MyChart Scheduling Setup and Support Guide

Last Updated: May 2, 2025

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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.

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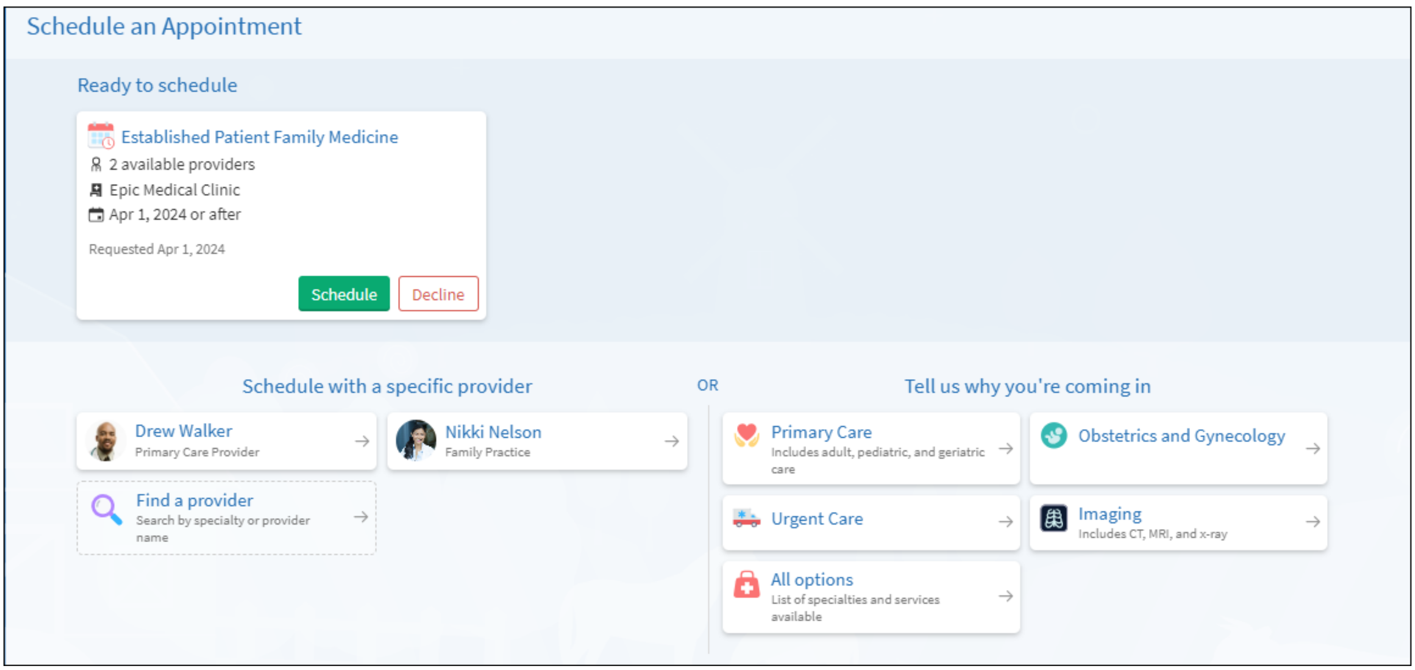
MyChart Scheduling Setup and Support Guide

You can use MyChart to let your patients schedule and cancel appointments online. MyChart scheduling provides a popular service to your patients while saving your clinicians and support staff time by eliminating telephone calls.

There are several different methods of scheduling you can use, including:

- Direct scheduling. Patients directly schedule their own appointments with physicians they have established relationships with online without interaction from scheduling staff.
- Scheduling tickets. Patients receive a ticket that can be used to schedule an appointment for a specific type of visit or procedure.
- Appointment requests. Patients send a message with preferred appointment dates and times, and scheduling staff follow up with the patient to schedule the appointment.

A centralized scheduling page provides patients with easy access to all of the scheduling methods your organization offers.



If you need to refer to legacy scheduling set up for scheduling web services, refer to the to the MyChart Legacy Scheduling Setup and Support Guide.

Across your organization

MyChart scheduling features require Cadence and rely on a number of Cadence settings to determine how online scheduling behaves for patients and providers.

Available Epic Resources

This guide contains the step-by-step setup information needed to use most scheduling features in MyChart.

For information about legacy scheduling for scheduling web services, refer to the MyChart Legacy Scheduling Setup and Support Guide.

If you're looking for information about open scheduling, MyChart's Provider Finder, Fast Pass, eCheck-In, On My Way, Hello Patient, or video visits, refer to the following guides:

- Open Scheduling Setup and Support Guide
- MyChart Provider Finder Setup and Support Guide
- Fast Pass Setup and Support Guide
- eCheck-In Setup and Support Guide
- On My Way Setup and Support Guide
- Hello Patient Setup and Support Guide
- Video Visits Setup and Support Guide

If you're looking for reference information or community resources, refer to the links below.

Reference Information

The following workflow diagrams provide a visual overview of workflows for various scheduling features:

- Scheduling, eCheck-In, and Cancellation.vsd
- Ticket Scheduling.vsd

Community Resources

Learn about how other Epic community members have been successful with other MyChart scheduling features through the Keep Provider Schedules Full and Reduce Front Desk Workload with Fast Pass financial programs.

You can also review Ochsner's XGM 2017 presentation about Fast Pass: MyAC03: Auto Wait List Notifications via Text Message (slides).

Supply Shop

Supply Shop is a set of programs that you can work with your Epic representative on implementing. It includes individual projects, clinical and financial programs, and Foundation System Refuels. Refer to the Supply Shop Catalog for more information.

MyChart Scheduling Strategy

Allowing patients to schedule through MyChart allows them to engage in their own care in ways they haven't before. The ability to schedule appointments by proxy for a family member can help bring peace of mind knowing that the appointment is booked at a time that works for everyone. The flexibility to change an appointment quickly allows patients to adapt healthcare to their busy lifestyles. Offering an opportunity to grab an earlier timeslot may result in reduced cancellation and no-show rates, while improving financial metrics and patient satisfaction. Using the full range of MyChart functionality will help your healthcare organization continue to meet your patient's ever-evolving needs.

Why Allow Patients to Schedule Through MyChart?

Allowing patients to schedule and cancel appointments online is becoming more of an expectation as other industries continue to expand the scope of what can be done online and on mobile platforms. While there will always be complex visits in a healthcare setting that do require your staff to schedule with the patient manually, provider utilization and patient satisfaction are highest when patients are able to schedule and interact with their own visits.

Scheduling online can result in several other benefits aside from increased patient satisfaction and provider schedule utilization:

- Reduce your front desk workload and phone call volumes (Johns Hopkins' Financial Program)
- Reduce no show rates and save money (Novant's Financial Program)
- Increase efficiency during check in (Johns Hopkins' Financial Program)

The Epic community has also seen great results in increased compliance with scheduling routine imaging procedures, such as mammograms, or simpler visits, like flu shots, when they are available for scheduling online.

Ticket Scheduling Recommendations

Ticket scheduling limits patients to scheduling appointments that their providers expect them to schedule. Clinicians can place orders to generate these tickets automatically or your front desk staff can manually create the ticket.

You can let patients opt to receive email or text message ticklers when a new scheduling ticket becomes available. This tickler applies to both manually created tickets and automatically generated tickets. Patients are notified when a new scheduling ticket is available through an alert or health feed card on the MyChart home page.

Epic recommends automatically generating tickets for your most common schedulable orders to reduce workloads for your scheduler without adding steps to the provider workflow. You'll likely want to use ticket scheduling in addition to direct scheduling and open scheduling to help patients self-schedule complex visits while reducing the risk of patient error. In the Foundation System, Epic has configured automatic ticket creation for most imaging procedures like yearly mammograms and recommends this workflow for COVID-19 vaccine scheduling.

For more information about ticket scheduling, refer to the MyChart Scheduling Setup: Ticket Scheduling topic.

Open Scheduling Recommendations

With open scheduling, patients who are new to your organization can view open appointment slots online by specialty and visit type. They are then able to schedule an appointment, even without a MyChart account. Existing patients can also use open scheduling within the portal to create appointments online with clinicians who might not otherwise be available to them through MyChart.

Open scheduling is most beneficial for new patients who do not have any prior relationships with providers that are necessary for use of Direct Scheduling in MyChart. Epic recommends allowing open scheduling for all providers currently accepting new patients without a referral. To facilitate the usage of open scheduling, enable patients to schedule the most common visit types at each location.

Open scheduling can also be piloted with primary care providers at a few clinic locations, at a particular specialty to increase schedule utilization, or even as part of a marketing strategy if desired. Enabling providers who are new to your organization can help them fill their schedules and create a patient base. Make sure to work with providers, IT, and operational stakeholders to determine which specialties see the highest volumes of new patients and could be a good fit.

For more information about open scheduling, refer to the Open Scheduling Setup and Support Guide.

Direct Scheduling Recommendations

Direct scheduling allows patients to select a slot for an appointment themselves without interaction from scheduling staff.

Direct scheduling can be used at both primary and specialty clinics. Primary care departments are ideal for pilots and large-scale rollouts, but organizations should critically examine ways to implement direct scheduling in their specialty clinics for established patients. Epic's decision trees and Smart Pool functionality can help your organization ensure that patients scheduling specialty appointments are directed to the right appointment and provider. Epic recommends that you enable these features for all PCPs in your system and for specialty providers where patients have had a visit in the last two years, or will have a visit within the next one year.

Popular Specialties for Direct Scheduling	Popular Visit Types for Direct Scheduling
Primary Care (Internal Medicine, Family, General Medicine) Pediatrics OB/GYN Nutrition Outpatient Lab Imaging Cardiology	Office Visit (New Established, Follow Up) Well Child Flu Shot Physical Annual Wellness Mammography Colonoscopy *Visit Types on this list are not matched to specialties on the left

For more information about direct scheduling, refer to the MyChart Scheduling Setup: Direct Scheduling topic.

Additional MyChart Scheduling and Arrival Features

To achieve the highest return on investment with online scheduling, there are a number of features you can make available to your patients. Below is a list of additional recommended functionality:

- Fast Pass. Patients on the waitlist can be offered earlier appointment times and accept the new appointment time with one click or tap.

- Cancellation and rescheduling. Patients can directly cancel or reschedule existing appointments without needing to call the provider’s office.
- On My Way. Patients can view wait times for nearby urgent care and emergency departments and let front desk staff know their intended arrival time with or without taking a scheduled appointment slot. No prior MyChart account is required.
- eCheck-In. Registration and verification steps can be done online before the patient arrives for their appointment in person or virtually, reducing their wait time and allowing front desk staff to spend their time on the appointments that need their expertise.
- Appointment requests. For visits too complex to allow direct scheduling, patients can request the appointment to let a scheduler know they would like to be contacted about a new appointment.
- Hello Patient. Hello Patient can leverage Bluetooth, geolocation, or time-based notifications on a patient's smartphone to detect when a patient arrives for their appointment. Patients can be automatically checked in, signed in, prompted to complete eCheck-In, or directed to the front desk upon arrival.
- MyChart's Provider Finder. Provider Finder helps prospective and established patients find the right provider that will meet their clinical needs and match their preferences. and then schedule with them through either open scheduling or direct scheduling.

Implementation Considerations

Implementing scheduling in MyChart requires coordination with your operational decision makers, along with analysts from MyChart, Cadence, and some ancillary applications. You need to determine which departments and clinicians to enable specific features for. Throughout the duration of the install or rollout, make sure to regularly engage these groups to ensure success and patient satisfaction. Epic recommends that you enable as much functionality as possible and encourage providers to allow their patients access to these features. Inconsistent functionality across an organization can confuse patients who might grow to enjoy the ease of use and expect it elsewhere. At the very least, your scheduling approach should remain consistent by service line to facilitate ease in online scheduling workflows.

Schedule and Visit Type Build

The template build recommendations outlined in the Provider Schedules Strategy topic allow you to easily accommodate MyChart scheduling. You should not need to change your template strategy to accommodate MyChart scheduling if you’re already following those recommendations.

MyChart scheduling is most effective when scheduling templates use minimal scheduling rules. Nationwide Children's Hospital's Financial Program shows that simplifying your Cadence build can increase schedule utilization and patient access.

Epic recommends using specialty-specific visit types, including those for consults, follow-ups, and each procedure commonly scheduled by a service provider. Any additional visit type should require specific materials, prerequisites, or be a result of another stipulation to suggest that an existing one cannot be used effectively. MyChart scheduling should use the same visit type (PRC) record used to schedule that type of appointment in Hyperspace so you don’t need to maintain the same visit type modifiers and restrictions in two places.

Additionally, Epic recommends using blocks minimally in your Cadence template build, which also translates to MyChart scheduling. To drive patients towards scheduling their visits appropriately, you can use decision trees and session limits to guide scheduling rather than blocking them into a limited number of available openings. . For example, limited provider or supply resources should prompt block usage. However, creating alternating new and established patient blocks to reflect provider preference would make templates incredibly restrictive. In the latter case, implementing session limits allowing for a maximum number of new patient visits per day would be a better alternative. Excessive block usage has the potential to significantly limit available slots for patients to schedule into, negatively impacting MyChart scheduling.

Rollout Strategy

You can limit open scheduling or direct scheduling to specific departments, clinicians, or visit types. You might consider limiting open scheduling or direct scheduling to only certain clinics or new patient visit types to allow providers time for effective adoption. Keep in mind, though, that limiting open scheduling or direct scheduling too much might diminish its benefits by making it difficult for patients to use.

Novant limited their initial implementation of open scheduling to providers who were accepting new patients to ensure that providers who weren't accepting new patients didn't find unexpected appointments on their schedules.

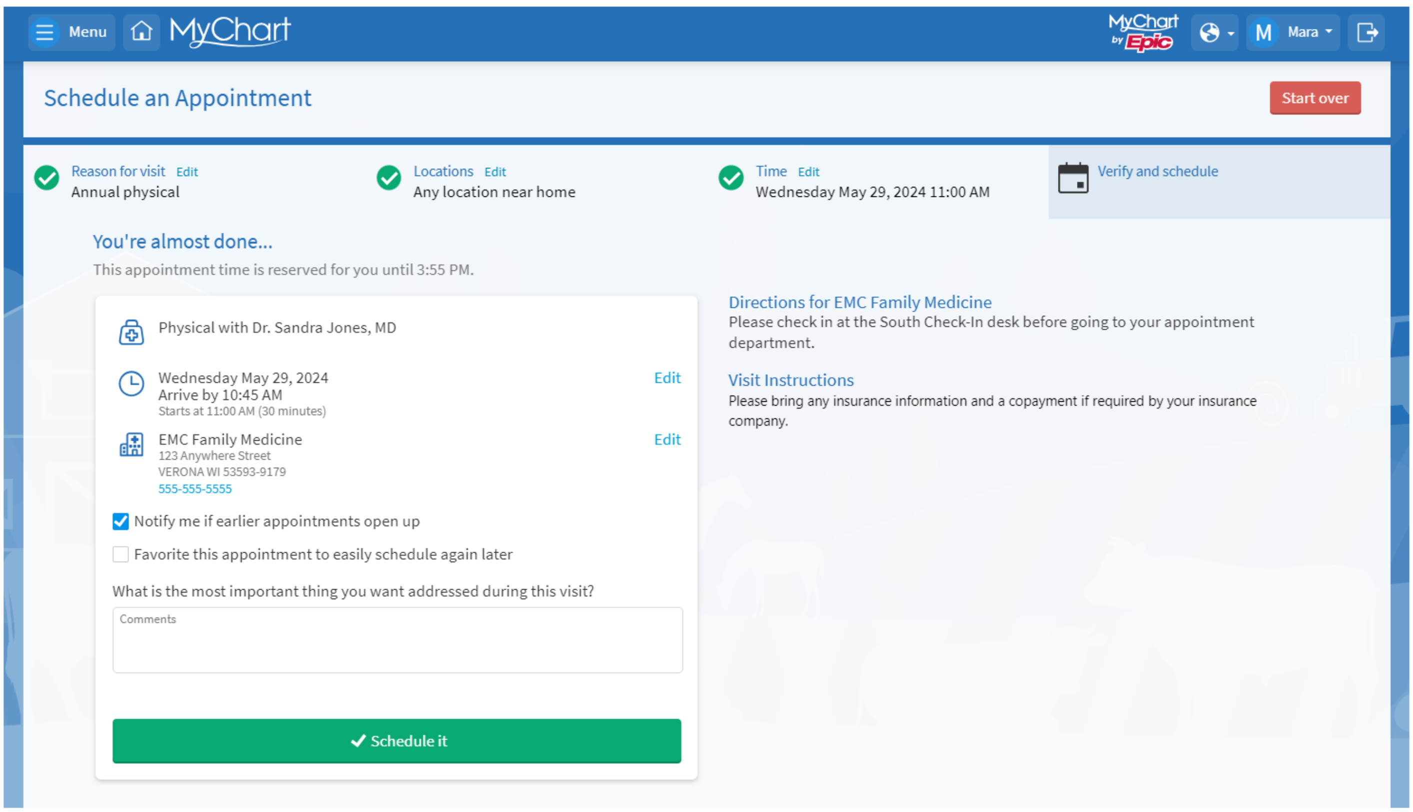
Sutter, Atlantic Health System, and Nemours began by allowing direct scheduling only for primary care and a few specialties. They've gradually added specialties to that list. They also use ticket-based scheduling for some specialties to improve the scheduling experience for patients while ensuring that appointments are scheduled in accordance with specialties' specific requirements. Epic recommends following a similar specialty by specialty rollout strategy.

