Scheduling Questionnaires Setup and Support Guide

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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.

Table of Contents

Scheduling Questionnaires Setup and Support Guide

A scheduling questionnaire presents a list of questions for a scheduler to ask a patient when scheduling an appointment. The logic you build into the questionnaire guides the scheduler to make the right scheduling decision based on the patient's answers. In particular, the patient's answers can trigger these actions:

- Display instructions to the scheduler.
- Prevent the scheduling of a certain visit type.
- Select the visit type or department to schedule the appointment in.
- Change the resources scheduled with the appointment.

In radiology, for example, a questionnaire can prompt the scheduler to ask the patient if she is pregnant or has metallic implants. If she says yes, the questionnaire logic can prevent the scheduling of a potentially harmful mammography visit type or replace that visit type with another.

Not all organizations use scheduling questionnaires. These are the two most common reasons to use them:

- If you used scheduling questionnaires before you installed Epic, whether on paper or in another computer system, you can replicate your old workflows with scheduling questionnaires in Epic.
- If you have centralized scheduling, questionnaires can guide the scheduler from one of a (relatively) few generic visit types to the specific visit type actually needed for the appointment.

If you're considering using scheduling questionnaires for other purposes or to gather information unrelated to scheduling, try to use other Epic features instead, such as scheduling instructions, patient instructions, visit type modifiers, panels, visit type restrictions, and sequencing rules. For example, instead of asking the question "Is this visit with Dr. Smith?" to determine whether the visit length should be 15 or 30 minutes, use a visit type modifier.

Related topics

You might also be interested in the following related information:

- Decision Trees Setup and Support Guide

Across your organization

Epic recommends that you build questionnaires only if your organization previously used them. As a result, the Foundation System does not include a complete set of scheduling questionnaires. Some sample questions are available for you use as a model for how your question records should look.

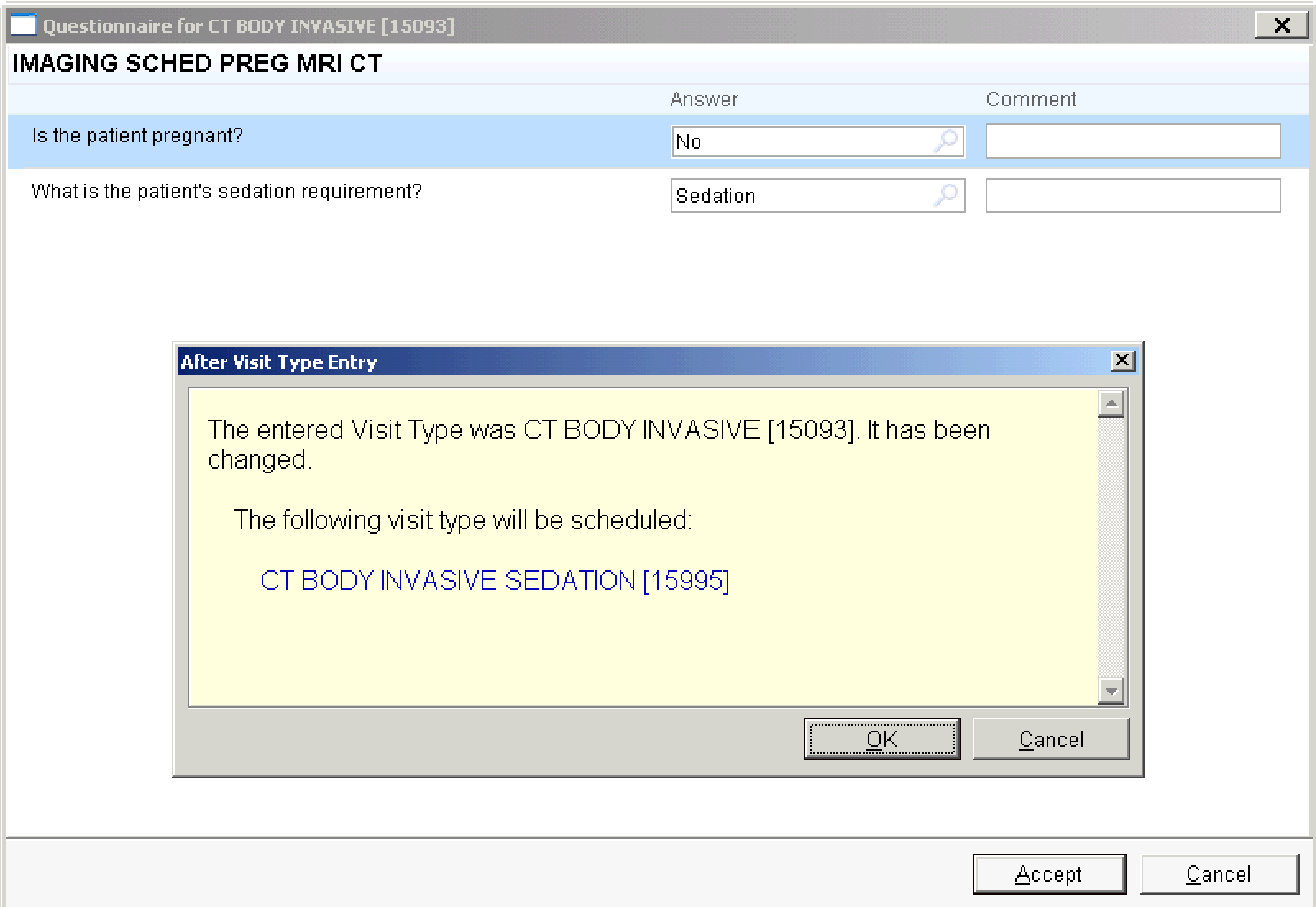
The questionnaire ES Inpatient-Outpatient includes a question similar to the one you can use to help redirect HOV appointments. For more information on redirecting HOV appointments with questionnaires, refer to the Drive HOV Appointment Redirection with an Answer topic.

Whether or not you choose to use questionnaires, you should hide the Foundation System's questions so they don't interfere with your workflows.

How It Works

While making an appointment, the scheduler enters a visit type in the Visit Type field. A questionnaire appears.

The scheduler asks the patient the questions and fills out the questionnaire. Based on the answers, any of the actions described in the introduction might occur, such as changing the visit type to the best one for the patient.



Scheduling Questionnaires Setup: Essentials

This section covers everything you must do to start using scheduling questionnaires. This includes making questionnaires available to your schedulers and configuring questionnaires to match Epic's build recommendations.

All of these instructions assume you are editing records in a non-production environment or unreleased records in your production environment. Refer to these topics for information about the potential consequences of editing released records in your production environment:

- Editing Questions
- Editing Questionnaires

Present Schedulers Questions to Ask Patients

This topic explains how to build the simplest kind of questionnaire, the kind that just gathers information from the patient. Continue on to other topics in this guide to have questionnaires perform their typical function of guiding the scheduler to the right scheduling decision.

Do not use scheduling questionnaires to collect clinical data. Answers to these questionnaires appear only in scheduling workflows and are hard for clinicians to find. Use scheduling questionnaires only to collect information for scheduling.

If you need to collect clinical information before the appointment, contact your Epic representative to discuss options for collecting this information elsewhere. Also, patients can provide clinical information, such as allergies and problems, with health history questionnaires in Welcome and MyChart.

Scheduling questionnaires are composed of two kinds of records. Each individual question is a record in the Question (LQL) master file. Each questionnaire is a record in the Forms (LQF) master file.

Prerequisites

Before you begin creating question and questionnaire records, make sure you know your organization's record naming and numbering conventions. This is especially important if you have a large questionnaire scope, where you might, for example, have dozens of different patient age questions for different questionnaires. Epic's recommended convention is to name questions and questionnaires as <Application> <Specialty> <Description>, such as ES GAS New Patient for a scheduling questionnaire used by the Gastroenterology department. Find additional information about naming and numbering conventions in the Epic Style Guide Master File Naming and Numbering Conventions document.

Make sure you plan enough time to do all of your build. Consider that one Epic organization reported with analysis time included, it took an average of 25 minutes to build each question and 22 minutes to compile questions into each questionnaire.

To create and edit questions and questionnaires, your default Chronicles security classification must allow data entry. If someone without data entry security needs to create and edit questions and questionnaires, you can override his Chronicles security classification to allow data entry in certain master files:

1. In Hyperspace, follow the path Epic button > Admin > Access Management > User Security.
2. Select the user and contact you need. The User Security activity opens.
3. Go to the Chronicles Security form.
4. In the Database overrides table, enter LQF (questionnaires) in the INI column. In the Security Classification column, enter a security classification that allows data entry.
5. Enter similar lines for LQL (questions) and other related master files that the person might need to edit. Note that in addition to being able to make changes related to questionnaires, the person will have full access to the entire master file.
   - To allow editing rules, enter CER.
   - To allow adding questionnaires at the visit type and panel levels, enter PRC.
   - To allow adding questionnaires at the department level, enter DEP.
   - To allow adding questionnaires at the system level, enter SDF.

	INI	Security Classification
1	LQF	CHRONICLES ADMINISTRATOR
2	LQL	CHRONICLES ADMINISTRATOR
3	CER	CHRONICLES ADMINISTRATOR
4	PRC	CHRONICLES ADMINISTRATOR

6. Click Finish to save your changes and exit the user record.

You need Shared security point 198-Edit Custom Filing Items to create questions that file responses to a Chronicles item.

You need Shared security point 199-Access Code to Execute and Code Dependent Configuration to edit the Exclusion Code (I LQL 121) field.

Considerations

Don't try to share the questions you create for scheduling questionnaires with other questionnaires in Epic. Because of this segregation, you might notice some question settings that you can ignore because they apply only to other types of questions. Because of the specific logic usually needed for each questionnaire, you will probably find it difficult to share questions even among scheduling questionnaires.

Instead of sharing questions, expect to create a number of similar questions that are each specific to a questionnaire. By limiting your question sharing, you will limit your potential for unintended consequences when you make changes to a question.

The following instructions explain how to create questions, collect them in a questionnaire, and have the questionnaire appear to schedulers.

Continue on to other topics in this guide to have questionnaires perform their typical function of guiding the scheduler to the right scheduling decision.

Decide What Information to Ask in Questionnaires

Before you begin creating questions, decide what information to include in your questionnaires. Try to limit the scope to questions whose answers affect scheduling. To gather other types of information, use other features instead, such as order-specific questions or fields on your registration forms.

Before you begin your build, create a list of all your needed questions and the rules for when to ask particular questions, such for questions that apply only to female patients.

Follow the Normal Steps for Creating a Question

Follow these steps for each question you create, regardless of what type it is, such as Yes/No or time-based.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor. The Launching Question Editor window appears (Choose Question Record window in the Classic client) .
2. To create a new question in the Hyperdrive Client, enter a type of Form Question and click Continue. Click Create a New Record. In the Classic client, enter a type of Form Question and click New. The Assign Question Name window appears.
3. Enter a name for your question record and click Continue.
    - Follow your organization's naming convention if you have one. Epic's recommendation is <Application> <Specialty> <Description>, such as ES GAS New Patient for a scheduling questionnaire used by the Gastroenterology department.
    - The record name is not the actual text of the question. You'll get to that in a second. For the record name, just enter a descriptive name that will make sense when you use the record later. In particular, you can use this record name to find the question later when you build the questionnaire.
4. Accept the current contact. The Question Editor appears.
5. In the Prompt field, enter the question that schedulers should ask patients.
   The exact text you enter here appears to schedulers as they complete the questionnaire. For questions that will be asked of pediatric patients, phrase the question in a way that makes sense for the scheduler to ask the parent. For example, "How many times has the patient been hospitalized?" instead of "How many times have you been hospitalized?"

