget, you can show multiple simple widgets on a single page to give patients quick access to a few open time slots for a given provider. For example, a patient can search through the provider directory on your organization's website. After finding a doctor he likes, the patient can choose an appointment time on the directory page using an open scheduling simple widget embedded in the provider's profile, which shows only open time slots for that provider.



- With the standalone widget, patients can click a link or button that takes them to your branded MyChart webpage to complete the open scheduling workflow. For example, you might provide a button on a provider's web page or department page that takes patients to the open scheduling widget or include a link in an email encouraging patients to schedule an appointment. This widget has the easiest setup.



After a patient has selected an appointment slot, he can either log in using his MyChart username and password or enter his or, starting in November 2023, someone else's demographic information to schedule the appointment. If he enters demographic information and already has a patient record at your organization that uniquely matches that information, the appointment is scheduled with his existing patient record. Otherwise, a new patient record is created.



Open scheduling supports proxy scheduling, which allows a proxy to make an appointment on another patient's behalf. After a proxy completes the steps for making an appointment through the open scheduling website or widget using her MyChart login credentials, she is presented with a form on which she can choose who she's scheduling the appointment for. The proxy herself (if she's a patient) and all other patients to whom she has proxy access appear on this form. After the proxy chooses a patient and clicks Schedule, she is taken to the Appointment Details page for the new appointment in proxy context. If the proxy does not have security to view the Appointment Details page, she is taken to the open scheduling confirmation page.

Considerations

Starting in August 2023, MyChart's Provider Finder integrates with open scheduling to help new or established patients find the right provider for their needs and then schedule an appointment with them. If you'll be using both features, make sure you're considering them together as you plan your strategy and build. For more information about Provider Finder, refer to the MyChart Provider Finder Setup and Support Guide.

Across your organization

To use open scheduling, you must use both MyChart and Cadence. Open scheduling workflows also affect Identity users, who must work to reconcile potential duplicate patient records created during the open scheduling workflow.

Note that the Care Everywhere license is required to complete some of the open scheduling setup, but the use of Care Everywhere itself is not required.

In the Foundation System

Open scheduling workflows are fully configured in the Foundation System for the dedicated open scheduling website.

Open Scheduling Setup: Essentials

In this section, we'll cover everything that you need to do to start using open scheduling. This includes what you need to do to make open scheduling available to patients and how to configure open scheduling to match our recommendations.

Configure Individual Departments and Specialties for Open Scheduling

Enable Departments for Open Scheduling

You have two options for enabling departments for open scheduling:

- Enable the entire department and use a default visit type for all appointments scheduled within that department.
- Enable open scheduling only for certain visit types within the department.

Note that each department must have a specialty listed in the department record in order for it to appear for open scheduling.

Enable the Department for Open Scheduling Using the Default Visit Type

If you enable open scheduling without configuring department-specific visit types, the system uses the default visit type (specified in I WDF 12510 on the Open Scheduling Settings screen in Patient Access System Definitions) for appointments scheduled in that department.

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Online Scheduling Settings 1 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions).
3. In the Allow open scheduling/request (I DEP 53200) field, enter 2-Schedule only. In August 2024 and earlier versions, the field is called Allow open sched? and the value is called Yes. By default, departments are not enabled for open scheduling.

Enable the Department for Open Scheduling Using Department-Specific Visit Types

Instead of using a default visit type for an entire department, you can choose to use department-specific visit types within the department. With this configuration, only visit types enabled for open scheduling are available to patients. The default visit type is not used.

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Online Scheduling Settings 1 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions).
3. In the Visit Type (I DEP 53005) column, list the visit types you want to allow for open scheduling.
4. In the Open? (I DEP 53250) column, enter Yes. By default, this field is set to No.

In the Foundation System, the following advanced visit types are enabled for open scheduling:

- Flu Shot (Family Medicine)
- Breast Imaging Screenings (Radiology)

Access the Foundation System open scheduling website to try out the scheduling workflow, or log in to the Foundation Hosted environment to view our advanced visit type build.

Enable Telehealth Scheduling in Open Scheduling Workflows

If you want to let patients use open scheduling for telehealth visits, complete the steps below. Note that these steps are not technically required for February 2023 and earlier versions. However, you must set the Allow telemedicine scheduling field to yes in May 2023 and later. If you're on an earlier version, setting this field to Yes now will save you time when you later upgrade.

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Online Scheduling Settings 2 screen (Direct Scheduling Settings 2 in August 2024 and earlier versions).
3. In the Allow telemedicine scheduling (I DEP 53150) field, enter Yes.

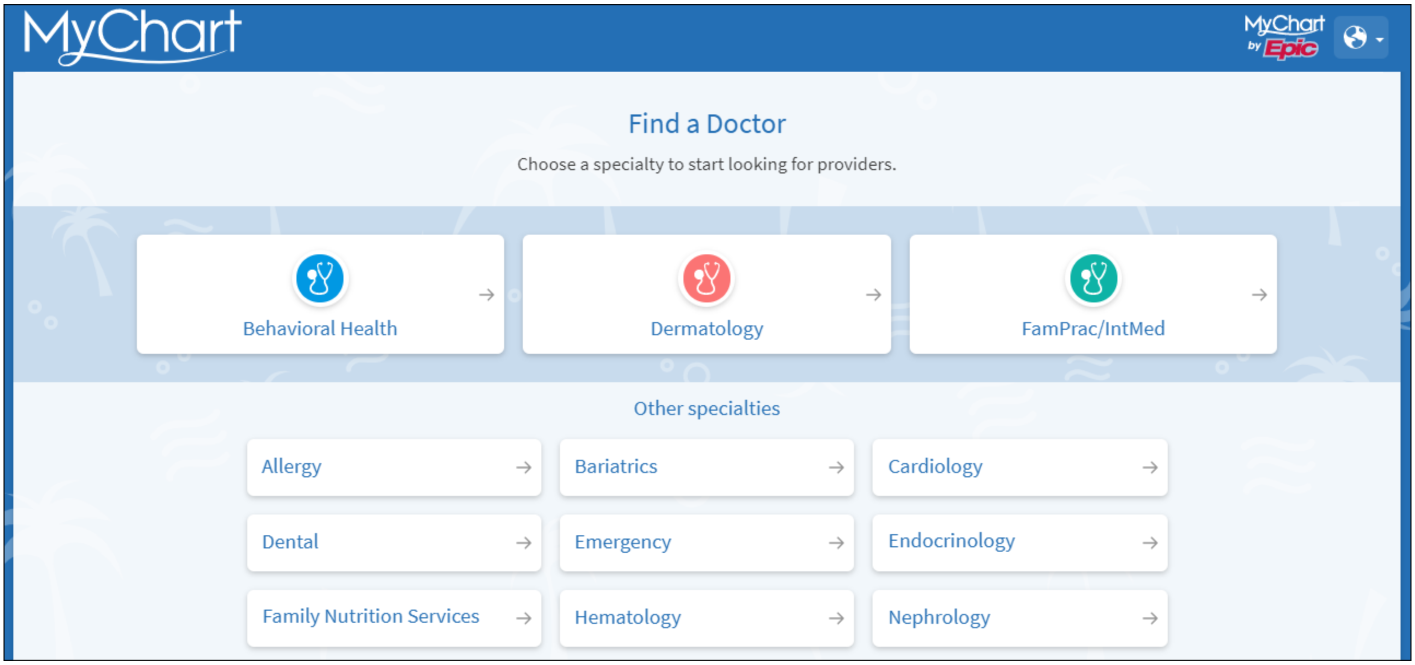
Specify Specialty Icons

In May 2023 and earlier versions, there are no Epic-released specialty icons, so you must specify the icon you want to use for each specialty available in open scheduling to have an image appear in the open scheduling workflow. If you don't specify an icon, the specialty name and a missing image icon appear.

Starting in August 2023, if no image is entered, a generic stethoscope image is used. To set up icons for post-login open scheduling, edit the SpecialtyPhotoUrl string in the Scheduling\Scheduling node of the Strings Manager to configure icons. For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

Configure Promoted Specialties

To help guide patients through the scheduling process, you can show the most common specialties with greater visual emphasis at the top of the list on the open scheduling landing page. If you have six or fewer specialties available in open scheduling, they all appear as promoted. If there are more than six specialties available, the first three alphabetically are promoted by default. We recommend reviewing which specialties appear as promoted and changing them to represent your most common specialties. We also recommend promoting three or fewer specialties to provide patients with a more focused experience.



To configure which specialties appear as promoted:

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. Go to the Open Scheduling Settings screen.
3. In the Promoted specialties (I WDF 12660) field, list the specialties you want to appear as promoted.
4. Clear the cache to apply your changes.
   a. From the MyChart System Manager Menu, go to System Utilities > Scheduling Utilities > Clear New Provider Cache.
   b. Enter Yes to continue.

Enable Individual Clinicians for Open Scheduling

In order for a clinician to be available for open scheduling, the following criteria must all be met:

- The clinician must be enabled for open scheduling in his provider record.
- The clinician's department must be enabled for open scheduling with a specialty specified for the department, and the clinician must have a scheduling template within the department with future openings available.
- Open scheduling must be enabled at the system level.

When a clinician is available for open scheduling, patients see the external name from the provider record followed by the clinician's license for display.

Considerations

If you are using open scheduling for advanced visit types, note the following:

- Providers who are in the pool for open scheduling for advanced visit types need to be enabled for open scheduling.
- The pool should not use current department logic.

To enable a clinician for open scheduling, follow these steps:

1. Edit the record for the provider for whom you want to enable open scheduling:
    - In Hyperspace, open a provider record (search: Provider) and go to the Scheduling > Online Scheduling form.
    - In text, from the MyChart System Manager Menu, select Master File Maintenance > Provider and open a provider record. Access the MyChart Settings screen.
2. Enter Yes in the Allow open scheduling or request? (I SER 32068) field (Allow Open Scheduling through MyChart? in August 2024 and earlier versions). By default, clinicians are not enabled for open scheduling.

Considerations

Before enabling a provider for open scheduling, check whether they have the following items populated in their record. These items are used in patient-facing filters that appear in open scheduling to help patients find and schedule with a provider who meets their needs.

- Sex (I SER 1340)
- Languages (I SER 1350)
- Clinical Interests (I SER 26200)
- Provider Type (I SER 1040)

Enable Open Scheduling System Wide

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Open scheduling enabled? (I WDF 12500) field, enter Yes. By default, this field is set to No.

Use the Redesigned Open Scheduling Wizard

A redesigned open scheduling wizard offers a better scheduling experience for patients. The new open scheduling wizard offers visual and workflow updates to make it more closely match direct scheduling, giving patients a consistent experience no matter how they schedule.

The guest demographics form in the redesigned open scheduling wizard relies on some of the same demographics settings that control which pieces of the name are collected during self-signup. If you do not use self-signup, as described in the Let Patients Initiate MyChart Activation Online with Self-Signup topic, you need to configure these settings. Otherwise, patients will not be prompted to enter their name if they choose the "Schedule as Guest" option. You do not need to enable self-signup to use the redesigned open scheduling wizard.

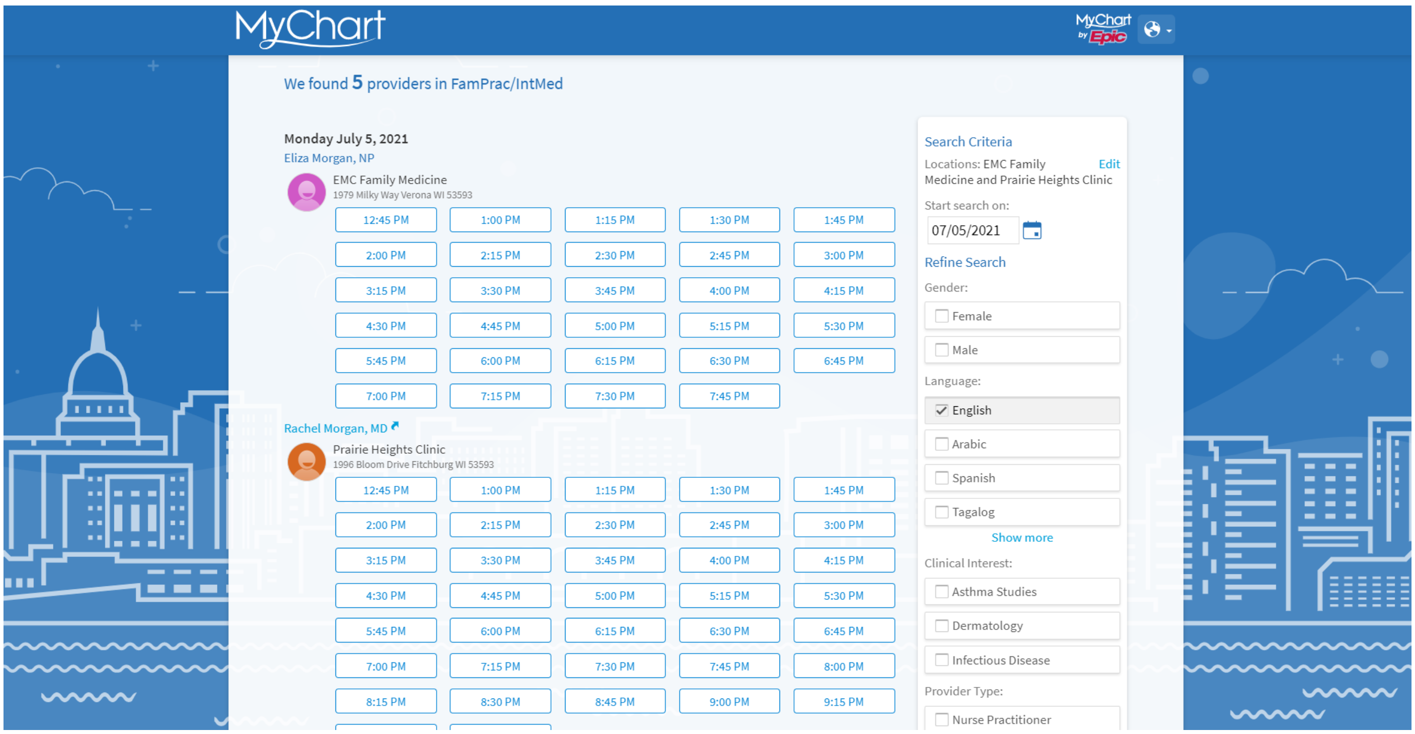
If you do use self-signup, we recommend reviewing your configuration to ensure that the demographics you are collecting from patients in the redesigned open scheduling wizard align with the demographics properties used by your duplicate configuration record and match what you expect to collect from new patients during open scheduling.

Note that the address fields in the guest demographics form no longer use the open scheduling configuration in the same way. Before, you could discretely configure each address field and whether it was required. With the redesigned open scheduling wizard, if any address field is listed in the Demographic Field (I WDF 12570) setting, address fields appear in open scheduling, but the individual fields are determined by configuration in the Epic Country Definitions (E4K) record of the selected or default country record, rather than the discrete fields in the open scheduling item. This makes open scheduling consistent with self-signup workflows.

There are a couple of other considerations for organizations that use chart synchronization with EMPI. If a patient's home deployment is different than the open scheduling instance's deployment, then once the appointment has been scheduled the patient will be redirected to their home deployment to view visit details.

Additionally, the redesigned open scheduling wizard uses a separate set of strings from the old open scheduling wizard, so if you previously customized strings for the old wizard, you need to duplicate those customizations in the strings for the new one. If this build is not completed, you will no longer see your string customizations.

The redesigned open scheduling wizard includes provider filters that patients can use to narrow their search while scheduling an appointment. Patients can filter on provider gender, language, type, and clinical interest, allowing them to find the provider who best meets their needs. Starting in November 2022, an additional provider filter is available that patients can use to narrow their provider selections based on the age ranges a provider treats.



Provider filters in the new open scheduling wizard

Configure Patient Name Items and Address Fields for the Guest Demographics Form

If you use self-signup, review your configuration of the demographics settings listed below to ensure that the demographics you are collecting from patients in the new open scheduling wizard align with the demographics properties used by your duplicate configuration record and match what you expect to collect from new patients during open scheduling. Refer to the Create a Custom Duplicate Configuration Record for Smarter Matching on Patient Names topic for more details on how your duplicate check record is configured.

If you don't currently use self-signup, you must configure the following settings so that the name fields appear in the redesigned open scheduling wizard.

- Name Field Label (I WDF 5245)
- Name Fields (I WDF 5242)
- Required? (I WDF 5240)
- Name field component logic (I WDF 5250)

For more information about these settings, refer to the Specify Name Formatting and Logic for Identification of Existing Patient Records topic.

If the name field labels are anything other than First Name, Middle Name, and Last Name, the field labels must also be configured in the corresponding strings in Strings Manager, under the Demographics > Shared > DemographicsForm > NameInputLabel node. For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

Use the Open Scheduling Widget

> If you want a third-party vendor to embed the open scheduling widget in a website they develop, or if you want to use it alongside a third-party solution in your own website, contact your Epic representative and mention SLG 7908617 to discuss how you can use this feature.

You can use a widget to link to or embed the open scheduling feature within an existing website. For example, you can include the widget on each provider's webpage so that patients who are reading about that provider can schedule an appointment with him without going to a different page.

You can also use the widget alongside the main open scheduling website or in place of having a dedicated site for open scheduling. The open scheduling widget is mobile-optimized, which also allows patients to access open scheduling from their mobile devices.

If patients use the open scheduling widget in a scenario where patients have already logged into MyChart, by default they must to log in again when they get to the confirmation step. If you want patients to remain logged in instead, you can use widgets on your self-developed or third-party post-login pages. For more information about this option, refer to the Let Patients Launch a MyChart Session Using an Access Token topic.

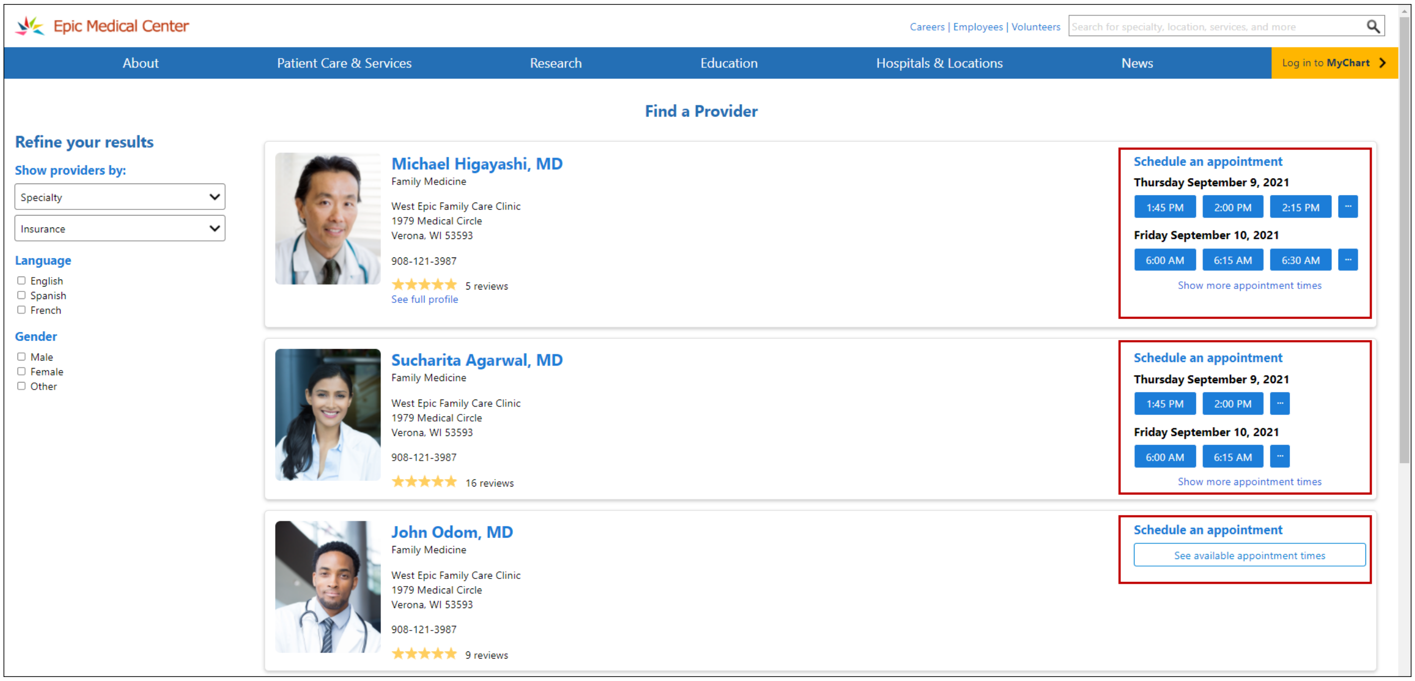
There are many different configuration options available for the open scheduling widget. For example, patients can choose an appointment slot for:

- A single provider, department, and visit type
- Multiple providers for a single department and visit type
- Multiple providers and departments for a single visit type
- Multiple providers, departments, and visit types

The following image shows the embedded widget, using multiple providers for a single specified department:

Use the Simple Widget

The simple widget is more compact than the embedded open scheduling widget. It shows only a couple of appointment times for a single provider which works best on a webpage where multiple providers might be listed, and you want to show appointment times for each. For example, you might use the simple widget on your directory page.



Patients can either click one of the appointment times shown or the dots to see more available times.

There are two options to embed the simple widget, using container-based code or script-based code. There is no difference in the behavior of the simple widget between the two options. We've provided two different options so you can choose the code you would prefer to work with.

To use the container-based simple widget, enter the following code where you want the widget to appear in your webpage:

```
<div
  id="[container ID]"
  data-url="https://[MyChart host]/[MyChart instance]"
  data-apikey="[API key]"
  data-widget-type="openschedulingsimple"
  data-additionalparams-visittype="[visit type ID]"
  data-additionalparams-department="[department ID]"
  data-additionalparams-provider="[provider ID]"
></div>
```

To use the script-based simple widget, enter the following code in the script of the webpage where you want the widget to appear:

```
<script type="text/javascript">
  window.addEventListener("load", function (event) {
    mychartWidget.renderWidget({
      url: "https://[MyChart host]/[MyChart instance]",
      apiKey: "[API key]",
      widgetType: "openschedulingsimple",
      containerId: "[container ID]",
      additionalParams: {
        visittype: "[visit type ID]",
```

```
        department: "[department ID]",
        provider: "[provider ID]",
      },
    });
  });
</script>
```

If you are using the script-based simple widget, enter the following code in your webpage's HTML code exactly where you want the widget to appear to patients:

```
<div id="[container ID]"></div>
```

You might already have similar code in your HTML to use for this purpose. Reuse the code so your webpage's code remains uncluttered.

Then, regardless of which option you choose, enter the following script in the head of your webpage:

```
<script src="https://[MyChart host]/[MyChart instance]/Scripts/lib/Widget/widget_sdk
.js"></script>
```

Generate an API Key

To ensure that only the intended widget appears on your organization's website, you need to use an API key.

To generate an API key:

1. In Hyperspace, open Category List Maintenance (search: Category List Maintenance) and open the Widget Domains (WDF 60010) category list. Create a new category value for the domain of the webpage you're embedding your widget into.
    a. The URL format should be in lower case and match the format of the domain URL that the widget is embedded in. For example, if your site is https://www.orgsite.com, make sure that’s how your category value is formatted. If your site is https://website.com, make sure there’s no “www” in the category value. Additionally, the category value should not include a slash at the end. Refer to the Add a Value to a Category List topic for more information.
2. Starting in August 2024, you must work with your Epic representative to configure the Widget URLs screen. Contact your Epic representative and mention SLG 7908617. Then, continue to step 3 to clear the cache and recycle applications pools. In May 2024 and earlier,
    a. Navigate to the MyChart System Manager Menu, select Login and Access Configuration and go to the Widget URLs screen.
    b. In the URL (I WDF 60010) field, enter the domain you added as a new category value.
    c. In the Type (I WDF 60020) field, enter OPENSCHEDULINGSIMPLE.
    d. An API key is automatically generated.
3. Clear the cache to apply your changes.
    a. From the MyChart System Manager Menu, go to System Utilities > Scheduling Utilities > Clear New Provider Cache.
    b. Enter Yes to continue.
4. Recycle the application pool for your MyChart web server.