MyChart Scheduling Setup: Direct Scheduling

With direct scheduling, patients can make appointments for themselves without requiring intervention from clinicians or scheduling staff.

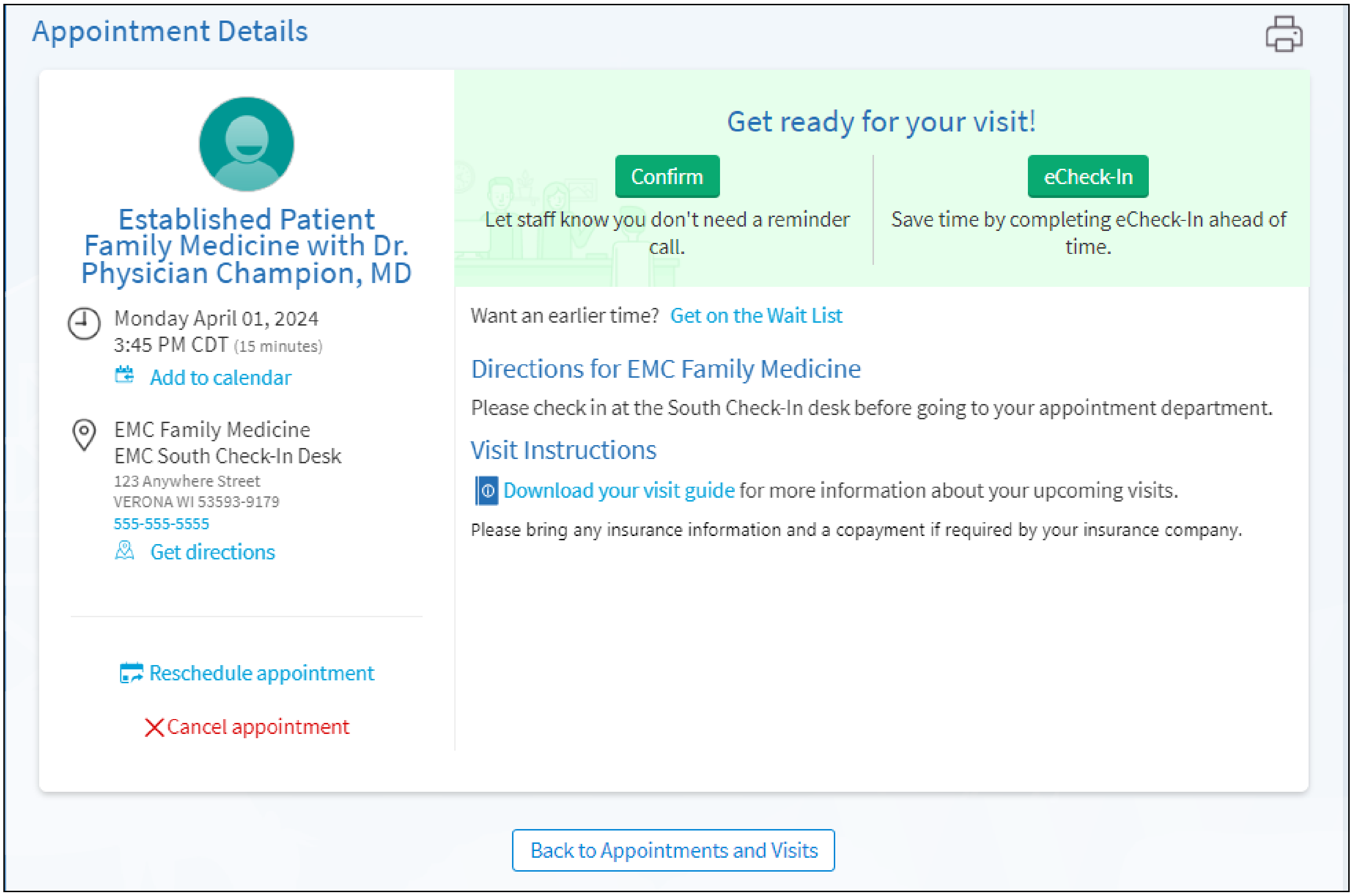
The direct scheduling workflow leads patients through a series of scheduling steps to provide the clinic with information about the visit. These include:

- The type of appointment needed
- Questions patients can answer to help determine the right type of appointment needed
- The clinic where the patient wants to be seen
- The provider the patient wants to see
- A range of dates to search for available slots by preferred days of the week and times of day
- Verification of demographics and insurance information

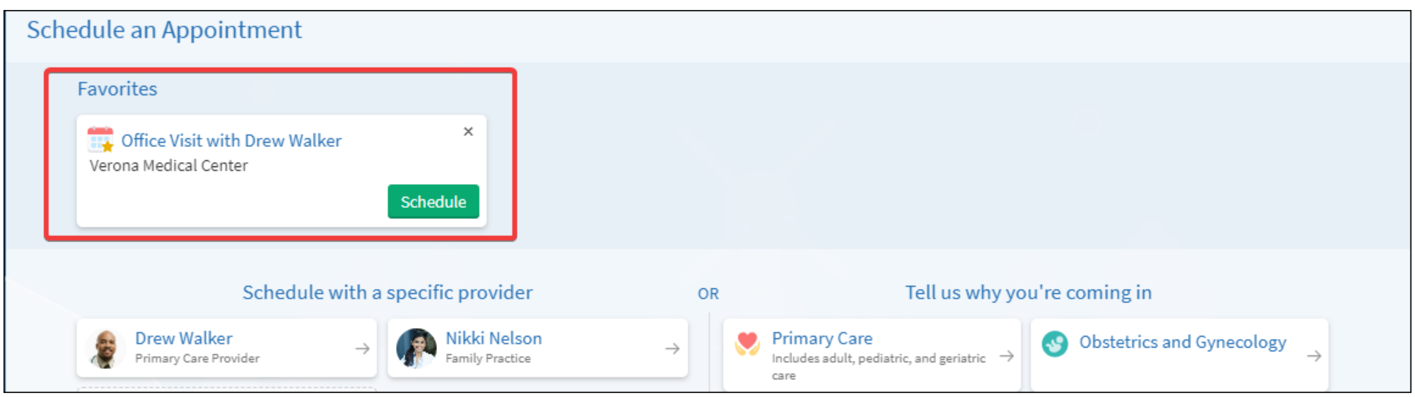


After a patient schedules the appointment, the Appointment Confirmation page shows the details for the appointment that was just scheduled, plus any of the following when applicable:

- Links to questionnaires that a patient can fill out to provide more information to their provider
- Driving directions to the clinic where the appointment is scheduled
- Instructions regarding what a patient should bring to an appointment or if they should come early to fill out paperwork
- The option to add the appointment to the wait list to be notified if an earlier appointment time becomes available



Patients can save appointments they've directly scheduled as favorites so that they can easily schedule them again in the future. When a patient saves a scheduled appointment as a favorite using the option that appears at the end of the direct scheduling workflow, a shortcut is added to the scheduling landing page so the patient can quickly schedule again with a predefined reason for visit, provider, and location.



Patients can schedule appointments that are part of a panel through direct scheduling or ticket scheduling in MyChart. Starting in May 2022, patients can also schedule multiple visits from a ticket bundle, as described in the Allow Schedulers to Create Request Bundles for Patients to Schedule Multiple Appointment Requests topic. Here's how multiple appointment scheduling works:

1. When a patient starts to schedule multiple appointments, a message appears that clarifies that multiple appointments are being scheduled and a list of visits is shown.
2. The patient selects a single overall location or, optionally starting in May 2022, a location for each visit.
3. If a visit has the Allow Provider Select? (I PRC 32400) setting set to Yes, the patient can select a provider for

that visit.

4. The patient is presented with options for appointment slots. Starting in May 2022, the patient sees one of two views based on whether or not all appointments will occur at the same location on the same day.

Note the following limitations of multiple appointment scheduling at this time:

- Panel scheduling is supported only for reason-for-visit-first scheduling workflows. It is not supported for workflows in which a patient must choose a provider as the first step in scheduling.
- Reason-for-visit department overrides are not supported for panel scheduling.
- In February 2022 and earlier, only locations that are available for all appointments appear. Starting in May 2022, you can allow patients to select a location for each visit, as described in the Change How Patients Select Locations When Scheduling Panels and Change How Patients Select Locations When Scheduling Request Bundles topics.
- Starting August 2023, request bundles can be rescheduled by patients with MyChart accounts.
- Rescheduling of panels is not yet supported.
- MyChart respects restrictions defined in the panel record for any simple visit types within the panel. It also respects any restrictions defined in the visit type record for component visits (visits within the panel), including "Panel Only" restrictions.

Additional considerations and setup may be needed to make telemedicine and video visits schedulable on MyChart. Refer to the Video Visits Setup and Support Guide for more information.

Select a Default Cadence User for Direct Scheduling

Direct scheduling uses a default user with Cadence security to allow patients to schedule and confirm appointments and classes in MyChart.

Before defining a default user for direct scheduling, you must create and configure a user so it has the security required to complete the desired tasks in Cadence.

The following table details the Cadence security points required to complete these tasks.

Form	Security Point	Function
Appointment Entry	Enter appointments (I ECL 5050)	Required for direct scheduling and adding to the wait list.
Appointment Functions	Check in (I ECL 5067)	Required to allow the visit to be checked in when a patient joins a video visit.
Appointment Functions	Cancel (I ECL 5068)	Required for direct cancellation and Fast Pass.
Reports/System Admin	Reports (I ECL 5115)	Required for Fast Pass.
Reports/System Admin	Assign resources (I ECL 5245)	Required to assign resources when scheduling a simple visit type with resource assignment configured.

Configure the Cadence Security Class for Your User

1. In Hyperspace, create a Cadence security class.
2. Add the desired security points from the table above.

Create the User Record and Add the Appropriate Security

1. In Hyperspace, open User Security (search: User Security).
2. Create or edit a single user record. For more information about creating and editing user records refer to the Creating Users topic.
3. Select the Cadence tab.
4. Configure the user's authorized service areas by configuring one of the following settings. If your user is not authorized in a particular service area, patients cannot schedule the associated departments in MyChart:
   - In the Authorized in all service areas? field, enter Yes.
   - In the Authorized Service Areas, list all service areas in which you want to allow direct scheduling.
5. In the Default security class field, enter the Cadence security class you created for this user.

Note that your default user must also have a Prelude security class in order for copays to appear for upcoming appointments. The contents of the Prelude security class do not affect this user in any other way.

Define the Default User for Direct Scheduling

1. From the MyChart System Manager Menu, select Scheduling Configuration to access the Scheduling Options 1 screen.
2. In the User (I WDF 800) field, enter a user record.

Configure Reasons for Visit and Visit Types for Direct Scheduling

Determine which reasons for visit and visit types patients can choose from when they schedule an appointment through MyChart.

Enable Direct Scheduling for Visit Types

Direct scheduling supports both simple visit types and advanced visit types.

Simple visit types are for appointments scheduled with a specific provider, such as an office visit. For more information about simple visit types, refer to the Create Simple Visit Types topic.

Advanced visit types are for appointments where the specific provider is unimportant because it is a generic provider or resource, or where all patients should schedule the appointment with the same provider or providers regardless of whether the patient has seen the provider before. A pool of providers or resources is attached to the visit type and determines which templates can be searched for appointment slots. More than one pool can be attached to the visit type, and the provider or resource scheduled out of each pool can be scheduled for a certain subset of the appointment time (for example, if a technician should be there for only the first 15 minutes of a 45 minute visit). For more information about advanced visit types, refer to the Build Advanced Visit Types topic.

In MyChart, the most common use of advanced visit types is for specialty or self-referral scheduling, such as for a mammogram, where patients do not have a previous relationship with the provider with whom they are scheduling. When patients schedule appointments for advanced visit types, the pool of available providers is calculated as follows:

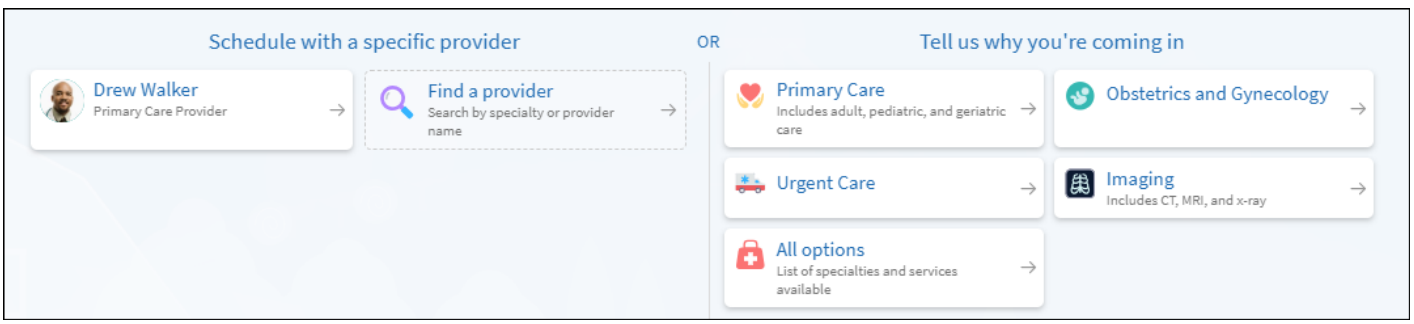
- The extensions listed in the Scheduling providers extension (I WDF 835) and Filter provider and department lst ext (I WDF 837) fields on the Scheduling Options 4 screen are not used.
- The extensions listed in the Provider list ext (I PRC 32050) field on the Scheduling Settings 1 screen for the selected visit type can modify the pool of available providers.

Considerations
You can list the same visit type for more than one reason for visit to give patients more and clearer choices for selecting what type of visit they want to schedule. For example, you might allow patients to specify whether their visit is for a backache or an immunization despite the fact that both of these reasons for visit link to your generic visit type for office visits. To do this, just enter the different reasons for visit and select the same visit type for each one.

Configure Visit Types

To configure reasons for visit and visit types for scheduling, you use a table on the Scheduling Reason For Visit Configuration screen. Note that this table also includes settings for configuring additional scheduling options, such as appointment requests. For more information about appointment requests, refer to the Determine Reasons for Visit Patients Can Choose for Appointment Requests and Use Rules to Define When Patients Can Request Appointments topics.