6. In the Abbreviation (I LQL 105) field, enter the abbreviation for the question prompt. When the question and response are printed on reports, the abbreviation is used instead of the prompt.
7. Select the Sort answers by name (I LQL 340) checkbox to sort responses by name. If the checkbox is cleared, responses with a response type of Category-INI are sorted by ID number and responses with a type of Custom List are sorted in the order they are listed. Questions that use a Category-INI response type are always sorted by name if there are more than 20 possible responses, regardless of how this setting is configured.
8. Enter settings specific to the type of question you are creating. Refer to the subsequent topics for details.
9. In the Note field, enter any comments that might help schedulers when they ask patients this question, or a note that appears with the question in MyChart, MyChart Bedside, and Welcome. You can also enter notes in HTML format in the Patient Note (I LQL 142) field. Notes entered in the Patient Note field override notes in the Note field for patients, but don't appear in MyChart Bedside or to schedulers.
10. Select the Response Required? (I LQL 150) checkbox if the scheduler must answer the question to accept the questionnaire. If you're using the Classic client, enter Yes in the Response Required? field.
11. Select the Released? (I LQL 250) checkbox when you are sure that the question is finalized and ready to appear in a questionnaire. If you're using the Classic client, enter Yes in the Released? field.
12. Click Accept to save and close the question record.

Create a Yes/No Question

You can have schedulers ask questions that must be answered with either a Yes or a No. When scheduling a mammogram, for example, a scheduler might ask if the patient is pregnant.

If you decide to drive scheduling decisions with questionnaires, you will find that the discrete Yes and No values make it easy to prevent scheduling our example mammogram if the answer is Yes.

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 110) field, enter Yes/No.
3. If you're using the Classic client, enter No in the Multiple Response? (I LQL 180) field. It's unlikely that you would have a yes/no question that should allow multiple answers.

Create a Time-Based Question

You can have schedulers ask questions that must be answered with a specific time. In a walk-in lab, for example, schedulers might ask what time the patient last ate before creating an appointment to perform some lab tests, such as a fasting glucose.

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 110) field, enter Time.
3. Do not check the Multiple Response? (I LQL 180) checkbox. If you're using the Classic client, enter No in the Multiple Response? field. It usually doesn't make sense to allow multiple answers to questions that ask for a specific time.

Create a Question Answered by a Date

You can have schedulers ask questions that must be answered with a date. Schedulers can easily enter dates with standard shortcuts, such as t for today or w-1 for one week ago. For example, you can ask the patient when her last appointment was. Or when scheduling an x-ray for a potentially broken bone, for example, you can ask when the injury occurred.

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 110) field, enter Date.
3. Do not check the Multiple response? (I LQL 180) checkbox. If you're using the Classic client, enter No in the Multiple Response? field. It doesn't usually make sense to allow multiple answers to questions that ask for a specific date.

Create a Question Answered by a Number

You can have schedulers ask questions that must be answered with a number. These questions are good for things that can be easily counted, such as "How many times have you been hospitalized?"

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 110) field, enter Numeric.
3. In the Decimal Places (I LQL 240) field, enter the number of digits after a decimal place that are required to answer the question. The default for this field is 0.
4. Determine whether to select the Multiple response? (I LQL 180) checkbox depending on if it makes sense to allow more than one answer. If you're using the Classic client, enter Yes or No in the Multiple response? field.

Create a Question Answered by a Record in Your System

You can have schedulers ask questions that must be answered with a record in your system. For example, you might ask the patient who their PCP is. Because the answers should correspond to your records in the Provider (SER) master file, you can make that list of the records the list of possible choices.

These questions are known as networked questions.

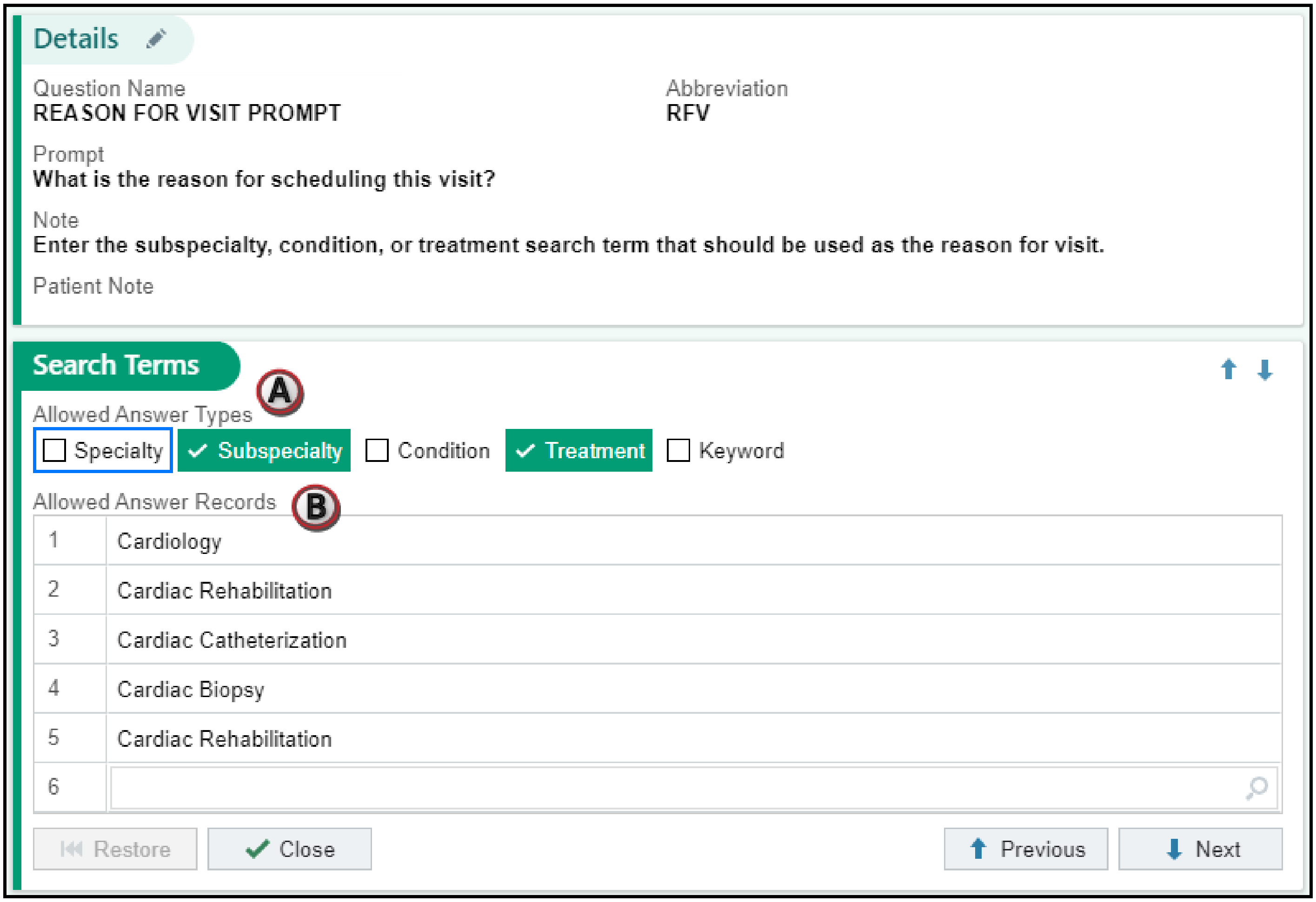
You might notice that category - INI questions and networked questions are similar. Your choice to use one or the other just depends on where the system stores your list of possible answers. If the answers are records in a master file, create a networked question. If the answers are in a category list, create a category - INI question.

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 110) field, enter Networked.
3. In the Linked INI (I LQL 120) field (or the Link to INI field if you are using the Classic client), enter the INI of the master file that the answers will come from. For example, enter SER to have answers come from your list of provider records.
4. To limit which records are available as answers, you have two options. Either way, the solution you develop will be specific to your particular situation. Contact your Epic representative for assistance.
   - You can enter M code in the Exclusion code (LQL 121) field.
   - You can allow only records with a certain value for a given item. That item must be indexed for this to work. Enter the item in the Index Item (I LQL 122) field. In the Index Value (I LQL 123) field, enter the specific value a record must have to be allowed as an answer. You can enter multiple caret-delimited values in this field.
5. Determine whether to select the Multiple response? (I LQL 180) checkbox depending on if it makes sense to allow more than one answer. If you're using the Classic client, enter Yes or No in the Multiple response? field.

Create a Question Answered by a Provider Search Term Record

Starting in November 2024

The Search Term Question type creates questions that are answered by provider search term (MAG) records and allow you to accept only specific types of provider search terms—specialty, subspecialty, condition, treatment, or keyword (A)—and specific records—such as the Cardiology specialty search term or the Cardiac Biopsy treatment search term (B)—as answers. Refer to the Provider Search Terms Setup and Support Guide for details about how provider search terms are used in ordering, referral, and scheduling workflows.



To create a Search Term Question:

1. Follow the normal steps for creating a question, but enter a type of Search Term Question in place of Form Question in step 2.
2. On the Search Terms form, select the types of provider search terms that are allowed as answers. Specialty, Subspecialty, Condition, and Treatment are selected by default.
3. In the Allowed Answer Records field, enter the specific records that can be used to answer the question. For example, you might list Angina, Cardiac Arrest, and other conditions in a follow-up question for a referral to Cardiology. If this field is left blank, all records of the selected types are allowed.
4. On the Quick Buttons form, deselect Show Answer Fields Alongside Quick Buttons, which is selected by default, if users should only be able to select answers that you've configured as quick buttons.
5. Enter the provider search terms that users see as quick buttons in the Add Quick Button field. If you deselected the Show Answer Fields Alongside Quick Buttons checkbox, you are required to enter at least one quick button.
6. To show users a different caption than the record name, click on the record name in the Caption column.

Create a Question Answered by a Category Value in Your System

You can have schedulers ask questions that must be answered with a value from a category list in your system. When rescheduling a procedure, for example, schedulers might ask for the reason the original procedure was canceled. These values are stored in a category list in the Procedure Not Performed (I ORL 7800) item. You can make that list of category values the list of possible choices.

These questions are known as category - INI questions.

You might notice that category - INI questions and networked questions are similar. Your choice to use one or the other just depends on where the system stores your list of possible answers. If the answers are records in a master file, create a networked question. If the answers are in a category list, create a category - INI question.

A nice thing about category - INI questions is that when the category list for the item is updated, the answers available for the question are automatically updated, too.

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 110) field, enter Category - INI.
3. In the Linked INI (I LQL 120) field (or the Link to INI field if you are using the Classic client), enter the three-letter abbreviation of the master file that holds the item with your category list. For example, enter ORL to have answers come from the category list in an item in the Surgical Log (ORL) master file.
4. In the Linked Item (I LQL 125) (or the Link to item field if you are using the Classic client), enter the ID of the item that holds the category list. For example, enter 7800 to select the Procedure Not Performed (I ORL 7800) item.
5. Determine whether to select the Multiple response? (I LQL 180) checkbox depending on if it makes sense to allow more than one answer. If you're using the Classic client, enter Yes or No in the Multiple response? field.

Create a Question Answered by a Custom List of Values

You can have schedulers ask questions that must be answered from a list of responses you set up specifically for that question. You might need to do this if the system contains no list of records and no category list that corresponds to the list of values you need.

These questions are known as custom list questions.