Set Parameters

Set required parameters:

- url. Replace [MyChart host] with the host name for your MyChart site. Replace [MyChart instance] with the name of your MyChart instance. For example, https://yourorganization.com/MyChart.
- apiKey. Enter the API key you generated in the Generate an API Key section. Each API key is unique for a given domain and widget type, so make sure to use the correct API key in your code.
- containerId. Enter the value you set for the div id. This parameter determines where on your webpage the embedded widget appears to patients. This parameter is required only for the script-based simple widget.
- department. Enter the ID of the department you want to schedule in. Multiple departments cannot be displayed in the simple widget.
- visittype. Enter the ID of the visit type to allow for scheduling. Multiple visit types cannot be specified at once for this parameter.

Set the provider parameter as described below.

- provider. Enter the ID of the provider you want to include in the simple widget.
    - Starting in May 2024, the provider parameter is optional. If you specify a department, you can omit the list of provider IDs so all providers who are enabled for open scheduling in that department with that visit type are automatically included in the widget. For example, you might leave the provider parameter empty for visits where the specific provider does not matter, such as an urgent care visit.
    - In February 2024 and earlier, the provider parameter is required.
    - Note that if you use an external ID type (I WDF 12585) that does not apply to resource providers, such as NPI, you must prepend the resource provider ID with RES^ to ensure that it is included in open scheduling. For example, to include resource provider 5892, you would configure this parameter to be id=RES^5892. To include providers who have an ID for the external ID type, such as a person provider with an NPI ID, you would configure this parameter with only their NPI ID.

Refer to the Set Additional Parameters topic for additional parameter options.

When you set the provider and visittype parameters, note that the parameters must match the ID (I SER .1) in the provider record and ID (I PRC .1) of the visit type record, respectively, unless you've chosen to use a different ID type, as described in the Hide Identifying Information in URLs topic.

You can also configure some parameters as pass through parameters. Pass through parameters are meant to set values for parameters that might be needed later in the patient's workflow. To add a pass through parameter, prepend "passthroughparam-" to your desired parameter and follow the general structure of the simple widget code:

data-additionalparams-passthroughparams-linksource="main directory"

For the above example, you might implement the simple widget on multiple webpages within your organization's website. If you want to track which webpage patients are accessing, you can use the linksource parameter to determine which patients accessed the simple widget on the main directory page of your organization's website.

Some common pass through parameters:

- linksource. Use this parameter to track the source from which open scheduling was accessed. You can report on how often patients are accessing open scheduling through a given source by creating a custom report that looks to the Open Scheduling Link Source (I EPT 28155) item.

- selDepId. Use this parameter to pre-select a department for the patient after they go through a decision tree. Refer to the Query String Parameters topic for more information.
- payor. Refer to the Preselect or Filter Payers for Open Scheduling topic for more information.

Use the Embedded Widget

The configuration for the embedded open scheduling widget is different depending on your Epic version.

Configure the New Open Scheduling Widget

There are two options to implement the embedded widget, using container-based code or script-based code. There is no difference in the behavior of the embedded widget between the two options. We've provided two different options so you can choose the code you would prefer to work with.

To use the container-based embedded widget, enter the following code where you want the widget to appear in your webpage:

```
<div
  id="[container ID]"
  data-url="https://[MyChart host]/[MyChart instance]"
  data-apikey="[API key]"
  data-widget-type="openscheduling"
  data-additionalparams-dept="[department ID]"
  data-additionalparams-vt="[visit type ID]"
  data-additionalparams-id="[provider ID]"
></div>
```

To use the script-based embedded widget, enter the following script where you want the widget to appear in your webpage:

```
<script type="text/javascript">
  window.addEventListener('load', function (event){
    mychartWidget.renderWidget({
      "url": "https://[MyChart host]/[MyChart instance]",
      "apiKey": "[API key]",
      "widgetType": "openscheduling",
      "containerId": "[container ID]",
      "additionalParams":{
        "vt": "[visit type ID]",
        "dept": "[department ID]",
        "id": "[provider ID]",
      },
    });
  });
</script>
```

If you are using the script-based embedded widget, enter the following code in your webpage's HTML code exactly where you want the widget to appear to patients:

```
<div id="[container ID]"></div>
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You might already have similar code in your HTML to use for this purpose. Reuse the code so your webpage's code remains uncluttered.

Then, regardless of which option you choose, enter the following script in the head of your webpage:

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<script src="https://[MyChart host]/[MyChart instance]/Scripts/lib/Widget/widget_sdk
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Generate an API Key

To ensure that only the intended widget appears on your organization's website, you need to use an API key.

To generate an API key:

1. In Hyperspace, open Category List Maintenance (search: Category List Maintenance) and open the Widget Domains (WDF 60010) category list. Create a new category value for the domain of the webpage you're embedding your widget into.
   a. The URL format should be in lower case and match the format of the domain URL that the widget is embedded in. For example, if your site is https://www.orgsite.com, make sure that's how your category value is formatted. If your site is https://website.com, make sure there's no "www" in the category value. Additionally, the category value should not include a slash at the end. Refer to the Add a Value to a Category List topic for more information.
2. Starting in August 2024, you must work with your Epic representative to configure the Widget URLs screen. Contact your Epic representative and mention SLG 7908617. Then, continue to step 3 to clear the cache and recycle applications pools. In May 2024 and earlier,
   a. Navigate to the MyChart System Manager Menu, select Login and Access Configuration and go to the Widget URLs screen.
   b. In the URL (I WDF 60010) field, enter the domain you added as a new category value.
   c. In the Type (I WDF 60020) field, enter OPENSCHEDULING.
   d. An API key is automatically generated.
3. Clear the cache to apply your changes.
   a. From the MyChart System Manager Menu, go to System Utilities > Scheduling Utilities > Clear New Provider Cache.
   b. Enter Yes to continue.
4. Recycle the application pool for your MyChart web server.

Set Parameters

Set required parameters:

- url. Replace [MyChart host] with the host name for your MyChart site. Replace [MyChart instance] with the name of your MyChart instance. For example, https://yourorganization.com/MyChart.
- apiKey. Enter the API key you generated in the Generate an API Key section. Each API key is unique for a given domain and widget type, so make sure to use the correct API key in your code.
- containerId. Enter the container id you entered in the <div> tag. This parameter determines where on your webpage the embedded widget appears to patients.

Set department, provider, and visit type parameters as described below. For the embedded widget to work, you must either provide department or provider parameters.

- dept. Enter a comma-delimited list of department IDs, or leave this parameter blank to show all departments.
- id. Enter a comma-delimited list of provider IDs for providers you want to include in the open scheduling widget.
  - Note that if you use an external ID type (I WDF 12585) that does not apply to resource providers, such as NPI, you must prepend the resource provider IDs with RES^ to ensure that they are included in open scheduling. For example, to include resource providers 5892, 7803, and 9177, you would configure this parameter to be id=RES^5892,RES^7803,RES^9177. To include providers who have an ID for the external ID type, such as a person provider with an NPI ID, you would configure this parameter with only their NPI ID.
  - If you specify a department, you can omit the list of provider IDs so all providers who are enabled for open scheduling in that department with that visit type are automatically included in the widget.
- vt. Enter a comma-delimited list of visit type IDs to allow for scheduling. Starting in November 2022 or in May 2022 with special update E10200291, visit types appear in the order in which they're listed in this parameter.

Refer to the Set Additional Parameters topic for additional parameter options.

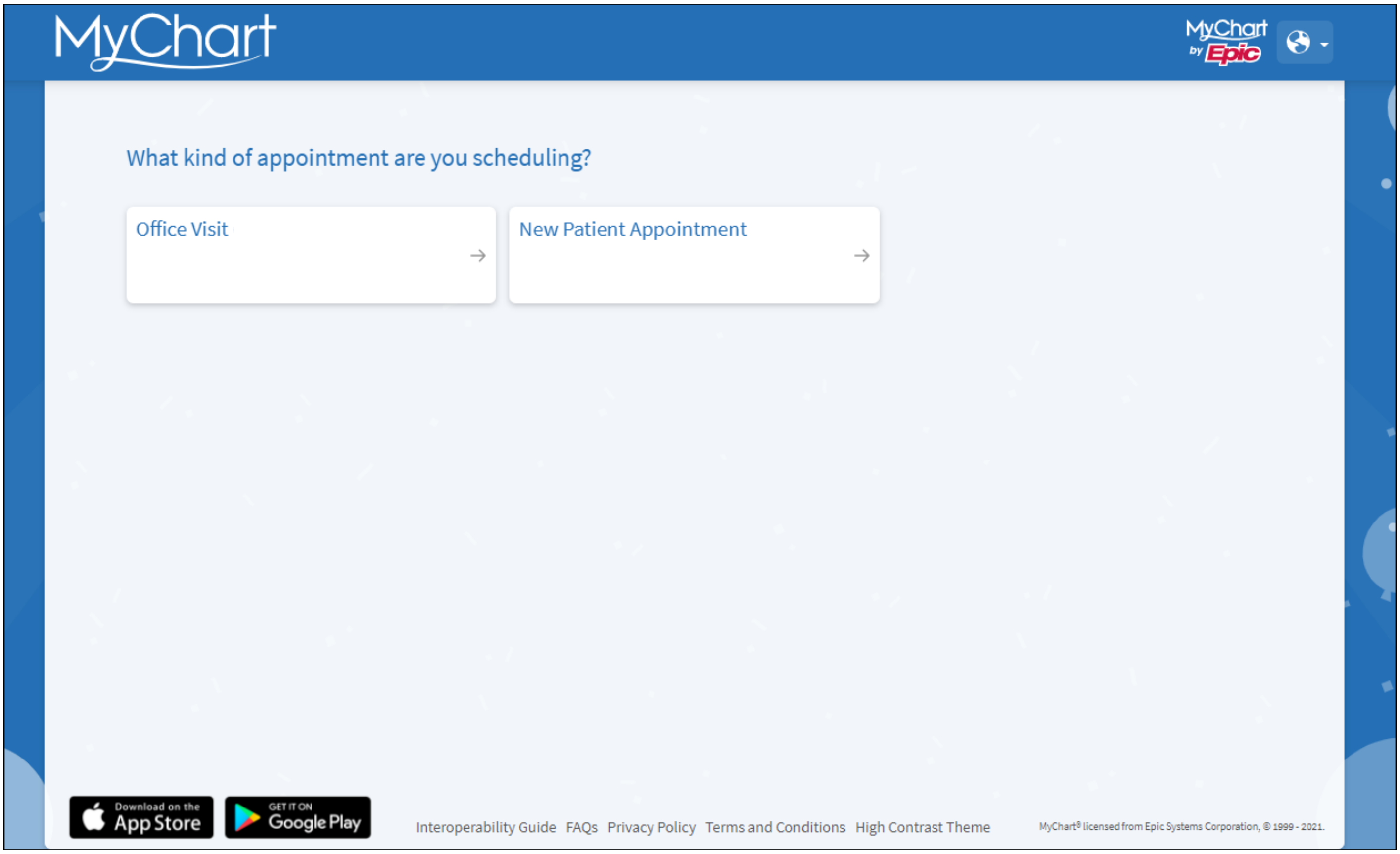
When you set the id and vt parameters, note that the parameters must match the ID (I SER .1) in the provider record and ID (I PRC .1) of the visit type record, respectively, unless you've chosen to use a different ID type, as described in the Hide Identifying Information in URLs topic.

If you embed the open scheduling widget within a dedicated mobile site or within a responsive website (instead of providing a direct link to the widget URL from a website or mobile app), you can further customize the widget by adding your own CSS to your override.css file.

For more information about adding icons and descriptions for reasons for visit in the open scheduling widget, refer to the Customize Text and Icons on Open Scheduling Pages topic.

Use the Standalone Widget

Provide a direct link to the widget URL from a website, email, or mobile app. For example, you might provide a button on a provider's webpage or department page that takes patients to the open scheduling widget or include a link in an email encouraging patients to schedule an appointment. This standalone widget has the easiest setup of all of the widgets.



The standalone widget appears for a patient to complete the open scheduling workflow.

To implement the standalone widget, follow this link structure:

```
https://[MyChart host]/[MyChart instance]/openscheduling/standalone?id=828679,827465
&dept=2200018738,2200020180&vt=3370
```

In the above example, the standalone widget is configured to allow scheduling for two providers (user IDs 828679 and 827465) for visit type 3370 in department 2200018738 and 2200020180.

To configure department, provider, and visit type parameters, update the query string parameters as described below. For the standalone widget to work, you must either provide department or provider parameters.

- dept. Enter a comma-delimited list of department IDs, or omit this parameter to show all departments.
  - If you specify a provider or providers, you can omit the list of department IDs so all departments in which a provider or providers have a schedule for are included.
- id. Enter a comma-delimited list of provider IDs for providers you want to include in the open scheduling widget.
  - Note that if you use an external ID type (I WDF 12585) that does not apply to resource providers, such as NPI, you must prepend the resource provider IDs with RES^ to ensure that they are included in open scheduling. For example, to include resource providers 5892, 7803, and 9177, you would configure this parameter to be id=RES^5892,RES^7803,RES^9177. To include providers who have an ID for the external ID type, such as a person provider with an NPI ID, you would configure this parameter with only their NPI ID.
  - If you specify a department, you can omit the list of provider IDs so all providers who are enabled for open scheduling in that department with that visit type are automatically included in the widget.

- vt. Enter a comma-delimited list of visit type IDs to allow for scheduling. Starting in November 2022 or in May 2022 with special update E10200291, visit types appear in the order in which they're listed in this parameter.

Refer to the Set Additional Parameters topic to set more parameters for your standalone widget.

When you set the id and vt parameters, note that the parameters must match the ID (I SER .1) in the provider record and ID (I PRC .1) of the visit type record, respectively, unless you've chosen to use a different ID type, as described in the Hide Identifying Information in URLs topic.

For more information about adding icons and descriptions for reasons for visit in the open scheduling widget, refer to the Customize Text and Icons on Open Scheduling Pages topic.

Set Additional Parameters

You can customize your open scheduling widget by using optional parameters. To use any of these parameters, follow the structure of the code you're using for passing in other parameters like department or provider to the widget unless otherwise specified.

- highcontrast. Set this parameter to (true) to show the widget in high contrast theme. Set this parameter to (false) to show the widget in the default theme. If you leave this parameter blank or enter any other value, the widget appears in the default theme.
- lang. Enter the language you want to appear for the embedded widget. All languages listed in the Available Languages topic are available. If you leave this parameter blank or enter any other value, the widget appears in English (US).
- linksource. Use this parameter to track the source from which open scheduling was accessed. For example, if you promote open scheduling through a Facebook ad, set it to linksource=facebook. You can report on how often patients are accessing open scheduling through a given source by creating a custom report that looks to the Open Scheduling Link Source (I EPT 28155) item. To set this parameter for the simple widget, you must use the pass through parameter format.
- selDepId. Use this parameter to pre-select a department for the patient after they go through a decision tree. Refer to the Query String Parameters topic for more information.
- isLocalStorageEnabled. The isLocalStorageEnabled parameter should be added at the same level as the apikey and url parameters. Set this parameter to true to enable the scheduling limit, based on the local storage of the page the widget is embedded on.
- numdays. Enter the number of days you want to appear in the simple widget. The maximum number of days you can show is 4. If you leave this parameter blank, the simple widget shows two days. This parameter only applies to the simple widget.
- numslotsperday. Enter the number of time slots you want to appear for each day in the simple widget. If you leave this parameter blank, the simple widget shows three time slots per day. This parameter only applies to the simple widget.
  - Starting in May 2024, there is no maximum number of time slots you can show per day.
  - In February 2024 and earlier, the maximum number of time slots you can show is 5.
- stringkey. Use this parameter when you want to show a custom landing page to patients when they open the standalone widget. To do this, follow the instructions in the Customize .NET Pages Using the Strings Manager topic to configure custom keys for the strings below. Then set the stringkey parameter to the key you made. For example, when using the standalone widget configured for vaccination appointments, you might want to give patients a landing page to provide additional context before showing them available

appointment times. Use Strings Manager to set a custom key of “vaccine” with the corresponding custom text for the strings above, then add “&stringkey=vaccine” to the standalone widget URL. This parameter only applies to the standalone widget.

  - CustomLandingPageTitle
  - CustomLandingPageBody
  - CustomLandingPageButtonText

- accesstoken. Available starting in May 2024. Use this parameter to keep a patient logged in to MyChart if you use the open scheduling widget on a custom or third-party site and used the standalone launch or EHR launch to retrieve an access token on behalf of the patient. More information on the standalone launch and EHR launch can be found in the Launching Patient-Facing Applications topic. Because this applies to all of your organization's widgets, it's passed into a widget like the URL and API Key parameters rather than as an additional parameter. If you are interested in using this parameter, contact your Epic representative and mention SLG 8313878.

A container-based simple widget that uses these parameters could look like this:

```
<div
  id="[container ID]"
  data-url="https://[MyChart host]/[MyChart instance]"
  data-apikey="[API key]"
  data-widget-type="openschedulingsimple"
  data-accesstoken="[access token ID]"
  data-additionalparams-visittype="[visit type ID]"
  data-additionalparams-department="[department ID]"
  data-additionalparams-provider="[provider ID]"
  data-additionalparams-lang="[language]"
  data-additionalparams-numdays="1"
  data-additionalparams-numslotsperday="2"
></div>
```

A script-based embedded widget that uses these parameters could look like this:

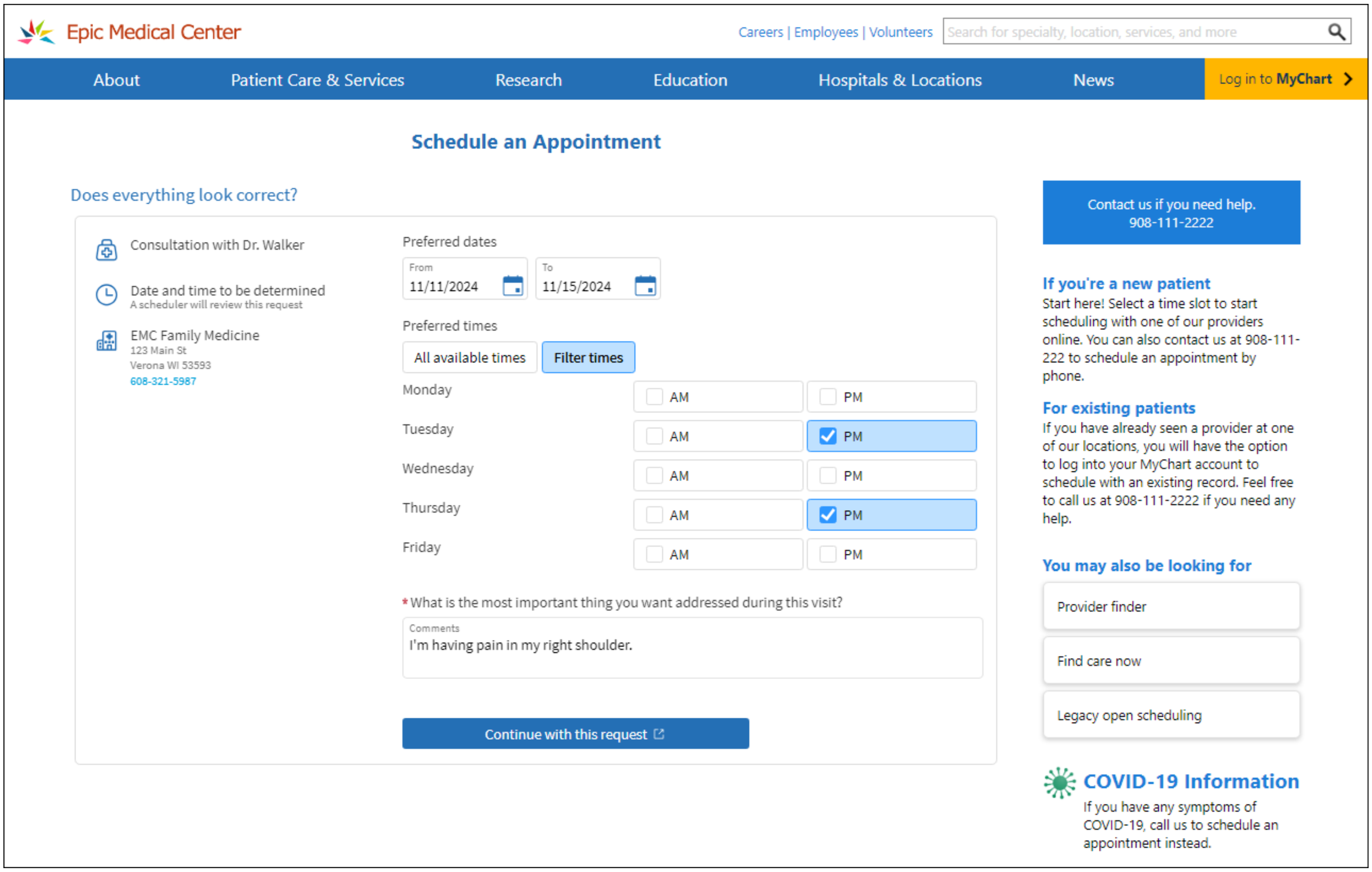
```
<script type="text/javascript">
  window.addEventListener('load', function (event){
    mychartWidget.renderWidget({
      "url": "https://[MyChart host]/[MyChart instance]",
      "apiKey": "[API key]",
      "widgetType": "openscheduling",
      "accessToken": "[access token ID]",
      "containerId": "[container ID]",
      "additionalParams":{
        "vt": "[visit type ID]",
        "dept": "[department ID]",
        "id": "[provider ID]",
        "highcontrast": "true",
        "linksource": "facebook",
      },
    });
```