As you configure this table, you'll notice settings that reference provider first scheduling or reason for visit first scheduling. This refers to the options that appear at the bottom of the scheduling landing page:



1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Reason For Visit Configuration screen.
2. In the Reason for Visit (I WDF 15000) column, enter a reason for visit you want to be available for scheduling.
3. In the Visit Type (I WDF 15005) column, enter the default visit type to use when scheduling this reason for visit.
4. In the Select Prov? (I WDF 15010) column, enter Yes or No to determine whether an individual provider can be selected for this visit type. If this field is set to No, only locations are visible to patients. By default, patients cannot select an individual provider for advanced visit types. Additionally, starting in November 2022, this field can be set to No for simple visit types.
5. In the Can Direct? (I WDF 15020) field, enter Yes or No to determine whether direct scheduling is allowed for this visit type. This setting is part of a hierarchy that is evaluated in the following order to determine whether direct scheduling is allowed for a given visit type:
    - Direct Scheduling? (I DEP 53705) setting in the department record

- Can Direct? (I WDF 15020) setting in Patient Access System Definitions
- Default system behavior (Yes)

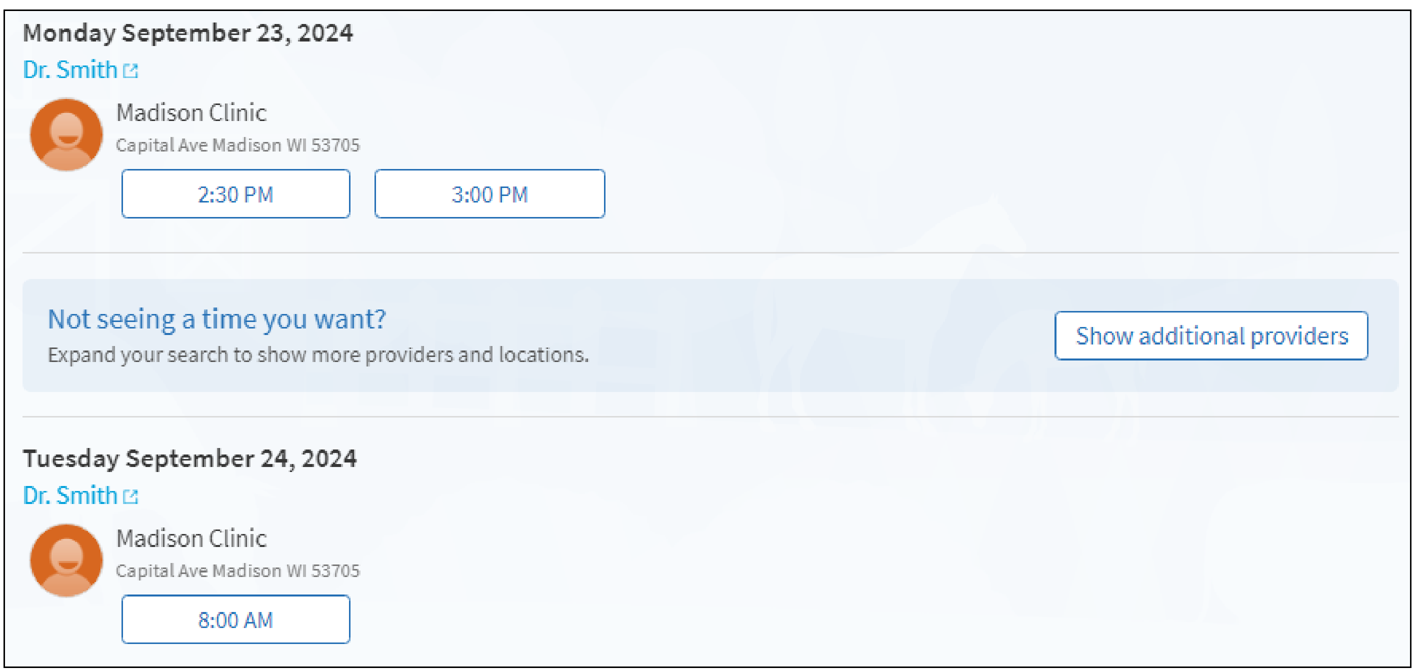
6. In the Prov First (I WDF 15050) column, enter Yes or No to determine whether this reason for visit and visit type combination is available in provider first scheduling. By default, if the associated visit type does not have a pool, it is available for provider first scheduling. If the visit type does have a pool, and the patient has a provider in that pool who is their PCP or is someone with whom they have a recent or upcoming appointment, it appears for provider first scheduling only if the Select Prov? (I WDF 15010) setting is set to Yes. This setting can be set for both simple and advanced visit types.
7. In the RFV First (I WDF 15055) column, enter Yes or No to determine whether this reason for visit and visit type combination is available in reason for visit first scheduling.
8. Go to the Scheduling Options 2 screen. In the Default Visit Type (I WDF 820) field, enter a visit type. This visit type is used when a patient selects a reason for visit that is not associated with a specific visit type.

For information about department overrides for direct scheduling, refer to the Configure Direct Scheduling Overrides for a Department topic. For an explanation of visit types, refer to the Visit Types Strategy Handbook.

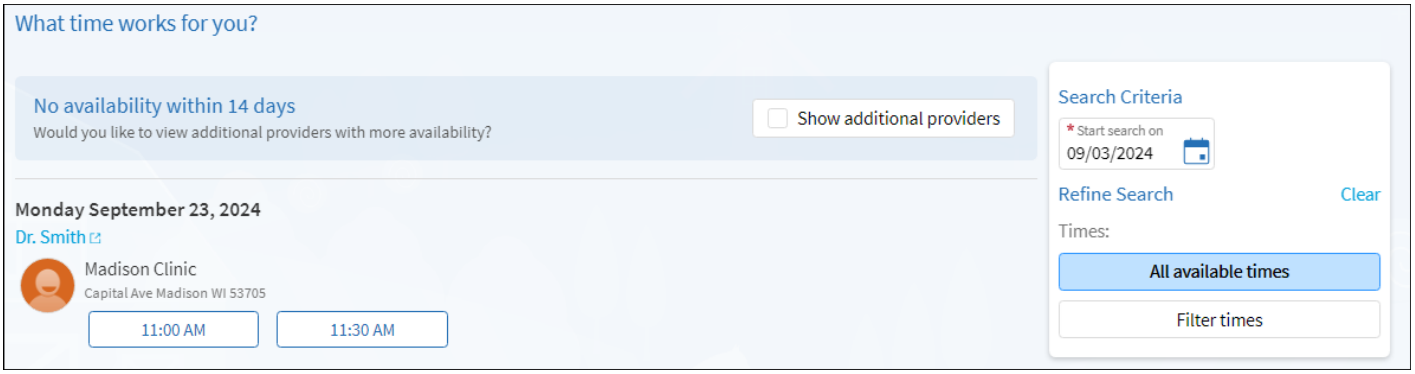
Give Patients Scheduling Flexibility with Tiered Pools

Starting in November 2024

Allow patients in MyChart and schedulers in Book It to quickly find more availability when an initial provider search yields limited time slots by configuring tiered pools in Smart Pools. With tiered pools, patients and schedulers are presented with an initial set of scheduling solutions that are based on the providers you have prioritized in the pool. In MyChart, if those time slots don't meet the patient's needs, a single click expands the search to show time slots for the rest of the providers in the Smart Pool. In Book It, a single click expands the search to show time slots for providers in the next row of the Smart Pool. For example, a patient in MyChart trying to schedule an appointment could see appointment times with their PCP, but if the patient does not find a suitable appointment time with their PCP, they can click to expand their search to view appointments with other providers in their PCP's department and providers in the same specialty as their PCP.

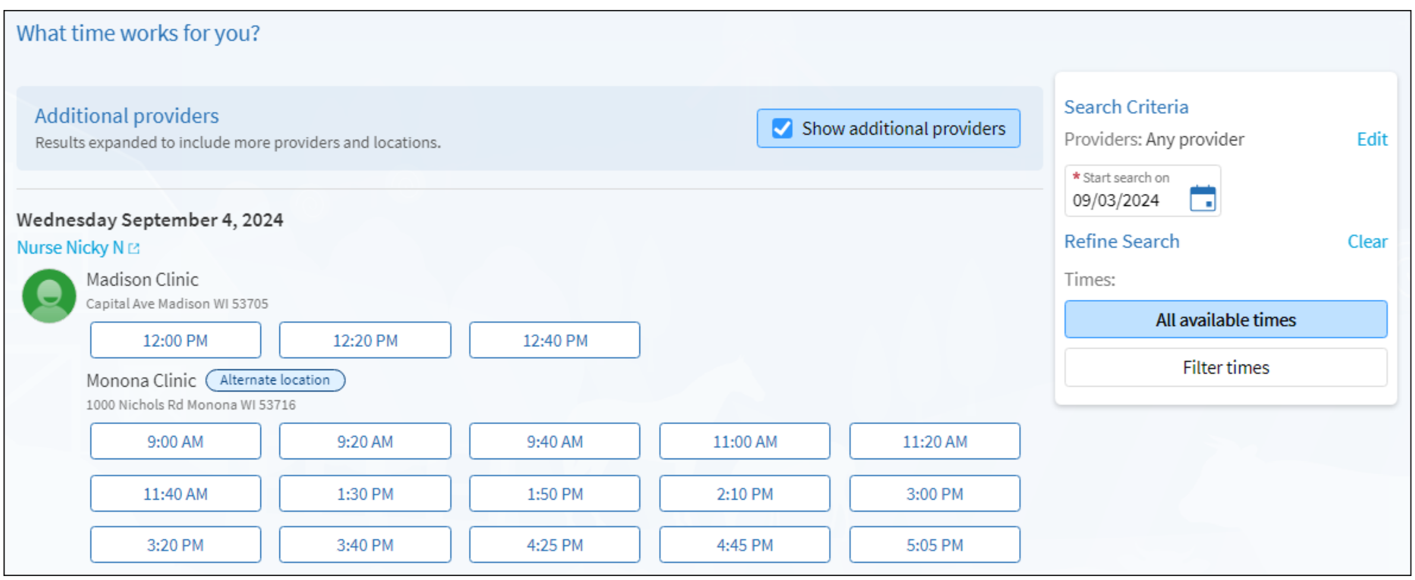


As part of setting up tiers in a Smart Pool, you can configure how many days in advance the system should look for a solution for the initial tier. For Cadence in Book It, if providers in the initial tier do not have any time slots available within the date range set, the system automatically expands the search to include providers from the next tier. In MyChart, a banner appears at the top of the page letting patients know that there is limited availability with the provider they are currently scheduling with and giving them the option to expand their search to see additional times with other providers.



In MyChart, when a patient clicks Show additional providers, the rest of the providers from the Smart Pool appear based on your current geolocation settings for direct scheduling, or (starting in February 2025) open scheduling, as described in the Use Geolocation to Help Patients Schedule in Nearby Departments topic. These settings control how locations are ordered and grouped on the slot step so the most relevant choices for the patient are shown first. The system uses these settings along with the patient's selected geolocation method to show the locations nearby while hiding locations farther away.

After expanding the search, patients are shown a banner at the top of the page with a checkbox already selected and are shown time slots for providers who were added to the results, as well as the providers they originally started scheduling with. Patients can clear the checkbox to remove the additional providers if they want to go back to seeing slots only for the providers they were originally scheduling with. If the expanded search includes locations not in the original search, an Alternate location tag appears next to the names of departments in those locations.



Understand How Tiered Scheduling Differs from Team Scheduling

The difference between tiered scheduling and team scheduling is that in team scheduling, provider teams are based on single department and multi-department subgroups, whereas tiered scheduling is based on Smart Pools. In team scheduling, to schedule with a single-department team, all providers must have a schedule in the same department as the original provider, and to schedule with a multi-department team, at least two providers on the team must have a schedule in the same department. With tiered scheduling, providers do not need to have a schedule in the same department.

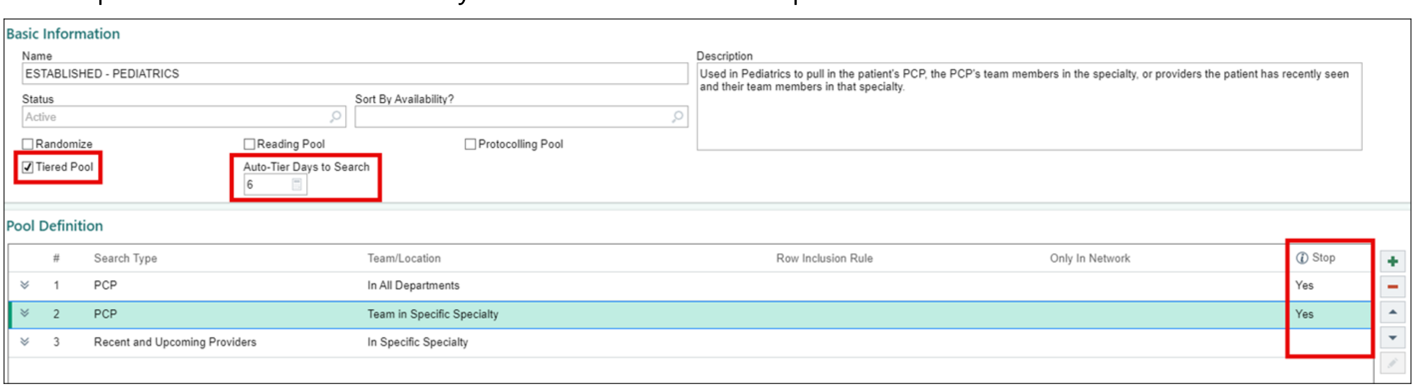
If you have provider teams set up for a provider who is in the initial row of a pool that is enabled for tiered scheduling, the team providers are automatically included when a patient expands their search.

Set Up Tiered Scheduling

If your organization has pools set up for specialty guided scheduling optimization, use the Build Wizard in Hyperspace to identify potential pools that are a good candidate for provider tiered scheduling based on how the pools are set up. To get started, open the Build Wizard (search: Build Wizard) and search for feature 424144-Provider Tiered Scheduling (Application: Cadence, MyChart). You can also use an import specification to more efficiently update a large number of pools to use tiers. Use import specification PLS, D,2-Stand Alone Import Specification - PLS to import all pools. For more information about importing records, refer to the Standard Import Guide.

To set up a tiered pool:

1. In Hyperspace, go to the Pool Editor (search: Pools) and select the Tiered Pool (I PLS 121) checkbox.
2. Optionally, set the Auto-Tier Days to Search (I PLS 122) field to the number of days within which a search must return a result for this tier to be used. For example, if you set the field to 6, the system checks the schedules of providers in the tier for the next six days to find solutions. If no solutions are found, then the button to expand the search appears above the first appointment slot shown to patients. If you leave this field blank, the button appears partway down the list of appointment slots.
3. Add a row in the Pool Definition table that includes providers to be returned in the first tier of search results and enter Yes in the Stop (I PLS 212) field for the row.
4. Add additional rows in the Pool Definition table that include providers to be returned when a patient expands the search results in MyChart. Enter Yes in the Stop field in each row.



Customize Direct Scheduling Options Related to Visit Types

This section includes optional tasks you can do to customize how direct scheduling works for different reasons for visit and visit types. These tasks are not essential and you can skip them if you're just setting up basic scheduling.

Determine Which Providers Can Be Scheduled for a Visit

You can configure visit types to change the pool of providers that patients can select from when they schedule an appointment. For example, you can include only providers from certain departments or providers with certain roles on the patient's care team. To do so, use extensions of type 32012-MyChart Scheduling Providers Function and enter them in the visit type record. These extensions are run after the extension entered in the Scheduling providers extension field on the Scheduling Options 4 screen in Patient Access System Definitions.

Below are the general steps for configuring such an extension, plus three details about three common use cases.

Specify an extension

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. Access the Scheduling Settings 1 screen.
3. In the Provider list ext (I PRC 32050) field, enter the extension you want to use.

Only allow scheduling with a patient's PCP

To limit patients to scheduling certain visit types only with their PCP, use extension 32910-MyChart - Allow Scheduling with PCP Only to a visit type. If you use multiple provider list extensions, list extension 32910 last.

Don't allow scheduling with a patient's PCP

To exclude a patient's PCP from scheduling for certain visit types, use an extension that returns 0 as the last extension in the list. You can use this option to remove the PCP from the providers available for simple visit types, which include the PCP by default.

Only allow scheduling with previously seen providers

Starting in November 2023, to limit patients to scheduling certain advanced visit types only with providers and departments with which they've had previous visits, you can create a Smart Pool that uses search type 10-Recent and Upcoming Providers as described in the Guide Schedulers to Providers a Patient Has Recently Seen topic.

In August 2023 and earlier versions, you can use a copy of extension 32103-MyChart - Filter Advanced Visit Type Providers by Lookback/Forward. You can also prevent patients from scheduling an appointment for an advanced visit type if the patient hasn't seen any of the allowed providers during the lookback/look forward period.