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 110) field, enter Custom List.
3. In the Custom List (I LQL 130) table, enter all the possible values that schedulers can choose from when answering the question.
   - Enter one value per line.
   - Each value will appear to schedulers exactly as you enter it here.
   - It doesn't matter what order you enter the values in. They will appear to schedulers in alphabetical order if you check the Sort Answers by Name (I LQL 340) checkbox.
   - It's often useful to include a catch-all response, such as Other, and allow schedulers to explain the response in the Comments field.
   - Don't use characters other than letters, numbers, and common punctuation.
4. Determine whether to select the Multiple response? (I LQL 180) checkbox depending on if it makes sense to allow more than one answer. If you're using the Classic client, enter Yes or No in the Multiple response?

field.

Create a Question Answered by Free Text

You can have schedulers ask questions that allow any free text as the answer. Free text questions are usually your last resort when none of the other question types will work. Because it's impossible to predict what the answers will be, it's difficult to write rules that drive scheduling based on free text questions. It's also impossible to do meaningful reporting on free text answers.

1. Follow the normal steps for creating a question.
2. In the Response type (I LQL 130) field, enter Free Text.
3. Determine whether to select the Multiple response? (I LQL 180) checkbox depending on if it makes sense to allow more than one answer. If you're using the Classic client, enter Yes or No in the Multiple response? field.

Create a Questionnaire

Once you have all of your questions built, collect them in a questionnaire record.

This topic describes the basic questionnaire setup of including your questions in the questionnaire. However, the questionnaire is also where you define the logic to present schedulers with questions based on conditions and to drive scheduling decisions. For details on that setup, continue on to the Control Which Questions Schedulers Need to Ask and Adjust Scheduling with Questionnaires topics in this guide.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Questionnaire Editor.
2. To create a new question in the Hyperdrive Client, enter a type of Visit Type Questionnaire, click Continue, click Create a New Record, enter a name and ID for the questionnaire, then click Continue. The name you assign will appear to schedulers as they complete the questionnaire. The ID should follow your organization's numbering convention if you have one.
   - In the Classic client, enter a type of Visit Type Questionnaire, then enter name for the questionnaire and click New. The name you assign will appear to schedulers as they complete the questionnaire. Then enter an ID for the questionnaire. The ID should follow your organization's numbering convention if you have one.
3. Accept the new contact. The Questionnaire Editor opens.
4. Control whether schedulers can enter comments along with the patient's answers:
   - If schedulers should be allowed to enter free text comments, enter Field or Icon in the Comment Display (I LQF 250) field to determine if the comment entry should be displayed to users in a field or an icon. The default value is a field.
   - Enter None to prevent comments. You might want to do this to simplify the user interface if your schedulers never enter comments.
5. In the Questions table, enter each question that you want on the questionnaire. Enter them in the order that schedulers should ask them. You can enter a question only once. Note that entering questions that are not released yet will result in a warning that the question is not released and you need to confirm you want to add it to the questionnaire. The question will not appear in the questionnaire until it is released.
   - To find each question, enter its name, enter its ID, or click the Selection button to browse for it. No matter which way you do it, this is where it pays off to have a consistent naming convention for your questions.
   - To insert a row above a question that you already have listed, select that question and press F4.

6. If the questionnaire might be used when scheduling group appointments, control whether schedulers need to ask each question separately for each patient:
   - In the Patient Specific? (I LQF 1010) column, enter Yes for each question that requires a separate answer for each patient.
   - Enter No for each question that can have a single answer for the entire group of patients. For example, when scheduling a group appointment for two children in a family to get immunizations, the question "Is this immunization required by your school?" might need only one answer for the group.
7. Select the Released? (I LQF 50) checkbox when your questionnaire is ready for schedulers to use. If you're using the Classic client, enter Yes in the Released? field.

Make a Questionnaire Available at the Visit Type or Panel Level

Epic recommends that you set up each scheduling questionnaire at the visit type level or the panel level. Your questionnaire then appears whenever schedulers choose that visit type or panel when making an appointment, regardless of which department the scheduler is in.

It is possible to set up questionnaires at other levels, but the need for this is highly situational. For details on this setup, refer to the Make a Questionnaire Available at the Department or System Level topic.

To set up a questionnaire at the visit type level or panel level:

1. In Hyperspace, open the visit type or panel to associate with a questionnaire.
   - Visit type: Epic button > Admin > Master File Edit > Visit Type.
   - Panel: Epic button > Admin > Schedule Admin > Master File Edit > Panel.
2. Starting in November 2023, go to the Decision Support form in the Visit Type Editor. In August 2023 and earlier, go to the After VT Entry form.
3. In the After Visit Type Selection Action (I PRC 800) field, enter Questionnaire.
4. In the Questionnaire field, enter your questionnaire.
5. Click Accept.

Move Your Build Between Environments

The Data Courier is the most efficient way to migrate your questionnaire build between environments. To ensure that everything works correctly in the target environment, you should migrate questions first, then rules, and then questionnaires.

If you're not using Data Courier, you can import questions with import specification LQL,1000-Template - Questions. You must manually rebuild all visit type and questionnaire conditions in the target environment, however. For more information about importing records, refer to the Standard Import Guide.

Control Which Questions Schedulers Need to Ask

Your questionnaires likely include questions that don't apply to every patient every time. You can make your questionnaires smart enough to show questions when they are applicable and hide them when they are not.

Here are the benefits of controlling which questions schedulers need to ask:

- Patients might spend less time on the phone being asked irrelevant questions. In addition to being a time saver, this might also prevent patient annoyance and confusion with your appointment-making process.

- Schedulers save their own time in addition to patients' time by not asking irrelevant questions.
- When you prompt schedulers to ask only relevant questions, they might be less likely to develop a habit of skipping questions.

You can make some settings at the question level so that the question always behaves the same, no matter what questionnaire it is in. You can also make settings at the questionnaire level to control the appearance of questions on the fly, based on other answers. Consider what behavior you want as you decide where to make your settings.

Hide a Question for Certain Patients

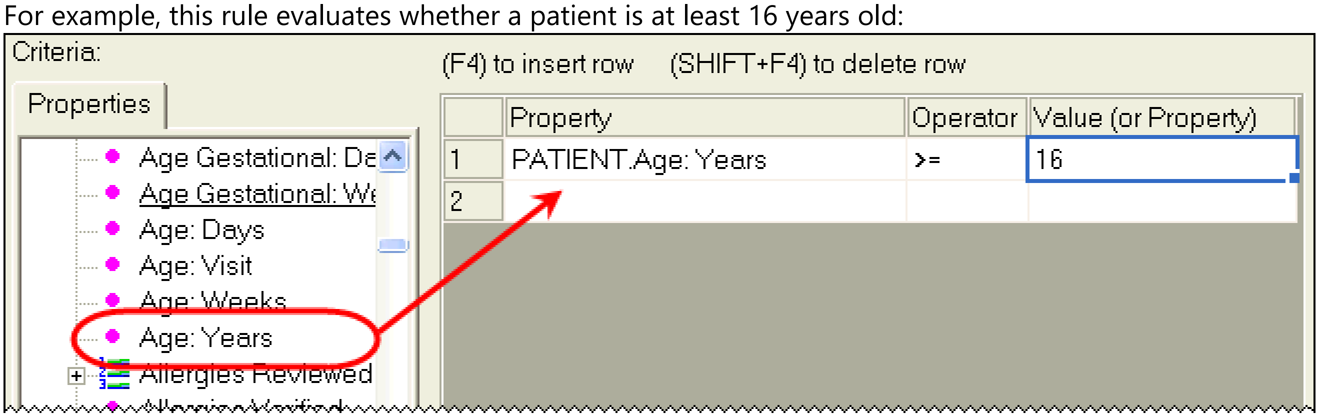
You can set up patient-based restrictions at the question level. These restrictions prevent a question from ever appearing - in any questionnaire - unless your criteria are met. This is a common way to hide questions that apply only to patients in certain age groups. For example, you might hide the question "Do you drive?" for patients under age 16.

You set up this kind of restriction with a rule in the question record. The question appears only if the conditions of the rule are satisfied.

> **!** These patient-based restrictions might not work as you want them to when scheduling group appointments. Because the system has no single set of patient data to evaluate, it evaluates the rules against empty patient data. In some cases, that means the question will always appear. In other cases, the question will never appear.

To hide a question based on the patient's sex, you can use a simpler method. Refer to the Hide a Question for a Certain Sex topic.

Create the rule that must be satisfied for the question to appear:

1. In Hyperspace, follow the path Epic button > Tools > Rule Editor Tools > Rule Editor.
2. Create a new rule record using the context Form Question Display.
   If you have already created a similar rule, enter that rule in the Copy from field to use it as a starting point.
3. Drag and drop the properties from the property tree to create your rule. The properties you need are in the Patient context.
   For example, this rule evaluates whether a patient is at least 16 years old:
   

4. Click Accept. Your rule is saved.

Set up your question to use the rule:

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor.
2. Open the question that you want to hide.

3. Click Edit Contact.
4. In the Display Only if This Rule is Satisfied (I LQL 305) field, enter the rule you created above.
5. Select the Released? (I LQL 250) checkbox when you are sure that the question is finalized and ready to appear in a questionnaire. If you're using the Classic client, enter Yes in the Released? field.
6. Click Accept when you are done making changes. The question is saved and the activity closes. In every questionnaire that uses the question, the question now appears only if the patient information satisfies your rule.

Hide a Question for a Certain Sex

You can hide a question for patients of a given sex. For example, you can set the question "Are you pregnant?" to appear only for patients who could become pregnant. Because you set up this restriction at the question level, it prevents the question from ever appearing - in any questionnaire - for patients of the non-applicable sex.

To hide a question based on sex, you only need to make a single setting in the question record. You do not have to build a rule.

If sex is not defined on a patient record, then no questions are hidden for that patient based on sex. Questions appear unless the system can reliably determine that the question is irrelevant to the patient using Epic's reliable sex logic. For more information, refer to the Understand the System's Sex-Based Logic topic.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor.
2. Open the question that you want to hide.
3. Click Edit Contact.
4. Enter the sex for which the question should appear in the Restrict to Sex (I LQL 300) field. For example, enter Female if your question is "Are you pregnant?"
5. Select the Released? (I LQL 250) checkbox when you are sure that the question is finalized and ready to appear in a questionnaire. If you're using the Classic client, enter Yes in the Released? field
6. Click Accept when you are done making changes to your question. The question is saved and the activity closes. In each questionnaire that uses the question, the question now appears only for patients of the applicable sex.

Copy Forward Answers That the Patient Already Gave

It can be convenient to copy forward answers that the patient already gave on a previous occasion, especially for answers that do not change often. For example:

- When a patient reschedules an appointment, the scheduler has to go through the questionnaire again. It's unnecessary to have the repeat answers that she already gave, especially if she is rescheduling an appointment that she made earlier on the same day.
- When a patient has a series of appointments scheduled, such as for physical therapy, the scheduler often copies those appointments forward when it's time to extend the series. It's unnecessary to repeat all the questions that the patient already answered when she scheduled the original series of appointments.

The setup described in this topic copies forward the patient's previous answer when the questionnaire first appears. If, instead, you want to copy an answer among multiple instances of a question within a composite questionnaire, refer to the Hide Duplicate Questions in a Single Questionnaire topic.

Because you set up this behavior at the question level, all questionnaires that include the question copy forward answers in the same way.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor.
2. Open your question.
3. Click Edit Contact.
4. On the Question form, go to the Defaulting table.
5. In the Workflow (I LQL 165) column, enter Scheduling. Unless you share the question with other kinds of questionnaires, this is the only workflow that you will ever enter in the Defaulting table.
6. In the From (I LQL 166) column, enter one of the options to control how the system finds the answer to copy forward. Refer to the table.
7. Select the Released? (I LQL 250) checkbox when you are sure that the question is finalized and ready to appear in a questionnaire. If you're using the Classic client, enter Yes in the Released? field
8. Click Accept to save your changes and close the activity.