```
  });
</script>
```

Let Patients Send Appointment Requests

Starting in November 2024

You can let patients send Cadence appointment requests so that they can take next steps to be seen with a provider without needing to pick up the phone and call. Your scheduling staff can then review and follow up on these requests with fewer phone calls.



Cadence appointment requests are enabled by default for all departments that are enabled for open scheduling. Alternatively, you can choose to allow only open scheduling, only appointment requests, or neither at the department level by setting the Allow open scheduling/request (I DEP 53200) field to one of the following values:

- 0-No (default)
- 1-Both schedule and request
- 2-Schedule only
- 3-Request only

Workqueue Testing Utility

You can use the Patient-Submitted Appointment Request Generation Utility to generate Cadence appointment requests to mimic those submitted by patients. This allows you to validate workqueue build for each relevant department or specialty without needing to submit requests as a test patient through MyChart. This utility can be run in your build, test, or production environments to confirm that the requests created by MyChart show up in the expected place for schedulers. This utility only submits Cadence appointment requests, not MyChart message-based appointment requests.

To use the Patient-Submitted Appointment Request Generation Utility:

1. From the MyChart System Manager Menu, go to System Utilities > Scheduling Utilities > Patient-Submitted Appointment Request Generation Utility.
2. At the Which workflow type would you like to test? prompt, enter which MyChart workflow you want the request to be sent from. The choices are OPEN, DIRECT, or PROVIDERFINDER.
3. At the Patient prompt, enter the name of the patient for whom you want to generate the appointment request.
4. If you chose OPEN or PROVIDERFINDER for the workflow, at the Would you like to see a list of departments enabled for Open Scheduling? prompt, enter Yes to see a list of departments enabled for open scheduling or enter No to skip to the next prompt.
5. At the Department prompt, enter the name of the department in which you want to generate the appointment request.
6. At the Would you like to enter a specific provider? prompt, enter Yes to specify a provider or enter No and the utility will automatically select one.
7. If you chose to specify a provider, at the Provider/Resource prompt, enter the name of the provider you want to generate the appointment request with.
8. At the Would you like to enter a specific visit type? prompt, enter Yes to choose a specific visit type or enter No and the utility will submit a request without a visit type.
9. If you chose to specify a visit type, at the Visit Type prompt, enter the name of the visit type you want the appointment request for.
10. If you chose PROVIDERFINDER for the workflow, at the Would you like to enter a search term? prompt, enter Yes to choose a specialty, subspecialty, condition, treatment, or keyword record you would like to associate the request with or enter No to submit the request without a search term.

Notify Patients of Appointment Request Confirmation

To ensure that patients know their request was successfully submitted, you should send an email message to patients to confirm that an appointment request was sent. Before you configure the system to send these messages, you must create a SmartText to define the body of each message. This SmartText must use functional type 8051-WP Guest Appointment Request Confirmation.

> To make it easier for you to get this content, we've created a Turbocharger package that contains the SmartText record with example email content. This package is available for download starting in November 2024. For information about importing this package, refer to the 282543-Open Scheduling Appointment Confirmation Email Content topic.

Then, follow these steps to set up the notification messages:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Message Settings screen.
2. Specify the message subject and the SmartText (I WDF 12556 and I WDF 12557) for the Confirm appointment request message.

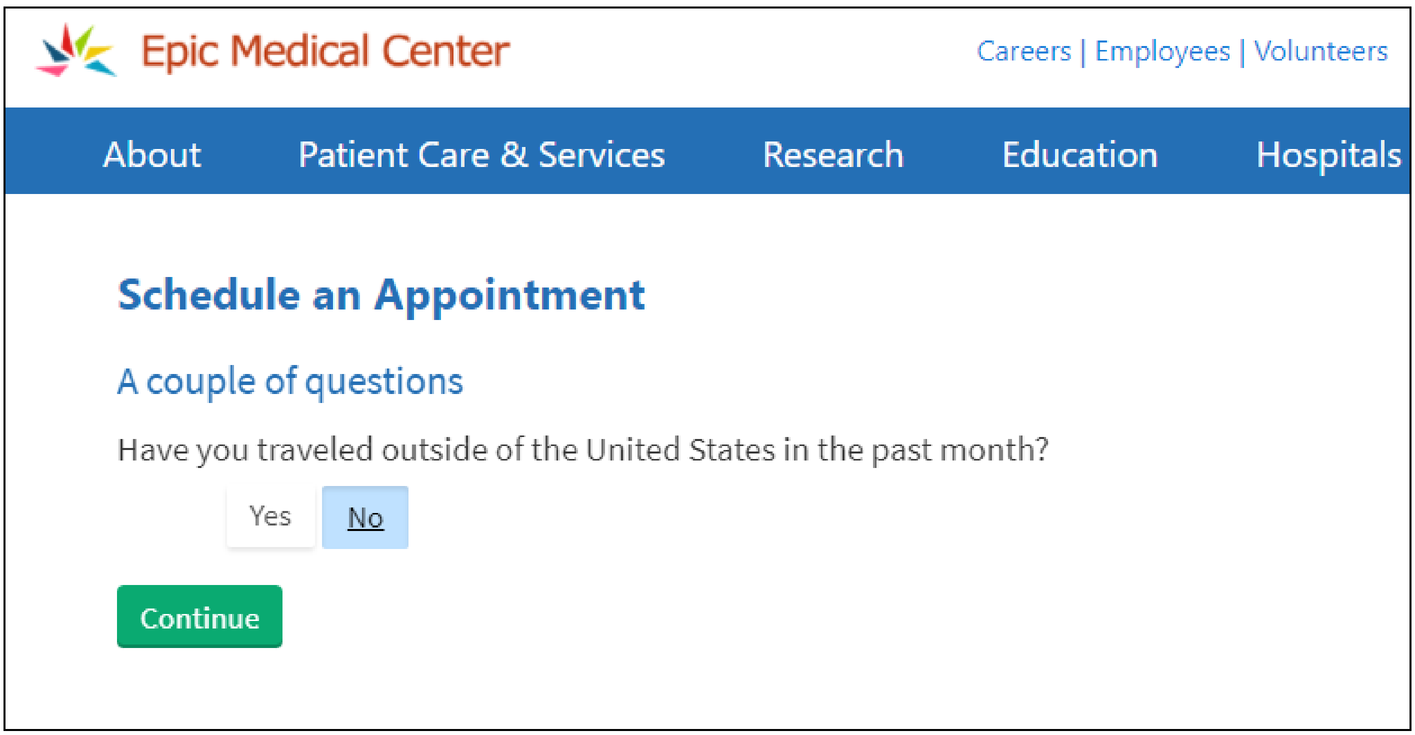
Similar to open scheduling confirmation emails, confirmation emails for appointment requests submitted through open scheduling and Provider Finder are sent according to the logic in the Send logic (I WDF 12525) field:

- 0-Send to email on file. Will never send a confirmation to the email address entered during open scheduling. This is the default value.
- 1-Prefer new email provided. Will send a confirmation to the new email entered. If no email is entered, the confirmation will send to the email on file.
- 2-Prefer email on file. Will send a confirmation to the email on file. If no email is on file, the confirmation will send to the new email address entered.

Guide Patients to the Right Visit with Decision Trees

You can use appointment entry decision trees in open scheduling to better guide new and existing patients toward scheduling the right visit with the right provider or resource. Based on a patient's answers, decision trees can change the provider or visit type a patient had originally selected, show more specific scheduling instructions, prevent scheduling, and more. For example, based on a patient's responses to questions about recent travel history, the system might redirect them to a virtual visit instead of an in-person visit.

Decision trees are supported in the redesigned open scheduling widget and in the open scheduling wizard. Note that we don't plan to support decision trees for open scheduling web services.



A decision tree in an embedded open scheduling widget

Similar to direct scheduling and ticket scheduling, decision tree results are linked to a patient's record after the patient makes an appointment through open scheduling. This means schedulers in Hyperspace can see how and why a particular visit was scheduled. Decision trees are available to patients accessing open scheduling both on a desktop and on a mobile device.

If you want to use the same decision tree for both anonymous patients and known patients but route them to different outcomes, you can use a Rule node. For example, you might want to ask anonymous patients if they've seen a certain provider before, or ask for basic demographic information to determine whether a certain visit is appropriate for them. You can also use rule property 32350-Is Anonymous Scheduling Patient to branch your tree based on whether a known patient record exists.

Decision trees in open scheduling support the node types available for appointment entry. You can find a list of these nodes and learn more about them in the Decision Trees Setup and Support Guide.

For example, the Foundation System uses decision tree 1400000004-MYC Annual Wellness Open Scheduling in visit type 1005-Physical to help the appropriate patients schedule a Medicare-specific visit instead of a general physical.

To see how this decision tree is configured, log in to the Foundation Hosted environment as your organization's Cadence analyst (ESADM) and open the ES Annual Wellness decision tree (search: Appointment Entry Decision Tree).

To make it easier for you to get this content, we’ve created a Turbocharger package for this decision tree and the questions it contains. This package is available for download from February 2020 to February 2023. For information about importing this package, refer to the 258096-MyChart Decision Tree for Annual Wellness Visit topic.

Special Considerations

There are a few things to be aware of before setting up decision trees in open scheduling:

Node Types

The Add Panel node type that is supported for known patient contexts is not supported in anonymous patient contexts like open scheduling. In February 2022 and earlier, the Questionnaire node type is also not supported in anonymous patient contexts.

Other node types that can leverage the information of a patient who is logged in to MyChart behave differently in open scheduling, since the patient hasn’t yet authenticated their information. As you’re configuring a decision tree for open scheduling, make sure to avoid:

- Rule nodes and connectors that evaluate patient data, since the decision tree will advance as if no patient record exists.
- Patient-based SmartLinks in Show Instructions nodes, since they won’t return any information.

Visit Type, Department, and Provider Settings

When a decision tree adds a visit type, department, or provider, there are different settings that determine whether that record is appropriate for an open scheduling workflow:

Type of configuration	Relevant setting	Outcome
Visit Type	Visit Type (I DEP 53005) and Open scheduling allowed? (I DEP 53250) in a department's Visit Type Overrides configuration table	Decision tree overrides configuration
Department	Allow open scheduling/request (I DEP 53200). In August 2024 and earlier versions, the field is called Allow open sched?.	Decision tree overrides configuration if set to 2-Schedule only, 3-Request only, or blank (or Yes in August 2024 and earlier versions); configuration is respected if set to No
Provider	Allow open scheduling or request? (I SER 32068). In August 2024 and earlier versions, the field is called Allow Open Scheduling through MyChart?.	Configuration is always respected
System	Open scheduling service area filters (I WDF 12670) and (starting May 2024) site ID service area filters (I WDF 2585)	Configuration is always respected
Query string parameters in the open scheduling widget	N/A	Decision tree overrides configuration

If a patient begins scheduling with a specific provider in an open scheduling widget and gets to an Add Visit or Modify Original Visit node of a decision tree, they see behavior similar to starting a direct scheduling workflow with a specific provider. That means:

- If the decision tree is configured to explicitly add other appropriate providers, the patient sees scheduling options for the original provider and any provider explicitly added by the decision tree, unless that provider is not available in the authorized service area.
- If the decision tree changes the original visit but does not explicitly add other providers, and the original provider is still appropriate for scheduling, the patient sees only scheduling options for that provider.

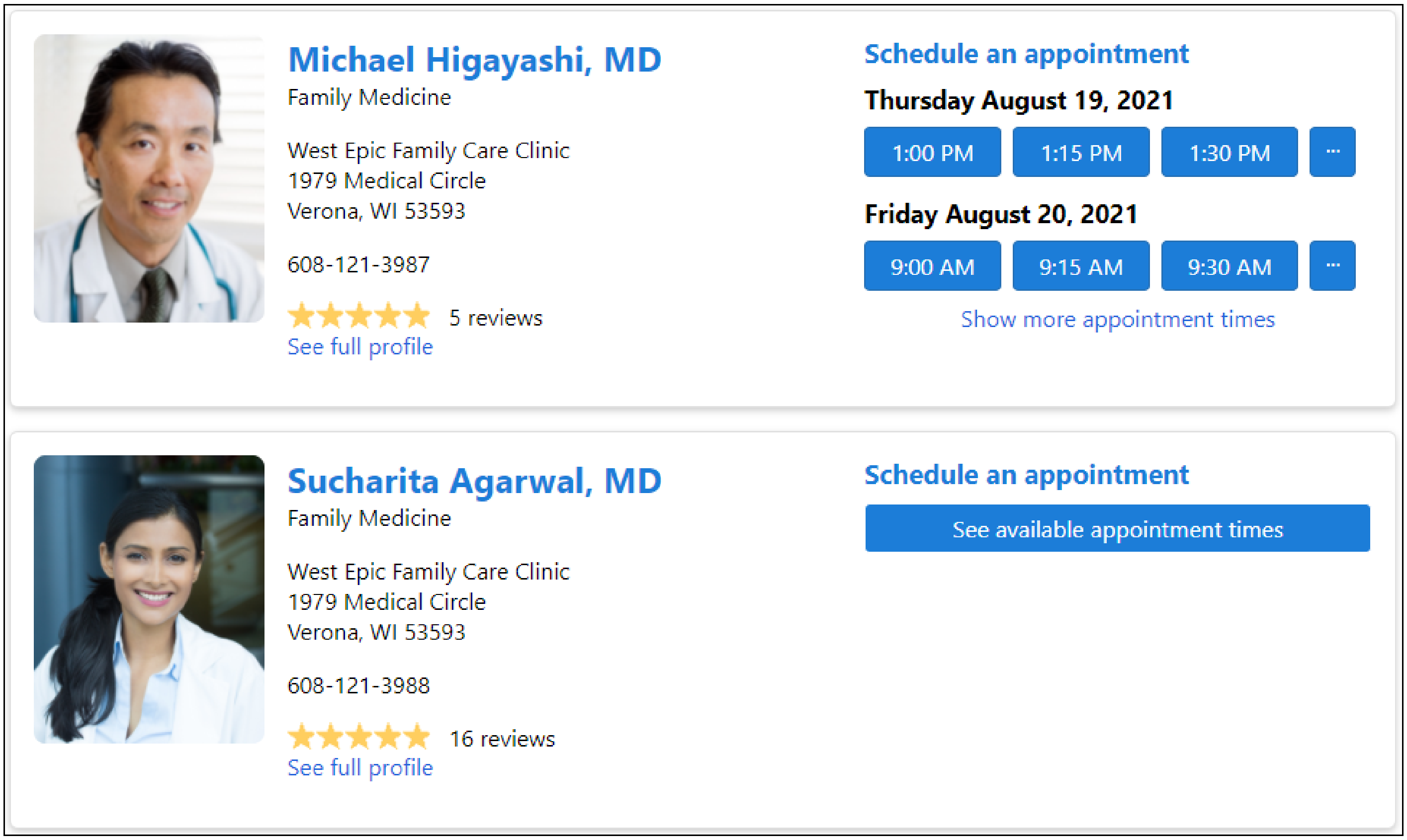
Decision Trees in the Simple Open Scheduling Widget

Depending on the complexity of a decision tree, patients can have a couple of different experiences when scheduling an appointment with an attached decision tree through the simple open scheduling widget.

If a decision tree is attached to a visit type made available in the simple open scheduling widget, patients see one of two views:

- Patients see a provider's available appointment slots if the attached decision tree does not contain any node types that could change which slots are available after completing the decision tree. Clicking a slot takes the patient to the standalone open scheduling widget to complete the decision tree with a preselected slot.
- Patients see a "See available appointment times" button if the attached decision tree contains any node types that could change which slots are available after completing the decision tree. Clicking this button

takes the patient to the standalone open scheduling widget to complete the decision tree without a preselected slot. If a decision tree has any of the following nodes, patients will see the "See available appointment times" button in the simple widget: Add Tag; Add Visit; Decision Tree; Modify Original Visit; Set Telehealth Mode (starting in May 2023)



The first provider's visit type has a decision tree that will not change which slots are available after completing the decision tree, so the patient sees the slots before going through the decision tree.

The second provider's visit type has a decision tree that might change which slots are available after completing the decision tree, so the patient must instead go through the decision tree before seeing slots.

Configure Decision Trees in Open Scheduling

If your organization already uses appointment entry decision trees for particular visit types in Cadence or in MyChart direct scheduling or ticket scheduling, review whether they're appropriate to use for that same visit type in an open scheduling context before a patient has provided their information.

Prerequisites

If your organization doesn't have any appointment entry decision trees built for visit types available in MyChart direct scheduling or ticket scheduling, refer to the Decision Trees Setup and Support Guide for more information on how to create decision trees.

General setup for open scheduling as described in the Open Scheduling Setup: Essentials topic is also necessary, as well as the enabling the redesigned open scheduling widget.

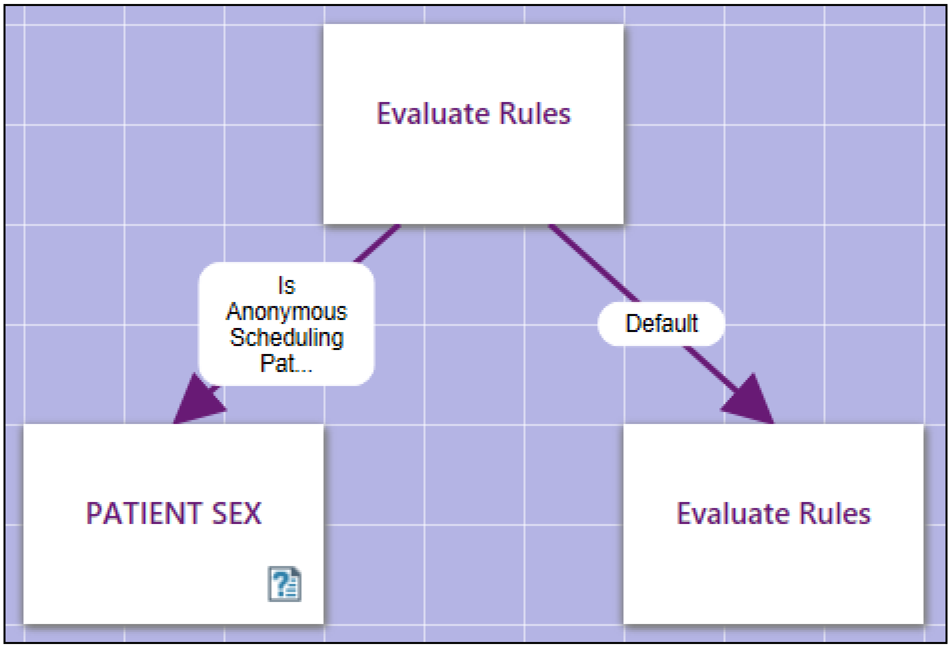
Use the Build Wizard in Hyperspace to update visit types to use decision trees for anonymous patients. To get started, open the Build Wizard (search: Build Wizard) and search for feature 320056-MyChart Scheduling - Assign Decision Trees and Visit Type Questionnaires to Visit Types (application: MyChart).

To manually configure a decision tree:

1. In Hyperspace, open a visit type record (search: Visit Type).
2. Starting in November 2023, go to the Decision Support form. In August 2023 and earlier, go to the Online Scheduling form.
3. In the Anonymous Patient Decision Tree (I PRC 32085) field, enter the decision tree you want to use for this visit type.
4. Clear the cache to apply your changes.
    a. From the MyChart System Manager Menu, go to System Utilities > Scheduling Utilities > Clear New Provider Cache.
    b. Enter Yes to continue.

To use the same decision tree to route anonymous patients down different paths as known patients, configure the tree to branch based on rule property 32350-Is Anonymous Scheduling Patient. To branch a tree based on whether the patient is anonymous:

1. In Hyperspace, open the Rule Editor activity (search: Rule Editor).
2. Create a rule with a context of 5003-Appointment Entry Begin. Then, configure the rule to evaluate as True when property 32350-Is Anonymous Scheduling Patient = Yes. For more information on using the Rule Editor activity, refer to the Create or Edit a Rule topic.
3. Open the Appointment Entry Decision Tree activity (search: Appointment Entry Decision Tree Editor).
4. Open the decision tree for your visit type.
5. Add an Evaluate Rules node at the beginning of your tree.
6. Configure a Rule connection with the rule you just created to branch to the appropriate node when a patient is anonymous. For example, this might be a Question node to ask for the patient's age or sex.
7. Configure a Default connection to branch to the appropriate node when a patient record is known. For example, this might be an Evaluate Rule node to automatically determine the patient's age or sex from their chart.
8. This part of your decision tree should look like this:



Set the Default Visit Type for Open Scheduling

The default visit type specified at the system level is used when a patient uses open scheduling to make an appointment in a department that does not use visit type overrides.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Default visit type field, enter the visit type to use for departments that don't have visit type overrides specified. By default, this field is blank, and departments without visit type overrides specified are not included for open scheduling, even if the departments themselves are enabled.

Set How Many Days Ahead to Look for Open Appointment Slots

You can specify how far in the future patients can schedule appointments through open scheduling using the minimum and maximum number of days to look ahead for open appointment slots. Note that settings specified at the department or visit type level can override these system-level settings, although the system-level settings are respected if they are more restrictive.

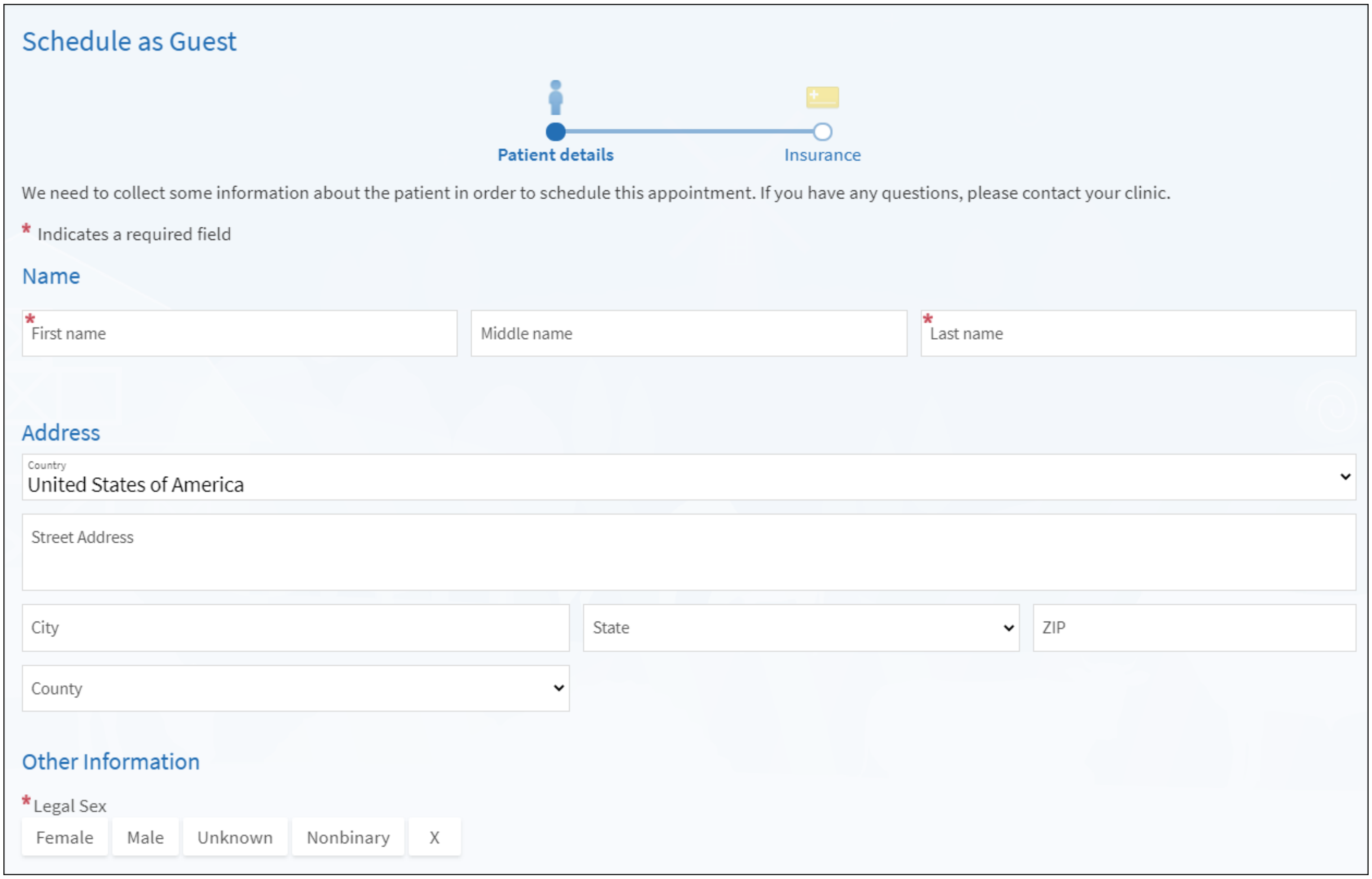
1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Min days lookahead field, enter the minimum number of days ahead that patients can search for open appointments. By default, this field is set to 0, so patients can search for any appointments starting with the current date.
3. In the Max days lookahead field, enter the maximum number of days ahead that patients can search for open appointments. By default, this field is set to 180 days.

Use CAPTCHA Validation in MyChart

Open scheduling uses CAPTCHA validation to verify that a real person and not an automated script is accessing MyChart. To set up CAPTCHA, refer to the MyChart Patient Access Setup: CAPTCHA Validation in MyChart topic.

Determine Which Demographic Fields Appear for Open Scheduling

You can determine which fields appear to collect demographic data during the open scheduling workflow for patients who do not already have a MyChart account and whether each field is required or optional. This setup applies only to the old open scheduling wizard. If you are using the new open scheduling wizard, refer to the Use the Redesigned Open Scheduling Wizard topic instead.



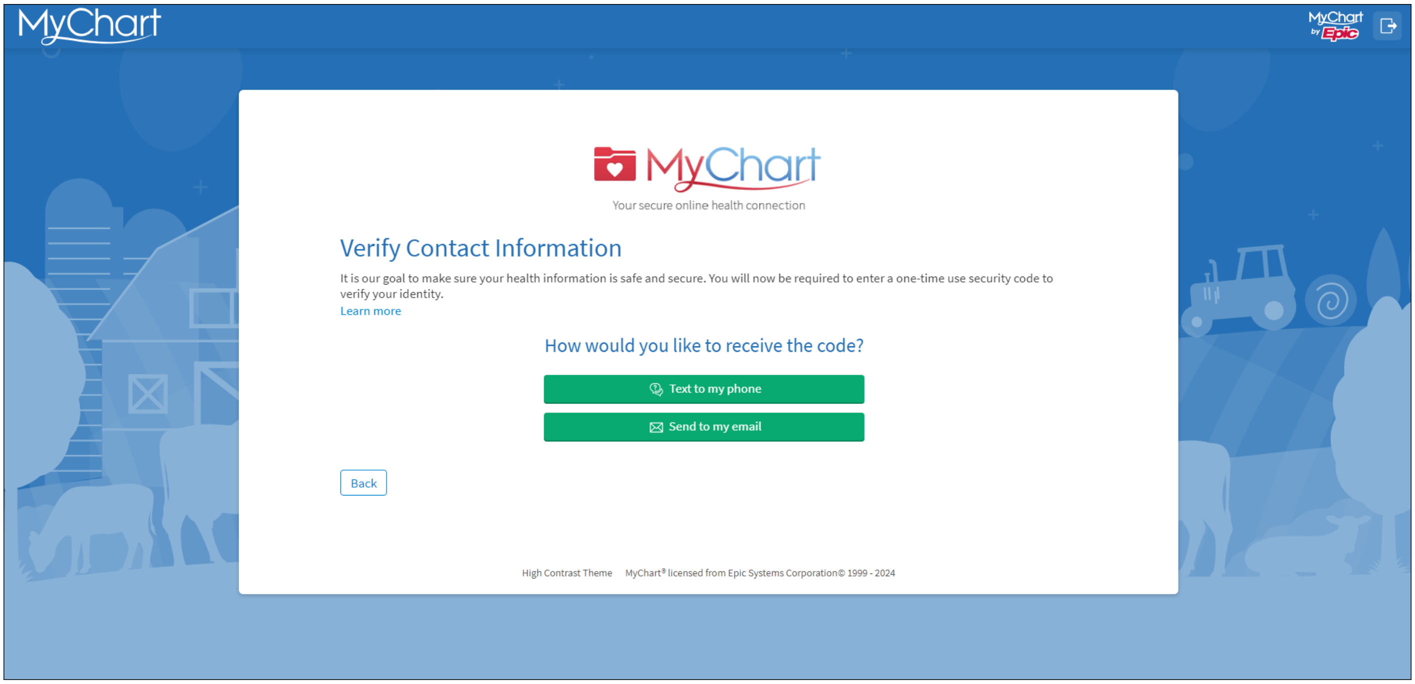
1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Signup Settings screen.
2. In the Demographic Field (I WDF 12570) column, list the fields in the order you want them to appear. Note that you cannot use National ID and Last Four Digits of National ID at the same time.
3. In the Required? (I WDF 12575) column, enter Yes for each field that should be required. You must require Date of Birth for the open scheduling workflow to function properly.
4. Clear the cache to apply your changes.
   a. From the MyChart System Manager Menu, go to System Utilities > Scheduling Utilities > Clear New Provider Cache.
   b. Enter Yes to continue.

Use Two-Factor Authentication in Open Scheduling

Starting in November 2024

You can enable two-factor authentication in open scheduling to ensure that the contact information the patient enters when filling out the demographic form is accurate so that schedulers or front desk staff can reach them through that contact method.

When two-factor authentication is enabled, after a patient enters demographic information for herself or someone else, she is taken to the Verify Contact Information page where she can request a code to be sent by email or text message. After the patient receives the code, she can enter it to finish scheduling or requesting an appointment.



Two-factor authentication is enabled by default for open appointment request workflows and disabled by default for open scheduling workflows. If email address or phone number demographic fields are not required in open scheduling or request workflows but two-factor authentication is enabled, the email address demographic field is automatically required.

To enable two-factor authentication for open scheduling workflows:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Signup Settings screen.
2. In the Require 2FA for open scheduling (I WDF 12521) item, enter Yes. If not set, a default of No is used.

To disable two-factor authentication for open appointment request workflows:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Signup Settings screen.
2. In the Require 2FA for open scheduling appt request (I WDF 12522) field, enter No. If not set, a default of Yes is used.

Collect Insurance Information for Anonymous Patients

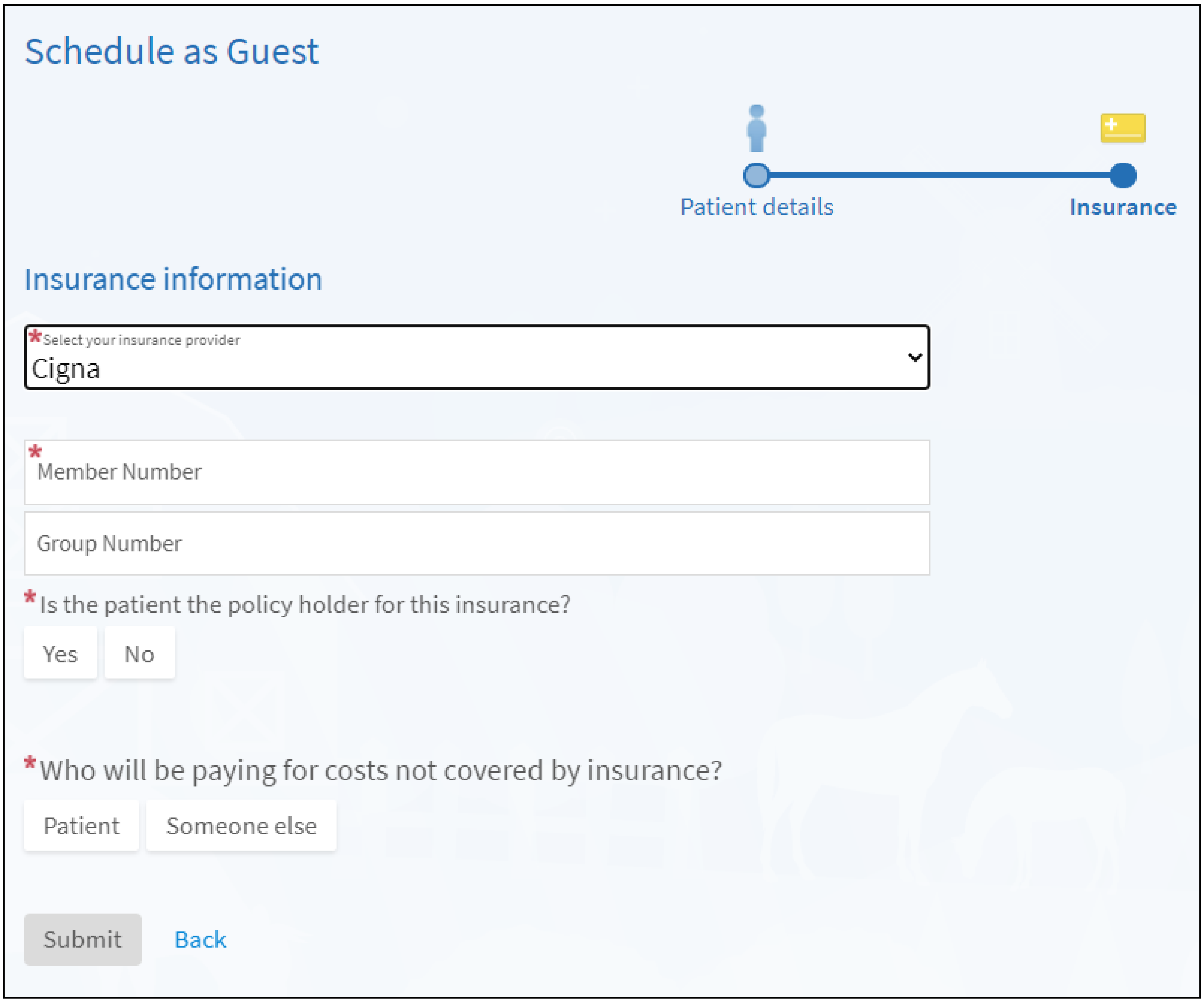
You can collect insurance information during open scheduling and self-triage for patients without a MyChart account so that registrars and other users don't need to follow up with every patient who openly schedules an appointment or completes self-triage without logging in to MyChart to gather this information before the visit.

Insurance collection is enabled by default, and the Insurance Information section appears after a patient has enteered her demographics information. When a patient selects a payer, the page can show an example image of that payer's insurance card to help the patient locate the IDs for the remaining insurance information fields. After a patient schedules the appointment, the insurance information is visible in both the registration navigator in Hyperspace and the Pt Schedule Request message in In Basket.

Starting in August 2023, you can configure visit types to skip the insurance step for a guest user who is scheduling the appointment for themselves.