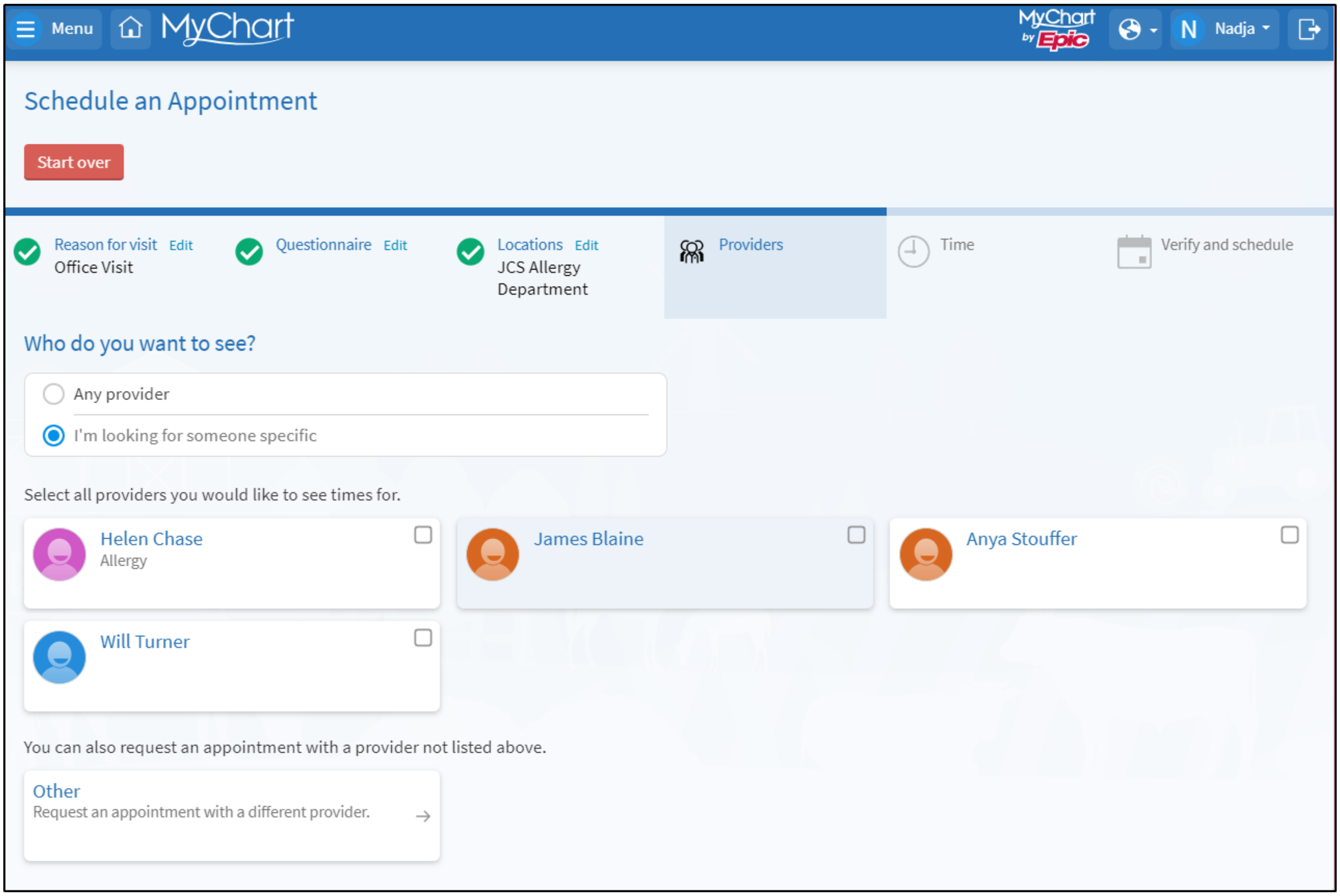
Let Patients Pick Relevant Providers Before Seeing Scheduling Availability

Starting in February 2024

If you have a visit type where patients would appreciate seeing what providers are available before looking at slots, you can add a discrete provider selection step to direct scheduling workflows. For example, patient Cardi lives in Chicago but travels often to New York for work. During their pregnancy, they would like to schedule with Dr. Chime when home in Chicago and schedule with Dr. Yancey at their organization's New York location when travelling for work. This provider selection step allows them to choose the specific provider they would like to see depending on their location at the time of the appointment without having the other provider's times shown. Often patients are more concerned with when they can be seen than what their specific provider options are so the provider step is not included by default. Regardless of whether you add the provider step, any visit type with Allow Provider Select? (I PRC 32400) set to Yes will have the Edit Provider link available in the slots step in case patients realize they would like to condense their search to a few specific providers.

To show this step for a specific visit type:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open the visit type you want to modify.
2. Access the Scheduling Settings 1 screen.
3. Set the Show provider step in direct sched (I PRC 32090) to 1-Yes if you want patients to have this separate provider selection step and 0-No if you do not want this step shown.



Use Questionnaires to Change Visit Types or Remove Providers Available for Scheduling

You can configure MyChart to attach a visit type questionnaire to some visit types and, based on a patient's answers, select a more appropriate visit type for the appointment the patient is scheduling.

For example, if you have a visit type for neurology appointments, you could use a questionnaire to ask the patient whether she needs to be seen regarding headaches, epilepsy, or a sports-related injury. Depending on the patient's answer, you could remove providers to filter the list of scheduling providers to those for the subspecialty that treats that condition.

This feature makes use of Cadence conditions in Visit Type Questionnaires. The following functionality supported in Cadence as part of the conditions is not supported in MyChart:

- Department-level questionnaires
- The Switch to department option
- Question-level comments

- Networked questions
- Conditions changing whether questions are required
- Decreasing or increasing appointment length

You can also use any type of question to change visit types except for Networked questions.

First, create a questionnaire by following the steps in the Adjust Scheduling with Questionnaires topic.

Considerations
Patients can save appointments they've directly scheduled as favorites so that they can easily schedule them again with the same reason for visit, provider, and location. If a favorite appointment includes a visit type questionnaire, the patient must still complete it when they schedule from the favorites shortcut. To speed up scheduling, you can choose to remember the patient's previous answer to questions within the questionnaire, when appropriate. To remember question answers for favorites, add a row to the Defaulting table on the Question form of the Question Editor as follows: • Workflow (I LQL 165): Sched/Request • From (I LQL 166): Rescheduled Appt Answer

Then, specify the questionnaire in Patient Access System Definitions:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open the visit type for which you want to remove providers based on questionnaire answers. Then, specify the questionnaire in Patient Access System Definitions:
2. On the Scheduling Settings 1 screen, enter the questionnaire you created in the MyChart visit type questionnaire (I PRC 32075) field.

Use Decision Trees to Guide Scheduling Workflows

You can use decision trees in place of visit type questionnaires to help guide patients to schedule the right type of appointment. Decision trees were introduced for Cadence with the Epic 2017 release.

For example, the Foundation System uses decision tree 1170000004-ES Annual Wellness in visit type 1005-Physical to help schedule a Welcome to Medicare or Medicare Annual Wellness visit instead of a general physical for the appropriate patients:

- Patients with a Medicare coverage on file, regardless of age, are prompted to schedule an appropriate Medicare visit.
- Patients over the age of 65 who don't have a Medicare coverage on file are asked whether they have Medicare. If they do, they're prompted to schedule an appropriate Medicare visit. If not, they can schedule a general physical.

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

MyChart supports appointment entry decision trees and most nodes you can use in that type of decision tree, with the exception of Conference Call. Note that the Add Visit node is only partially supported. MyChart does not support scheduling multiple appointments at one time, so this node can be used only if you are fully replacing the current visit with a different one. Starting in February 2021, questions in appointment entry decision trees also appear during patient self-triage in MyChart.

If you already created this type of decision tree for Cadence, you can use it in your MyChart build, but you should review it to make sure any scheduling instruction text is appropriate for patients to see. Starting in November 2021, basic decision tree support is also available in the redesigned open scheduling widget, and starting in February 2022, decision tree support is available in the open scheduling wizard and post-login new provider scheduling.

To consolidate build, you can use Rule nodes in your decision tree to route patients down certain paths depending on the scenario. For example, you might want to ask anonymous patients for basic demographic information to drive available scheduling options, but automatically pull that same data from known patients' charts to save them time. To do this:

- Starting in February 2022 or November 2021 with special update E9910848, if you want to use the same tree to route anonymous patients to a different outcome than known patients, you can use rule property 32350-Is Anonymous Scheduling Patient to branch your tree based on whether a known patient record exists. For more information about decision trees in open scheduling, refer to the Guide Patients to the Right Visit with Decision Trees topic.
- Starting in May 2023 or February 2023 with special updates E10402322 and C10402322-MyChart, if you want to route patients using post-login new provider scheduling to a different outcome than patients using direct scheduling or ticket scheduling, you can use rule property 32351-Is Logged In Patient Finding New Provider to branch your tree accordingly. For more information about this setup, refer to the Determine Whether Patients Can Schedule with a New Provider topic.

For information about creating decision trees, refer to the Decision Trees Setup and Support Guide.

Considerations

Patients can save appointments they've directly scheduled as favorites so that they can easily schedule them again with the same reason for visit, provider, and location. If a favorite appointment includes a decision tree, the patient must still respond to the decision tree questions when they schedule from the favorites shortcut. To speed up scheduling, you can choose to remember the patient's previous answer to questions within the decision tree, when appropriate. To remember question answers for favorites, add a row to the Defaulting table on the Question form of the Question Editor as follows:

- Workflow (I LQL 165): Sched/Request
- From (I LQL 166): Rescheduled Appt Answer

After you create a decision tree for a specific visit type, specify it in the visit type record to start using it:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type, open a visit type record, and access the Scheduling Settings 1 screen.
2. In the Known patient decision tree (I PRC 32080) field, enter the decision tree you want to use for this visit type.

Always Show a Visit Type Linked to a Questionnaire or Decision Tree on the Scheduling Landing Page

If you use a series of questionnaires or decision trees to direct patients to a particular visit type based on their responses, the initial visit type (typically referred to as a generic visit type) isn't schedulable because it doesn’t have available providers and departments for scheduling. Because of this, it is hidden from the scheduling landing page. You can use a setting in the visit type record to ensure that the visit type always appears on the scheduling landing page so patients have a starting point for scheduling in this scenario.

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. Access the Scheduling Settings 1 screen.
3. In the Is Placeholder Visit Type? (I PRC 32029) field, enter Yes.

Show Scheduling Instructions for Selected Visit Types

You can show custom instructions during the scheduling workflow when a patient schedules a particular type of appointment. For example, you might provide information about preparation the patient needs to do before the appointment, such as fasting for 12 hours, or tell the patient to check with their insurance company to make sure the service is covered before they schedule.

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type, and open a visit type that should present scheduling instructions.
2. Access the Appointment Settings screen.
3. In the Patient Instructions (I PRC 32010) field at the bottom of the screen, type the scheduling instructions. You can use HTML tags to format the instructions.

Configure Departments for Direct Scheduling

By default, departments allow patients to schedule appointments in them (using the default settings for each visit type). However, you can configure how direct scheduling works (or disable it entirely) in specific departments if desired.

Configure Direct Scheduling Overrides for a Department

There are two main reasons to override settings at the department level:

- The department wants to use different date ranges to determine when patients can schedule appointments. For example, a dental clinic might let patients schedule appointments seven months in advance, while the rest of your departments use a shorter time range. Department can even use different date ranges for each visit type.
- Different departments want to use different visit types for the same reason for visit. For example, departments might have 15-minute or 30-minute visit types for follow-up appointments.

Configure Visit Type Overrides

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Online Scheduling Settings 1 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions).
3. In the Visit Type Overrides table, create a line for each visit type that has special scheduling rules in this department.
   - In the Sched? (I DEP 53006) column, enter Yes or No to determine whether patients can schedule that visit type in the department.
   - In the Days From (I DEP 53007), Days To (I DEP 53008), and Mins From (I DEP 53270) columns, define when patients can schedule that visit type in this department. For more information about these settings, refer to the Customize the Date Range for Scheduling Appointments topic.
   - In the Teams? column, determine whether that visit type can be scheduled using team scheduling. For more information, refer to the Allow Patients to Schedule with a Provider Team topic.

- In the Open? (I DEP 53250) column, determine whether that visit type is available for open scheduling. Refer to the Open Scheduling Setup and Support Guide for more information.
- In the WtLst? (I DEP 53260) column, determine whether appointments with that visit type can be added to the wait list. For more information, refer to the Let Patients Update Wait List Status from MyChart topic.

Note that for the date offset, the values from the Days From, Days To, and Mins From settings are taken as a group, meaning the number of minutes is added to the from days value. If one level in the hierarchy has a value for the Days From and not the Days To setting, then the default value is used to determine the Days To value. For example, if you enter 30 for minutes and 1 for day and today is 6/16/2018 at 1:30 PM, patients can schedule appointments starting 6/17/2018 at 2:00 PM. If the minutes field is set to 0, patients can schedule from this time on the first available day. If the minutes field is left empty, patients can schedule appointments starting at midnight of the first available day.

Configure Reason for Visit Overrides

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Reason For Visit Scheduling Overrides screen.
3. In the Reason for Visit (I DEP 53700) column, enter a reason for visit for which you want to override behavior specified at the system level.
4. In the Visit Type (I DEP 53715) column, enter a visit type to override behavior specified at the system level. Note that you can enter only simple visit types in this setting.
5. In the Direct Scheduling? (I DEP 53705) column, enter Yes or No to override the system behavior for allowing direct scheduling in this department.
6. In the Request Appointment? (I DEP 53710) column, enter Yes or No to override the system behavior for allowing appointment requests in this department. For more information about appointment requests, refer to the Use Appointment Request Messages in Addition to Direct Scheduling topic.

Disable Direct Scheduling for a Department

If you enable direct scheduling system-wide but have specific departments you want to exclude from direct scheduling, you can turn direct scheduling off just for those departments.

1. From the MyChart System Manager Menu, select Master File Entry > Department and open the department record for which you want to disable direct scheduling.
2. Access the Online Scheduling Settings 1 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions).
3. In the Allow Scheduling? (I DEP 53001) field, enter No to prevent patients from scheduling appointment in this department.

Customize Direct Scheduling Options Related to Centers and Departments

The following tasks detail the specific direct scheduling options that relate to centers and departments. For a general description of centers and how they function within Epic, refer to the Centers topic. For information about creating and configuring centers, refer to the Organize Departments into Centers for Easier Scheduling topic.

Determine How Locations Are Grouped During Scheduling

The Location grouping method (I WDF 15115) field determines how departments are grouped in the location step for scheduling. You can configure this setting if you want to group by something other than center.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Workflow Configuration screen.
2. In the Location grouping method (I WDF 15115) field, enter a group method. If not all departments have a grouping method set in the Scheduling department grouper (I DEP 53225) field, departments that have that field set are grouped and the other departments are listed individually. By default, departments are grouped by center. If you want to specify grouping at the department level, set this field to 3-MyChart Scheduling Grouper.

To specify grouping at the department level:

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Online Scheduling Settings 2 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions).
3. In the Scheduling department grouper (I DEP 53225) field, choose how departments are grouped in the location step for scheduling. To use this setting, the location group method (I WDF 15115) set at the system level must be set to 3-MyChart Scheduling Grouper.

Determine How Departments Are Grouped During Multiple Appointment Scheduling

By default, if you use Single Department as the location grouping method for direct scheduling, departments are grouped by center during the location step in multiple appointment scheduling. If you want to use a different grouping method:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Workflow Configuration screen.
2. In the multi-appt location grouping method (I WDF 15118) field (called the panel location grouping method in August 2021 and earlier), enter how you want departments to be grouped in the location step when a patient schedules multiple appointments at one time. If not all departments have a grouping method set (for example, not all departments are in a center), departments that have the selected item set are grouped while the rest are shown individually. By default, departments are grouped by center. This setting is used only if the Location grouping method (I WDF 15115) field is set to 2-Single Department. Choose from the following options:
   - 1-Center (default)
   - 3-MyChart Scheduling Grouper
   - 4-Cadence Scheduling Grouper
   - 5-Revenue Location

Change How Patients Select Locations When Scheduling Panels

Starting in May 2022

By default, when patients schedule a panel they are asked to choose from a list of locations once, and the selection applies to all visits in the panel. To change this behavior so patients need to select a location for each visit when scheduling a panel, for example because the list of locations differs for the visits in the panel:

1. From the MyChart System Manager Menu, select Master File Entry > Panel and open a panel record.
2. Go to the Panel Setting screen.
3. Set Allow separate locations (I PRC 32038) to Yes. The default is No.

Change How Patients Select Locations When Scheduling Request Bundles

Starting in May 2022

By default, when patients schedule a request bundle, as described in the Allow Schedulers to Create Request Bundles for Patients to Schedule Multiple Appointment Requests topic, they are asked to select locations for each visit. To change this behavior so patients need to select a location once for all visits when scheduling a bundle, for example because the list of locations is shared for visits you bundle:

1. In Hyperspace, open Cadence System Definitions.
2. Go to the Appointment Requests > Ticket Bundle form.
3. Set Allow separate location selection? to No. The default is Yes.

Filter the List of Departments for Direct Scheduling

You can use an extension to filter the list of departments that patients can select when they use direct scheduling.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 4 screen.
2. In the Filter provider and department lst ext (I WDF 837) field, enter an extension of type 32060-MyChart Filter Prov and Dept Sched List. Refer to the item's help text for more information about how to format the extension.

Configure Providers for Direct Scheduling

Choose Which Providers Are Enabled for Direct Scheduling

By default, providers allow patients to schedule appointments with them (using the default settings for each visit type). However, you can prevent patients from using direct scheduling to schedule appointments with a specific provider if desired.

Considerations
If you configure your system to always let patients schedule appointments with their PCPs, patients can schedule appointments with their PCPs regardless of whether they are enabled for direct scheduling. On the Scheduling Options 4 screen in Patient Access System Definitions, the Include PCP? (I WDF 7845) field determines whether patients can always schedule appointments with their PCPs. To be able to completely exclude providers from direct scheduling, set this field to No.

1. Edit the record for the provider for whom you want to enable direct scheduling:
   - In Hyperspace, open a provider record (search: Provider) and go to the Scheduling > Online Scheduling form.
   - In text, from the MyChart System Manager Menu, select Master File Maintenance > Provider and open a provider record. Access the MyChart Settings screen.
2. In the Allow Direct Scheduling through MyChart? (I SER 32065) field, enter No to prevent patients from using direct scheduling to schedule appointments with the provider.