Option	Behavior	Comments
Never Default	An earlier answer is never brought forward.	This option is good for questions whose answers change frequently, such as "Do you have a headache?" This is the default behavior. If you never want to copy forward a question's answer, you don't need to do any of the setup described in this topic.
Rescheduled Appt Answer	The questionnaire appears with the answer that the patient already gave on an earlier, related contact, such as a rescheduled appointment or a wait list appointment.	Use this option for questions that are appointment-specific, rather than patient-specific. When the patient reschedules an appointment or gets an appointment from the Wait List, she doesn't need to repeat answers she gave previously. You can see the distinction between this option and the next in this scenario: 1. The patient schedules an appointment. 2. The patient answers the question on another questionnaire for a different contact. 3. The patient reschedules the appointment from step 1. This option copies forward her answer from the original appointment in step 1, rather than her most recent answer in step 2, which might have had nothing to do with the rescheduled appointment. As with the next option, answers are copied forward if the question is on multiple questionnaires that appear in immediate succession. If the patient just answered the question a minute ago, she doesn't have to answer it again when the question reappears.
Most Recent Answer	The questionnaire appears with the	Use this option for questions that are patient-specific, rather than appointment-specific. Whenever the patient answers the

Option	Behavior	Comments
	patient's most recent answer, regardless of whether it is part of the same visit.	question, her most recent answer is copied forward. You can see the distinction between this option and the previous one in this scenario: 1. The patient schedules an appointment. 2. The patient answers the question on another questionnaire for a different contact. 3. The patient reschedules the appointment from step 1. This option copies forward her most recent answer in step 2, rather than from the appointment in step 1, which might be outdated. As with the previous option, answers are copied forward if the question is on multiple questionnaires that appear in immediate succession. If the patient just answered the question a minute ago, she doesn't have to answer it again when the question reappears.
Contact-Specific Answer	The questionnaire appears with the patient's most recent answer only for questions linked to the same order.	Use this option for questions that are both patient-specific and appointment-specific. Whenever the patient answers the question once within a visit, her most recent answer is copied forward to other linked appointments that are associated with the same order. This option is appropriate for questions that are likely to change from day to day but not within a single day, such as a question about what medication the patient took that morning.

Require Schedulers to Always Answer a Question

You can require an answer to a question in every questionnaire it appears. This is useful when a certain answer is critical to make the right scheduling decision. The only exception is when the question is made optional or disabled altogether based on the answer to another question. To disable questions in this way, refer to the Enable or Disable Questions Based on a Previous Answer topic.

This behavior is the same across questionnaires because you set it up in the question record.

If you want to require a question only in a given situation - depending on answers to other questions - set up conditional logic in your questionnaire instead. Refer to the Require Schedulers to Answer a Question Based on a Previous Answer topic.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor.
2. Open your question record.
3. Click Edit Contact.
4. Select the Response Required? (I LQL 150) checkbox. If you're using the Classic client, enter Yes in the Response Required? field.

5. Select the Released? (I LQL 250) checkbox when you are sure that the question is finalized and ready to appear in a questionnaire. If you're using the Classic client, enter Yes in the Released? field
6. Click Accept to save and close the question record.

Enable or Disable Questions Based on a Previous Answer

Save time for schedulers and patients by prompting only the questions that the scheduler needs to ask in a given situation, according to the patient's earlier answers on the questionnaire. For example, imagine your questionnaire contains the following questions:

1. Do you smoke?
2. How many packs a day do you smoke?

It makes sense for the scheduler to ask question 2 only if the answer to question 1 is Yes.

You can disable questions even if they are normally required according to the question-level setting.

> In general, you should arrange your questionnaires' questions in the order that makes sense for the scheduler to ask them. This is especially important if you enable or disable questions based on a previous answer. For example, if the patient says she smokes and the question "How many packs a day do you smoke?" is enabled, that second question should not appear in an earlier part of the questionnaire. Not only would that be awkward, but the scheduler might neglect to ask that second question if it is not required.

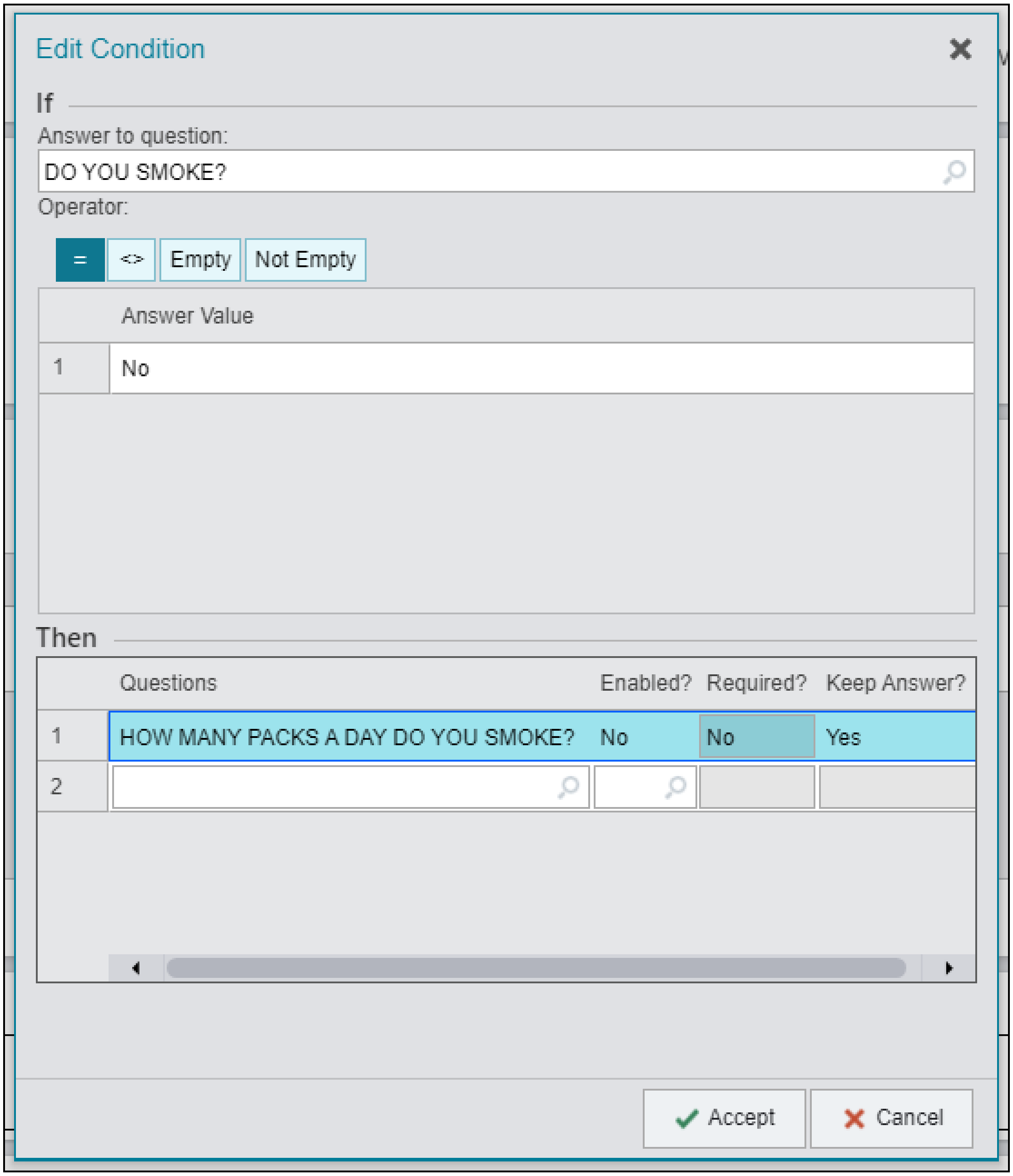
The logic to enable and disable questions is specific to each questionnaire because you set it up in the questionnaire record. Even if you share questions among questionnaires, each questionnaire can have completely different logic.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Questionnaire Editor.
2. Open your questionnaire.
3. Click Edit Contact.
4. Go to the Questionnaire Conditions section of the Questionnaire Editor.
5. To add a condition to a question:
   - In the Hyperdrive client, click the green plus sign. The Edit Condition window appears.
   - In the Classic client, click Add New Condition. The Questionnaire Conditions window appears.
6. In the Answer To question (I LQL 1210) field, select the question whose answer will control whether other questions are enabled. This and other selection lists on this window are smart enough to show you just the options for that questionnaire. You don't have to scroll through a bunch of irrelevant options.
7. Select one of the following operators by clicking its radio button:
   - =. The Equal To operator is available for all single response questions with the exception of free text questions. This operator is not available for multiple response questions.
   - <>. The Not Equal To operator is available for all single response questions with the exception of free text questions and Yes/No questions. This operator is not available for multiple response questions.
   - <. The Less Than operator compares category list numbers, dates, time, and other numeric values. This operator is available for all single response questions with the exception of free text questions

and Yes/No questions. It is not available for multiple response questions.

- >. The Greater Than operator compares category list numbers, dates, times, and other numeric values. This operator is available for all single response questions with the exception of free text questions and Yes/No questions. This operator is not available for multiple response questions.
- <=. The Less Than Or Equal To operator compares category list numbers, dates, times, and other numeric values. This operator is available for all single response questions with the exception of free text questions and Yes/No questions. This operator is not available for multiple response questions.
- <=. The Greater Than Or Equal To operator compares category list numbers, dates, times, and other numeric values. This operator is available for all single response questions with the exception of free text questions and Yes/No questions. This operator is not available for multiple response questions.
- In List. The In List operator looks at the answers and, if any of the answers match the answer values and there are no answers that are not included in the answer values, the condition is true. For example, if you enter blue and red in the Answer value section, and the user answers red and/or blue, then the condition is true. However, if the user answers yellow and red, or yellow, blue, and red, the condition is false. This operator is available for all single and multiple response questions with the exception of free text questions and Yes/No questions.
- Not in List. The Not in List operator looks at the answers and, if one of the user's answers does not match the answer values, then the condition is true. This operator is available for all single and multiple response questions with the exception of free text questions and Yes/No questions.
- Contains. The Contains operator looks at the answers and, if all the answer values specified in the rule are contained in the answers supplied by the user, the condition is true, regardless of whether or not the user also selects additional answer values not specified in the rule. This operator is available for all multiple response questions. It is not available for any single response questions with the exception of free text questions.
- Does not Contain. The Does Not Contain operator looks at the answers and, if at least one of the answer values specified in the rule is not contained in the user's answers, the condition is true. The condition evaluates to false only if all of the values specified in the rule are contained in the user's answers. This operator is available for all multiple response questions. It is not available for any single response questions with the exception of free text questions.
- Empty. If the question is left blank in the questionnaire, then the condition is true. This operator is available for all questions, both single and multiple response.
- Not Empty. The Not Empty operator works in the opposite way. If there is any value entered for the question, then the condition is true. This operator is available for all questions, both single and multiple response.

8. In the Answer Value field, enter the values that complete the "if" logic statement that you're building.
9. In the Questions table, enter a question to enable or disable when your "if" logic statement is true.
10. Enter Yes or No in the Enabled? column as appropriate. In this example, the question of how many packs a day the patient smokes is disabled unless the patient says she smokes.