Starting in November 2023, guest users can schedule an appointment on behalf of someone else. Starting in February 2025, November 2024 with special update E11200634, August 2024 with special update E11104959, May 2024 with special update E10910295, and February 2024 with special update E10813433, you can configure visit types to skip the insurance step for guest users both scheduling appointments for themselves and on behalf of someone else. In November 2024 and earlier without those special updates, the insurance step is skipped only if a patient is scheduling an appointment for themselves, not someone else.

Starting in February 2025, November 2024 with special update E11200634, August 2024 with special update E11104959, May 2024 with special update E10910295, and February 2024 with special update E10813433, you can hide the Guarantor Creation question for a guest user who is scheduling an appointment on behalf of someone else.



To configure how insurance collection works in the open scheduling workflow, follow these steps:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access either:
   - Starting in August 2023 and in May 2023 with special update E10501418, the Open Scheduling and Self-Triage for All Insurance Settings screen.
   - In February 2023 and earlier, the Open Scheduling Insurance Settings screen.
2. In the Insurance Field column, remove any insurance collection fields you don't want to appear during the open scheduling workflow, or clear this field if you want to disable insurance collection. The following insurance collection fields are included unless you remove them:
   - 1-Payor
   - 2-Member ID
   - 3-Subscriber ID
   - 4-Group ID
   - 5-Subscriber Name
   - 6-Subscriber Date of Birth
3. In the corresponding Required? column, enter Yes for each field you want to be required. If this column is left blank, as released, none of the insurance fields are required.
4. In the Payors for Verification field, enter a list of payers to appear for insurance collection in the order in which you want them to appear. If this field is left blank, as released, all payers are available.
5. In the Include "None"? field, enter Yes if you want to include None as an option in the payer list for open scheduling. The default value is No.
6. In the Include "Other"? field, enter Yes if you want to include Other as an option in the payer list for open scheduling. If the patient chooses Other, a free-text Insurance Name field appears where the patient can enter her payer information. The default value is No.

Show Example Insurance Cards

To show example insurance cards for each payer, specify an example image in each payer's payer record. The recommended image size for example insurance cards is 315 x 200 pixels. If you use insurance collection in Welcome, you might have already completed this setup.

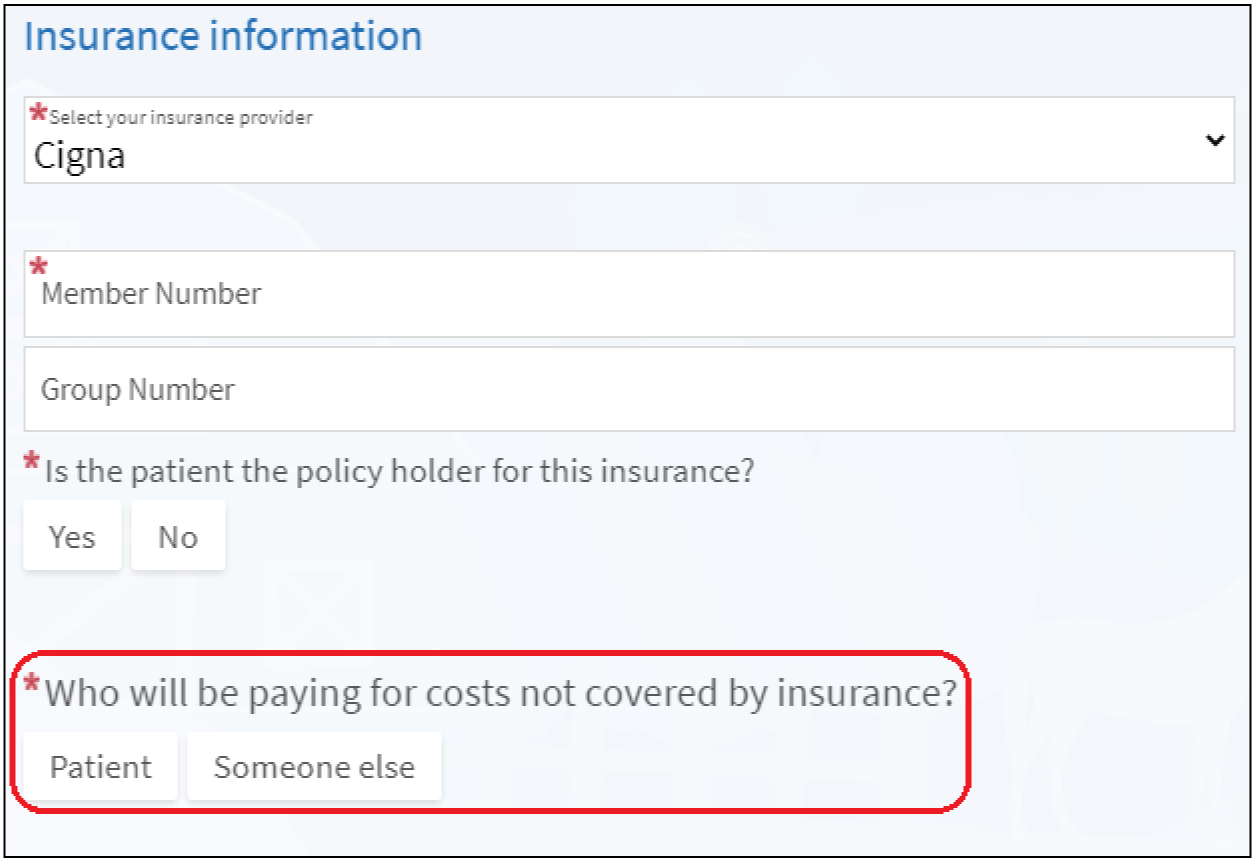
1. In Chronicles, access the Payor (EPM) master file and open a payer record.
2. Access the Patient Display Information screen.
3. In the Example Ins. Card Images field, specify a URL or network file path for the image of the example insurance card that should appear to patients. You can include multiple examples for each payer. The example images should highlight key information, such as the plan ID, member ID, and subscriber ID.

Automatically Create Guarantor Accounts for Coverages Entered Through Open Scheduling

To help ensure that patients are eligible for care during appointments they make through open scheduling, real-time eligibility (RTE) queries are automatically sent for RTE-enabled payers. Registrars can see the response from an RTE query in registration. After an RTE query is sent, a coverage might be created automatically, even if the patient record is new and there are no guarantor accounts associated with it. Automatic coverage creation requires build found in the Automate Coverage Creation section of the Real Time Eligibility (RTE) Setup and Support Guide.

There are two options you can use to associate or create guarantor accounts during open scheduling:

- With the first option, patients respond to a question during the insurance step of open scheduling that asks who will be responsible for costs not covered by insurance. If the patient indicates that he (and not someone else) will be responsible, a self-guarantor account is created as long as one doesn't already exist and the patient meets the minimum age requirement.



- With the second option, the above question is not shown and a self-guarantor account is automatically created for each patient as long as one doesn't already exist and the patient meets the minimum age requirement.

In both of the above scenarios, an RTE query is automatically sent using the insurance information the patient entered, and the following logic is used to associate or create the guarantor account:

- If a personal/family account already exists in the service area, it is used as the guarantor account.
- If no personal/family guarantor account is found in the service area, but one is found in a different service area, information from that guarantor is copied to the new guarantor account.
- If no personal/family guarantor account is found in any service area, a new guarantor account is created and the service area configuration is used to determine which information is copied from the patient to the guarantor.
- In all cases, the encounter guarantor account (I EPT 2205) is set.

To show the "Who will be paying for costs not covered by insurance?" question to guest users who are scheduling an appointment for themselves, add the Guarantor Creation field as required during open scheduling:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling and Self-Triage for All Insurance Settings 1 screen (the Open Scheduling Insurance Settings screen in February 2023 and earlier).
2. In the Insurance Field (I WDF 12620) column, add Guarantor Creation. This option is set up in the

Foundation System.

3. In the Required? column for this field, enter Yes.

The "Who will be paying for costs not covered by insurance?" question is shown by default to guest users who are scheduling an appointment for someone else. You can hide this question for guest users scheduling for someone else starting in February 2025, November 2024 with special update E11200634, August 2024 with special update E11104959, May 2024 with special update E10910295, and February 2024 with special update E10813433. You might want to hide this question to reduce the creation of duplicate guarantor records, or if your organization is located outside of the U.S., since your insurance systems vary from those in the U.S., and patients might be hesitant to schedule if they believe they're responsible for paying for services. To hide the question for users scheduling for someone else:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling and Self-Triage for All Insurance Settings 2 screen.
2. Set the Allow guarantor creation question in "Someone else" workflow (I WDF 12642) field to No. The default value is Yes. This setting is respected regardless of if Guarantor Creation is listed in the Insurance Field (I WDF 12620) column or not.

Starting in May 2025, February 2025 with special updates E11302462, E11302463, C11302462, E11302019 and E11300749, and November 2024 with special updates E11207941, E11207940, C11207940, E11207557 and E11206501, you can allow guest users to enter guarantor information when they specify that someone other than themselves or the patient is paying the costs not covered by insurance. The February and November versions require a change in your licensing. Contact your Epic representative and mention parent SLG 9256368 to enable the license.

Guest users need to enter the guarantor's name, contact information, relationship to the patient, and date of birth. This information is transposed into an external guarantor record that is shown in the Possible Guarantors and Coverages section (80018-REG_EXTERNAL_COVERAGES_SECTION) in registration. Prior to guarantor creation, registrars can review the information in registration to verify that it is correct. If the Possible Guarantors and Coverages section is not part of your registration navigator, use the Navigator Template Editor to add it. For more information, refer to the Edit Navigators in Hyperspace topic.

Starting in May 2025 and later, to create external guarantor records in registration, configure the following:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling and Self-Triage for All Insurance Settings 2 screen.
2. Set the Allow guarantor creation question in "Someone else" workflow (I WDF 12642) field to Yes or leave it blank. The default is Yes.
3. Set the Create external guarantor for "Someone else" option (I WDF 12641) field to Yes. The default is No.

If you want to change the text of the question or the buttons that appear below it, you can do so by modifying the following strings under the Shared > Signup node in the Strings Manager:

- IsGuarantorLabel
- IsGuarantorNo
- IsGuarantorYes

For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

To automatically create guarantor accounts when the guarantor creation field is not included in open scheduling and the question is not shown:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling and Self-Triage for All Insurance Settings 2 screen (the Open Scheduling Insurance Settings screen in February 2023 and earlier).
2. In the Automatically create guarantor? (I WDF 12640) field, enter Yes. The default value is No.

After you set up automatic RTE queries, you need to also create a workqueue to capture coverage for payers that are not RTE-enabled. For more information, refer to the Create Workqueues to Capture MyChart Coverage Updates topic.

Hide the Insurance Section for Certain Visit Types

Starting in August 2023

You can skip collecting insurance information from anonymous patients in certain scenarios where it shouldn't be required, like some COVID-19 vaccination appointments or free physicals. In these scenarios, patients won't see an extra step to collect insurance information, because it's not a requirement for the visit. Starting in February 2025, November 2024 with special update E11200634, August 2024 with special update E11104959, May 2024 with special update E10910295, and February 2024 with special update E10813433, this setting applies to guest users both scheduling appointments for themselves and on behalf of someone else. In November 2024 and earlier without those special updates, the insurance step is skipped only if a patient is scheduling an appointment for themselves, not someone else.

Note: In May 2024 and earlier, this setting doesn't apply to visit types used in the Add E-Visit and Add On-Demand Video Visit nodes for decision trees used in Self-Triage for All. Starting in August 2024, it does.

For more information on which visit types your organization uses for E-Visits, refer to the steps in the Determine the Available Reasons for E-Visits topic. For more information on which visit types your organization uses for On-Demand Video Visits, refer to the steps the Configure On-Demand Video Visit Reasons for Visit topic

To hide the insurance section from specific visit types:

1. In Hyperspace, open a visit type record (search: Visit Type).
2. Go to the Online Scheduling > Anonymous Workflow Settings form.
3. Enter Yes in the Hide Insurance Step in Anonymous Workflows? (I PRC 32045) field.

Determine Scheduling Behavior for Patients with an Unknown Social Security Number

If your organization requires that all patients have a Social Security number (SSN) and a patient does not enter his SSN during the open scheduling workflow, you can automatically assign a generic SSN to that patient.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Signup Settings screen.
2. In the Unknown SSN Type field, enter the SSN to use when one is not entered during the open scheduling workflow. The SSN type you enter here must be configured in the Additional Unknown SSN table on the SSN Setup screen in your Shared Configuration record. If this field is left blank, the Standard Unknown SSN type is used, as configured in your Shared Configuration record.

Display the Forgot username? and Forgot password?

Links for MyChart Authentication

You can include the Forgot username? and Forgot password? links on the open scheduling page so that patients who already have a MyChart account can retrieve their username or password and schedule the appointment as an existing patient. To display these links, you must configure the URLs manually using the Strings Manager, an Epic-provided tool.

1. Open the Strings Manager from the web server.
2. Select the Shared\MyChartLogin view.
3. In the loginRecoveryLinkUrl and passwordRecoveryLinkUrl strings, enter the URLs to the login recovery and password recovery pages on your MyChart web server, respectively.
4. Click File > Save.

Use Open Scheduling with Single Sign-On Integration

Organizations that use single sign-on (SSO) can integrate open scheduling with their SSO system, which allows patients to schedule appointments by logging in as an existing patient using their SSO username and password.

To support open scheduling for SSO, you must complete the following tasks:

- Create or update an authentication handler assembly.
- Create or update an authorization handler assembly.
- Configure the new PatientAccessAuthentication.config.template file to point to these assemblies.

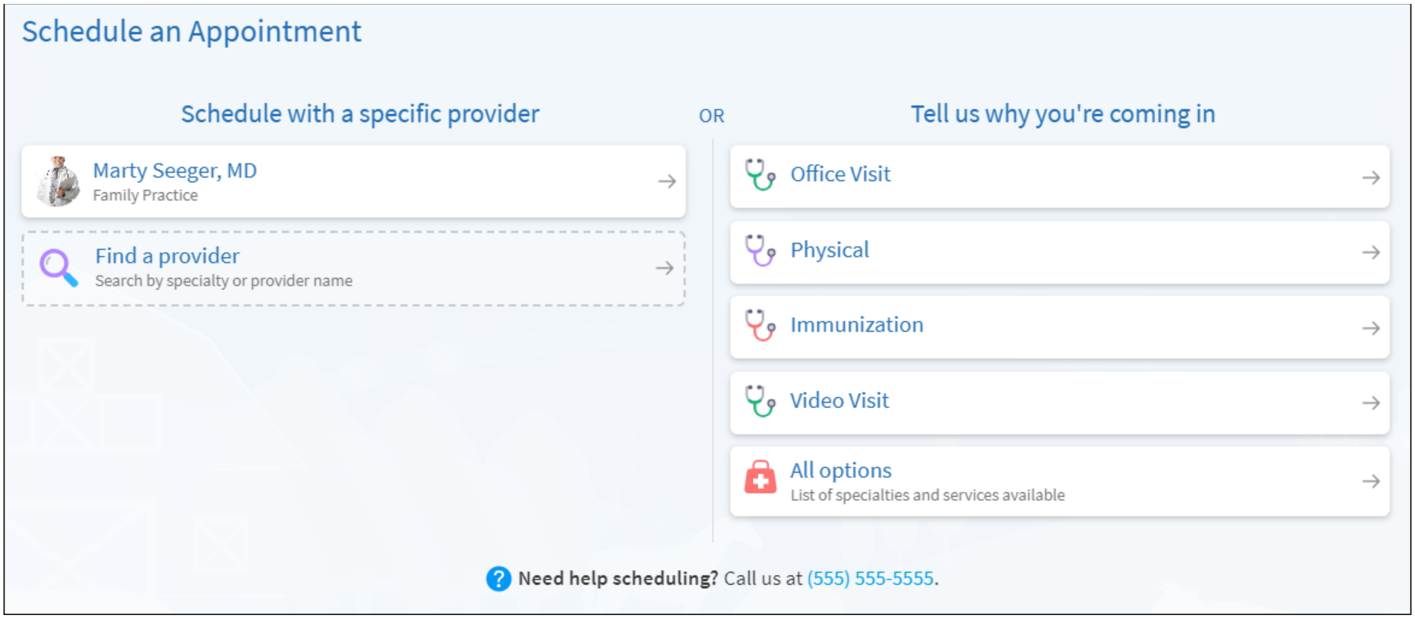
You can obtain sample code provided by Epic to help you more quickly complete this setup. To obtain the sample code and complete the tasks above, contact your Epic representative and mention parent SLG 2641878.

> **!** If you don't use SAML for SSO, contact your Epic representative and mention parent SLG 4072985 to have your Epic representative turn off a patient login workflow that isn't currently supported for non-SAML SSO.

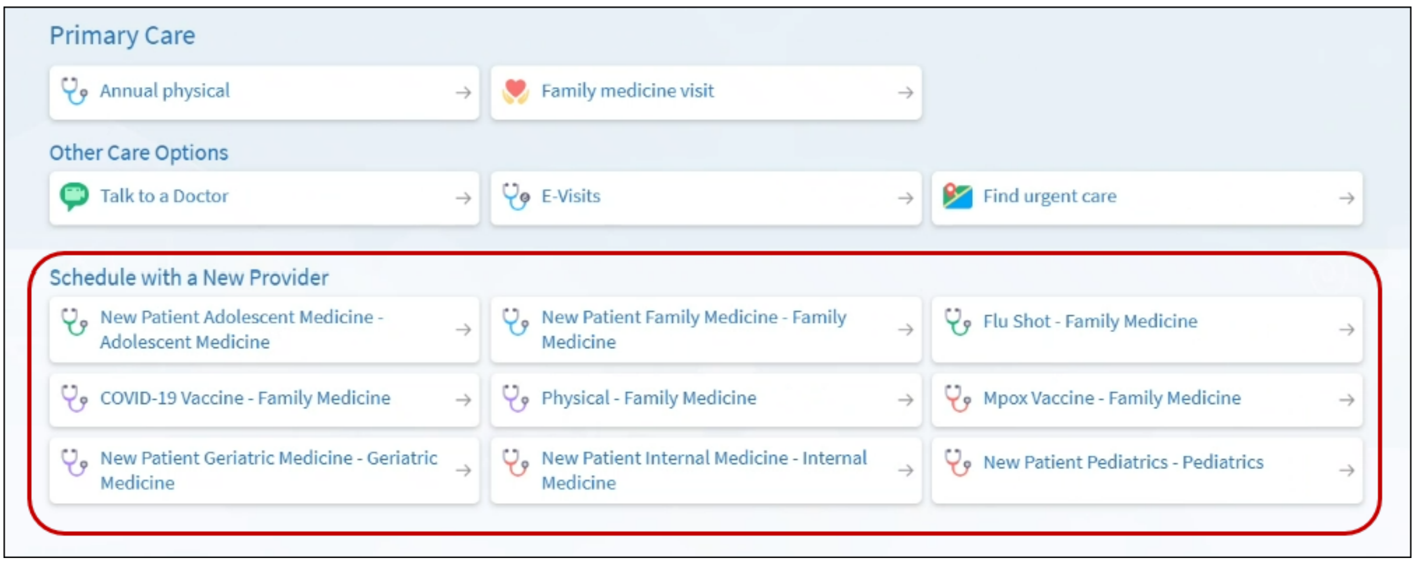
Determine Whether Patients Can Schedule with a New Provider

Patients can schedule appointments with providers enabled for open scheduling the same way they schedule appointments with providers enabled for direct scheduling.

Starting in August 2023, if you use MyChart's Provider Finder feature, the "Find a provider" button on the scheduling landing page takes patients to Provider Finder for scheduling, while the "All options" button at the bottom of the reason for visit list takes patients to new provider scheduling. For more information about Provider Finder, refer to the MyChart Provider Finder Setup and Support Guide. If you don't use Provider Finder, the "Find a provider" button does not appear, and patients still get to new provider scheduling through the "All options" button.

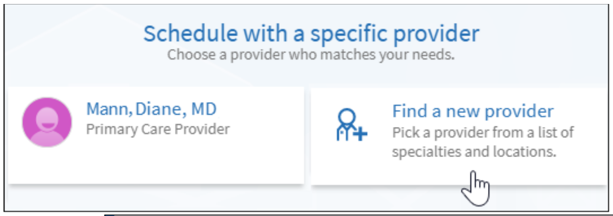


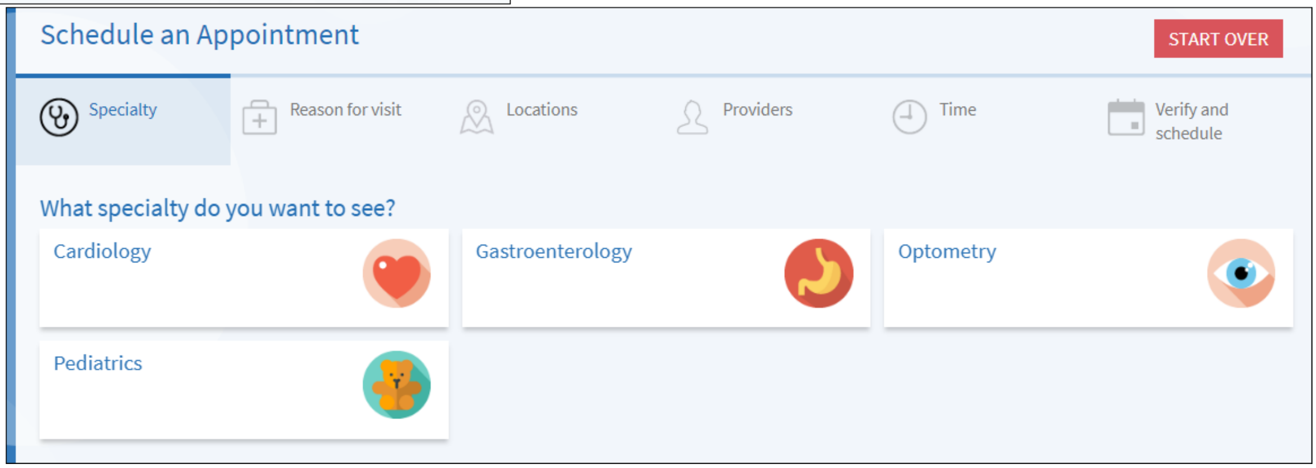
If you've turned on scheduling groupers, as described in the Group Visit Types to Reduce Clutter on the Scheduling Landing Page topic, open scheduling options appear under a Schedule with a New Provider heading within the scheduling grouper.



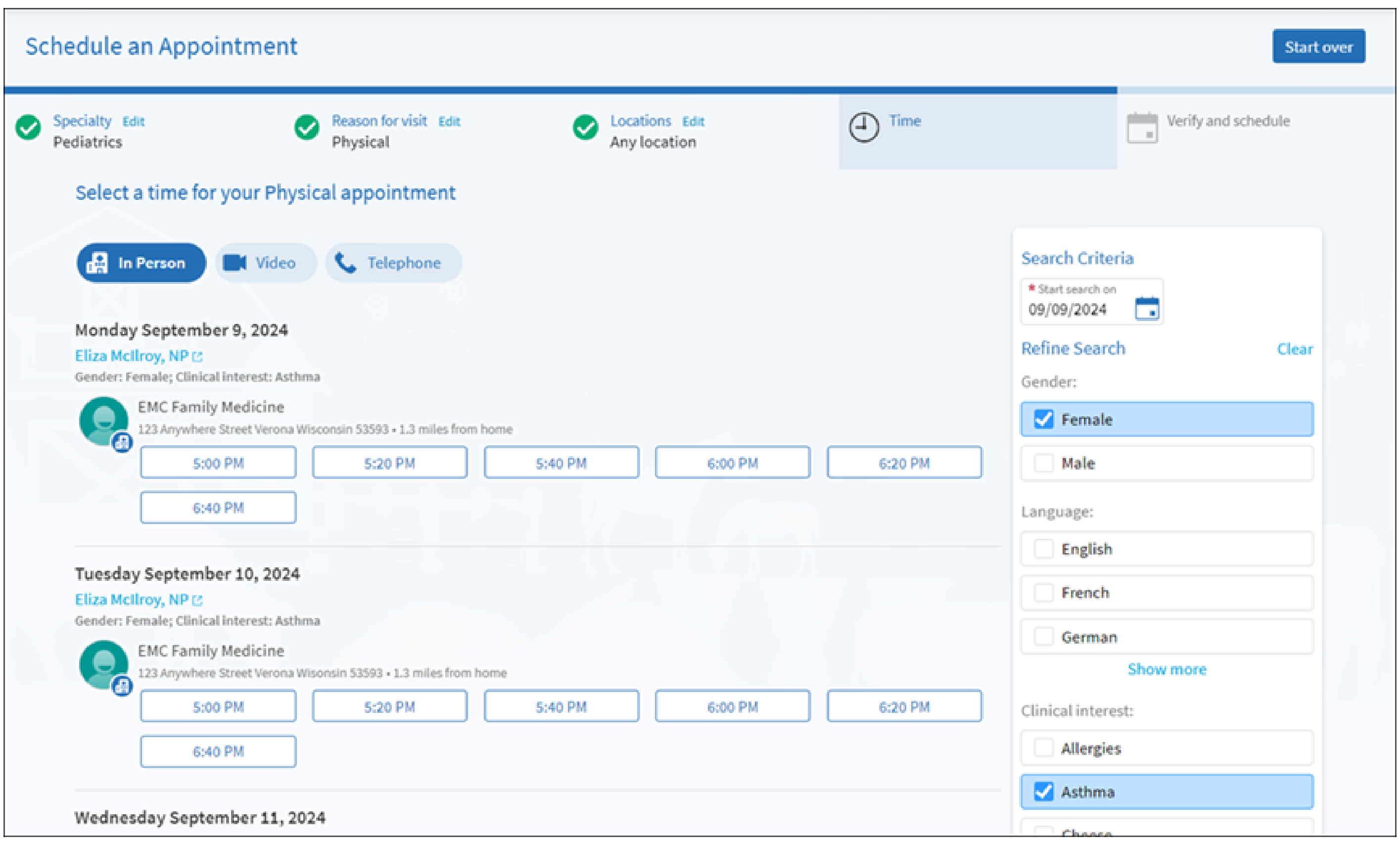
In May 2023 and earlier, after a patient logs in to their MyChart account, they can use the "Find a new provider" button to go to a new provider scheduling section on the scheduling landing page. The patient goes through these steps:

1. Select a specialty. The available specialties come from the Department (I DEP 110) setting of each open-scheduling-enabled department that also have an associated open-scheduling-enabled provider.
2. Select a reason for visit. The reasons for visit the patient sees are actually the names of visit types enabled for open scheduling.
3. Select a location for the appointment.
4. Pick the appointment time. Available appointment slots appear based on which open-scheduling-enabled providers match the patient's selected specialty and location.



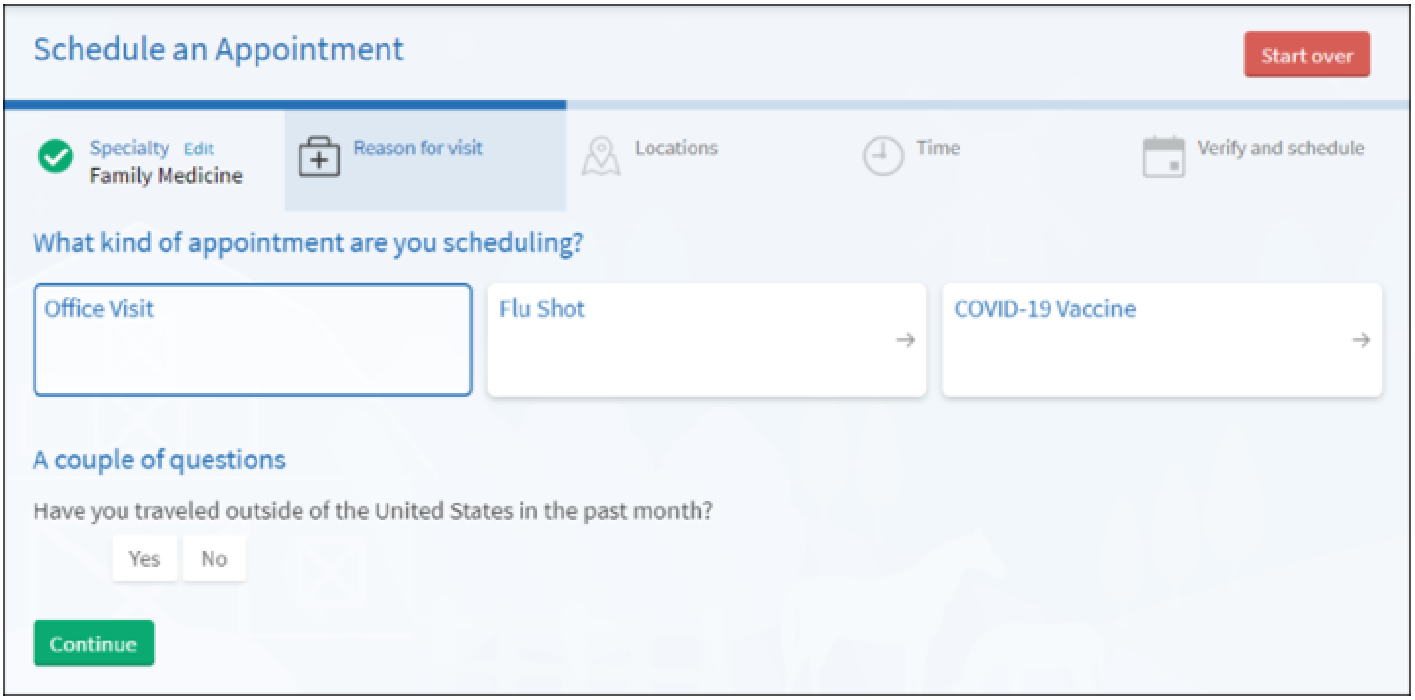


New provider scheduling includes provider filters that patients can use to narrow their search while scheduling an appointment. Patients can filter on provider gender, language, type, and clinical interest, allowing them to find the provider who best meets their needs. Refer to the second Considerations box under the Enable Individual Clinicians for Open Scheduling topic to find the items used by these filters and review your provider records if necessary.



Provider filters that appear when a patient schedules with an appointment with a new provider in MyChart

Starting in February 2022, patients scheduling with a new provider can interact with appointment entry decision trees and visit type questionnaires. Starting in May 2023 or February 2023 with special updates E10402322 and C10402322-MyChart, you can route patients finding a new provider to different outcomes than patients using direct scheduling or ticket scheduling by using a Rule node and property 32351-Is Logged In Patient Finding New Provider. For example, you might want to give patients looking for a new provider more options to choose from than patients scheduling with a provider they've seen before. For more information on what decision trees and visit type questionnaires can do in MyChart, refer to the Use Decision Trees to Guide Scheduling Workflows and Use Questionnaires to Change Visit Types or Remove Providers Available for Scheduling topics.



A decision tree that appears when a patient schedules an appointment with a new provider in MyChart

Because the patient has to provide all of these parameters to successfully schedule an appointment, any steps you add or remove using the Open scheduling steps (I WDF 12650) setting don't apply to the workflow.

> Note that the minutes-based settings described in the Customize the Date Range for Scheduling Appointments topic are respected in this workflow. Also note that confirmation emails aren't sent from this workflow, because the patient can find the appointment information in MyChart.

To allow patients to schedule with a new provider, first you need to allow open scheduling system-wide:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Open Scheduling Settings screen.
2. In the Open scheduling enabled? (I WDF 12500) field, enter Yes.

To enable a provider for selection in the workflow:

1. From the MyChart System Manager Menu, go to Master File Entry > Provider and open a provider record.
2. Go to the MyChart Settings screen.
3. In the Allow open scheduling or request? (I SER 32068) field (Allow Open Scheduling through MyChart? in August 2024 and earlier versions), enter Yes.

To enable a department for selection in the workflow:

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Go to the Online Scheduling Settings 1 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions).
3. In the Allow open scheduling/request (I DEP 53200) field, enter 2-Schedule only. In August 2024 and earlier versions, the field is called Allow open sched? and the value is called Yes.

You can configure the icons and descriptions in the Scheduling\Scheduling node in the Strings Manager. For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

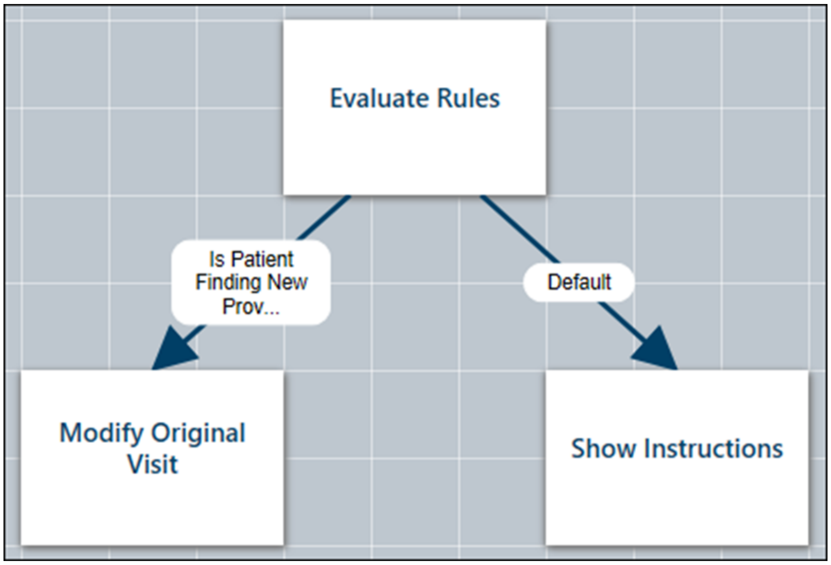
- To configure the reason for visit descriptions, edit the ReasonForVisitDescription string.
- To configure the reason for visit icons, edit the ReasonForVisitPhotoUrl string.
- To configure specialty descriptions, edit the SpecialtyDescription string.
- To configure the specialty icons, edit the SpecialtyPhotoUrl string.

If you'd like to prevent patients from scheduling with providers enabled for open scheduling using the method described above, you can remove the new provider option from the MyChart landing page. To do so:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Workflow Configuration screen.
2. In the Hide post-login open scheduling? (I WDF 15130) field (called Hide New Provider Scheduling? in May 2023 and earlier), enter Yes.

To branch patients scheduling with a new provider to a specific outcome in a decision tree:

1. In Hyperspace, open the Rule Editor activity (search: Rule Editor).
2. Create a rule with a context of 5003-Appointment Entry Begin. Then, configure the rule to evaluate as True when property 32351-Is Logged In Patient Finding New Provider = Yes. For more information on using the Rule Editor activity, refer to the Create or Edit a Rule topic.
3. Open the Appointment Entry Decision Tree activity (search: Appointment Entry Decision Tree Editor).
4. Open the decision tree for your visit type.
5. Add an Evaluate Rules node at the beginning of your tree.
6. Configure a Rule connection with the rule you just created to branch to the appropriate node when a patient is scheduling with a new provider. For example, this might be a Modify Original Visit node configured to add additional provider subgroups.