Alternatively, if you want to make most providers unavailable for direct scheduling (for example, if you are piloting this feature), you can reduce configuration by setting the Allow/include provider by default? (I WDF 808) field to No. If you do so, no providers are available for direct scheduling unless you configure their provider records to otherwise allow it (or if your system always lets patients schedule appointments with their PCPs).

Providers with Yes in the Allow Telemedicine Scheduling (I SER 32075 and I DEP 53150) setting appear in MyChart to patients scheduling video visits, even if they're not enabled for other types of direct scheduling.

Customize Direct Scheduling Options Related to Providers

This section includes optional tasks you can do to customize how direct scheduling work for different providers.

Choose the Provider Display Name Format for Scheduling

By default, provider names appear by the external name or the Firstname Lastname format based on the name specified in the provider's provider (SER) record if no external name is available. You can optionally change the name format to Lastname, Firstname so that providers are listed alphabetically by last name for scheduling. Using this format might help patients more easily find the provider they're looking for when there is a long list of providers to choose from, especially if they don't know the provider's first name.

To change the display name format:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Workflow Configuration screen.
2. In the Provider name display format (I WDF 15117) field, enter 2-Last Name First. The default value is 1-External Name.

Note that this setting applies only to the provider-first section of the scheduling landing page and the Provider step in direct scheduling. The provider's external name (with the fallback of the Firstname Lastname format) still appears in the subway header, the appointment slots step, and the confirmation step during scheduling, as well as in scheduling tickets and on the Appointment Details page.

Show Links to Provider Bios During Direct Scheduling

When patients get to the appointment slot selection step in direct scheduling, they can click the provider's name to access that provider's biography page. To make this work, you must define the URL for the provider's bio page in their provider record. You might have already completed this setup if you have providers who are also available for open scheduling.

To define the URL for the provider's bio page:

1. From the MyChart System Manager Menu, select Master File Entry > Provider and open a provider record.
2. Go to the first MyChart Settings screen.
3. In the Web page's URL (I SER 32060) field, enter the URL of the provider's bio page. Press Shift+F3 for extended entry if your URL is longer than the space on the screen.

Include the PCP for Direct Scheduling Only If the Patient Has a Visit in the Recent Past or Future

By default, a patient's PCP is always included in the list of available providers for direct scheduling. You can choose to include the PCP only if the patient has a past or upcoming appointment with that provider within the time range determined by the Look back on visits for and Look at future appointments for settings on the Scheduling Options 4 screen. To do so:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 4 screen.
2. In the Include PCP? (I WDF 7845) field, enter No.

Limit Scheduling to Providers with Whom the Patient Has a Recent Past or Upcoming Appointment

MyChart can allow direct scheduling with certain providers based on whether the patient has a past or upcoming appointment or a certain encounter type with that provider in a specified time frame. No-show or canceled appointments are excluded from this search. Starting in February 2022, if you have encounter filter rules configured to prevent certain encounters from appearing in MyChart as described in the Filter Appointments and Encounters Based on Rules topic, the filter rules will also remove the providers associated with those encounters from the direct scheduling landing page in the case where the filtered encounter is the only one the patient has with that provider. Also starting in February 2022, if a patient's only encounter with a provider uses a visit type that has Allow Review In MyChart (I PRC 32027) set to No, that provider will not be included in the look-back search.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 4 screen.
2. In the Look back for visits for (I WDF 7815) field, enter the number of days that the system looks back for past visits of the encounter types specified in the Enc Types for Direct Scheduling Provider List in look-back search (I WDF 7850) field. The default value is 0 days.
3. In the Look at future appointments for (I WDF 7825) field, enter the number of days that the system looks forward for future appointments. The search checks only for encounters of the type 50-Appointment. The default value is 0 days. Entering a value greater than 0 lets patients schedule additional appointments for any available appointment in this window of time, even before their first qualifying visit.
4. In the Enc Types for Direct Scheduling Provider List in look-back search (I WDF 7850) field, list the encounter types you want to be searched.

Considerations

If a patient's only encounter with a provider is one that either uses a visit type that is not enabled for direct scheduling or is scheduled in a department that is not enabled for direct scheduling, that provider will not be included in the look-back search. MyChart uses a hierarchy to determine if a visit type or department is considered enabled for direct scheduling. The hierarchy is:

1. The value of Patient Access - Sch Ovr - Sched? (I DEP 53006) for a given visit type in a department
2. The value of Patient Access - Direct Scheduling Allowed? (I DEP 53001) for a given department
3. The value of Schedule In MyChart? (I PRC 32020) for a given visit type

Prevent Patients from Scheduling Appointments in Departments in Which They Have Not Been Seen

When a patient sees a clinician who works in multiple departments, you can prevent the patient from directly scheduling an appointment with that clinician in departments in which the patient does not have a recent visit or upcoming appointment. For example, if a clinician works in both a family practice department where the patient was previously seen and an urgent care department, you can prevent the patient from scheduling an appointment with that clinician in urgent care.

To prevent patients from scheduling appointments in departments in which they haven't had a visit with a clinician:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 4 screen.
2. In the Only allow encounter departments? (I WDF 7860) field, enter Yes.

Note that this setting applies only to clinicians who are made available for direct scheduling because a patient has a past visit or future appointment with them. It does not affect clinicians who are made available for direct scheduling because they are the patient's PCP or are added by an extension.

Prevent Patients from Scheduling with Providers with No Available Time Slots

You can optimize direct scheduling so that patients are not shown providers who have no available slots for the selected visit type and dates. This feature uses scheduling blocks to determine whether to show a provider. If a particular visit type is set to use a specific block or blocks and the block restrictions cannot be overruled, providers who do not use those blocks do not appear in the list of providers a patient can choose. For information about configuring scheduling blocks, refer to the Reserving and Restricting Time in a Provider's Schedule for Specific Appointments Using Blocks topic.

You enable this setting at the system level:

1. From the MyChart System Manager Menu, select Scheduling Configuration to access the Scheduling Options 1 screen.
2. In the Block check level (I WDF 803) field, select one of the following options:
    - 0 - No checking
        - Summary: No block-specific checking is attempted. This is the default value.
        - Prerequisites: None
        - Description: Blocks are not checked, but provider templates are checked for future release dates and valid future dates for scheduling. These checks are always performed (they cannot be turned off).
    - 10 - Provider & Department master files
        - Summary: Uses the list of released blocks in the provider and department master files.
        - Prerequisites: None
        - Description: The list of blocks released in the provider record is used to determine whether the provider should be filtered. If the required block is not found in the provider record, the system looks at the list of blocks in the department record that are released for all providers. The block does not necessarily have to be used in the provider's template.
    - 20 - Reserved Blocks
        - Summary: Uses the list of reserved blocks for a provider within a department.
        - Prerequisites: None
        - Description: Checks the provider's template within a department to see if the required block is actually used in the template. It also accounts for time released blocks. Because the computation must be performed at the time of the check, it must make several passes over the data.
    - 30 - Free Blocks & Times
        - Summary: Uses the list of currently free blocks and times for the provider within a department.
        - Prerequisites: To use this level of filtering, you must use a batch process to build out provider templates for as many days into the future as patient scheduling is allowed. The batch process uses template 401 - Build ^STA in Advance.
          The batch process checks the provider's template within a department to see whether the required block is used in the template and there is an available time slot to schedule into.

This level is the most foolproof way to avoid scheduling dead ends, but it requires that certain scheduling indexes be built out as far into the future as you allow patients to schedule appointments. Normally these indexes are built on demand when a search for time slots is performed for the first time. Use the batch process referred to above to build the indexes out ahead of time.

Each level of checking is progressively more reliable, but is also progressively more complex and requires more time and system resources. It is recommended that you take into account current system performance, build, and scheduling policies when deciding whether to use this setting. Filtering based on template release dates and future templates is always performed in any case. If there is no value specified, the default value is 0-No checking.

Under the following conditions, the block level setting does not filter providers:

- The Restrict visit types by block? setting, stored in the Use Visit Type Blocks in Autoscheduler? (I SDF 8107) item in Cadence System Definitions is set to Yes.
- The visit type has no blocks associated with it.
- The Overrule for Secondary Slots setting, stored in the visit type's Block Override (I PRC 5010) item, is set to 4-Unblocked Always Allowed.
- The Allow overruling in MyChart setting, stored in the Autoscheduler Allow Overrule Pass (I WDF 847) item is set to 2-Allow Overrule and Block Override for the visit type is set to 3-Unblocked Allowed on Overrule.
- MyChart allows overruling, the Block Override for the visit type is set to 1-Overrule to Any Block, and the default Cadence user specified in Patient Access System Definitions (Hyperspace user specified in the User field on the Scheduling Options 1 screen) has block overrule security.

Limit Patients to Direct Scheduling for Certain Providers

You can configure direct scheduling so that patients can schedule appointments only with certain providers.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 4 screen.
2. In the Scheduling providers extension (I WDF 835) field, enter an extension of the type 32012-MyChart Scheduling Providers Function to determine with which providers a patient can schedule an appointment.

Allow Patients to Schedule with a Provider Team

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

You can extend the Provider Team features to your patients. If there are slots available with the appropriate team members, MyChart gives the patient an option to include the Provider Team in his search for slots during direct scheduling and, starting in November 2023, open scheduling. You have two different ways to provide Provider Team features to patients:

- Pre-Search: You can add an "Include members of the care team when possible" check box to the scheduling workflow. The check box appears on the page with the appointment slot. The behavior of the check box also depends on whether you've configured it to be pre-selected by default through the Show option before search? (I WDF 817) setting. Note that this does not apply to open scheduling.
- Post-Search: If there are no slots available when a patient searches for times with a particular provider, but there are team members available, you can add an option to the results page for the patient to search for available slots with team members.

Prerequisites
If you haven't already set up subgroups of providers that make up your Provider Teams, refer to the Create Provider Teams for Scheduling for setup information.

Considerations
In August 2023 and earlier, you cannot use Provider Teams during direct scheduling for advanced visit types. It is available starting in November 2023.

There are relevant settings at the following levels. The order in which the settings are evaluated, from most specific to most general, is as follows:

1. Visit type specified in the department (DEP) record
2. Department record
3. Visit type record
4. Patient Access System Definitions

If there are no settings at any level, Provider Team features are disabled by default.

Enable Provider Team Features at the Department Level

You can determine whether providers in particular departments can be considered for Provider Team features. You can further configure Provider Team features by limiting them to certain visit types within the department. This is the most specific level that is considered when determining whether a provider's team members can be included in a list of available slots for direct scheduling.

1. From the MyChart System Manager Menu, select Master File Entry > Department and edit a department.
2. Access the Online Scheduling Settings 1 screen.
3. In the Allow teams (I DEP 53004) field, select one of the following options to define the default settings for the department:
   - 0-No Team Scheduling. Team scheduling cannot be used for this department.
   - 1-PCP Only. Team scheduling can be used for this department, but only teams associated with the patient's PCP.
   - 2-All Providers. Team scheduling can be used within this department, and the teams associated with all available providers are considered when searching for team members.
4. In the Visit Type Overrides table, you can override the default settings for specific visit types. Each row defines settings for a different visit type.
   a. In the Visit Type (I DEP 53005) column, enter a visit type.
   b. In the Teams? (I DEP 53009) column, select a scheduling option.

Enable Provider Team Features for Visit Types

You can determine whether providers can be scheduled using team scheduling using a particular visit type.

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. Access the Scheduling Settings 1 screen.
3. In the Allow team scheduling (I PRC 32024) field, select one of the following options to define the default

settings for the department:

  - 0-No Team Scheduling. Team scheduling cannot be used for this visit type
  - 1-PCP Only. Team scheduling can be used for this visit type, but only teams associated with the patient's PCP
  - 2-All Providers: Team scheduling can be used within this visit type, and the teams associated with all available providers are considered when searching for team members to schedule with.

Enable Provider Team Features at the System Level

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 5 screen.
2. To set up team scheduling system-wide, enter Yes in the Allow provider teams (I WDF 816) field.
3. In the Show option before search? (I WDF 817) field, choose from the following options to determine whether the "Include members of the care team when possible" check box appears before the search and whether it is selected by default:
   - No. The check box does not appear before the search. This is the default value.
   - Yes - Unchecked by Default. The check box appears before the search and is not selected by default.
   - Yes - Checked by Default. The check box appears before the search and is selected by default.

Note that you must recycle the web server for the changes to take effect.

Group Visit Types to Reduce Clutter on the Scheduling Landing Page

Starting in August 2023

Scheduling groupers help patients more easily find the right appointment to schedule by grouping similar visit types on the scheduling landing page. We recommend that you run the Build Wizard to enable scheduling groupers unless you meet either of these criteria:

- Your organization has fewer than five reasons for visit enabled for direct scheduling in the Reasons for Visit (I WDF 15000) field in Patient Access System Definitions and they don't include decision trees or visit type questionnaires to swap visit types. In this case, it's likely that patients can already easily find the right appointment.
- You offer care only for one specialty, in which case you likely don't have enough options to make grouping worthwhile.

We've released 51 scheduling groupers, so you don't need to make your own. After you turn on scheduling groupers, groupers for Primary Care, Obstetrics and Gynecology, Urgent Care, Labs, and Imaging appear under the “Tell us why you're coming in” section on the landing page. This helps patients find the most common reasons for visit quickly and also helps provide a consistent experience for patients across organizations. All groupers with configured scheduling options appear within the All Options button, which helps declutter the scheduling landing page and provides more logical grouping for patients. If you don't configure a grouper with scheduling options, or if a scheduling grouper has reasons for visit but the visit type is restricted to the patient, the scheduling grouper is hidden from the patient so they aren't presented with an option that they can't act on.

If your organization has a popular reason for visit, you can include it directly on the scheduling landing page by adding it to the root grouper with the MyChart Scheduling Grouper Builder activity. Scheduling groupers can also include other groupers. For example, an immunization grouper that includes COVID-19 Vaccine and MMR Vaccine reasons for visit can appear within the Primary Care grouper. This helps patients more easily find options that might be related or similar. Additionally, you can customize other elements of scheduling groupers, such as their patient-facing description and the icon that appears next to the grouper name.

If you use open scheduling in a post-login context, open scheduling options automatically appear within scheduling groupers, as long as you have mapped your custom specialties to the appropriate standard Epic specialties, as described in the Map Custom Specialties to Standard Values topic. This mapping determines which open scheduling options appear in which scheduling groupers.

To see how scheduling groupers are configured in the Foundation System, log in to the Foundation Hosted environment as your organization's MyChart administrator and open the 1-Root Grouper scheduling grouper (search: MyChart Scheduling Grouper Builder).

Make Sure Users Have Security to Configure Scheduling Groupers

To access the administrative activities for configuring scheduling groupers and the Build Wizard, you need security point 50-Edit Scheduling Groupers. All security classes with security point 29-MyChart Universal Admin Login automatically include security point 50. If additional users need security, update their MyChart security class:

1. In Hyperspace, open the Security Class Editor (search: Security Class Editor) and open a class with an application of MyChart - Hyperspace User security class.
2. In the Security Points form, click the corresponding button in the Active column for security point 50-Edit Scheduling Groupers.

Set Up Scheduling Groupers

> You can use the Build Wizard to associate your reasons for visit with different scheduling groupers. In Hyperspace, open the Build Wizard (search: Build Wizard) and search for feature 320015-Add Reasons for Visit to Schedule Groupers (application: MyChart).

To manually set up scheduling groupers or adjust settings after running the Build Wizard:

1. In Hyperspace, open the MyChart Scheduling Grouper Builder activity (search: MyChart Scheduling Grouper Builder).
2. Open 1-Root Grouper or create a new custom root grouper for different MyChart patient profiles.
3. Select the All available groupers tab and select a grouper.
4. In the Reasons for Visit (I MAG 400) field, list the reasons for visit that should be included under the scheduling grouper. Any reasons for visit in this field must be listed in the Reason for Visit (I WDF 15000) column in Patient Access System Definitions.
5. Repeat steps 2-3 until you've associated all your reasons for visit with a scheduling grouper.
6. In Text, from the MyChart System Manager Menu, select Scheduling Configuration, and go to the Scheduling Menu Configuration screen.
7. In the Scheduling Landing Page Menu (I WDF 15600) field, enter 1-Root Grouper.

Make Additional Options Available Directly from the Scheduling Landing Page

You can customize which groupers and reasons for visit are included directly on the scheduling landing page. For example, you can include your most popular reason for visit to help patients quickly find what they need or include your reason for visit for a flu shot during a seasonal flu shot campaign. We recommend keeping the number of groupers and reasons for visit that appear directly on the scheduling page to a minimum to make it easier for patients, so they don't have to scroll to find scheduling options when using MyChart on their phone.