11. Enter Yes or No in the Required? column as appropriate. Use this field to determine whether the associated question is required based on the conditions for the Answer To question.
12. Enter Yes or No in the Keep Answer? column as appropriate. When a patient changes her answer to the Answer To question so that the listed question is no longer applicable, you determine whether to keep the question answers in this question.
13. Repeat the previous four steps to disable or enable any other questions when the condition is true.
14. Click Accept. The Questionnaires Conditions window closes and your new condition appears on the questionnaire's list of conditions. If the questionnaire has multiple conditions, your new one appears at the bottom. You can adjust the order of conditions by either entering where it should fall numerically, or by pressing the up or down arrow.
15. To create additional conditions, click the green plus sign (or Add New Condition in the Classic Client) again and repeat the process.

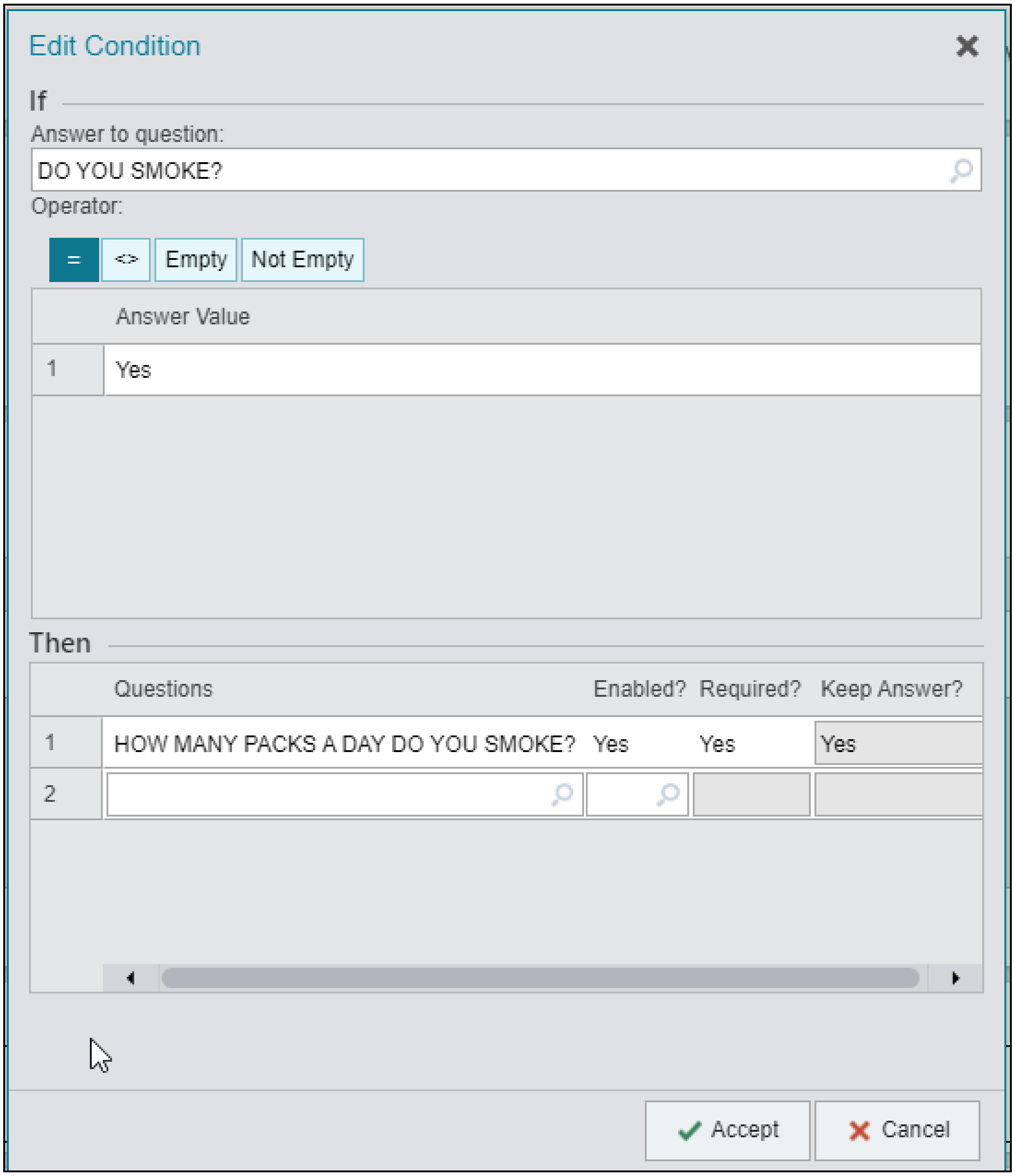
Require Schedulers to Answer a Question Based on a Previous Answer

Sometimes the answer to one question makes it important to answer another question. For example, imagine your questionnaire contains the following questions:

1. Do you smoke?
2. How many packs a day do you smoke?

If the patient answers Yes to question 1, you could make question 2 required.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Questionnaire Editor.
2. Open your questionnaire.
3. Click Edit Contact.
4. Go to the Questionnaire Conditions section of the Edit Questionnaire form.
5. Click Add New Condition. The Questionnaire Conditions window appears.
6. In the Answer To question field, select the question whose answer will control whether other questions are required.
7. Select an operator by clicking its radio button. For example, click >= to require a question when the answer is at least a certain value.
8. In the Answer value field, enter the values that complete the "if" logic statement that you're building.
9. In the Questions table, enter a question to require when your "if" logic statement is true.
10. Enter Yes in the Enabled? column.
11. Enter Yes in the Required column. In this example, the question of how many packs a day the patient smokes is required when the patient says she smokes.



12. Repeat the previous three steps for any other questions that you want to require when this condition is true.
13. Click Accept. The Questionnaire Conditions window closes and your new condition appears on the questionnaire's list of conditions. If the questionnaire has multiple conditions, your new one appears at the bottom. You can adjust the order of conditions by either entering where it should fall numerically, or by pressing the up or down arrow.
14. To create additional conditions, click the green plus sign (or Add New Condition in the Classic Client) again and repeat the process.

Adjust Scheduling with Questionnaires

Questionnaires built with visit type conditions are often the best method for guiding schedulers to the right scheduling decision. This is especially true if you have centralized scheduling where schedulers must schedule for a variety of departments with only a minimal understanding of how those departments work. In particular, you can set up questionnaires with visit type conditions that do the following based on the patient's answers:

- Display a message to the scheduler.
- Prevent scheduling altogether.
- Select the scheduled department or visit type.
- Change the visit length.
- Change the resources scheduled with the appointment.

This example workflow illustrates how you can adjust scheduling with questionnaires:

1. When a patient calls the central scheduling center for an appointment, the scheduler finds out if she is a new or existing patient. Based on the patient's response, the scheduler chooses a generic visit type, such as New Orthopedics.
2. A questionnaire for that visit type appears, and its answers trigger the system to change the visit type to something specific, such as New Sports Medicine.
3. A questionnaire for the specific visit type appears, and its answers determine the correct provider to schedule. For example, if the injury is to the knee, hip, or ankle, the visit is scheduled with Dr. Smith. If it is to the shoulder, elbow, or neck, the visit is scheduled with Dr. Jones.

! The order in which you list visit type conditions in a questionnaire is critical.

When the scheduler accepts the questionnaire, the system goes down this list of conditions and triggers actions only for the first true condition it finds. After that, it stops checking for true conditions.

Imagine you want to trigger one action if condition A is true and you want to trigger a different action if condition B is true. If A and B are both true, you want both to trigger both actions. You can't just have a condition for A followed by a condition for B, because when both are true the system will never get to B after finding that A is true. Instead, you must first create a condition to trigger both actions if both A and B are true. You can follow that with your specific conditions for A and B.

Composite questionnaires comprised of questionnaires set up at different levels can be especially tricky. Such a structure is not the Epic recommendation, but if you use it, consider this system behavior when you build conditions. True conditions in a department portion of the questionnaire will never be acted on if true conditions are found first on the visit type portion.

Click the Up and Down hyperlinks for individual visit type conditions to arrange the conditions in the proper order.

Plan Your Build

Before you build a complex set of questionnaires with numerous questions, conditions, and rules:

- Create a logic map to plan your work.
- Make sure you know in what order you will create questionnaire conditions.

Create a Generic Visit Type Condition

The following instructions describe the generic steps that you must perform to set up a variety of scheduling adjustments. These steps on their own will not produce a concrete outcome.

Refer to the subsequent topics for the specific steps for setting up particular scheduling adjustments.

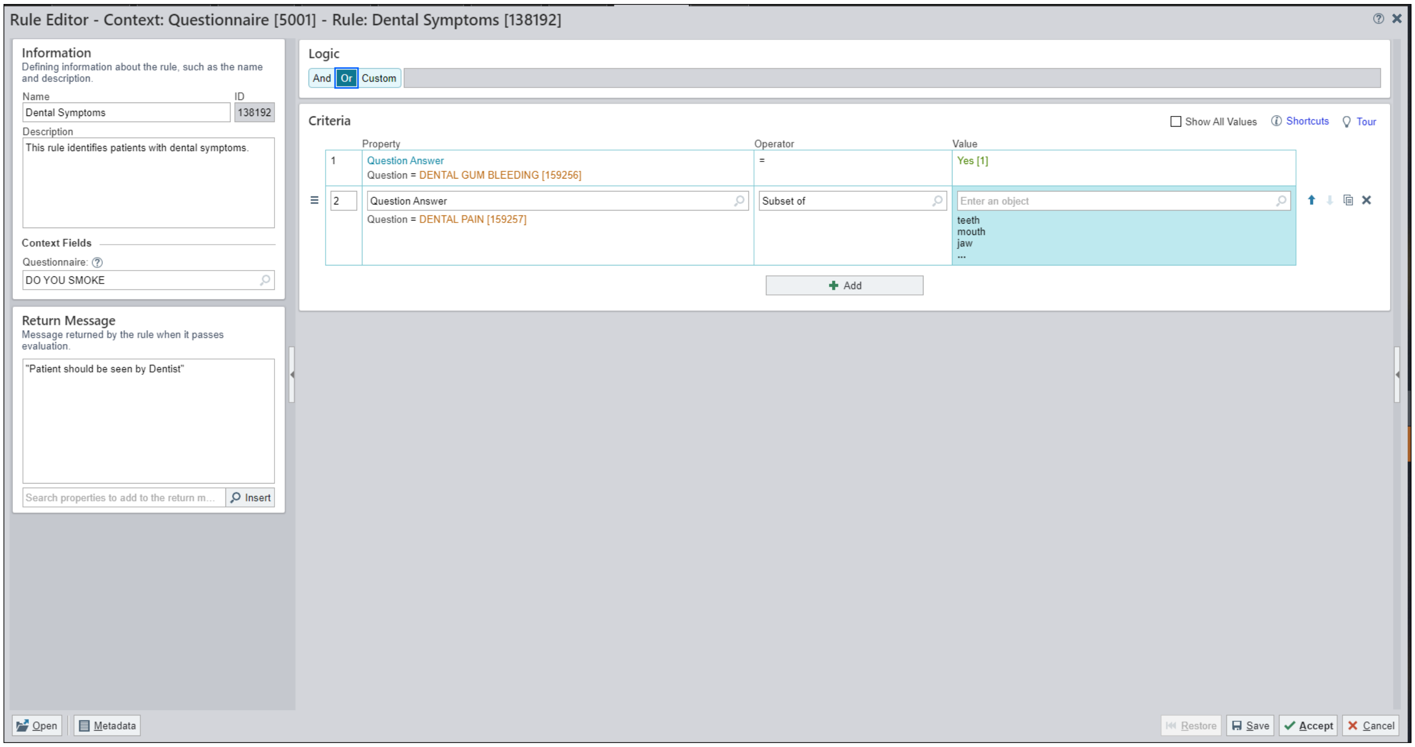
Automatic scheduling adjustments are controlled by visit type conditions in individual questionnaire records. Each visit type condition you build needs two parts:

- The rule, which controls when to trigger the visit type condition.
- The visit type condition itself, which controls what scheduling adjustments to make.