7. Configure a Default connection to branch to the appropriate node when a patient is scheduling through direct scheduling or ticket scheduling. For example, this might be a Show Instructions node.
8. This part of your decision tree should look like this:



Verify Security for Background Users

Background Scheduling User

Open scheduling relies on the background scheduling user as the user to schedule appointments. You must verify that this user is set up and has Identity security (necessary for the patient lookup and creation to work correctly) and Cadence security (to allow searching for slots and scheduling of appointments).

Also verify that the user has security to create new patient records. To identify your background scheduling user:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 1 screen.
2. The MyChart scheduling user is specified in the User field under Default Settings for Cadence.

Then, open the Identity security class assigned to that user and verify that it includes Identity security point 1-Create Record.

MyChart Background User

Epic strongly recommends that you allow the MyChart background user to search across all service areas in which patients can schedule appointments to reduce the likelihood of creating duplicate patient records. If you limit the service areas the background user can search, they'll find fewer matching patients and create new records more often.

The system determines whether the MyChart background user has security in a service area by checking the following settings:

1. External ID Lookup Routine (I HDF 9080). If you specify a routine other than the default routine of disc^HWEPTEXF here, the system uses this setting to determine the background user's access. If this item is blank or the default routine disc^HWEPTEXF is specified in that field, the system determines the user's security access using the applications listed in the Exclusion Applications (I HDF 9098) item.
2. Exclusion Applications (I HDF 9098). The system checks the user's Identity, EpicCare, Cadence, or Prelude security configuration, based on which applications you specify here.
3. Application-specific security. The system checks the following places that correspond with the application you specified in Exclusion Applications (I HDF 9098):
   - Identity: The system checks the security class listed in the Default security class (I EMP 19000) item

or service area-specific security listed in the Security Class Override (I EMP 19006) item.
    - EpicCare: The system checks the EpicCare authorized service areas (I EMP 17700) item.
    - Cadence: The system checks whether the Authorized in all service areas? (I EMP 5045) item is set to Yes, or that the needed service areas are listed in the Authorized Service Areas (I EMP 5040) item.
    - Prelude: The system checks whether the needed service areas are authorized based on the Authorized Facility (I EMP 16003) and Authorized Service Area (I EMP 16000) items.

For more information about the MyChart background user, refer to the Set Up the MyChart Background User topic.

Notify Patients of Appointment Confirmation

You can send an email message to patients to confirm that an appointment was scheduled and to remind them of their MyChart username if they already have a MyChart account and attempt to schedule an appointment as a new patient.

Before you configure the system to send these messages, you must create SmartTexts to define the body of each message. Create a SmartText for each of the three types of messages:

- Reminder of MyChart username (sent to patients with an active MyChart account who attempt to schedule an appointment as a new patient). This SmartText must use functional type 8000-WP Patient Internet Email Tickler Template.
- Confirm appointment made through open scheduling for a patient without an active MyChart account. This SmartText must use functional type 8050-WP w/Cadence Appt.
- Confirm appointment made through open scheduling for a patient with an active MyChart account. This SmartText must use functional type 8050-WP w/Cadence Appt.

Note that there are many SmartLinks available for use in the context of 8050-WP w/Cadence Appt. Also note that the email messages are sent by plain text by default. You can use HTML email messages by including <html> and nothing else on the first line of your SmartText.

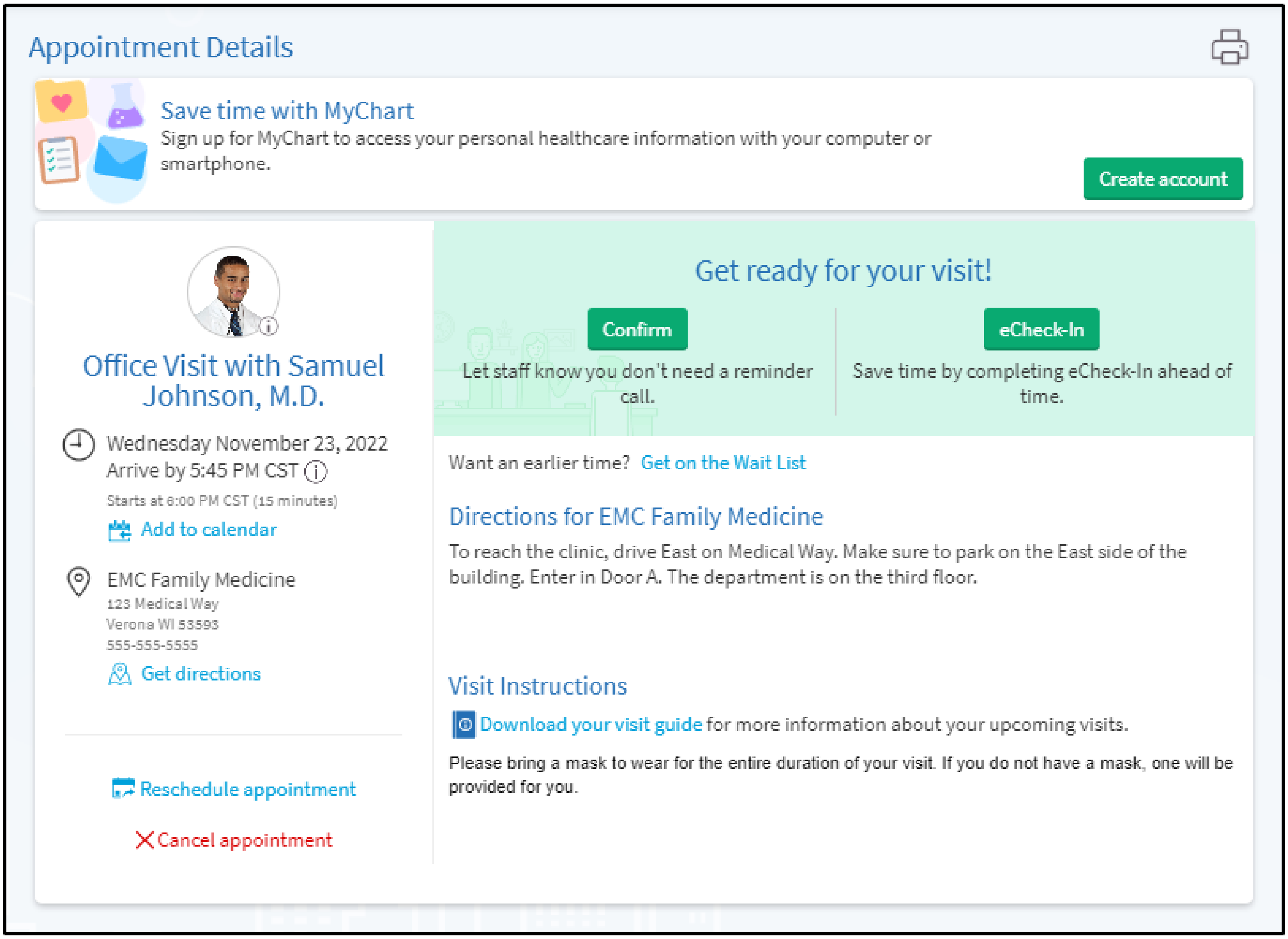
Then, follow these steps to set up the notification messages:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Message Settings screen.
2. Specify the message subject and the SmartText for each type of message:
    - Reminder of login ID (I WDF 12550 and I WDF 12551)
    - Confirm appt, inactive account (I WDF 12552 and I WDF 12553)
    - Confirm appt, active account (I WDF 12554 and I WDF 12555)

Allow Patients Without a MyChart Account to View Visit Details, Cancel Appointments, and Reschedule Appointments

Starting in February 2023

We recommend that you give patients without MyChart accounts more information about their scheduled appointments, along with the option to cancel or reschedule if needed. Patients can use a link in their appointment confirmation email to view the details about their appointment, including department or visit instructions. They can also cancel or reschedule the appointment if needed right from the appointment details, which can reduce no-shows and free up phone lines at the clinic.



The appointment details page when accessed by a patient without a MyChart account.

Create an override SmartText to send open scheduling confirmation emails with an appointment details link. This override SmartText is sent to the patient if the appointment details can be viewed, as evaluated by rule 32906-Can Patient View Appointment Without MyChart Account?

1. Identify the SmartText defined for the "Confirm appt, inactive account" message, as described in the Notify Patients of Appointment Confirmation topic above.
2. In Hyperspace, open the SmartText Editor (search: SmartText) and open the SmartText from step 1.
3. Click Save As and create a copy of the SmartText.
4. In your new SmartText, add SmartLink 32037-MYC Appt Details Without Acct Link (mnemonic: .NOACCTAPPTDETAILSDEEPLINK).
5. Mark this record as released and close it.
6. Open the SmartText from step 1 again.
7. On the Languages & Overrides tab, add rule 32906-Can Patient View Appointment Without MyChart Account? to the Rule (I ETX 705) column.
8. On the same row, specify the SmartText from step 3 in the Override SmartText (I ETX 710) column.

To make it easy for you to get this content, we've created a Turbocharger package with these SmartText record updates. This package edition is available starting in February 2023. For more information about importing the package, refer to 245486-Updated Scheduling Ticklers - Edition 2: Starting in February 2023 topic.

Starting in August 2024, you can prevent appointment details links from being sent to patients if they don't qualify for demographic authentication based on the rule set in the Demographic Authentication Excluded (I WDF 11040) field, as described in the Exclude Groups of Patients from Secure Link Authentication topic. For example, if your demographic authentication rule excludes pediatric patients, you might not want to include a visit details link in their confirmation email.

1. From the MyChart System Manager menu, select Scheduling Configuration and go to the Appointment Options 3 screen.
2. In the Use demographic authentication requirements for guest? (I WDF 15400) field, enter Yes.

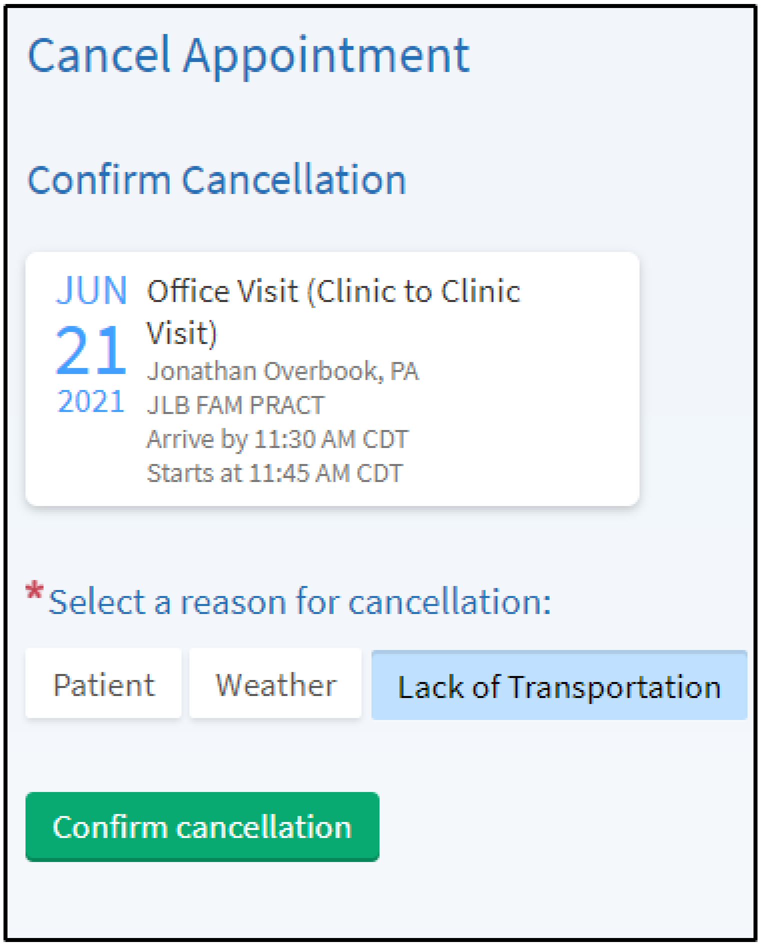
Allow Patients Without a MyChart Account to Cancel an Appointment

November 2022 and Earlier

We recommend that you reduce no-shows and free up phone lines by allowing patients to cancel appointments they made using open scheduling. You can add a SmartLink to open scheduling appointment confirmation emails that allows patients to open a browser and cancel their appointment. Starting in February 2023, we recommend using the feature described in the Allow Patients Without a MyChart Account to View Visit Details, Cancel Appointments, and Reschedule Appointments topic instead because it supports rescheduling appointments and showing appointment details in addition to canceling appointments.

You can add a SmartLink to open scheduling appointment confirmation emails that allows patients to open a browser and cancel their appointment.

To enable this, add SmartLink 32034-MYC Appt Cancel Without Acct Link (mnemonic: .NOACCTAPPTCANCELDEEPLINK) to a copy of your open scheduling appointment confirmation SmartText, and then use a rule to override the default SmartText with your copy when the patient meets the rule's criteria for being able to cancel the appointment.



The MYC Appt Cancel Without Acct Link SmartLink takes the patient to an appointment cancellation screen.

Create an override SmartText to send open scheduling confirmation emails with a cancellation link. This override SmartText is sent to the patient if the appointment can be canceled, as evaluated by rule 32905-Can Patient Direct Cancel Appointment Without MyChart Account?

1. Identify the SmartText defined for the "Confirm appt, inactive account" message, as described in the Notify Patients of Appointment Confirmation topic above.
2. In Hyperspace, open the SmartText Editor (search: SmartText) and open the SmartText from step 1.
3. Click Save As and create a copy of the SmartText.
4. In your new SmartText, add SmartLink 32034-MYC Appt Cancel Without Acct Link (mnemonic: .NOACCTAPPTCANCELDEEPLINK).
5. Mark this record as released and close it.
6. Open the SmartText from step 1 again.
7. On the Languages & Overrides tab, add rule 32905-Can Patient Direct Cancel Appointment Without MyChart Account? to the Rule (I ETX 705) column.
8. On the same row, specify the SmartText from step 3 in the Override SmartText (I ETX 710) column.

Add a Barcode to Appointment Confirmation Emails

Barcodes allow a patient's chart to appear to clinic staff with just one scan, replacing the need to ask and search for a name in a long list of patients. In cases where efficiency is extra important, such as when running drive-thru COVID-19 testing sites, you can add a barcode with appointment information to a patient's appointment confirmation email. The patient can then take a screenshot of this barcode or print it at home so the staff can scan it with their Rover device and verify demographic information. Epic recommends that the patient takes a screenshot or prints it just in case the patient is unable to connect to wireless internet on their mobile device.

Enable Barcode Scanning in Rover

To allow clinic staff to use barcode scanning in Rover, you must first complete the steps in the Use Barcode Scanning for Workflows in Rover topic. You must also complete the steps in the Determine How the System Interprets Data Received from Barcode Scanners topic.

Enable Barcode Scanning in Welcome

These barcodes can be scanned in Welcome by default. Ensure the barcode prefix supported by Welcome matches the barcode prefix configured in the open scheduling confirmation email SmartText by completing the steps in the Update or Remove the Prefix for eCheck-In Barcodes topic.

Configure Barcodes to Take Staff to the Patient Summary

To ensure that clinic staff are taken to the Patient Summary rather than the Collection activity in Rover:

1. In Rover Text, go to Profile (LPR) and open the Rover device profile.
2. Go to the Patient Manager Settings screen and in the Patient scan activity (I LPR 45700) field, select Patient Summary.

Update Appointment Confirmation Emails

To ensure that barcodes appear only in open scheduling confirmation emails, as described in the Notify Patients of Appointment Confirmation topic, for appointments where clinic staff use Rover devices, Epic recommends adding the barcode to an override SmartText:

1. In Hyperspace, go to the Rule Editor (search: Rule Editor) and create a new Patient-context rule to identify which appointments should include your barcode. For example, you can set the Appointment Visit Type property equal to your COVID-19 rapid testing visit type.
2. Go to the SmartText Editor (search: SmartText) and create copies of your existing open scheduling appointment confirmation email SmartTexts.
3. On the General tab, add a URL in the following format: <img src=@MYCHARTURL@Scheduling/ECheckIn/BarcodeImageForEmail?barcode=AC@CSN@ /img>. You need to replace AC with the patient barcode prefix you configured in the Determine How the System Interprets Data Received from Barcode Scanners topic.
4. Add a direct link to the image so the patient can click it to access the barcode if it doesn't render in the email. For example, you can add something like this: If you do not see your check-in barcode, click here to open the barcode in a web browser. Again, replace the patient barcode prefix as you did in step 3.
5. In the SmartText Editor, open the SmartText you use for open scheduling appointment confirmation emails. This is the SmartText you created copies from in step 2.
6. On the Languages & Overrides tab, in the Rule column, enter the Patient-context rule you created in step 1.
7. In the corresponding Override SmartText column, enter the new SmartText you created in step 2.

Prevent and Reconcile Duplicate Patients Created During

Open Scheduling

When a patient uses open scheduling to schedule an appointment, the system uses an Identity duplicate configuration (IDC) record to try to match the patient to an existing patient record in the system. If there is a matching patient, the appointment is scheduled for the existing patient. If there are multiple matches, the appointment is scheduled for the patient with the highest match. This prevents duplicate patients from being created when there are multiple matches with different weights. If there are multiple patients with the same highest weight, the system creates a new patient record. This prevents appointments from being scheduled for the wrong patient, but can result in additional duplicate patients being created if the system doesn't realize that an existing patient record is a match.

There are several methods that you can use to reduce the number of duplicate patients created during open scheduling and to reconcile duplicate patients that do get created:

- Use an Epic-released duplicate configuration record. Epic-released records are optimized to reduce the number of duplicate records created.
- Use a custom duplicate configuration record with additional setup to better match on names with slight differences, such as a missing final S.
- Flag patient records created during open scheduling as potential duplicates if they are similar to an existing record in the system.

Use an Epic-Released IDC for Open Scheduling Patient Matching

By default, the system uses the Identity duplicate configuration (IDC) record specified for patient searches, as described in the Use Duplicate Checking During Patient Creation topic, for patient matching during open scheduling workflows. However, you should use a duplicate configuration record that's been optimized for open scheduling workflows because open scheduling checks the duplicate configuration record's low threshold to determine whether there's a match, while other workflows use the high threshold.

You can use the following Epic-released duplicate configuration records that are configured for open scheduling:

- 520-Identity High Threshold Only Matching Configuration. Use this option if you don't require a SSN.
- 521-Identity High Threshold Only with Last 4 SSN Matching Configuration. Use this option if you don't require a full SSN or MRN.
- 600-Identity High Threshold Only with Unknown Sex Matching Configuration. Use this option if you don't require a SSN or patient sex.
- 602-Identity High Threshold Only with Unknown Sex and Last 4 SSN Matching. Use this option if you don't require a full SSN or patient sex.

Epic no longer recommends using configuration records 570-MyChart Self Sign Up and Open Scheduling Configuration or 580-MyChart Self Sign Up and Open Scheduling Configuration with Full SSN.

Refer to the Customize a Duplicate Configuration Record topic for more information.

After choosing or configuring your duplication configuration record, specify your record in Patient Access System Definitions:

1. From the MyChart System Manager Menu, select General System Definitions and access the General System Definitions screen.
2. In the Mnemonic/Module column, enter WP_PT_SRCH_IDC.
3. In the corresponding Value column, enter duplicate configuration record 520, 521, 600, 602, or your

custom record ID.

Create a Custom Duplicate Configuration Record for Smarter Matching on Patient Names

In some cases when searching for an existing patient record, small name differences such as a single missing letter result in no longer having a sounds-like match for names. You can add a custom name distance property, which compares small differences in names, to the duplicate configuration record you have specified for open scheduling to help identify existing patients during scheduling.

> If your organization already uses a custom duplicate configuration record for open scheduling, work with your Epic Identity representative to add the name distance matching custom property to that record.
>
> If your organization uses an Epic-released duplicate configuration record, work with your Epic Identity representative to create a custom duplicate configuration record that uses the name distance matching custom property. Refer to the Customize a Duplicate Configuration Record topic for more information.

To increase the chance of finding a matching patient during open scheduling, include duplicate property 150-ID, Name Distance Matching in your duplicate configuration record to find matches between patients who meet a percent match between names.

1. In text, copy duplicate configuration record 520-Identity High Threshold Only Matching Configuration.
2. In Hyperspace, open the duplicate configuration record (search: Duplicate Configuration).
3. In the Groups (I IDC 2000) grid, add a group for the custom property.
4. In the subsequent grid below, in the Group (I IDC 2010) column, add your newly created group.
5. In the Custom Property (I IDC 2020) column, add Custom Property 150-ID, Name Distance Matching.
6. In the weight (I IDC 2030) column, specify a weight of 10.

After updating your duplication configuration record, specify your record in Patient Access System Definitions:

1. From the MyChart System Manager Menu, select General System Definitions and access the General System Definitions screen.
2. In the Mnemonic/Module (I WDF 100) column, enter WP_PT_SRCH_IDC.
3. In the corresponding Value (I WDF 110) column, enter your duplicate configuration record ID.

Limit Scheduling to a Single Patient Match in the System

Scheduling appointments for the highest match in the system is Epic's recommendation to minimize the creation of duplicate patient records in open scheduling. However, if you need to switch back to previous match behavior and limit scheduling appointments to a single patient match in the system:

1. In text, from the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Use Highest Threshold Match? (I WDF 12540) field, enter No.

Allow Patients to Perform Open Scheduling for a Provider Team

Starting in November 2023

In Cadence, schedulers can use Provider Teams to schedule appointments for patients when that patient's primary care provider or regular care provider is not available. Provider Teams can include providers from multiple departments, and each provider can belong to multiple teams.

You can extend the provider team features to your patients. If there are slots available with the appropriate team members. MyChart gives the patient an option to include the Provider Team in his search for slots during open and direct scheduling. See the Allow Patients to Schedule with a Provider Team topic for more details on how to build Provider Teams.

Open Scheduling Setup: Bells & Whistles

In this section, we'll show you more configuration options for open scheduling.

Hide a Visit Type from Open Scheduling Unless It's Deep Linked

If you've configured a visit type to be available for scheduling in an open scheduling widget, that same visit type is also automatically available through the open scheduling wizard in MyChart. However, some visit types might not be appropriate to make available to all patients through the open scheduling wizard, such as a vaccine for which only a certain patient population is eligible. In those scenarios, you might want to instead only allow certain patients to schedule the visit type if they have a link to a specific open scheduling widget. To hide visit types like this from the general public but keep them available for certain targeted open scheduling workflows, you can configure an item at the visit type level.