1. In Hyperspace, open the MyChart Scheduling Grouper Builder activity (search: MyChart Scheduling Grouper Builder) and open 1-Root Grouper.
2. In the Reasons for Visit (I MAG 400) field, enter the reasons for visit that you want to include directly on the scheduling landing page under Tell us why you're coming in. For example, include your most popular reason for visit can help most patients quickly find what they need or include your reason for visit for a flu shot during a seasonal flu shot campaign. We recommend listing no more than a few reasons for visit to make sure the landing page remains simple and easy for patients to navigate. Any reasons for visit in this field must be listed in the Reason for Visit (I WDF 15000) column in Patient Access System Definitions.
3. In the Standard Specialties (I MAG 200) field, list specialties that should have new provider scheduling options appear directly within the grouper.
4. In the Sub-Groupers (I MAG 500) field, enter specialty groupers that you want to appear directly on the scheduling landing page under Tell us why you're coming in. By default, this field includes 36-Primary care and 19-Immunizations.

Customize Scheduling Groupers

You can customize elements of a scheduling grouper, such as the icon, display name, and description, to make it match your organization's scheduling needs. You can also organize specialty groupers within other specialty groupers. For example, you can add the Immunizations grouper under the Primary Care grouper to make it easy for patients to schedule their flu shot.

To customize a specialty grouper:

1. In Hyperspace, open the MyChart Scheduling Grouper Builder activity (search: MyChart Scheduling Grouper Builder) and open 1-Root Grouper.
2. Select the grouper you want to edit in the grouper tree table. Use the All available groupers tab to view all scheduling groupers if the grouper you want to edit isn't directly in the root grouper.
3. In the Display name (I MAG 100) field, enter the patient-facing name for the scheduling grouper, which appears on the specialty button and on the specialty grouper page before the released name of the grouper.
4. All groupers have default icons, which you can see in the Change Images on the Scheduling Buttons topic. If you want to use a different icon, enter an icon in the MyChart icon (I MAG 110) field.
5. Optionally, if you want to use a custom image, enter an absolute URL or the file name for an image located in the [locale]/images folder on the MyChart web server in the Custom image file (I MAG 111) field. Supported file extensions are .jpg, .jpeg, .png, and .svg.
6. In the Description (I MAG 120) field, enter the patient-facing description for the grouper. We recommend keeping this description short, so the description is easily read. Some groupers have descriptions by default to help patients understand clinical names.
7. In the Standard Specialties (I MAG 200) field, add additional specialties that should have new provider scheduling options appear directly within the grouper. If you make updates to open scheduling options, you need to clear the cache to have your changes appear in MyChart. To clear the cache:
    a. From the MyChart System Manager Menu, go to System Utilities > Scheduling Utilities > Clear Provider Finder and Open Scheduling Cache.

b. Enter Yes to continue.

8. In the Sub-Groupers (I MAG 500) field, enter additional specialty groupers that should be included.

Give Patients Security for Direct Scheduling

Add the following security points to your patient access classes to give patients access to direct scheduling features:

- 16-Make Appointment. Gives patient access to direct scheduling.
- 67-Provider Details. Gives patient access to Provider Information from the scheduling feature, if you've enabled it. For more information, refer to the Add Provider Information to Direct Scheduling topic.
- 25-Driving Directions. Gives patient access to Driving Directions from the scheduling feature, if you've enabled it. For more information, refer to the Let Patients View Driving Directions to a Clinic topic.

To add the security points:

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and enter the appropriate security points.

Configure Other Direct Scheduling Features

This section has steps for customizing direct scheduling, including enabling additional features, defining rules for when appointments can be scheduled, and other options.

Filter Advanced Visit Types by Service Areas

Starting in May 2024

When a patient accesses direct scheduling, the visit types and slots presented to them can be filtered based on those that are available in a specified service area. This can help you make sure patients only see scheduling results from Community Connect affiliates that are applicable to them. If you want to limit service areas for all patients, you can apply service area filtering to the MyChart profile used by your patients. If you would rather filter service areas based on the affiliate organizations your patient uses, you can apply service area filtering based on an affiliate site ID or based on the service areas allowed in a patient's record. For effective filtering, make sure that the Cadence default user for MyChart is authorized for all relevant service areas.

If you want to limit service areas for all patients, you can apply service area filtering using the MyChart patient profile.

1. From the MyChart System Manager Menu, access Patient Profile Settings.
2. Open your patient profile and navigate to the Affiliate Scheduling Settings 1 screen.
3. To filter the scheduling options available for your patient, list the service areas the patient is authorized to schedule in the Service Areas item (I WDF 12670).

If your organization has affiliates that share the same MyChart site ID, you can filter the service areas a patient can see to those allowed in the patient's record. You can determine which service areas are linked to the patient record using the Service Areas activity in Hyperspace (I EPT 5635).

1. Access the Login and Access Configuration System Definitions and navigate to the Affiliate Scheduling Filtering Settings 2 screen.
2. To filter a patient's scheduling options on a given MyChart site by the service areas linked to their record,

set Filter by Patient SAs? (I WDF 2586) to Yes.

If your organization has affiliates that do not share the same MyChart site ID, you can filter the service areas a patient can see to only those associated with the affiliate site.

1. From the MyChart System Manager Menu, open the Login and Access Configuration System Definitions.
2. Navigate to the Affiliate Scheduling Filtering Settings 2 screen and make sure that the affiliate site is listed there. The site should automatically be listed here when it is added to the Affiliate Settings table.
3. To make sure a patient sees scheduling options limited to the service area of the affiliate site, set Filter by Site ID SAs? (I WDF 2585) to Yes.

Applying both site ID and patient record filtering restricts patients to seeing only scheduling options in service areas that are both associated with the affiliate site and allowed in their patient record.

Use Geolocation for Direct Scheduling

Geolocation features in direct scheduling make it easier for patients to choose a convenient location when making appointments. Patients can filter scheduling options for departments within a defined radius and can see the distance from their location to each department.

When a patient reaches the Locations step in direct scheduling, they can use the following options to filter to nearby locations:

- All
- Near Me. This option appears only if the patient has allowed their web browser or mobile device to access their location settings.
- Near Home. This option appears only if your organization has geocoded the Patient (EPT) master file.
- Near ZIP Code

Locations appear in order of proximity. When the patient selects more than one location, the location address and distance also appear with the appointment slots in the Time step of direct scheduling.

Prerequisites
To use geolocation during direct scheduling, direct scheduling departments must be geocoded with latitude and longitude coordinates. You might have already completed this setup if you use geocoding for Provider Finder or another MyChart feature, such as open scheduling, On My Way, or Hello Patient. For more information, refer to the Geodata Setup and Support Guide.

Geolocation for direct scheduling relies on settings that are used for geolocation during open scheduling. For more information, refer to the Use Geolocation to Help Patients Schedule in Nearby Departments topic.

Determine Whether Patients Can Reply to Appointment Notifications

By default, conversations for appointment notifications in MyChart allow replies from patients. This behavior applies to messages sent as:

- Cadence appointment notifications. When an appointment is scheduled, canceled, changed, rescheduled, or missed, Cadence sends a notification to MyChart based on the patient's preferences.
- Surgical case reminders. When a patient has an upcoming surgery, you can send reminders to help the patient prepare for it.

We recommend either setting up In Basket pools and training users on how to respond to patient replies to these messages or preventing patients from sending replies to appointment-related notifications. Preventing replies can be done either at the system level or for specific departments. In the Foundation System, we have done so at the system level to reduce In Basket clutter. Note that with this configuration, patients can still reply to the conversation if a Hyperspace user replies to it first.

To prevent replies at the system level:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Options 1 screen.
2. In the Allow replies to MyChart messages? (I WDF 844) field, enter No.

To prevent or allow replies at the department level:

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Go to the Online Scheduling Settings 2 screen (Direct Scheduling Settings 1 in August 2024 and earlier versions).
3. In the Allow replies to MyChart Messages? (I DEP 53865) field, enter Yes or No, depending on how you want to override the system-level behavior defined in the Allow replies to MyChart messages? (I WDF 844) field.

If you choose to allow replies at the department level, you need to associate a scheduling pool in that department's message routing:

1. From the MyChart System Manager Menu, select Master File Entry > Department
2. Open the department record.
3. In the Default Scheduling (I DEP 53000) field, enter the scheduling pool of users who can respond to the patient's message.

Manage Scheduling Options for Employee Health

Employee health organizations can determine the providers with whom a patient can directly schedule an appointment through MyChart based on the patient's employer. This option allows patients to schedule appointments with any provider at their employer site regardless of whether they have an established PCP relationship or have had a previous visit with a provider.

For example, Mary works at Widget World and wants to schedule her first internal medicine visit at the Widget World internal medicine site. When Mary goes to the Schedule an Appointment page in MyChart and selects a visit type, the scheduling pool includes all available providers at Widget World. Mary can choose a provider to confirm the provider's availability and directly schedule her appointment, even though she hasn't seen this provider in the past.

To determine who a patient can schedule with, the system first looks at the Employer (I EPT 5100) field in the patient's record. The system then checks whether the employer in that field is in the Location's Employers List (I EAF 32300) field in the location record. Next, the system identifies all the departments with that revenue location in the Revenue Location (I DEP 4001) field. If one of these departments is in the Departments (I SER 40) list in a provider's record, that provider is available for direct scheduling in MyChart.

When the following configuration is used, only patients with employers in the list can directly schedule appointments in the location through MyChart. These setup instructions assume that the Patient Employer format (I EAF 6410) field is set to Link to EEP database in the facility record.

1. From the MyChart System Manager Menu, select Master File Entry > Location.
2. Open a location record and access the MyChart Settings screen.
3. In the Location's Employers List (I EAF 32300) field, enter a list of employers associated with this location.
4. Return to the MyChart System Manager Menu and select Scheduling Configuration.
5. Go to the Scheduling Options 4 screen.
6. In the Scheduling providers extension (I WDF 835) item, enter extension 32226-MyChart - Employer Provider Lookup.
7. Verify that the Only allow encounter departments? (I WDF 7860) field is set to Yes.

Verify Personal and Insurance Information During Direct Scheduling and On-Demand Video Visits

You can ask patients to verify personal and insurance information when they use direct scheduling. This helps you keep your patient records up to date. Any changes made by the patient are applied when the appointment is successfully scheduled.

Starting in February 2023, these settings apply to scheduling and on-demand video visit workflows. In November 2022 and earlier, these settings apply only to scheduling workflows.

Prerequisites

To verify their personal and insurance information during direct scheduling, patients must have the following security points in their patient access classes:

- 6-View/Edit Personal Information
- 46-Insurance
- 280-Registration Insurance Updates (127-Update Insurance in May 2024 and earlier)
- 213-View/Edit Sex at Birth, Sexual Orientation, and Gender Identity

Refer to the Collect Patient Demographics and Personal Information topic for detailed instructions on configuring demographics verification. Demographics verification speeds up the check-in process for both patients and staff who verify this information.

To confirm insurance verification is on:

1. From the MyChart System Manager Menu, select Login and Access Configuration and access the Patient Information Options screen.
2. In the Insurance frequency (I WDF 5405) field, enter how often in days that patients should be required to verify their insurance information. If this setting is set to 0, the insurance verification step always appears. If this setting is blank, the step never appears.

By default, demographics (personal information) and insurance verification are not included in the scheduling workflow. If you use demographics and insurance verification during eCheck-in, you might want to leave these features turned off for scheduling to speed up the scheduling process.

If you want to include these verification steps in scheduling and on-demand video visit workflows:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Workflow Configuration screen.

2. In the Verification steps (I WDF 15100) field, enter Demographics, Insurance, or both.

Customize the Date Range for Scheduling Appointments

You can determine how far in advance of a date a patient can schedule an appointment, to prevent patients from creating appointments at times that interfere with your scheduling needs. You can also exclude weekends and holidays from the scheduling range offset, which might be useful if you need to give scheduling staff a certain number of business days before a visit follow up on appointments scheduled through MyChart. Holidays to exclude from scheduling are those that are defined for departments as described in the Apply Holidays to Departments section of the Account for Holidays in Your Schedules topic.

Considerations
The settings that control the range of dates and times that appear as a patient's available choices for direct scheduling are also used for other scheduling features, including rescheduling, care team scheduling, mobile scheduling, and open scheduling. If your departments are usually fully scheduled in advance, you might consider setting the date offset to start at a time when schedules are usually open. For example, if your clinics are scheduled two weeks in advance, set the first date in the offset to 14 to indicate that earlier times are usually not available and to prevent patients from being frustrated when they are unable to find an opening at an earlier time. If you want to allow next-day scheduling using an offset of 1 day, you might choose to exclude weekends in the Days to exclude in offset setting so that a patient can't schedule a Monday appointment over the weekend when scheduling staff can't review it.

These settings rely on a four-tier hierarchy that looks to the department visit type override, department, visit type, and system settings, respectively.

To configure the range of dates available for a specific visit type within a specific department:

1. From the MyChart System Manager menu, select Master File Entry > Department and open a department record.
2. Go to the Direct Scheduling Settings 1 screen.
3. Complete the Visit Type Overrides table, making sure to specify a number of days in the Days From (I DEP 53007) and Days To (I DEP 53008) fields. If you use redesigned scheduling, you can use also specify the date offset in minutes (I DEP 53270) to further refine the scheduling window and choose whether weekends and holidays are excluded from the scheduling range offset (I DEP 53014).

If you do not define a range of dates available for a specific visit type at the department level, the system uses the department's default range of dates. To configure the default range of dates available for a department:

1. From the MyChart System Manager menu, select Master File Entry > Department and open a department record.
2. Go to the Direct Scheduling Settings 1 screen and add the desired number of days in the From (I DEP 53002) and To (I DEP 53003) fields. If you use redesigned scheduling, you can use also specify the date offset in minutes (I DEP 53230) to further refine the scheduling window.
3. In the Days to exclude in offset (I DEP 53013) field, specify whether the scheduling range offset in the department record should exclude weekends, holidays, or both. By default neither weekends nor holidays are excluded and calendar days are used.

If you do not define a default range of dates for a department, the system uses the visit type's default range of dates. To configure the default range of dates available for a visit type:

1. From the MyChart System Manager menu, select Master File Entry > Visit Type and open a visit type record.
2. On the Scheduling Settings 1 screen, add the desired number of days in the From (I PRC 32022) and To (I PRC 32023) fields. If you use redesigned scheduling, you can use also specify the date offset in minutes (I PRC 32021) to further refine the scheduling window.
3. In the Days to exclude in offset (I PRC 32028) field, specify whether the scheduling range offset in the visit type record should exclude weekends, holidays, or both. By default neither weekends nor holidays are excluded and calendar days are used.

If you do not define a default range of dates for a visit type, the system uses the system-level default range of dates. To configure the range of dates available at the system level:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Options 1 screen.
2. In the Date offset to schedule appointments (I WDF 810 and I WDF 815) fields, specify the minimum and maximum number of days in the future that patients can view open slots and make appointments. For example, if you specify "5 days to 30 days," patients can schedule appointments no closer than 5 days and no later than 30 days in the future. If you use redesigned scheduling, you can use also specify the date offset in minutes (I WDF 15120) to further refine the scheduling window. You might use this setting to support same-day appointment scheduling (for example, to allow patients to schedule an appointment as long as it's at least 60 minutes out).
3. In the Days to exclude in offset (I WDF 15125) field, specify whether the system-level scheduling range offset should excluded weekends, holidays, or both. By default neither weekends nor holidays are excluded and calendar days are used.

Note that for the date offset, the days from and to and the minutes from are taken as a group, meaning the number of minutes is added to the from days value. If one level in the hierarchy defines the from day and not the to day, then the default value is used to determine the to day. For example, if you enter 30 for minutes and 1 for day and today is 6/16/2018 at 1:30 PM, patients can schedule appointments starting 6/17/2018 at 2:00 PM. If the minutes field is left empty, patients can schedule appointments starting at midnight of the first available day. The Days to exclude in offset setting is always taken from the same level of the hierarchy as the offset that is used.

Require or Customize the Character Limit for Patients Comments During Direct Scheduling

During direct scheduling, patients can enter a comment about the appointment they are scheduling. By default, a comment is not required, but you can require patients to enter one with system-level configuration described below. If appropriate, you can override the comment behavior for individual visit types by following the steps in the Disable Reason for Visit for a Specific Visit Type topic.

Patients can enter up to 500 characters for the comment by default, but you can change the character limit if you choose. If you require comments, you might consider increasing the limit so that patients have enough space to enter required information. However, keep in mind that the comment the patient enters appears in the Appointment Notes column for the appointment in many locations in Hyperspace, such as the Appointment Desk and Department Appointments Report in Cadence, so you might not want to make the character limit too high.