Create a Rule That Controls When to Trigger the Visit Type Condition

Control when to adjust scheduling by creating a rule based on patient answers.

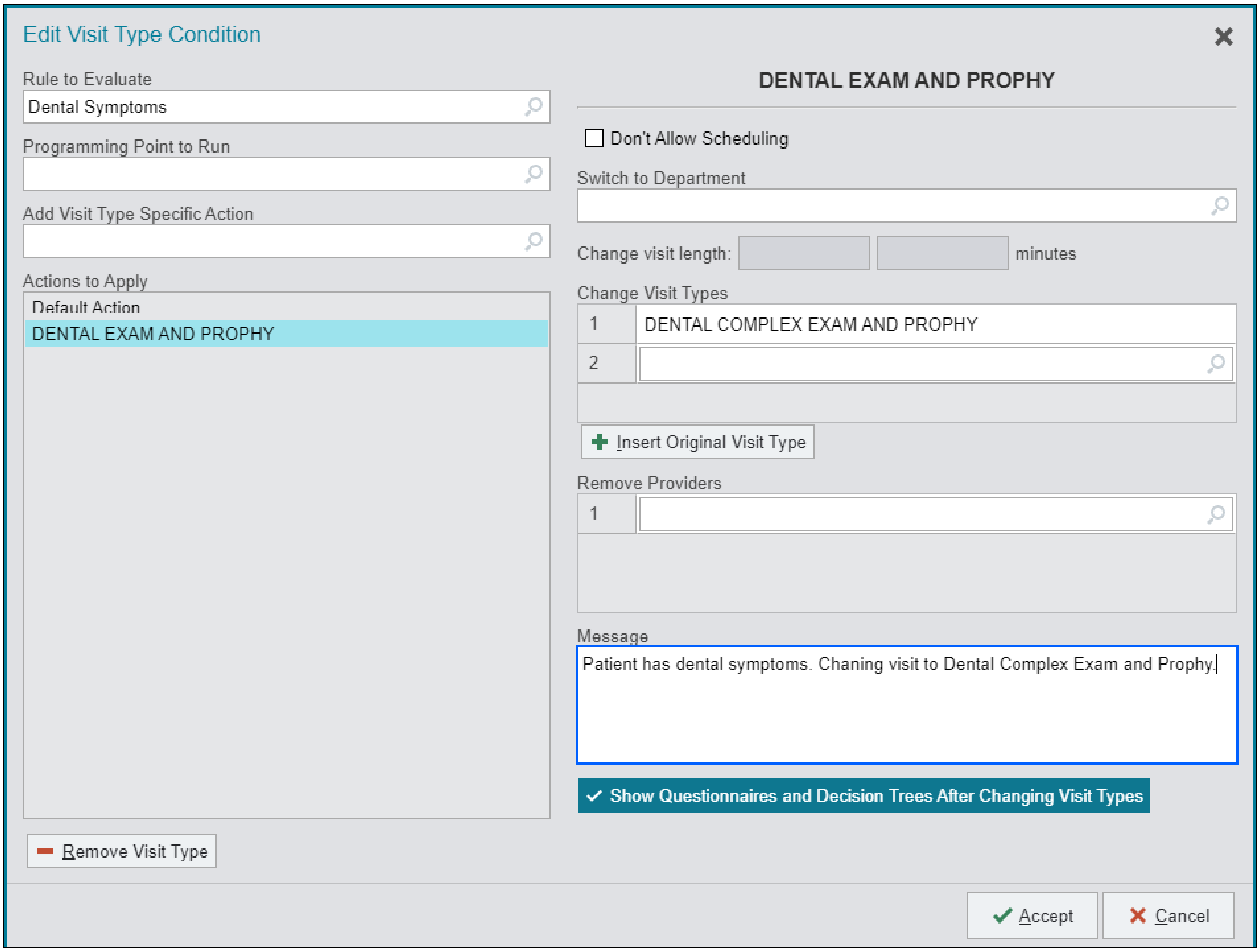
1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Questionnaire Editor.
2. Open your questionnaire.
3. Click Edit Contact.
4. Go to the Visit Type Actions section (or the Visit Type Conditions form in the Classic Client.)
5. To create a new rule:
    - In the Hyperdrive Client, click New Rule. The Open Existing Rule window opens. Click Create a New Rule.
    - In the Classic Client, click New Rule. The Rule Selection window appears, with Questionnaire already selected in the Context field.
6. Enter a name for your rule and click Accept. The Rule Editor opens.
7. Drag and drop a question to use as criteria from the Properties list to the Property field.
8. In the Operator field, specify a relationship between the question and the patient's answer.
9. In the Value (or Property) field, enter the answer that determines whether the rule is satisfied.
10. For more complex rules, you can enter multiple rows in the Property table. If you do this, remember to set the Evaluation logic as needed.
11. Click Accept to save your rule and return to the Questionnaire Editor. Your rule is now available for your visit type actions (visit type conditions in the Classic Client.)



Create the Visit Type Condition to Control What Scheduling Adjustments to Make

To adjust scheduling based on patient answers, create a visit type condition using the rule you created.

1. In your questionnaire record, go to the Visit Type Actions section (or the Visit Type Conditions form if you are using the Classic Client) if you're not already there.
2. Click New Condition.
   - In the Hyperdrive client, the Edit Visit Type Condition window appears. In the Rule to Evaluate (I LQF 1217) field, enter the rule you created for this visit type condition.
   - In the Classic client, the Visit Type Condition form appears. In the If the following rule is true field, enter the rule you created for this visit type condition. Press = to enter the rule that you most recently worked with.
3. To adjust scheduling in the same way no matter what visit type is selected at the time in Appointment Entry, make settings according to the topics that immediately follow this one.
   - In the Hyperdrive client, enter the visit type that needs specific scheduling adjustments in the Add Visit Type Specific Action (I LQF 1232) field. The visit type appears in the Actions to Apply list at the left on the window. Click that visit type and make settings according to the topics that immediately follow this one.
   - In the Classic client, click Add visit type and select the visit type that needs specific scheduling adjustments. The visit type appears in the visit type list at the left of the window. Click that visit type and make settings according to the topics that immediately follow this one.
4. Click Accept when you're done.



Display a Message Based on an Answer

You can combine this with other scheduling adjustments. For example, if you prevent scheduling altogether you can display a message that explains the situation to the scheduler and tells her what to do.

1. Create a rule that controls when to trigger the visit type condition.
2. Create the visit type condition to control what scheduling adjustments to make.
3. In the Message field, enter the message to display to schedulers.

Prevent Scheduling Altogether Based on an Answer

You can prevent scheduling altogether when a patient answer shows that the appointment might cause the patient harm.

For example, if a patient scheduling a radiology appointment says she's pregnant, you can prevent the scheduling of the appointment.

1. Create a rule that controls when to trigger the visit type condition.
2. Create the visit type condition to control what scheduling adjustments to make.
3. The Don't allow scheduling checkbox is automatically selected. Leave it selected and click Accept.

Change the Visit Length Based on an Answer

You can change the length of a visit based on the answer to a question. For advanced visit types the length adjustment from a questionnaire is made only for pools that use the CALC mnemonic. You cannot create a condition that changes the visit length and the visit type; you must choose one or the other.

1. Create a rule that controls when to trigger the visit type condition.
2. Create the visit type condition to control what scheduling adjustments to make.
3. Clear the Don't Allow Scheduling (I LQF 1230) checkbox.
4. In the Change visit length (I LQF 1236) field, choose to add or subtract time from the visit.
5. In the Minutes (I LQF 1237) field, enter the number of minutes to add or subtract.

Change the Visit Type Based on an Answer

If you use questionnaires to adjust scheduling in a centralized scheduling setting, one of your most common scheduling adjustments will be changing the visit type.

You might change the generic visit type to the specific visit type to schedule, or you might change it to an intermediate visit type that displays its own questionnaire, whose answers will in turn change the visit type to the specific one to schedule.

When the visit type changes, the system allows the scheduler to schedule the new visit type even if she is normally restricted from scheduling it. This allows the patient to work with one person to schedule the appointment, regardless of her questionnaire answers.

You cannot create a condition that changes the visit length and the visit type; you must choose one or the other.

1. Create a rule that controls when to trigger the visit type condition.
2. Create the visit type condition to control what scheduling adjustments to make.
3. Clear the Don't Allow Scheduling checkbox.
4. Enter a visit type on the Change Visit Types table. When you enter visit types here, the original visit type or panel is removed from the appointment and replaced by all visit types and panels listed here.
5. To make the new visit type's questionnaire or decision tree appear, select the Show Questionnaires and Decision Trees After Changing Visit Types checkbox. Decision tree support is available starting in February 2019.

Change the Current Department Based on an Answer

1. Create a rule that controls when to trigger the visit type condition.
2. Create the visit type condition to control what scheduling adjustments to make.
3. Clear the Don't Allow Scheduling checkbox.
4. In the Switch to Department field, enter the new department to use.

Remove Scheduled Resources Based on an Answer

You can remove resources, including providers, from an appointment based on an answer. Suppose, for example, that you have a pool of diagnostic machines, and some cannot accommodate patients of a certain stature. If the patient says he is over a certain weight, you can remove the unsuitable machines from the scheduling pool.

You'll notice that the setting you use for this is labeled Providers to remove, but you can remove any kind of resource, not just providers.

1. Create a rule that controls when to trigger the visit type condition.

2. Create the visit type condition to control what scheduling adjustments to make.
3. Clear the Don't allow scheduling checkbox.
4. On the Remove Providers table, enter the resources to remove.

Scheduling Questionnaires Setup: Bells & Whistles

Avoid Asking Repetitive Questions in Scheduling Questionnaires

Are schedulers and patients tired of being asked the same questions repeatedly, such as whether a patient has been out of the country in the last 21 days? If so, you can configure the system to hide questions that have been asked recently in Cadence visit type questionnaires. This feature is also available for patient-entered questionnaires in MyChart and Welcome. For more information about using this feature with patient-entered questionnaires, refer to the Avoid Asking Repetitive Questions in Patient-Entered Questionnaires topic.

1. Create a rule in the Form Question Display context that uses one of the following properties. For details about creating rules, refer to the Create or Edit a Rule topic.
   - 98086-Questionnaire Question Last Answer. This property returns the patient's most recent answer to a specific question within a certain date range. For example, you might use to property to hide the travel history question if a patient answered no in the last seven days.
   - 98109-Date of Last Question Answer. This property returns the date when a patient most recently answered a specific question. For example, you might use this property to hide the travel history question if it's been answered in the last seven days.
2. Open a form question in the Question Editor.
   - Search: Question Editor
   - Path: Epic button > Tools > Questionnaire Tools > Question Editor
3. In the Restrictions section (or the Question form if you are using the Classic Client), enter your rule in the Display only if this rule is satisfied field.

Show Possible Question Answers in Quick Buttons for Easy Selection

To allow schedulers to speed through questionnaires, you can highlight possible question answers in quick buttons so schedulers can click a button rather than typing or selecting an answer.

You determine the quick buttons available for each question and which buttons appear in the questionnaire by default. You can add up to 50 buttons to a question and the buttons appear in the same order as they appear on the Quick Buttons form. In May 2019 and earlier, you can add up to 5 buttons.

You can also allow schedulers to add quick buttons to questions if the button is not there by default. For example, let's say an answer to a question is used by schedulers in only one department. You can create a button for that question but not add the button to the question by default. If schedulers in that department have correct security, they can add the button to the question on their questionnaires. Schedulers with security to add custom quick buttons can add buttons only to questions that you enable for custom buttons.