- Starting in August 2023, configuring this setting hides the visit type from any open scheduling workflow where the visit type is not specifically configured using a visit type parameter. This includes:
  - The open scheduling wizard
  - The MyChart Provider Finder
  - Any open scheduling widget that only uses a combination of provider and department parameters
- In May 2023 and earlier, configuring this setting hides the visit type from the open scheduling wizard.

To hide a visit type from open scheduling unless it's specifically configured using a visit type parameter:

1. From the MyChart System Manager Menu, go to Master File Entry > Visit Type (PRC) and open the visit type.
2. Go to the Scheduling Settings 2 screen.
3. In the Hide unless deep linked? (I PRC 32035) field, enter Yes. In May 2023 and earlier, this field is named Hide from Open Scheduling Wizard?.

Add Security Guardrails for Providers Available for Sensitive Visit Types

Starting in November 2022

You might have some types of appointments where it's important to avoid making certain identifying information for providers, such as their name, workplace location, and workplace phone number, publicly available. In these scenarios, you can configure a visit type-level setting to prevent providers' information from appearing in certain places in MyChart.

Configuring this setting for a visit type prevents it from appearing in certain open scheduling widgets. Specifically, it filters out the visit type from any widget with providers listed in the 'id' parameter, since malicious users can compare the information shown on a widget to the provider information that could appear in a browser's network traffic. This setting is available only when a visit type also doesn't allow individual provider selection during open scheduling, as determined by the Allow provider selection? (I PRC 32400) field.

Starting in May 2024:

- Configuring this setting also prevents provider information from appearing on the screen or in a browser's network traffic in the following areas:
  - The Visit Details page, for a visit with this setting configured
  - The Visits list, for any visit with this setting configured
  - The health feed on the MyChart home page, for any upcoming appointment card showing a visit with this setting configured
  - Cancellation workflows
  - Rescheduling workflows
- Provider information in these places is hidden only until an appointment's status has been marked Complete. After a patient is seen for their appointment, MyChart shows their provider's information in these areas.
- This setting is available only when a visit type also doesn't allow individual provider selection during any non-direct scheduling workflow, as determined by the Allow provider selection? (I PRC 32400) field. If patients can schedule the relevant visit type in direct scheduling, the Select prov? (I WDF 15010) field should also be set to No, so a provider's privacy is respected throughout the direct scheduling workflow.

To avoid revealing certain provider information for visit types you consider sensitive:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. On the Scheduling Settings 1 screen, set the Hide provider information (I PRC 32420) field to Yes. In February 2024 and earlier, this field is named Hide from OS widget with providers?.

Configure the Maximum Number of Appointments a Patient Can Schedule Within a Day

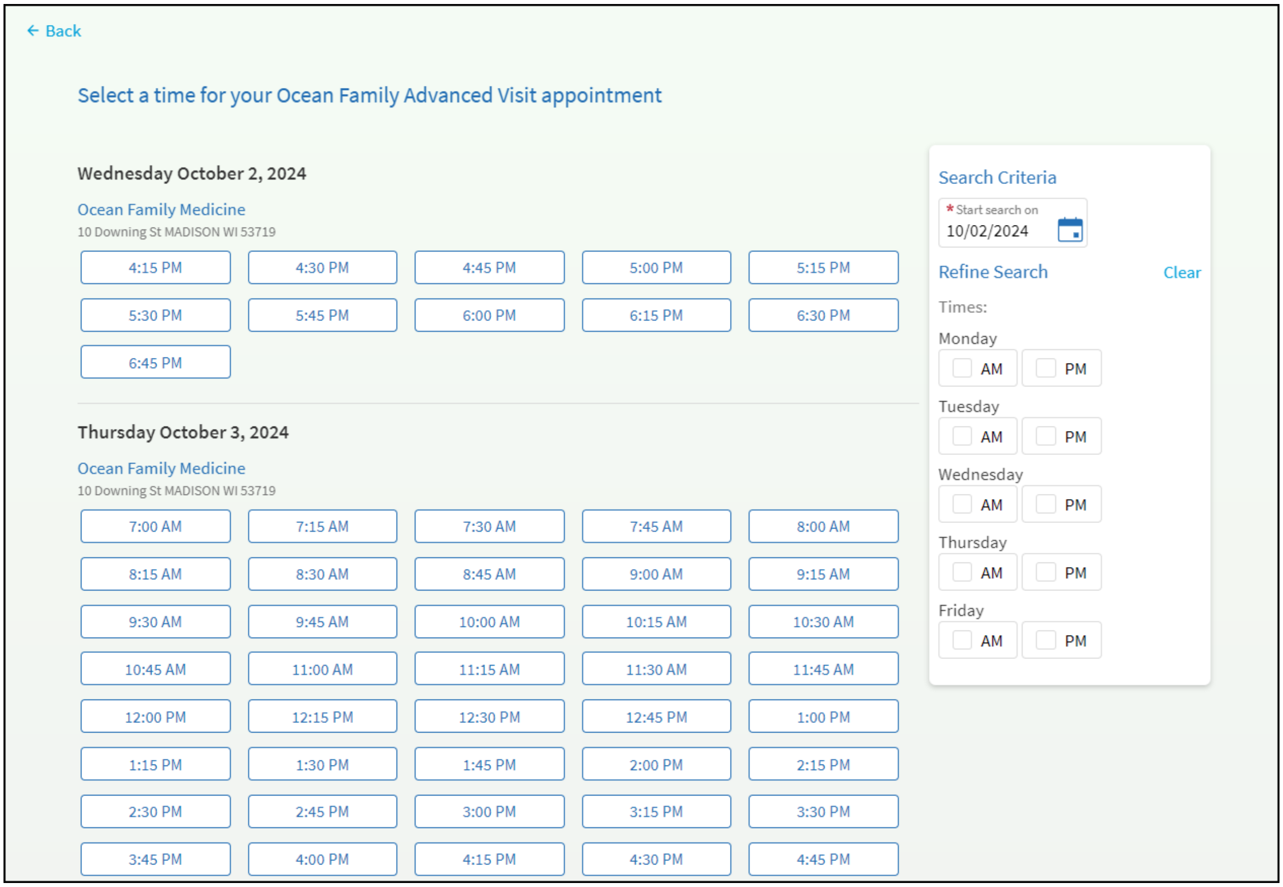
To prevent patients from overusing open scheduling, you can specify the number of appointments they can schedule within a single day. By default, patients can schedule up to two appointments, but you can customize this number to meet your needs.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Max appointments (I WDF 12515) field, enter the maximum number of appointments a patient can schedule within a single day. The default value is 2. This setting is ignored if the scheduling patient is logged in to MyChart.

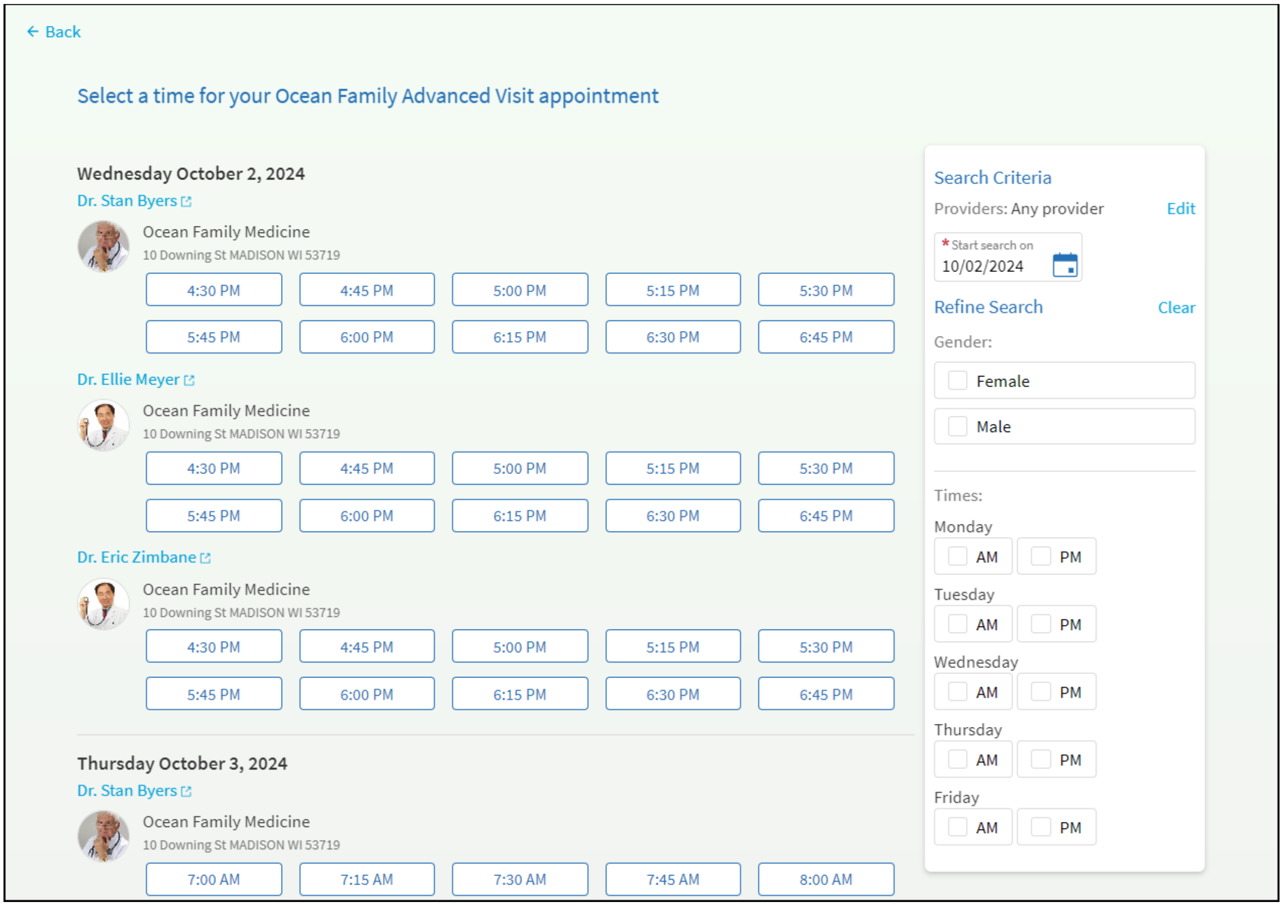
Change Appointment Slot Grouping Options for Advanced Visit Types

You can choose whether appointment slots for advanced visit types are grouped by department or provider on the open scheduling pages by configuring a setting in the visit type record.

- When you group appointment slots by department, open scheduling does not show individual providers and slots for all providers in a department are grouped under the corresponding department's name.



- When you group appointment slots by provider, the open scheduling page appears similarly to how it appears for simple visit types with all slots grouped under the corresponding provider's name.



By default, appointment slots for advanced visit types are grouped by department. If you want to group appointment slots by provider instead, complete these steps:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open an advanced visit type record.
2. In the Allow provider selection (I PRC 32400) field, enter Yes.

Choose Sending Logic for Appointment Confirmation Emails

After a patient enters her information and schedules an appointment with open scheduling, an appointment confirmation email is sent to the email address on file for the patient. You can change this behavior to send the confirmation email to the email address the patient entered during open scheduling. If the patient didn't enter an email address during open scheduling, the email is still sent to the email address on file. Alternatively, you can choose to send the email to the newly entered email address only if there is no email address on file for the patient.

Note that these sending options apply only to appointment confirmation emails. They are not used for the login reminder emails that are sent to patients who already have a MyChart account.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Message Settings screen.
2. In the Send logic field, enter the logic for sending appointment confirmation emails. Choose from the following options:
   - 0-Send to email on file. A confirmation email is sent to the email address on file. This is the default

value.

    - 1-Prefer new email entered. A confirmation email is sent to the new email address the patient entered. If no email address is entered, the confirmation email is sent to the email address on file.
    - 2-Prefer email on file. A confirmation email is sent to the email address on file. If no email address is on file, a confirmation email is sent to the new email address the patient entered.

Disable MyChart Login for Existing Patients During Open Scheduling

To help prevent appointments from being scheduled for the wrong patient, you can hide the MyChart login option in the open scheduling workflow and require all users who make appointments to complete the demographics verification information for the patient.

This option is most useful for pediatric organizations where users who make appointments through open scheduling are usually parents with proxy access to their children's charts. Hiding the MyChart login option prevents the parent from logging in to her own MyChart account and accidentally scheduling the appointment for herself.

Note that the setting below also controls whether the MyChart login option is available in the On My Way workflow. If you disable MyChart login for open scheduling, it is also disabled for On My Way.

To disable this option, complete these steps:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Disable login? field, enter Yes if you want to disable the option for patients to log in to an existing MyChart account when openly scheduling an appointment and when scheduling an appointment through On My Way. The default value is No.

Considerations
Unverified patient records may be created when the demographic information a patient enters does not match an existing patient record and the patient has not yet verified their identity to show that the demographic information is their own. For more information on unverified patient records, refer to the Unverified Patients Setup and Support Guide.

Disable Scheduling Comments or Make Them Optional During Open Scheduling

A scheduling comments field, presented to the patient as "What do you want addressed during this visit?", appears automatically as a required field after a patient chooses a time slot with a specific provider from the open scheduling website or the open scheduling widget on a provider's webpage. Collecting this information at the time of scheduling reduces the need for registrars and other users to follow up with every patient who openly schedules an appointment to gather this information before the visit. After a patient schedules the appointment, the comments the patient entered are visible as appointment notes wherever the appointment is viewed in Hyperspace.

If you don't want to collect scheduling comments or if you want to make the field optional, you can use a setting in Patient Access System Definitions to make this field not required or to hide it completely.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Show appt comment (I WDF 12635) field, specify whether patients can include a comment for the appointment and whether the comment is required. These comments appear in the appointment notes field in Hyperspace. Choose from the following:
   - 0-Hide
   - 1-Show, Optional
   - 2-Show, Required. This is the default value.

Disable Scheduling Comments for a Specific Visit Type

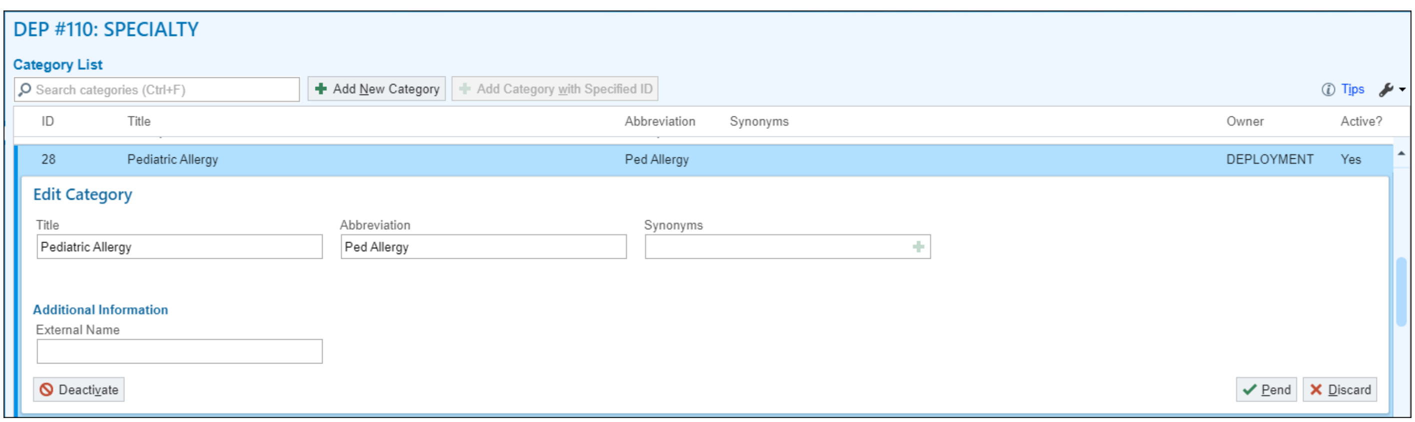
If a visit type implies a reason for the visit, such as a COVID-19 vaccination or a mammogram, you can either hide the scheduling comments field that appears to the patient on the confirmation step, or make it optional so the patient doesn't have to enter redundant information. If the scheduling comments field isn't made required, optional, or hidden for the visit type, the system relies on the system-level Show appt comment? (I WDF 12635) setting. To set the behavior of the reason for visit field for a visit type:

1. From the MyChart System Manager Menu, go to Master File Entry > Visit Type (PRC).
2. Go to the Scheduling Settings 2 screen.
3. In the Ask and required scheduling comments (I PRC 32034) field, enter one of the following values:
   - 0-Ask Comments. The patient can enter comments about their reason for visit but it's not mandatory.
   - 1-Ask and Require Comments. The patient must enter comments about their reason for visit.
   - 2-Don't Ask Comments. The patient isn't prompted to enter comments.

Customize the Appearance of Open Scheduling Pages

Customize Specialty Names

By default, the specialty name that appears in open scheduling workflows is the name of the category value for the specialty specified on the Department Information screen in the department record. If you want to display a different name, you can edit the category value and specify an external name to be used instead.



1. In Hyperspace, go to Epic button > Admin > General Admin > Category List Maintenance. The Category Editor window appears.
2. In the Database field, enter Department [DEP].
3. In the Item field, enter 110.

4. Select the specialty for which you want to display a different name from the list.
5. In the Edit Category section, enter the name you want to appear in open scheduling workflows in the External Name field.
6. Click Accept.

Customize Text and Icons on Open Scheduling Pages

You can add text and icons in open scheduling to help patients determine which visit types and specialties to choose.

Starting in August 2023, you configure visit type icons in Patient Access System Definitions:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Open Scheduling Visit Type Configuration screen.
2. For each visit type, in the Standard Image (I WDF 12681) field, enter an image. If no image is entered, a generic stethoscope image is used. Refer to the Change Images on the Scheduling Buttons topic for a list of available images.
3. If you want to use your own custom image, in the Custom Image Path (I WDF 12682) field, enter the file name for an image located in the <locale>/images folder on your webserver. The following file extensions are supported: jpg, jpeg, png, and svg. You can also use a relative URL, such as /Images/MyChart/Scheduling/OfficeVisit.png.

In May 2023 and earlier, you configure visit type icons using Strings Manager, an Epic-provided tool. Strings Manager is also where you customize the text that appears on open scheduling pages for all versions, as well as error messages related to open scheduling. For more information about working with Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

The table below shows the most commonly customized strings and their location in Strings Manager for the the open scheduling wizard and the open scheduling widget:

Type of String	Location in Strings Manager
Specialty descriptions (applies only to the open scheduling wizard)	Scheduling > Scheduling > Index > SpecialtyDescription
Specialty icons (applies only to the open scheduling wizard)	Scheduling > Scheduling > Index > SpecialtyPhotoUrl
Workflow step pretext (applies only to the open scheduling wizard)	Scheduling > Scheduling > Index > various strings
Emergency disclaimer (applies only to the open scheduling wizard)	Scheduling > Scheduling > Index > EmergencyDisclaimer and EmergencyDisclaimerExpanded
Visit type descriptions	Scheduling > Scheduling > Index > ReasonForVisitDescription Note that these strings require a special key, newprov_[PRC ID] (for example, newprov_123)
Visit type icons	Scheduling > Scheduling > Index > ReasonForVisitPhotoUrl Note that these strings require a special key, newprov_[PRC ID] (for example, newprov_123)
Custom error messages that appear if scheduling fails	Scheduling > Scheduling > Index > ErrorMessage and ScheduleErrorMessage

You can also customize the error message text that appears based on the error codes returned by Cadence. To do this, open the Strings Manager and select the Scheduling > Scheduling > Index node, then select the ScheduleErrorMessage string to edit it. Under Epic Default Keys, select the row for the specific error message you want to edit. The numbers in the Key column correspond to the following errors:

- 6-Overlapping Visit. The selected appointment slot overlaps one of the patient's existing appointments.
- 20-Overbook Slot. The selected appointment slot is no longer available and the scheduling user does not have security to overbook the slot.
- 25-Visit Type Session Limit. The selected appointment slot exceeds the provider's visit type session limit.
- 49-Reservation Exists. The selected appointment slot is already reserved.

Then, stop the website hosting the application, save your changes in Strings Manager by clicking File > Save, and then restart the website.

Customize Look and Feel of Open Scheduling Pages

You can customize the look and feel of the open scheduling pages by modifying the Cascading Style Sheets (.css) files. For example, you might want to customize the open scheduling pages so that the more closely match the look and feel of your MyChart website.

The open scheduling embedded widget respects the CSS override and mobile CSS override setting in Base.xml.

Display Photos and Link to Other Pages in the Open

Scheduling Workflow

You can use images and linked webpages to provide patients with more information about the providers and departments with whom they're scheduling an appointment. This information appears throughout MyChart, including in open scheduling and MyChart Provider Finder. For example, you can display a photo of each provider and provide a link to that provider's webpage on your organization's website so that patients can read about the provider's background. You might also provide a photo and a link to a map for each clinic in which you have departments available for open scheduling.

Images cropped to a smaller size, such as 90 pixels x 90 pixels, work best.

Display Provider Photos and Webpages

Considerations
You might have already completed this setup if you use the Provider Details feature as described in the Let Patients View Provider Information topic.

To add provider photos and web pages:

1. Identify the photo you want to display for each provider. Either save the file to a location on your web server (such as C:\Program Files (x86)\Epic\EpicOpenScheduling\Content\images) or note the URL for later reference.
2. In Hyperspace, go to Epic button > Admin > Master File Edit > Provider and open the provider's record.
3. Select the Biographical Information form (starting in August 2024) or the Online Access form (in May 2024 and earlier) and enter a provider's photo in the Photograph URL field (I SER 32050). Note that this URL must be a full URL that begins with http or https (for example: http://images.hospital.org/staff/DrName.png).
4. In the Web Page URL field (I SER 32060), enter the URL of the provider's webpage. The URL you specify here is also used to show the provider biographical page during slot selection in direct scheduling if the patient does not have access to the Provider Details page.

Display Department Photos and Home Page

1. If you are displaying a department photo, identify the photo you want to display. Either save the file to a location on your web server (such as C:\Program Files (x86)\Epic\EpicOpenScheduling\Content\images) or note the URL for later reference.
2. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
3. Access the URL Configuration screen.
4. In the Type column, enter the type of URL. Choose from Home Page or Photograph.
5. In the Location column enter the URL for the corresponding home page or photograph. Press Shift+F3 for extended entry if your URL is longer than the space on the screen.

Note that you must display a department photo to link to the department home page. The department home page appears when a patient clicks the department photo.

Format URLs for Linking to Open Scheduling Website

When you link to the open scheduling website from another website or webpage, the way you format the URL can determine what patients see or how the open scheduling website behaves. For example, you can hide potentially identifying information in URLs and choose whether certain forms are cleared to protect patient privacy when using the open scheduling website on shared computers.

Hide Identifying Information in URLs

If you are concerned about record IDs for providers, departments, or visit types appearing in the URLs used for open scheduling, you can configure the system to show a different ID in their place.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Signup Settings screen.
2. In the Master File (I WDF 12580) column, enter the master file for which you want to send a different ID in the URL. Choose from Provider (SER), Department (DEP) and Visit Type (PRC).
3. In the ID Type (I WDF 12585) column, enter the ID type to use when transmitting information about this master file through the web browser. Enter the Descriptor (I IIT 600) of the Identity ID type set up for the affected master file, or use the EXTERNAL or CID string. The default is to use the external form of the record ID.

Clear Login and Demographics Forms When a Patient Closes Them

When the lightbox containing the login and signup forms is closed during the open scheduling workflow, the forms retain the values that have been entered into some of the input fields. On shared computers, this poses a security risk if a patient backs out of the lightbox without closing the browser tab or window.

The password and national ID field are automatically cleared in the scenario above, but you can configure the URL to clear the entire login and demographics forms for added security.

To do so, add the "public" parameter to the open scheduling website URL and set it to 1.

For example: MyChart/OpenScheduling?public=1

Preselect or Filter Payers for Open Scheduling

You can save patients time when scheduling as a guest by preselecting a specific payer or filtering the list of payers that is available on the Insurance step of the open scheduling workflow to only certain ones.

The "payor" query string parameter can pass in a list of allowed payers to the open scheduling widget and wizard. You can preselect a payer for patients by setting the parameter to a single payer ID or filter the list of payers by setting the parameter to a comma-delimited list of payer IDs. For example, the following standalone widget URL is configured to preselect payer 100001:

```
https://[MyChart host]/[MyChart instance]/openscheduling/standalone?dept=2200018738,
2200020180&vt=3370&payor=100001
```

When configuring the parameter, you can choose from payer IDs that are listed in the Payors for Verification (I WDF 12610) field on the Open Scheduling Insurance Settings screen of Patient Access System Definitions or, if that field is empty, you can specify any payer ID in your system.

In addition to specifying certain payers in the parameter, you can give patients the option to select a “Not Listed” payer or indicate that they don’t have insurance.

- If the Include “Other” (I WDF 12616) field on the Open Scheduling Insurance Settings screen of Patient Access System Definitions is set to Yes, you can add -2 to include an option for Not Listed.

  - For example, the following open scheduling wizard link is configured to allow selecting payer 100001, 100052, or a Not Listed payer:

```
https://[MyChart host]/[MyChart instance]/openscheduling?payor=100001,100052,-2
```

- If the Include “None” (I WDF 12615) field on the Open Scheduling Insurance Settings screen of Patient Access System Definitions is set to Yes, you can add -3 to include an option for No Insurance.
- In the simple widget, add the following line to the widget's code to default in "No Insurance":

```
data-additionalparams-passthroughparams-payor="-3"
```

- In the embedded widget, add the following line to the widget's code to default in "No Insurance":