Configure Comments Options

To determine whether comments are required during direct scheduling or change the character limit:

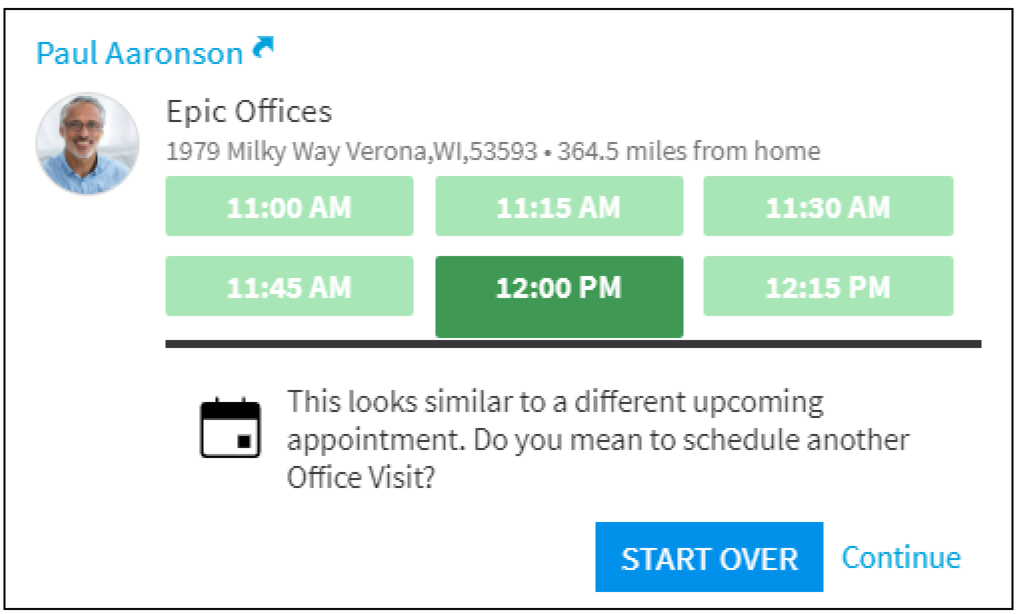
1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Workflow Configuration screen.
2. In the Ask and require comments (I WDF 15110) field, choose the option for the behavior you want regarding comments:
   - 0-Ask Comments. Patients are presented with the comments field but it is not required. This is the default value.
   - 1-Ask and Require Comments. Patients are required to enter comments.
   - 2-Don't Ask Comments. Patients don't have the option to enter comments.
3. In the Maximum length for comments (I WDF 15111) field, enter the maximum length for comments. The default and maximum value is 500 characters.

Restrict Patients from Direct Scheduling Duplicate Appointments

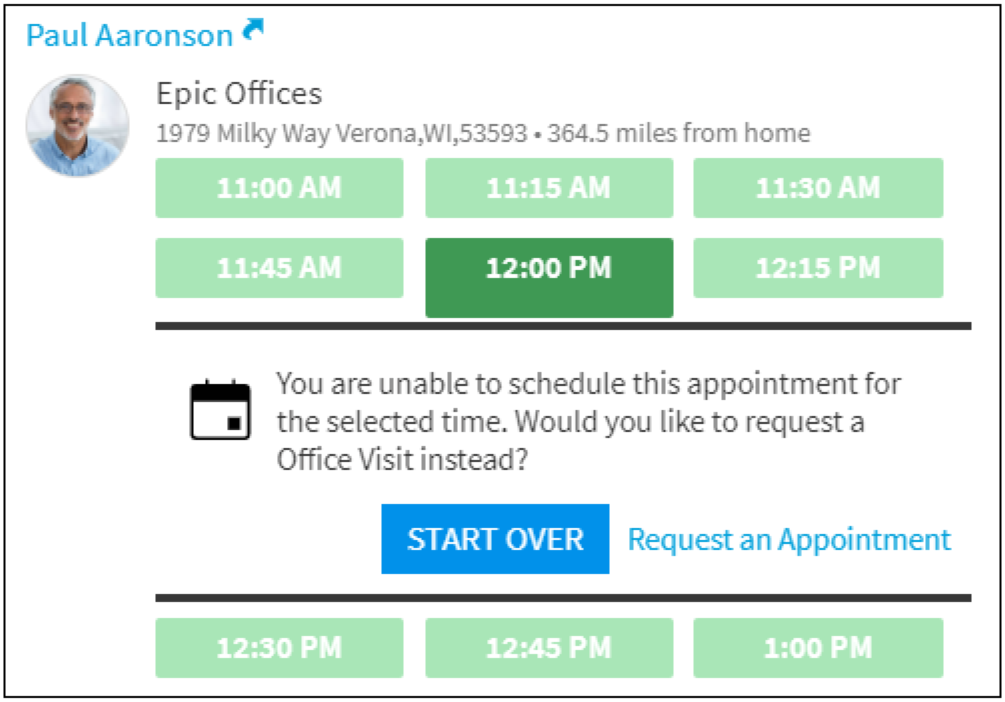
Dissuade patients from scheduling duplicate or unnecessarily frequent appointments using MyChart direct scheduling.

By default, patients see a warning if they try to make an appointment of the same visit type and in the same department on the same day. This discourages patients from, for example, scheduling multiple appointments with the provider on the same day and only showing up to one of them.

With a warning, the patient can still move forward with scheduling and they must enter a comment in the confirmation step that explains why they're scheduling the visit. You can also configure the system so the patient is prevented from scheduling the visit.



If you prevent scheduling and the visit type is enabled for scheduling requests, the patient can still submit the request for the visit.



To enable a duplicate warning, you need to select a range of days in which appointments are considered duplicates. While the recommended configuration is to consider at least same-day appointments in the same department and with the same visit type duplicates, you can also extend the time range in which appointments are considered duplicates. You can also specify additional criteria that flag them as duplicates, such as having both the same provider and visit type.

To change the range of days in which appointments are considered duplicates and show a warning to patients during scheduling:

1. In Hyperspace, go to the Epic button and click Admin > Schedule Admin > Master File Edit and select Visit Type or Panels.
2. Open the visit type or panel you'd like to modify and go to the Online Scheduling form.
3. In the Days to warn when scheduling duplicate (I PRC 32031) field, enter a number of days 1-30. If you also plan to configure the Days to prevent scheduling duplicate (I PRC 32032) field to prevent patients from scheduling the appointment, the number of days during which you show a warning must be higher.

To prevent the patient from scheduling the duplicate appointment, instead of showing a warning they can advance through, you need to set the range of days in which appointments are considered duplicates that can't be scheduled:

1. In Hyperspace, go to the Epic button and click Admin > Schedule Admin > Master File Edit and select Visit Type or Panels.
2. Open the visit type or panel you'd like to modify and go to the Online Scheduling form.
3. In the Days to prevent scheduling duplicate (I PRC 32032) field, enter a number of days 0-7. The value you specify here must be lower than the value in the Days to warn when scheduling duplicate (I PRC 32031) field.

To change the criteria that determines which appointments are considered duplicates:

1. In Hyperspace, go to the Epic button and click Admin > Schedule Admin > Master File Edit and select Visit Type or Panels.

2. Open the visit type or panel you'd like to modify and go to the Online Scheduling form.
3. In the Consider appointment duplicate if same (I PRC 32033) field, select the criterion to use to determine whether an appointment is a duplicate and should therefore show the warning to the patient scheduling it or prevent them from scheduling it within the number of days above. Available criteria are:

- Same visit type
- Same visit type and department
- Same visit type and provider
- Same visit type, department, and provider
- Same visit type and department specialty

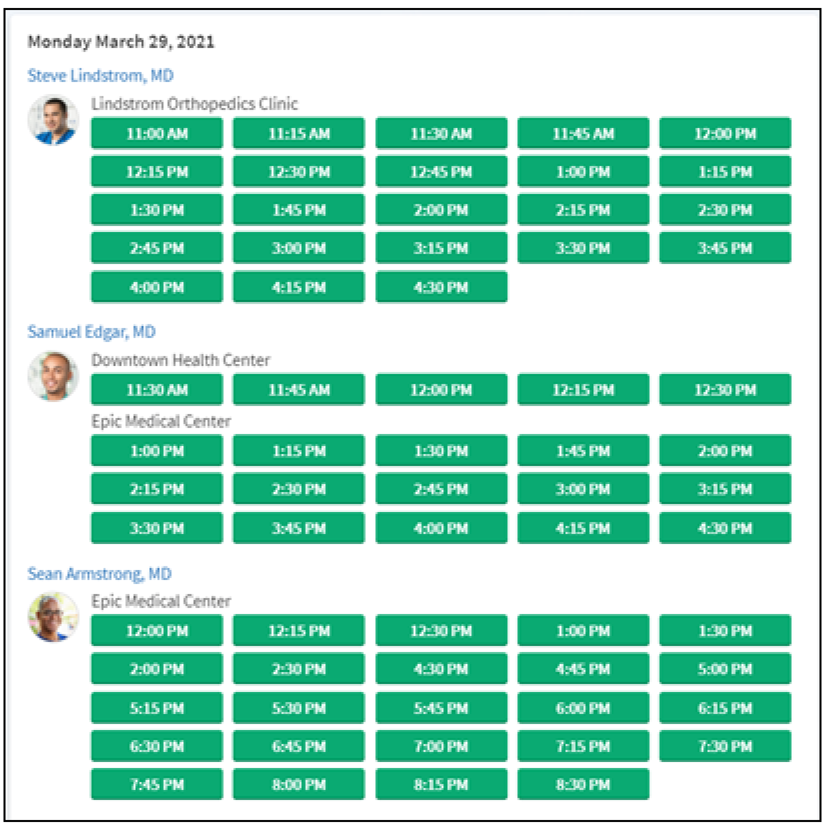
Allow Patients to Schedule with a New Provider

Patients can directly schedule appointments with providers enabled for open scheduling the same way they schedule appointments with providers enabled for direct scheduling. While this feature behaves like direct scheduling for patients, it relies on open scheduling being enabled. Refer to the Determine Whether Patients Can Schedule with a New Provider topic for setup instructions.

Sort Appointment Slots by Provider Availability

To show a patient who is scheduling an appointment the earliest available time slot, you can sort slot search results by provider availability rather than alphabetically by provider name. With this option, which is enabled in the Foundation System, the first provider listed is the provider with the earliest appointment open on that day. Note that with this option, all slots for a day load at once rather than incrementally, which could lead to patients experiencing longer times to load slots.

Sorting by availability does not apply to slot searches done using "Find a new provider."



To configure sorting by availability:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Options 5 screen.
2. In the Sort providers by availability? (I WDF 15146) field, enter Yes.

Show the Department Phone Instead of the Appointment Phone in MyChart

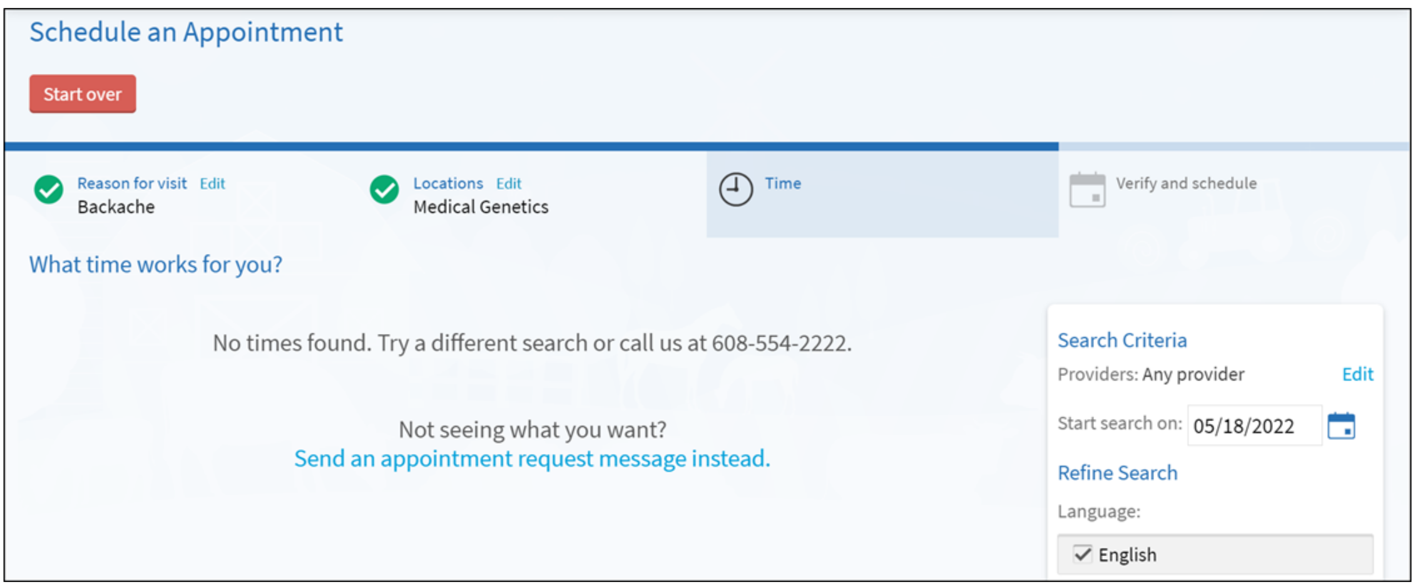
Starting in November 2022

You can use the department phone and appointment phone numbers for varying purposes in MyChart. The related items, Department phone (I DEP 150) and Appointment phone (I DEP 5060), are meant for general calls related to a specific department and calls related to appointments within the department, respectively.

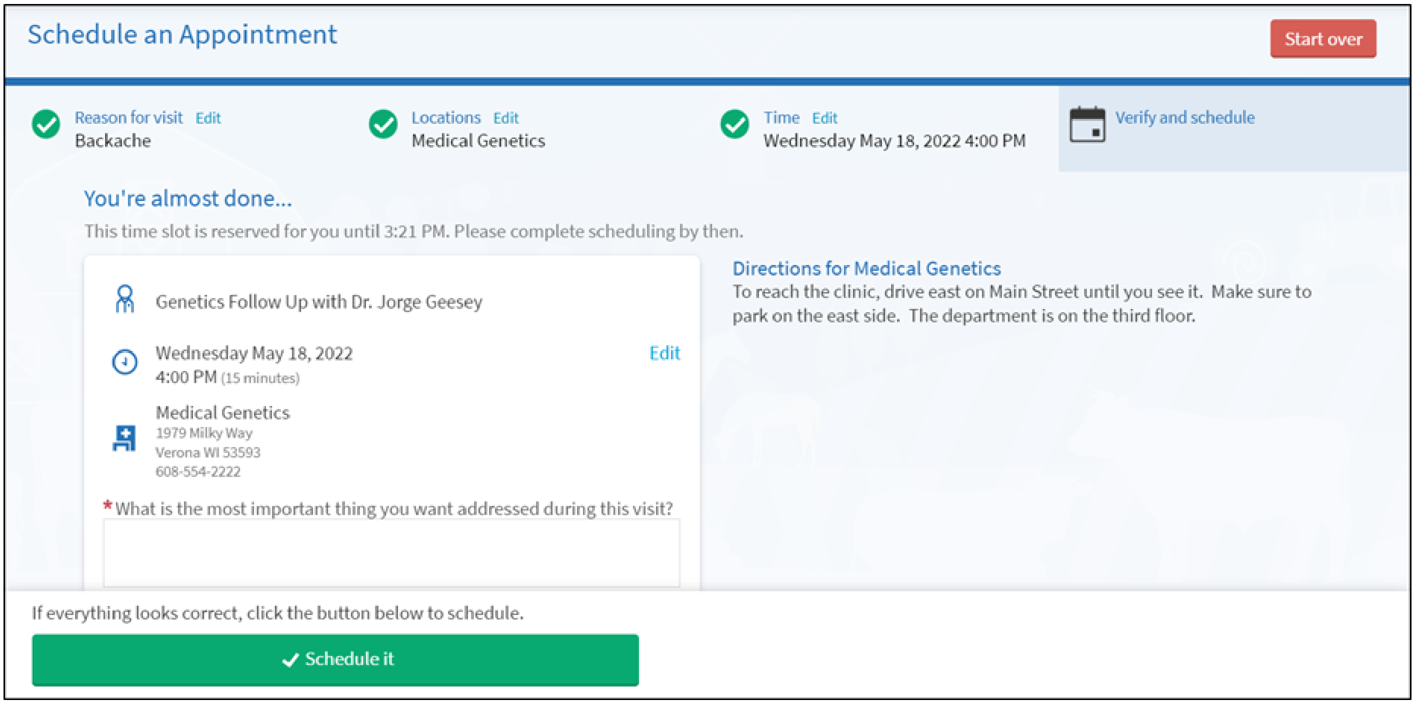
If you want to show the department phone number instead of the appointment phone number in MyChart, you can configure the Override department appointment phone (I WDF 15180) field to do so. This option can be useful when the appointment number is not used for all appointment needs or you don't have a clear distinction between a general department number and an appointment number.