1. In a question record, select the Quick Buttons form.
2. Clear the Allow Users to Choose Their Quick Buttons (I LQL 382) checkbox if you don't want schedulers with correct security to add quick buttons to questions.
3. Enter the answer that you want to add as a quick button in the Add Quick Button field.
   - You can also click Add Quick Button. This button is helpful if the question has multiple answers and

you don't remember which ones need quick buttons.

- You can also automatically create quick buttons for the first 50 answers listed for the question using the Pull first 50 answers button. This button is available only for Category, Custom List, and Yes/No question types.
- You cannot create quick buttons for answers that are longer than 174 characters or include a left bracket character.

4. For each quick button, clear the Display By Default? (I LQL 391) checkbox if you don't want this button to automatically appear on the questionnaire. You might do this if you want a button available for those schedulers who choose to add it to their questionnaires.
5. Edit the button caption as necessary. Be careful to use clear and easy-to-understand captions so schedulers don't accidentally choose an incorrect answer.

Allow Schedulers to Add Quick Buttons to Questions

Add Shared security point 155-May Access Questionnaire Quick Button Configuration to the scheduler's Shared security class.

Automatically Bring In Answers Based on Data for the Patient

You might find that a question asks for information that already exists in the patient record, such as patient age. You can set up custom load code to automatically bring in the information when the questionnaire appears. After that information is brought in, you can drive normal questionnaire behavior from it, like enabling or disabling other questions.

> ! This is an inappropriate method for determining patient age in some cases, like when scheduling pediatric appointments far in advance. In such cases, consider asking how old the patient will be at the time of the appointment instead of bringing in the patient's age at the time of scheduling the appointment.

Because you need custom load code for this behavior, contact your Epic representative for assistance. Mention parent SLG 1569100.

Automatically Bring In Answers Based on Another Question Answer

You might find that you want to display questionnaire data based on another question answer. For example, if an ordering provider enters their preferred location in an order-based questionnaire, you might want that preferred location to appear in a scheduling questionnaire.

You can set this up in the specific question where you want the information to appear.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor.
   a. In the Hyperdrive client, enter a workflow of Sched/Request in the Defaulting table in the Defaulting section.
   b. In the Classic client, enter a workflow of scheduling in the Defaulting table on the Question form.
2. Choose a Lookup method:

- Contact-Specific Answer: The patient's most recent response to the question when it was answered for an appointment linked to the same order.
- Most Recent Answer: The patient's most recent response to the question.

3. In the Linked Questions table (the Link to Question table in the Classic Client), enter the type of question from which you want to pull data. The question type you enter here must be different from the type of the question you are editing.
4. In the Question column, enter the question to pull the answer from. You can link only questions that have the same response type and, for category list questions, the same category list as the question you are editing.
    - For example: If you want to pull information from a question the provider answered during order entry, you enter a Question Type of order-specific and then enter the question record from which to pull the answer.

Note that the Custom load code field or the File to INI field in the Filing section (or the File Action form if you are using the Classic Client) overrides the settings in the Defaulting table.

Control Which Items Answers Are Saved In

The answers to scheduling questions typically have no function beyond helping to schedule the appointment. You might have some answers, though, that you want to capture more permanently. For example, an answer might be helpful for patient population reporting.

You can set up a question so its answers are saved to an item in the patient record. The item is typically a custom item, but you can file the answer to a standard item, too. Once filed, you can display the data in a variety of places, such as a column in the Department Appointments report or on various HTML displays.

To prevent data corruption, match the response type of the patient (EPT) item with the response type of the question. Use a No Add or Response Each Time item.

Note that if you set up a question so its answers are saved to an item, then the value in that item will automatically appear for the question the next time the question appears in a questionnaire.

Before following these instructions, discuss your plans with your Epic representative. Starting in November 2018, you need Shared security point 198-Edit Custom Filing Items to create questions that file responses to a Chronicles item.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor.
2. Open your question record.
3. Go to the Filing section (or the File Action form if you are using the Classic Client.)
4. In the File to INI (I LQL 200) field, enter EPT. Answers for the question are filed in the Questionnaire Answer (HQA) master file and in the additional master file you specify here.
5. In the File Response Item (I LQL 210) field (or the File response to item field if you are using the Classic Client), enter the number of the item to save answers in. The response type of the item you enter here must match the response type of this question record.
6. In the File Comment Item (I LQL 215) field (or the File response to item field if you are using the Classic Client), enter the number of the item to save schedulers' comments in. This must be a free text item.

Make a Questionnaire Available at the Department or

System Level

Although Epic recommends that you set up your scheduling questionnaires at the visit type or panel level, it's also possible to set them up at the department or facility level.

- Department-level questionnaires appear when appointments are scheduled in that department. This might be useful for questions that really do apply to the department and not the visit type. For example, if you have a department located far out of town away from the rest of your departments, you might want to ask the patient if she has the time and the means to get there. Or, to ask female patients if they're pregnant before scheduling radiology appointments, you might set up the questionnaire for each radiology department so the scheduler always asks that question, regardless of what visit type she uses. If you use department-level questionnaires, keep in mind that you'll have to maintain this second layer of build.
- If you set up questionnaires at the system level, they apply to every visit scheduled at your organization. It's unlikely that a questionnaire would be so broadly applicable that you would combine it with every questionnaire at more specific levels. It's also unlikely that a system-level questionnaire could provide a meaningful backup when no questionnaire is set up at more specific levels.

You can have department and facility questionnaires appear in one of two ways:

- They can appear merged with the visit type or panel questionnaire. This is how you would set up the above examples of a department level questionnaire.
- They can appear as a backup when no questionnaire is set up at more specific visit type or panel levels. This is the default behavior.

Make a Questionnaire Available at the Department Level

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Open your department record.
3. Go to the Scheduling > Decision Support form. In February 2024 and earlier versions, go to the After VT Entry form.
4. In the After Visit Type Selection (I DEP 1450) field, enter Questionnaire.
5. In the Questionnaire (I DEP 1460) field, enter your questionnaire.

Make a Questionnaire Available at the System Level

1. In Hyperspace, open Cadence System Definitions.
2. Go to the Scheduling > Decision Support form. In February 2024 and earlier versions, go to the After VT Entry form.
3. In the After Visit Type Selection (I SDF 14050) field, enter Questionnaire.
4. In the Questionnaire (I SDF 14060) field, enter your questionnaire.

Control Whether Department and System Questionnaires Appear Along with More Specific Questionnaires

By default, only the most specific questionnaire appears at any given time. This behavior is useful if you want your department or system questionnaire to be the back-up questionnaire that appears only when nothing is set up at the visit type or panel level.

If instead, however, you use a system questionnaire or department questionnaires for questions common to all visit types in that department, then you can have the questionnaires at different levels appear together in a composite questionnaire.

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Visit Type.
2. Go to the Decision Support form. In August 2023 and earlier, go to the After VT Entry form.
3. In the Combine with Questionnaire at Higher Level? (I PRC 811) field, enter Yes.

Although a similar setting is available in the department record to combine its questionnaire with the system questionnaire, the need for this is extremely rare.

Hide Duplicate Questions in a Single Questionnaire

If you have visit types set up to combine questionnaires with those for the department, a question might appear multiple times on a single questionnaire. To prevent schedulers from repeating the question, you can hide the duplicate questions or you can copy the first answer to the subsequent questions.

The setup described in this topic handles repetition of a question within a single questionnaire, including composite questionnaires comprised of questionnaires set up at different levels. If, instead, you're looking for instructions to copy forward the patient's previous answers when the questionnaire first appears, refer to the Copy Forward Answers That the Patient Already Gave topic.

Because you set up this behavior at the question level, all questionnaires that include the question more than once handle the duplicates in the same way.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Question Editor.
2. Open your question.
3. Click Edit Contact.
4. In the Duplicate question display (I LQL 350) field, enter one of the following:
   - Merge and Copy. Duplicate questions are hidden. Behind the scenes, the answer is copied to each instance of the question.
   - Display and Copy. Each instance of the question appears, but the answer recorded by the scheduler appears with each other instance of the question. You might want to use this option if your schedulers expect to see a certain question in a certain questionnaire. This way, the scheduler sees that she doesn't have to ask the question again, and she doesn't worry that the question is missing.
   - Always Display. This default option allows the question to appear multiple times. The answer is not copied from one to another. This is the default setting.
5. Select the Released? (I LQL 250) checkbox when you are sure that the question is finalized and ready to appear in a questionnaire. If you're using the Classic client, enter Yes in the Released? field.
6. Click Accept to save and close the question record.

Conditionally Attach Questionnaires After Appointments Are Created

Settings at the system, department, and visit type levels allow you to specify rules to be evaluated after an appointment is created or copied forward, but before the after appointment advantage activity appears. The system looks first at the visit type level, then the department level, and finally the system level when deciding which action and extension record to use for an appointment.

The questionnaire appears when the appointment or patient qualifies for the rule. We recommend using these settings instead of Appointment Entry extensions in Cadence System Definitions to show questionnaires because rules are more customizable and easier to configure.

If the conditions of a rule are met, the associated questionnaire is shown. This can be especially useful when you want to show a questionnaire to users who are copying appointment details forward to a new appointment.

1. Create a patient context rule that controls when to show a questionnaire. For more information, refer to the Create or Edit a Rule topic.
2. If you don't already have a questionnaire, create one. For more information, refer to the Present Schedulers Questions to Ask Patients topic.
3. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions), a department (search: Department Edit), or a visit type (search: Visit Type).
4. For Cadence System Definitions or a department record, select the Scheduling > Decision Support form. For a visit type record, select the Basic Settings > Decision Support form.
5. In the Questionnaires Attached After Appointment Accept section, enter the rule you created in step 1 in the Rule (I SDF 8696, I DEP 8696, or I PRC 8696) field.
6. In the corresponding Questionnaire (I SDF 8695, I DEP 8695, or I PRC 8695) field, enter the questionnaire you created in step 2.

Display Answers in Appointment Information

The answers to scheduling questions normally have no function beyond helping to schedule the appointment, and in many organizations the answers never again appear anywhere after the appointment is scheduled. If staff at your organization want to see the answers down the road, though, you can display the answers in Appointment Information or during Check In or Check Out.

If you have answers with long-term value, you can also let users update the answers from those activities.

> When a scheduler updates an answer in these locations, she does not affect the scheduling of the appointment. For example, if a patient schedules an MRI and indicates that he does not have metal pins or plates, but the scheduler later updates the answer to say that the patient does indeed have metal pins or plates, the patient is still scheduled for the MRI.
>
> Also, if a scheduler updates answers for a sequential or recurring appointment, the other appointments in the sequence retain the original answers.

Considerations
These steps assume you are using standard advantage activity records for your Cadence workflows. If you need to make your own records, refer to the Set Up Appointment Demographics Advantage Activities topic.

Right after the scheduler schedules an appointment, the Appointment Information window appears. You can have the patient's answers appear in this window for the scheduler to review.

You can enable this at the department or system level. At either level, you also control whether schedulers can update answers or just view them.

Consider whether it's necessary to show answers in this window. These will be the answers that the scheduler just entered a moment ago, so there might be little need for her to review them. And frequently displaying information that people ignore can contribute to "click-through syndrome."

Display Answers in Appointment Information for a Department

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Department and open a department record.
   Select the Workflow Definitions > Adv Activities Core form.
2. In the Appointment demographics (I DEP 1400) field, enter the appropriate advantage activity record:
   - To allow schedulers to update answers, enter 25-ES Appointment Demographics w/ Edit Qnrs.
   - To allow schedulers to just view answers, enter 26-ES Appointment Demographics w/ View Qnrs.