```
data-additionalparams-payor="-3
```

- For the previous open scheduling widget only, we recommend adding -1 to the comma-delimited list to include an "---Insurance---" placeholder value.

To use the “payor” query string parameter, take the following steps for the appropriate open scheduling workflow:

- In the simple or embedded open scheduling widget, you can set the ”payor” parameter in the same way as other parameters like visittype, department, provider, or linksource. For more information about setting parameters in the simple or embedded open scheduling widgets, refer to the Use the Simple Widget or Use the Embedded Widget topics.
- In the standalone widget or the open scheduling wizard, update the query string in the link’s URL to include the “payor” parameter like in the examples above.
- In the previous scheduling widget, update the query string in the HTML for the open scheduling widget by adding the "payor" parameter as shown below:

```
<iframe id=”openSchedulingFrame” class=”widgetframe” scrolling=”no” src=”../../SignupAndSchedule/EmbeddedSchedule?id=1234,5678&vt=518&dept=17874&view=plain&payor=10001”
>
```

```
</iframe>
```

Preselect the Specialty for Open Scheduling

When a patient accesses the open scheduling website through a link on a specialty-specific webpage, that specialty can be preselected to move along the scheduling workflow.

Depending on your configuration of query string parameters in the open scheduling website URL, the Choose a Specialty step can also be hidden such that the Choose a Type of Appointment step becomes step 1. Alternatively, you can show the Choose a Specialty step but have the available specialties filtered to only the specialty you define.

Consider an example in which your organization has a webpage dedicated to cardiological care. When a patient clicks the open scheduling link from that page, the cardiology specialty is automatically selected behind the scenes, the Choose a Specialty step is hidden, and the patient begins the open scheduling workflow by choosing an appointment type. If you use specialty filtering instead of hiding the Choose a Specialty step completely, patients see the preselected cardiology specialty for that step while all other specialties (such as family medicine and pediatrics) are hidden.

To preselect a specialty for the Choose a Specialty step, update the URL for the link to the open scheduling website by adding the "specialty" query string parameter set to a category value from the Specialty (I DEP 110) item.

If you want to hide the Choose a Specialty step or filter the specialty that appears to the preselected option, append either the "hidespecialtysection" or the "hidespecialties" query string parameter, respectively. For example:

- If you set the URL to /openscheduling?specialty=4&hidespecialtysection=1, the Choose a Specialty step is hidden when the specialty matches on category value 4.
- If you set the URL to /openscheduling?specialty=4&hidespecialties=1, the Choose a Specialty step appears but includes a button only for the preselected specialty.

Note that the "hidespecialties" and "hidespecialtysection" query string parameters work only if a specialty has already been pre-selected. If a specialty has not been pre-selected, either because the "specialty" parameter is absent or none of the values matched, the "hidespecialties" and "hidespecialtysection" parameters are ignored.

Use Geolocation to Help Patients Schedule in Nearby Departments

Make it easier for patients to choose a convenient location for open scheduling or direct scheduling by limiting the list of departments that appears to departments that are close to them. With geolocation features, patients can use the location provided by their web browser or use a specific ZIP Code to find nearby departments when scheduling an appointment. These features might be especially useful if:

- Your organization is spread out across a large geographic area.
- Your organization is spread out across an area where travel time might be a significant concern, such as in a large city.

In the open scheduling workflow, the distance to each location is visible next to a department's name in the list of appointment slots for the Choose a Time step. When a patient hovers the mouse over the department name or distance, the full department address is visible in a tooltip in both the open scheduling wizard and the open scheduling widget.

For direct scheduling, the distance to each location is visible next to a department's name in the location step. Patients can use the All, Near Me, Near Home, and Near ZIP Code options in the location step to filter to nearby departments.

The list of departments that appear for geolocation is determined by the following rules. Note that the numbers in brackets are configurable and show the default values.

1. Departments less than [10] miles from the search location are always included.
2. Scheduling continues searching until it finds [6] departments.
3. Open scheduling stops searching for departments when it reaches [50] miles from the search location.

Set Geolocation Coordinates for Scheduling Departments

For geolocation to work, the scheduling system must know the latitude and longitude coordinates for the ZIP codes that patients enter during scheduling and the departments in which they are scheduling the appointments.

To find these coordinates, you can use a third-party geocoding service, or you can use GPS functionality on a mobile device while being present at a given location. Note that not all third-party geocoding services permit long-term storage of coordinate values, so you must make sure you adhere to their guidelines for use and obtain any needed licenses.

If you license with a third-party geocoding product for other features, such as Provider Lookup, this setup is done for you. For more information, refer to the Geodata Setup and Support Guide.

If you need to manually import coordinates for some reason, you can use the following import spreadsheets to populate these items in the system after you've collected all of the coordinates:

- DEP,1000-Template - Department. Populates the Additional Address Categories (I DEP 441) and Additional Address Values (I DEP 442) items.
- EZP,1004-ZIP Code-US Postal Service Load (US & CA). Populates the Latitude (I EZP 200) and Longitude (I EZP 201) items.
- EZP,1005-Template with Prof Billing-ZIP Code (US & CA). Populates the Latitude (I EZP 200) and Longitude (I EZP 201) items.
- EZP,1006-ZIP Code-US Postal Service Load (Multiple Cities/Counties). Populates the Latitude (I EZP 200) and Longitude (I EZP 201) items.

Configure Geolocation Settings

To configure how geolocation works for scheduling, complete the following steps. If you use geolocation only for direct scheduling, skip to step 3.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Open scheduling steps (I WDF 12650) field, enter the steps you want to include in the open scheduling wizard in the order in which you want them to appear. Include the Location step to enable geolocation. We recommend listing the steps in the following order: Specialty and Visit Type, Location. Note that if the Specialty and Visit Type steps are not listed, they appear in the open scheduling wizard workflow after all other steps that are listed. By default, only the Specialty and Visit Type steps are included.
3. On the Geolocation Settings screen, configure the following fields, which also apply to direct scheduling. They also apply to Ticket Pass offers and capacity-based appointment request notifications starting in November 2024, August 2024 with SU E11104425, and May 2024 with SU E10909857:
    - Number of departments to pre-select (I WDF 12655). Enter the minimum number of departments to pre-select when a patient has specified a search location. By default, six departments are pre-selected.
    - Distance to always pre-select department (I WDF 12656). Enter a maximum distance in miles. Note that this number must be a whole number and cannot use a decimal point. Departments within this distance from the search location are always included in the search results. By default, departments within 10 miles are included.
    - Distance to never pre-select department (I WDF 12657). Enter a maximum distance in miles. Note that this number must be a whole number and cannot use a decimal point. Departments that are greater than this distance from the search location are never included in the search results. By default, departments greater than 50 miles from the search location are not included.

Customize Geolocation Text

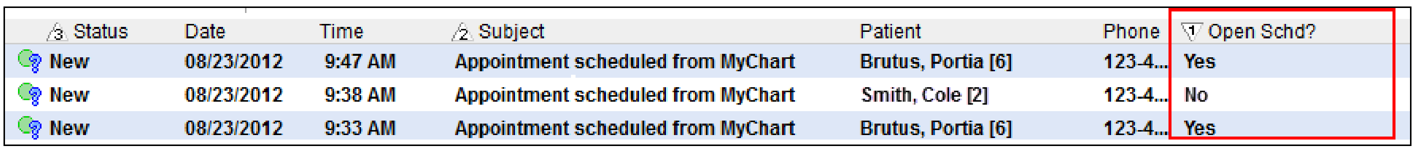
If you want to customize the text that appears during the location search, you can do so by modifying strings under the following nodes in the Strings Manager:

- OpenScheduling\OpenScheduling\Index
- OpenScheduling\Shared\Openings
- Scheduling\Index

For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

Help Scheduling Staff Determine Whether an Appointment Was Made Through Open Scheduling

You can include a column for Patient Schedule Request messages in In Basket to help scheduling staff identify whether an appointment scheduled online was scheduled through open scheduling versus through MyChart direct scheduling.



Status	Date	Time	Subject	Patient	Phone	Open Schd?
New	08/23/2012	9:47 AM	Appointment scheduled from MyChart	Brutus, Portia [6]	123-4...	Yes
New	08/23/2012	9:38 AM	Appointment scheduled from MyChart	Smith, Cole [2]	123-4...	No
New	08/23/2012	9:33 AM	Appointment scheduled from MyChart	Brutus, Portia [6]	123-4...	Yes

This column uses extension record 32475-MyChart - IB Message Schedule Source Open?. It has the following configurable parameters:

- 1-Scrlist. Required. Determines the list of scheduling sources that are evaluated for the new In Basket column. Enter a list of category values from the Audited From (I EPT 7545) item. As released, this parameter includes scheduling sources:
  - 15-Patient Open Scheduling (Internal)
  - 16-Patient Open Scheduling (External)
  - 37-Patient Opening Scheduling Widget. Available starting in May 2023, in February 2023 with special updates I10404634, and in November 2022 with special updates I10311383.
- 2-ystr. Optional. Determines the text that appears to indicate that the appointment associated with the message was scheduled through one of the scheduling sources specified in the first parameter. By default, the text "Y" appears. Enter free text to customize the text that appears.
- 3-nstr. Optional. Determines the text that appears to indicate that the appointment associated with the message was not scheduled through one of the scheduling sources specified in the first parameter. By default, the text "N" appears. Enter free text to customize the text that appears.

If you do not want to customize the parameters of the extension record, you can skip to step 3.

1. In Chronicles, access the Extension (LPP) master file and duplicate extension record 32475.
2. In your duplicate extension record, modify the parameters as appropriate.
3. In Hyperspace, go to Epic button > Admin > In Basket > Message Type Definition and open the message type definition you use for Patient Schedule Request messages.
4. Select the Listing Columns form. In the Additional Columns section, add a new row to the table.
   - In the Column Name field, enter a name for the column as you want it to appear to front desk staff.

For example, Open Sched?

  - In the Extension column, enter extension record 32475 or your copy of it.

Let Patients Join the Wait List in Open Scheduling

Starting in November 2024

When patients schedule an appointment in open scheduling, they can opt in to Fast Pass and join a wait list to be offered earlier appointment times. This means patients without a MyChart account can benefit from Fast Pass. Refer to the Enable Fast Pass for Open Scheduling topic for more information.

Prerequisites
To set up this feature, you need to have set up Hello World's SMS gateway, as described in the Hello World Setup and Support Guide.

Disable Open Scheduling Integration with Self-Signup

When prospective patients use open scheduling to create their first appointment at your organization, they can sign up for a MyChart account at the same time. This feature is automatically enabled if you use both open scheduling and self-signup with third-party identity verification.

Activating patients during open scheduling helps to engage patients from their first interactions with your organization and lets them take advantage of features such as eCheck-In, online copay payment, and pre-visit questionnaires with their first appointment. The demographics information a patient enters during open scheduling carries over to the self-signup portion of the workflow, so patients don't need to re-enter everything. The same patient record that is used for open scheduling is also used for self-signup.

Third-party verification is the only verification method supported for self-signup from open scheduling, even if you use both third-party verification and the option to match existing patient records in your system for self-signup on the MyChart website.

Note that the Sign Up Now button is hidden if the patient is below the minimum age required to activate a MyChart account.

If for some reason you do not want to use this feature, you can disable it. Note that the setting to disable this feature also disables self-signup integration with On My Way.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Open Scheduling Settings screen.
2. In the Signup action (I WDF 12560) field, enter None.

Change the URL Used for Self-Signup from Open Scheduling

If your organization uses a custom signup workflow in place of the released self-signup feature, you can update open scheduling so that a patient is taken to your custom signup workflow when they click Sign Up Now after scheduling an appointment through open scheduling.

1. From the MyChart System Manager Menu, select Login and Access Configuration and access the MyChart Access URL Configuration screen.

2. Add a row in the table with Self Signup specified in the Acc Mode (I WDF 2520) column and the URL for your custom signup page in the URL (I WDF 2510) column.

Integrate with a Third-Party for Additional Open Scheduling Features

Several external web services are available that third-party vendors can use to create custom development for open scheduling. For example, you might work with a third-party vendor to integrate open scheduling with a mobile application.

If you want to work with a third-party vendor on custom open scheduling development, work with your Epic representative to review your build and ensure that you performed all the tasks listed below from the Open Scheduling Setup: Essentials topic that describe standard setup of Epic features that are prerequisites for third-party integration:

- Enable Departments for Open Scheduling
- Enable Individual Clinicians for Open Scheduling
- Enable Open Scheduling System Wide
- Set the Default Visit Type for Open Scheduling
- Set How Many Days Ahead to Look for Open Appointment Slots
- Determine Scheduling Behavior for Patients with an Unknown Social Security Number
- Verify Security for the MyChart Background and Scheduling Users
- Notify Patients of Appointment Confirmation

You can find open scheduling integrations on Showroom.

Note that this configuration might require a fee for an additional license.

Filter Open Scheduling Options by Service Area

When a patient accesses the Open Scheduling website or new provider scheduling, the options they're shown be filtered to show only those that are available in a specified service area. For example, this can be used to prevent patients from seeing results for Community Connect affiliates that aren't applicable to those patients.

Starting in May 2024, if your organization has affiliates that do not share the same MyChart site ID, you can filter Open Scheduling by limiting service areas to their associated departments. For effective filtering, make sure that the Cadence default user for MyChart is authorized for all relevant service areas.

1. From the MyChart System Manager Menu, select Login and Access Configuration and go to the Affiliate Scheduling Filtering Settings 2 screen.
2. Find your affiliate in the Affiliate Site Name (I WDF 2570) column, and set the Filter by Site ID SAs? (I WDF 2585) field to Yes. For more details on linking affiliates to departments, see the Set Up a Default Service Area for MyChart topic.

For New Provider Scheduling, in addition to limiting the available advanced visit types by the affiliate site ID, you can also filter by the service areas linked to the patient record through the Service Areas activity in Hyperspace (I EPT 5635). This filter can be applied on its own, or together with site ID filtering to limit the advanced visit types available for logged-in patients to only those that are both associated with the affiliate site and allowed by the patient's record.

To apply this filter:

1. From the MyChart System Manager Menu, select Login and Access Configuration and go to the Affiliate Scheduling Filtering Settings 2 screen.
2. In the Filter by Patient SAs? (I WDF 2586) field, enter Yes.

In February 2024 and earlier versions, you can apply service area filtering either by updating the MyChart Profile assigned to patients at that organization, or by using query string parameters.

To apply service area filtering in a MyChart profile:

1. From the MyChart System Manager Menu, select Patient Profile Settings and open the appropriate profile record.
2. On the Open Scheduling Filtering screen, enter the service areas that you want to be visible to the patient in the Service Areas (I WDF 12670) field.

To apply service area filtering using query string parameters, you can use the case-sensitive "serviceAreas" query string parameter set to a comma-delimited list of service area Ids from the Facility Profile (EAF) master file. For example:

- In Open Scheduling, you can update the URL to MyChart/openscheduling?serviceAreas=13,23.
- In New Provider Scheduling, you can update the URL to MyChart/Scheduling?workflow=NewProvider&serviceAreas=13,23.

For more information on configuring parameters, see the Query String Parameters topic.

For instructions on creating a service area, see this topic in the Facility Structure Management Strategy Handbook.

Let Patients Sign Up for Text Messages in Open Scheduling

Starting in August 2023

May 2023 by SU E10505443 and C10505443-MyChart

Someone who uses open scheduling to schedule an appointment for themself or for someone else can opt in to receive text message updates about the appointment. Keeping patients and their proxies informed can improve their experiences with your clinics.

After someone schedules an appointment, you can help them remember the appointment details and feel more welcome with appointment confirmation and reminder text messages. Starting in August 2024, you can send them real-time updates when key events file during their visit, keeping them in the loop about their care. If you want to let people sign up for these kinds of text messages in open scheduling, review the information in this topic.

Prerequisites
Open scheduling must be set up to collect a mobile phone number. For instructions to enable mobile phone number collection, refer to the Use the Redesigned Open Scheduling Wizard topic.

To let patients or their proxies sign up for text messages in open scheduling, you need to have messages set up to be sent. The messages can be configured using communication concepts or, starting in August 2024, event-triggered patient messaging. If you're not already sending text messages and want to set up one or both of these options, be aware that the messages aren't limited to open scheduling. The communication concept setup affects messages that can be sent for any Cadence appointment. Event-triggered patient messages are limited at the department level and are sent conditionally based on visit contacts, as described below.

Review the following information about each option and then follow the instructions below to complete the setup.

- To send appointment notifications and reminders ahead of the patient's appointment, you can use appointment-related communication concepts. Communication concepts store settings that send different kinds of messages in certain scenarios, like a reminder text message that gets sent the day before an appointment. To send communication concept text messages to people who use open scheduling, you need to use Hello World's SMS gateway, which is license key C of the Hello World license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868. The communication concepts must also be set to send text messages in their default communication preferences.
- Starting in August 2024, you can send text messages during a patient's visit with event-triggered patient messaging to help the patient and their proxies stay informed about their care. These notifications are set up at the department level, giving you the flexibility to customize the experience at your clinics. You can also tailor your messages based on whether the person who signs up for them is the patient or someone else, like their proxy. To send event-triggered patient messages, you need to specify the events to use and the messages to send in your department settings. Your departments also need to be set up to collect visit contact information as described in the Collect Visit Contact Information from Patients During eCheck-In topic.

If you're already using either of these options to send text messages to patients who schedule appointments through other methods, it's possible your setup already makes text messaging opt-in available in open scheduling, so you don't need to do additional setup. Review the instructions below to confirm the way the messages work and to make any changes you need.

You can set up both options if you want to send both kinds of messages, starting in August 2024. For example, you could use communication concepts for text messages before an appointment and event-triggered patient messaging if you want to send text messages during the appointment. This maximizes your clinics' engagement with patients through text messaging.

Set Up Default Communication Preferences for Communication Concepts

If you want to let people sign up for appointment notification and reminder text messages when they schedule through open scheduling, update your system's default communication preference to Default on or Always on for the communication concepts that send those messages.

Prerequisites
You must use Hello World's SMS gateway, which is license key 185C of the Hello World license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

The option to sign up for text messages appears in open scheduling if at least one of the following communication concepts is set up to send text messages by default:

- 28502-Cadence Quick Reminders Preference
- 28503-Cadence Appointment Notifications Preference

- 28504-Cadence Automated Calling System Preference
- 28516-New Auto Wait List Offer
- 28524-Appointment Information

When someone signs up, text messages are sent based on the default text message preference in each of the communication concepts. To update your communication concepts' default preferences, complete the following steps:

1. In Hyperspace, open a communication concept (search: Communication Concept Editor).
2. In the Media Settings section, update the Text Message field to Default on or Always on.

Set Up Event-Triggered Patient Messaging

Starting in August 2024, if you want to let people sign up for event-triggered patient messages when they schedule through open scheduling, you can configure event-triggered patient messaging in your clinics' department settings.

Prerequisites
Your departments must be set up to collect visit contact information, which is enabled by default when event-triggered patient messaging is set up. For information about reviewing your settings, refer to the Collect Visit Contact Information from Patients During eCheck-In topic.

The option to sign up for text messages appears in open scheduling if you have at least one event and its associated messages set up in your department's event-triggered patient messaging settings.

When you set up event-triggered patient messaging, you choose the events that should send messages and the messages that should be sent. You can specify whether the messages for each event should be sent to the patient, to the patient's other contacts, or to both the patient and their other contacts. This distinction relies on recipient information in a patient's visit contacts. If the patient is listed as a recipient, they're sent the messages you set up to be sent to the patient. If someone else is listed, they're sent the messages you set up to be sent to the patient's other contacts. If there are no recipients, no messages are sent.

If someone who signs up for text messages in open scheduling is scheduling for themself, they receive messages for patients. If they're scheduling for someone else, they're added to that patient’s visit contacts to be sent messages for that patient’s other contacts.

You can send event-triggered patient messages for appointments scheduled in other ways if you give your staff access to enter visit contacts manually. For example, you can add the Visit Contacts activity to the Department Appointments Report to let your front desk staff capture visit contact information when patients arrive. For more information, refer to the Add Patient Message Activities to Users' Workspaces topic.

The information below is an overview of the necessary setup for event-triggered patient messaging. Refer to the linked topics in each section for detailed instructions. For more information about event-triggered patient messaging, refer to the Trigger Patient Messages from Events topic.

Choose Key Appointment Events to Trigger Messages

First, determine which events should trigger messages. In general, we recommend using at least one event that is filed for every visit to send a message, like event 600-Check In. You can also create custom events to send messages in specific scenarios, like if a provider is running late, as described in the Create and Track Events for Appointments topic.

If you aren't sending text messages with the communication concepts described above, you can use event 608-Appointment Scheduled to send an appointment confirmation message. If you are, that might be duplicative of the messages they send.

Build the Message Content

Then, build the messages you want to send. You can build different messages to send to the patient or their other contacts, or you can use one set for both. If you don't use Hello World's content management tools, you can create them as SmartTexts.

To build your messages with Hello World:

1. If necessary, work with your Hello World team to get the appropriate security to manage message content, as described in the Give Users Hello World Security topic.
2. Follow the steps in the Manage Message Content topic as you build your content.
   - Starting in November 2024, begin with the instructions in the Create Communication Topics topic. In the SmartTool Contexts (I HST 85540) field, enter the SmartTool Context 931-Patient External Notification. Enter the communication workflow 83002-Visit Messaging in the Communication Workflow (I HST 85515) field. If you want to send different messages to the patient and their other contacts, select the Different content for self and other option in the Allowed Recipient Content Types (I HST 85503) field.
   - In August 2024, begin with the instructions in the Create Base Communication Templates topic. In the SmartTool Contexts (I HST 85540) field, enter the SmartTool Context 931-Patient External Notification. Enter the communication workflow 83002-Visit Messaging in the Communication Workflow (I HST 85515) field. If you want to send different messages for the patient and their other contacts, create separate base communication templates.
3. Create override communication templates, as described in the Create Override Communication Templates topic.
4. Work with your Hello World team to approve the message content, as described in the Approve Message Content topic.

To build your messages as SmartTexts:

1. If necessary, add Shared security point 365-Edit External Notification SmartTexts and SmartLinks. Refer to the Add Patient Messaging Security Points topic for more information.
2. Use the SmartText editor in Hyperspace to build your content. Refer to the instructions in the SmartTexts topic for instructions. In the Restrictions card, enter 931-Patient External Notification in the Context (I ETX 30) field.
3. When ready, release and accept your SmartTexts.

Add the Events and Messages to the Event-Triggered Patient Messaging Table

When you have your events and messages to send, you need to enter them in your department event-triggered patient messaging settings. Refer to the Add Patient Messaging Security Points topic if you need security to access these settings.

To complete your event-triggered patient messaging setup, follow the steps in the Configure Automatic Message Notifications for a Department topic to open your departments' event-triggered patient messaging settings and enter your events and messages in their corresponding fields.

Review Your Build with the Open Scheduling and New

Provider Scheduling Slot Search Utilities

Starting in May 2024

The Open Scheduling Slot Search and New Provider Scheduling Slot Search utilities let you troubleshoot potential scheduling issues in these workflows by returning information about settings at the provider, department, visit type, and system levels. These utilities can help you identify why slots aren't showing to patients, such as a provider's template not having slots or a visit type having modifiers that restrict scheduling. You can use the Open Scheduling Slot Search utility to analyze build for patients without a MyChart account, and the New Provider Scheduling Slot Search utility to analyze build for patients with a MyChart account.

To access the utilities, go to the MyChart System Manager Menu and select System Utilities > Scheduling Utilities > Open Scheduling Slot Search or New Provider Scheduling Slot Search.

For both utilities you enter a provider, department, and visit type, and can specify a time range to search slots for. For the New Provider Scheduling Slot Search utility, you will also enter a patient and can specify a MyChart user. If slots are found, you will see the slot times. If no slots are found, you will see a message under the provider, department, or visit type that specifies what configuration settings are preventing slots from being shown.

Open Scheduling Support: Common Issues

This section describes some common issues you might encounter with open scheduling, along with possible solutions for addressing each issue.

The open scheduling page shows a blank template.

Solution

Verify that open scheduling is enabled at the system level, as described in the Enable Open Scheduling System Wide topic. If you change this setting, clear the cache.

A department isn't available for open scheduling.

Solution

Verify that the department is enabled for open scheduling, as described in the Enable Departments for Open Scheduling topic.

Solution

Verify that a specialty is listed for the department in the Specialty field on the Department Information screen.

The specialty icon doesn't appear.

Solution

Verify that your image is saved in the right place on the web server. Images should be saved in the following location: C:\Program Files (x86)\Epic\MyChart\\asp\Content\images.

Solution

Verify that the image is saved with the correct filename, as described in the Specify Specialty Icons topic. This name should include the specialty's ID, not CID.

A provider isn't available for open scheduling.

Solution

Verify that the provider is enabled for open scheduling, as described in the Enable Individual Clinicians for Open Scheduling topic.

Solution

Verify that at least one of the departments listed on the Provider Information screen in the provider record is enabled for open scheduling and that the department has a specialty listed. Refer to A department isn't available for open scheduling. for more information.

Solution

Verify that the provider has a valid scheduling template in a department enabled for open scheduling. This template must have regular (non-overbook) slots available and a release date in the future.

The provider photo or webpage link doesn't appear.

Solution

If you've configured provider photos using the Photograph's URL (I SER 32050) field described in the Display Provider Photos and WebPages topic, try these things:

- Verify that you've saved your image in the right place. Enter the URL of the provider photo in a web browser to make sure it is accessible.
- Verify that you've included the full URL in the provider record. For example: http://www.mycompany.org/providers/drseeger.html

Solution

If you are using a web URL in the Photo (I SER 6002) field to show provider photos and are using, try the same things listed above for the Photograph's URL (I SER 32050) field.

Solution

If you are using a file path for an image in the Photo (I SER 6002) field to show provider photos, try these things:

- Verify that the image is stored on your web BLOB server. If it isn't, you need to move it to your web BLOB server in order for the photo to appear.
- Verify that the Display provider photos without WBS? (I LSD 15177) field is left blank or set to No in EMR System Definitions (Server, Interface, MF, etc. > Facility Name & BLOB Service Settings screen).

Scheduling succeeds for new patients but fails when an existing patient is matched.

Solution

Verify that the ID type record has EPI set as the ID Type Descriptor. Refer to the Specify the ID Type Descriptor for the ID Type topic for more information.

A blank page (HTTP Error 500) appears.

Solution

Check if you're missing the background user for MyChart. For more information, refer to the Verify Security for the MyChart Background and Scheduling Users topic.

CAPTCHA entries always fail.

Solution

You CAPTCHA keys might be wrong. Verify that you have the correct public and private keys specified. For more information, refer to the MyChart Patient Access Setup: CAPTCHA Validation in MyChart topic.

Correct CAPTCHA entries always refresh.

Solution

Make sure that both the MyChart scheduling user and the MyChart background user have Identity security point 1-Create record and Cadence security. For more information, refer to the Verify Security for the MyChart Background and Scheduling Users topic.

Creating a new patient fails.

Solution

Verify that your MyChart scheduling user has the following security points, which are required to create patients:

- The user's Identity security class must have security point 1-Create Record.
- The user's EpicCare security class must have security point 35-Create New Patient.
- The user's Cadence security class must have Open Patient Record (I ECL 5201) set to Yes.

Solution

The default messaging department for MyChart might be hidden, deleted, or in some way prevent patients from being created in it. Open Scheduling creates patients in this default department, not the department the appointments are scheduled in.

You can identify the default message department by checking the Encounter department (I WDF 230) field in Patient Access System Definitions (MyChart System Manager Menu > Message Configuration > Basic Message Options screen).

When a patient tries to sign in, the spinning wheel doesn't disappear.

Solution

Verify that token.asp is in the web folder of the working directory on your MyChart web server.

When a patient accesses a specific provider's schedule through the open scheduling widget, the following error message appears: "Sorry, we couldn't find any open appointments."

Solution

Check the visit type being used in the provider widget and verify that the visit type is one enabled for open scheduling at the department level (MyChart System Manager Menu > Master File Entry > Department > your department > Online Scheduling Settings 1 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions)).

If no visit types are specified in the department record, verify that the system level default open scheduling visit type is specified (MyChart System Manager Menu > Scheduling Configuration > Open Scheduling settings screen > Default visit type field).

Solution

Check that the provider has a valid template for the department you intend to schedule in.

1. In Hyperspace, go to Epic button > Edit Template.
2. Open the template for your provider and verify that their schedule for your department is valid.

The expected appointment slots don't appear after a

patient selects a specialty or visit type.

Solution

Make sure the following are true:

- You've cleared the cache in MyChart System Utilities if you've made any changes in Patient Access System Definitions.
- The provider has the Allow open scheduling or request? (I SER 32068) item (Allow Open Scheduling through MyChart? in August 2024 and earlier versions) set to Yes in the provider record.
  - To confirm that the provider allows open scheduling, go to the MyChart System Manager Menu > Master File Entry > Provider > and open a provider record. On the MyChart Settings screen, verify that the Allow open scheduling or request? field is set to Yes (Allow Open Scheduling through MyChart? in August 2024 and earlier versions).
- The Department is set to allow open scheduling, at least with a visit type override. To verify this, from the MyChart System Manager Menu > select Master File Entry > Department > and open your department record. On the Online Scheduling Settings 1 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions), check the Allow open scheduling/request field (Allow Open Scheduling through MyChart? in August 2024 and earlier versions) for department-level open scheduling or the Open? column for the specified visit type for visit type overrides.
- The slots the patient looking for fall within the to and from dates open scheduling considers (MyChart System Manager Menu > Scheduling Configuration > Open Scheduling Settings screen > Min days lookahead and Max days lookahead fields).
  - Keep in mind that while you can override the default system definition setting at the department and visit type level, the system definition settings are respected if they are more restrictive.
- The MyChart scheduling and background users have proper Cadence security to schedule the visit.
- There is enough available time for the visit, either as a single slot or consecutive slots, in the provider's schedule. If you restrict scheduling with visit type blocks, the slots must have the visit type block applied. To check the provider's scheduling template, go to Epic button > Admin > Schedule Admin > Templates > Edit Template > and enter your provider. Check the template for the day and department for which you expect to see slots.

The following error message appears: "An error occurred while executing the command: USER-NOT-AUTHORIZED"

Solution

You probably have not set up a background user for open scheduling. Refer to the Verify Security for the MyChart Background and Scheduling Users topic for more information.