Display Answers in Appointment Information for Your Whole System

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Workflow Definitions > Adv Activities Core form.
3. In the Appointment demographics (I SDF 14000) field, enter the appropriate advantage activity record:
   - To allow schedulers to update answers, enter 25-ES Appointment Demographics w/ Edit Qnrs.
   - To allow schedulers to just view answers, enter 26-ES Appointment Demographics w/ View Qnrs.

Display Answers During Check In and Check Out

You can control whether answers appear during Check In or Check Out at the department or system level. At either level, you also control whether schedulers can update answers or just view them. Refer to the Cadence Standard Records Setup and Support Guide for information about which Epic-released and Foundation System advantage activities include questionnaire details. To create a custom advantage activity that includes questionnaire details, refer to the Set Up Sign In, Check In, and Check Out Advantage Activities topic. For navigator-based advantages activities, you can use the Questionnaire (90037-ES_APPT_QNR) section. For menu-based advantage activities, you can include the Questionnaire (1291-ES_ND_APPT_QNR_EDIT) and Questionnaire (1292-ES_ND_APPT_QNR_VIEW) forms.

Display Answers in the Department Appointments Report

Some questionnaire answers might be useful to have on the Department Appointments report.

To display information from a date, time, networked, or category - INI question, contact your Epic representative to help format the report column.

1. In Chronicles, access the Extension (LPP) master file.
2. Select Enter Data > Duplicate Extension and duplicate extension 52403-Img Question Answer (PAF).
3. In your copied extension, set the following configurable parameters:
   - 4-Order Question ID. Required if the Form Question ID parameter is blank. Determines the order-specific questions for which answers appear. Enter IDs of order-specific questions.
   - 5-Form Question ID. Required if the Order Question ID parameter is blank. Determines the form-based question for which answers appear. Enter the ID of a form-based question. (All questions except order-specific questions are form-based questions. For example, scheduling, begin exam, and end exam questions are form-based questions.)
   - 6-Question Answer Type. Optional. Determines the type of questionnaire the questions appear in. If the same question appears in multiple questionnaires and this field is blank, the first questionnaire found is used.
     - Enter 1 to show the answer found in the order-specific questionnaire.
     - Enter 2 to show the answer found in the scheduling questionnaire.

    - Enter 3 to show the answer found in the begin exam visit type questionnaire.
    - Enter 4 to show the answer found in the begin exam procedure questionnaire.
    - Enter 5 to show the answer found in the end exam visit type questionnaire.
    - Enter 6 to show the answer found in the end exam procedure questionnaire.
    - Enter 7 to show the answer found in the MRI screening form.
  - 7-Delim Type. Optional. Determines the delimiter to separate multiple answers to a question. As released, the parameter is blank, and a comma is used. Enter 1 to use a line break.
  - 8-Date Format. Optional. Determines the format in which the date appears. As released, the date appears in the format M/D/YY (for example, 5/5/11). Refer to this parameter's help text for information about selecting a date format.
  - 9-24-Hour Time? Optional. Determines whether to show the time in 12-hour or 24-hour format. As released, this parameter is blank, and the time appears in 12-hour format. Enter 1 to show the time in 24-hour format.
  - 10-Record Format. Optional. Determines the format in which the record appears. As released, this parameter is blank, and the record name is followed by the record ID in triangular brackets. Refer to this parameter's help text for information about selecting a record format.
  - 11-Category Format. Optional. Determines the format in which category information appears. As released, this parameter is blank, and the Yes or No appears for yes/no questions. All other categories appear in the format Title <ID>. Refer to this parameter's help text for information about selecting a category format.
4. In Hyperspace, access the Department Appointments report to which you want to add the column.
5. Click Settings and select the Display tab.
6. Click Add and select the Create New Column tab.
7. Enter a name and ID for your new column and enter 52071-Img Question Answer in the Copy from field.
8. In your copied column, replace extension 52403 in the Text Ext field with your copy of extension 52403.
9. Click Accept and add your new column to the Selected Columns list for the Department Appointments report.

Display Answers in the Expand Appointment Display

Some questionnaire answers might be useful to have on the Expand Appointment display, which appears when schedulers expand an appointment from the Appointment Desk. This display also appears in appointment-related reports like the Department Appointments report.

Because this display shows the history of an appointment, you might know it as the appointment audit trail.

To add questionnaire information to this HTML display, edit the display by adding questionnaire-related table 10110-AS Appt Questionnaire Answers. You can customize HTML displays at the department, location, or system level. For additional information on editing HTML displays, refer to the Customize an HTML Table topic in your online documentation.

Drive HOV Appointment Redirection with an Answer

Appointment redirection for hospital outpatient visits (HOVs) is normally a combination of settings outside of questionnaires. However, you might have scenarios where the redirection logic must depend on the patient's situation on the day of the appointment. In such scenarios, you can use scheduling questionnaires to collect the needed information.

If you think you might need to set this up, contact your Epic representative about using the routines IPQues^S2QUESNR7 and AftChngIP^S2QUESNR7(lqlID) in scheduling workflows.

Disable Schedulers' Ability to Enter Free-Text Comments Along with Patients' Answers

You might want to hide the Comments field to simplify the interface if your schedulers never enter comments.

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Questionnaire Editor.
2. Open your questionnaire.
3. Click Edit Contact.
4. In the Comments Display (I LQF 250) field, enter None.
5. Click Accept.

Scheduling Questionnaires Support: Ongoing Tasks

Editing Questions

After your questionnaires are live in your production environment, avoid these pitfalls when you edit questions:

- If you revise a question's prompt in a way that changes its meaning, you might make existing patient answers inaccurate. Do not edit a released contact for a question in a production environment. Instead, click Switch Contact to open an unreleased contact or create a new contact. (In a non-production environment, it's OK to edit a released contact by clicking Edit Contact.)
- If you have a question on multiple questionnaires, your edits to the question affect each of those questionnaires. If you don't want that to happen, create separate questions for each questionnaire instead of editing the existing question.
  To see what questionnaires a question appears in, look at the Linked Questionnaires form in the question record.

Editing Questionnaires

Avoid this pitfall when you edit questionnaires:

If you edit a released contact of a questionnaire in a production environment and change the list of questions, it could make existing patient answers inaccurate. Do not edit a released contact for a questionnaire in a production environment or for a questionnaire in a non-production environment that could be moved to production through Data Courier or another means. Instead, click Switch Contact to open an unreleased contact or create a new contact. (In a non-production environment, it's OK to edit a released contact by clicking Edit Contact. Just be sure that the changes won't affect anything that could be moved to production.)

If you need to change the logic flow of a questionnaire's questionnaire conditions:

- You can delete conditions from the middle of the list.
- You can edit a condition to do something else.
- You can add conditions to the end of the list.
- You can move a condition up or down in the list.
- In the Questionnaire condition behavior (I LQF 1205) field, you can choose to either apply all matching conditions, or to apply only the first matching condition per question. Available starting in November 2022, in May 2022 with special update E10202823, in February 2022 with special update E10108791, in November 2021 with special update E19912424, and in August 2021 with special update E9810670.

Edit a Questionnaire Condition

1. In Hyperspace, follow the path Epic button > Tools > Questionnaire Tools > Questionnaire Editor.
2. Open your questionnaire.
3. On the Edit Questionnaire form, find the condition you need to change in the Conditions section (or the Questionnaire Conditions section if you are using the Classic Client).
4. Use the icons along the right side of the conditions to edit the condition. You can edit or delete a condition, or move the condition up or down in the list.
5. To move a condition to a specific order in the condition list, enter that number in the numbered box. The condition moves to that order.
6. Click Accept to save your changes and close the questionnaire.

Scheduling Questionnaires Support: Common Issues

I Can't Add a Question to a Questionnaire

Solution

The question is probably of a type other than Form Question. Find or create a different question to use in your questionnaire.

A Questionnaire Doesn't Appear in Hyperspace When Expected

Solution

Make sure the questionnaire and all of its questions that you expect to appear are released.

Solution

If you have questionnaires set up at the department or system level, you can control when those set up at more general levels appear. Refer to the Control Whether Department and System Questionnaires Appear Along with More Specific Questionnaires topic.

Solution

This solution might apply to you if the questionnaire fails to appear when scheduling an inpatient appointment.

It's not common, but your system might be set up to use different questionnaires for inpatient appointments. First, check your system definitions to see if this is the case:

1. In Hyperspace, open Cadence System Definitions.
   - Search: Cadence System Definitions
   - Path: Epic button > Admin > Schedule Admin > Cadence System Definitions
2. Go to the Scheduling > Decision Support form. In February 2024 and earlier versions, go to the After VT Entry form.
3. In the Use inpatient questionnaire? field, see if Yes is entered.

If Yes is not entered, then this solution does not apply to you. If Yes is entered, make sure you have an inpatient questionnaire set up for your visit type, department, or system definitions. To check this in your visit type, for example:

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Visit Type.
2. Go to the Decision Support form. In August 2023 and earlier versions, go to the After VT Entry form.
3. In the Inpatient questionnaire field, see if a questionnaire is entered. Enter one if necessary.

My Questionnaire Logic Doesn't Work as Expected

Solution

If a questionnaire doesn't change visit types, enable questions, or do anything that you expected based on your questionnaire conditions, review the conditions from top to bottom. Remember that only the first true condition triggers its actions. For more information, refer to the Adjust Scheduling with Questionnaires topic.

Starting in November 2022, in May 2022 with special update E10202823, in February 2022 with special update

E10108791, in November 2021 with special update E19912424, and in August 2021 with special update E9810670, if a questionnaire doesn't change visit types, enable questions, or anything else you expected based on your questionnaire conditions, check what you have set in Questionnaire Conditions Behavior item. If it is set to Apply All Matching, every condition that is true for that question/questionnaire is applied. If it is set to Apply First Matching Per Question, only the first true condition (from top to bottom) is applied for each question. For more information, refer to the Adjust Scheduling with Questionnaires topic.

I Don't Like How Questions Are Repeated in My Questionnaires

Solution

Does one of the following describe your situation?

- You have a question repeated within a composite questionnaire, that is, one comprised of questionnaires set up at different levels. This happens if you included the question on different questionnaires, set up a questionnaire at the department or system level, and made a setting to combine the questionnaires from different levels. If possible, revise your questionnaire structure. Epic recommends setting up questionnaires at the visit type and panel levels only.
- You have a question repeated between questionnaires that appear in succession. This might occur if you need the answer to drive one set of logic in the first questionnaire and another set of logic in the second questionnaire. If that's the case, you might be able to bring forward the previous answer. See the next solution. If that's not the case, revise the set of questionnaires included on one of the questionnaires.

Solution

If it's not possible to revise your questionnaire structure, you can mitigate the duplication by bringing forward previous answers and/or hiding the repeated questions.

- To bring forward previous answers from an earlier questionnaire or from an earlier patient contact, refer to the Copy Forward Answers That the Patient Already Gave topic.
- To hide questions repeated in a single questionnaire, refer to the Hide Duplicate Questions in a Single Questionnaire topic.

Scheduling Questionnaires Reporting Index

You can use Clarity to report on answers stored in questionnaire answer (HQA) records, one of which is saved per questionnaire, per appointment and linked to the patient record. Ask your report writer to create such a report. Your report writer might use some of the following standard tables:

- CL_QANSWER
- CL_QANSWER_OVTM
- CL_QANSWER_QA
- CL_QANSWER_VERIFY

You could use such reports to identify schedulers who frequently answer a given question in a certain way. For example, you might identify schedulers who frequently record that their patients don't know if they have HMOs, and then follow up with those schedulers to educate them about HMOs.