This field is respected only in the following two places in MyChart:

- When scheduling an appointment and no slots are found:



- On the confirmation screen before scheduling an appointment:



To show the appointment phone number instead of the department phone number in these places:

1. In Chronicles, open the Department (DEP) master file and open the department you want to edit.
2. In the Phone # and Appt # (I DEP 150 and I DEP 5060) fields, enter the different phone numbers for the department and for scheduling appointments.
3. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Options 3 screen.
4. In the Override department appointment phone? (I WDF 15180) field, enter Yes.

MyChart Scheduling Setup: Ticket Scheduling

Ticket scheduling limits patients to scheduling appointments that their providers expect them to schedule. You can allow users to manually release scheduling tickets for certain types of visits or procedures, or you can configure the system to automatically generate scheduling tickets when a clinician orders a certain procedure or lab test.

We recommend using order-based ticket scheduling for follow-up orders. The date range, telehealth mode, and provider selection can be automated using order questions, decision trees, and Smart Pool logic. If the patient needs to complete prerequisites before scheduling a procedure, rule logic can prevent the system from sending the ticket to the patient until those prerequisites have been completed. Scheduling can also be delayed a certain number of days to allow time for authorization to be completed if needed.

To allow patients to schedule appointments from tickets in MyChart, you must have the MyChart - Make Appointment Using Ticket license, which is included in the standard MyChart license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Ticket scheduling in MyChart automatically uses Cadence's appointment request framework.

Starting in February 2022, you can allow patients to view pending appointment requests from Hyperspace by enabling a filtering rule in Patient Access System Definitions. Refer to the Customize Pending Appointment Requests on the Appointment and Visits Page topic for more information.

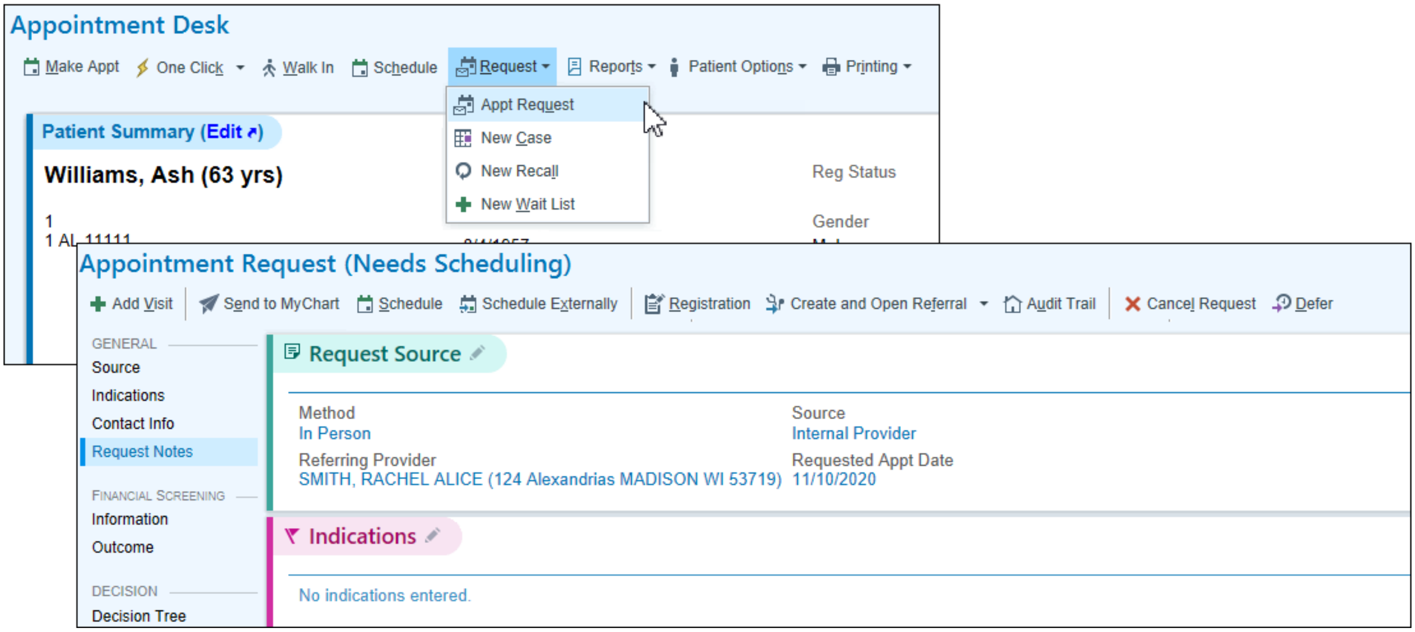
There are three ways to release Cadence appointment requests to MyChart so the patient can schedule:

- From a message: A provider or scheduler sends a message in MyChart that includes the appointment request.
- From an order automatically: The system generates an appointment request based on the order, allowing the patient to schedule without any help from scheduling staff. Refer to the Automatically Generate Scheduling Tickets for Procedures topic for more information.
- Manually: A scheduler releases the appointment request from Appointment Desk on an ad hoc basis.

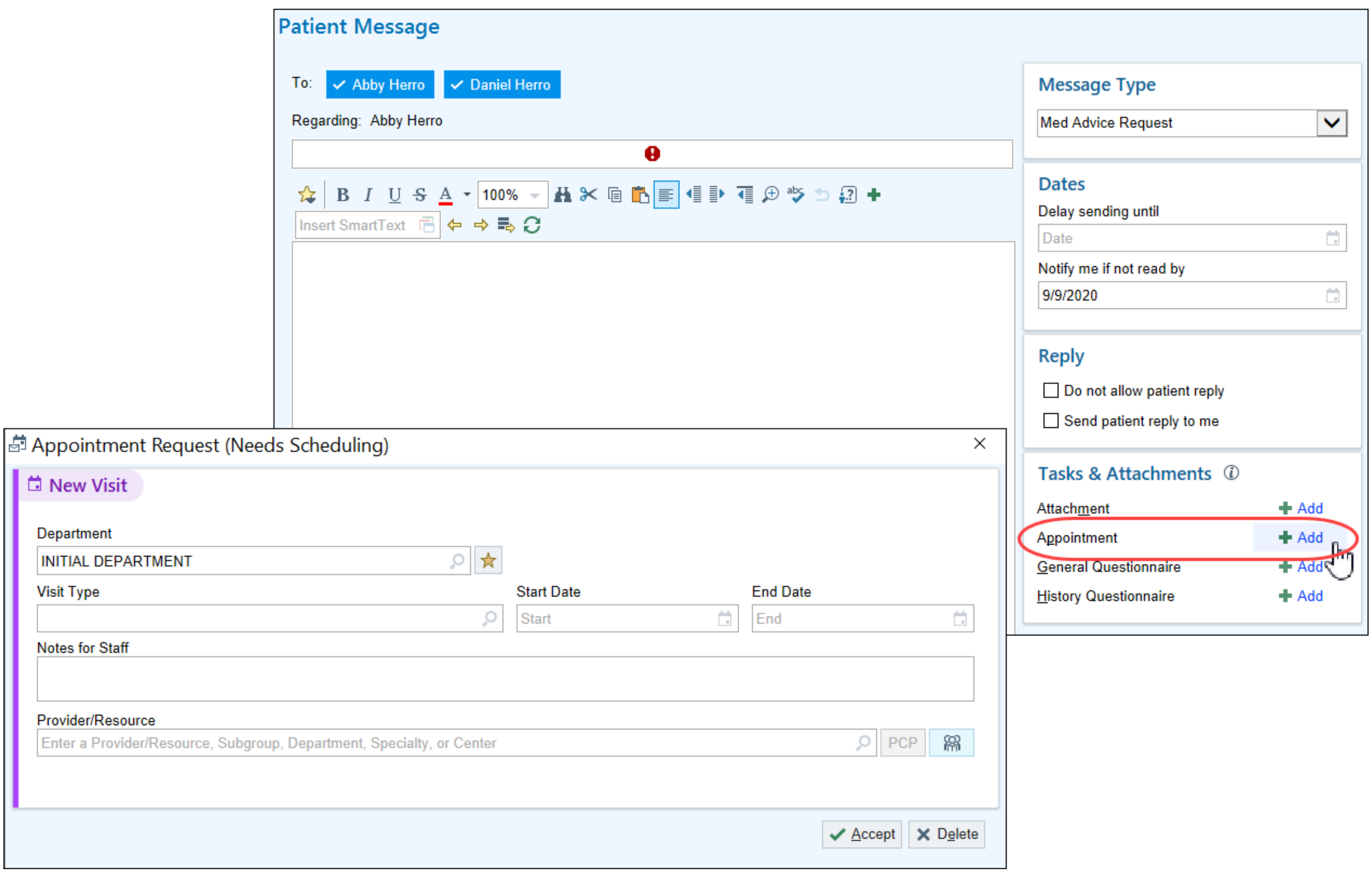
! The following types of Cadence appointment requests can't be released to MyChart for scheduling:

- Requests for Inpatient orders.
- Requests for dental treatment visits (in May 2021 and earlier).
- Requests for standing orders or a medication orders with multiple doses (in August 2021 and earlier).

From the Appointment Desk, schedulers and front desk staff can create new appointment requests and release them to MyChart.



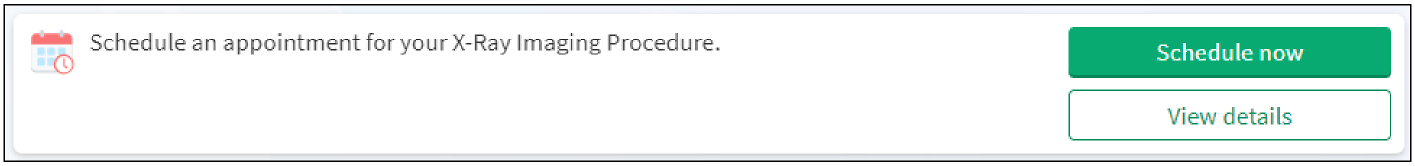
Providers and front desk staff can also attach appointment requests to patient messages.

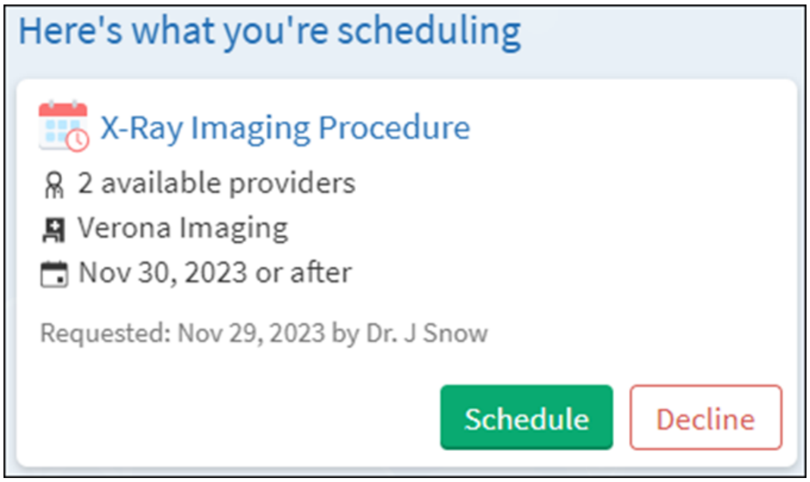


To use the message attachment or manual options, you must have the Cadence Appointment Requests license, which is included in the standard Cadence license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

After a ticket is created, a tickler is sent to notify the patient that a new scheduling ticket is available. You can also include an alert on the MyChart home page to prompt the patient to use the ticket after logging in. If you use the redesigned MyChart home page, a scheduling ticket health feed card appears. Scheduling tickets also appear on the top of the scheduling landing page.

Starting in August 2023 and May 2023 with special updates E10503617 and C10503617, a label of "Complete on or around @MYCHART@ExpectedDate@" appears for upcoming orders on health feed cards and in the Scheduling activity. Seeing the expected date encourages patients to schedule their appointments earlier rather than waiting for the expiration date. In earlier versions, the expiration date is shown instead of the expected date. For additional information, see the Customize Display Options for Upcoming Orders in MyChart guide.





To allow release to MyChart, the following must be true of the Cadence appointment request:

- Request has one visit.
- Request has ticket scheduling-enabled providers.
- Request has end date in the future.
- If the referral associated with the request has a sensitivity, it's allowed in the scheduling department.

When an appointment request is released for scheduling, either automatically or by a scheduler, the request must meet certain criteria for a patient to see it in MyChart. The criteria for non-clinical Cadence appointment requests is as follows:

- There's a provider specified on the visit.
- The specified provider is enabled for ticket scheduling, according to the Allow Ticket Scheduling? (I SER 32070) setting. For a video visit, the provider must also have the Allow Telemedicine Direct Scheduling? (I SER 32075) setting set to Yes. This only applies to advanced visits.
- The appointment request date is in the future and falls within the allowed schedulable time range for the department.
- The appointment request is released to the patient.

The criteria for clinical order Cadence appointment requests is as follows:

- There's a visit in the procedure or procedure category.

- There's a provider pool for the visit.
- The providers in the pool are enabled for ticket scheduling, according to the Allow Ticket Scheduling? (I SER 32070) setting.
- The appointment request is released to the patient.

Verify That Providers Are Enabled for Ticket Scheduling

Before you can use ticket scheduling, you must ensure that the provider accepts appointments made through scheduling tickets.

1. Edit the record for the provider for whom you want to enable ticket scheduling:
   - In Hyperspace, open a provider record (search: Provider) and go to the Scheduling > Online Scheduling form.
   - In text, from the MyChart System Manager Menu, select Master File Maintenance > Provider and open a provider record. Access the MyChart Settings screen.
2. In the Allow Ticket Scheduling? (I SER 32070) field, enter Yes. If this field is left blank, the behavior is determined by the Allow/include provider by default? (I WDF 808) setting in Patient Access System Definitions. In the Foundation System, this field is set to Yes.

Verify that Procedures Are Enabled for Scheduling

Before you can use ticket scheduling for procedures, you must ensure that the procedures are enabled for scheduling. Refer to the Enable Scheduling of Procedures topic for more information.

Cadence appointment requests can be manually sent to patients without additional configuration. To specify different behavior by procedure or procedure category, refer to the Automatically Generate Scheduling Tickets for Procedures topic.

Configure Visit Types for Ticket Scheduling

To allow patients to request an appointment in MyChart with ticket scheduling, you need to determine which visit types should have this option available.

Appointment request-based ticket scheduling is available for advanced visit types with the Allow provider selection? (I PRC 32400) field set to Yes. For more information, refer to the Let Patients Request an Appointment from Self-Triage topic.

Optionally, starting in November 2021, August 2021 with special update E9800490, May 2021 with special update E9704855, February 2021 with special update E9608962, and November 2020 with special update E9510580, tickets for advanced visit types can limit patients to scheduling only with providers and departments with which they've had previous visits, as described in Determine Which Providers Can Be Scheduled for a Visit.

Considerations
Note that automatically generated scheduling tickets can use only advanced visit types with pools. They cannot use simple visit types.

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type you want to use for ticket scheduling.
2. Access the Scheduling Settings 1 screen.

3. If the visit is an advanced visit type, in the Ticket sched provider display name (I PRC 32200) field, enter the patient-friendly name for the scheduling pool used by this visit type. If this field is left blank, the provider is blank for any tickets that use this visit type. Simple visit types include the names of any providers listed.
4. Use the Allow provider selection? (I PRC 32400) field to determine whether patients can select an individual provider during ticket scheduling. Note that this setting also applies to open scheduling, rescheduling, panel scheduling, self-triage, and new provider scheduling. By default, this setting is set to No. Starting in November 2022, use this setting to disallow provider selection for simple visit types as well as advanced types.
5. If you use a series of questionnaires or decision trees to direct patients to a particular visit type based on their responses, starting in May 2025, February 2025 with special update E11305823, and November 2024 with special update E11210638, use the Is Placeholder Visit Type? (I PRC 32029) field to send tickets to patients for scheduling in this scenario.

Automatically Generate Scheduling Tickets for Procedures

If you configure automatic ticket scheduling, tickets are generated when a clinician orders a procedure with an advanced visit type. Automatic ticket scheduling is available for panels. Users do not need to create a ticket in the Ticket Scheduling activity in Hyperspace.

You can choose to defer scheduling ticket generation or block it altogether for certain orders based on rules you define. For example, you might not want to generate a scheduling ticket for an order until the linked referral has been authorized. Or one of your service areas might not be using scheduling tickets, so orders placed in that service area shouldn't have scheduling tickets generated.

You can use the Build Wizard in Hyperspace to enable scheduling tickets for procedures. To get started, open the Build Wizard (search: Build Wizard) and search for feature 520002-MyChart Ticket Scheduling for Procedures (application: MyChart). You can use the Build Wizard feature instead of the manual setup in the subtopics below.

Prerequisites

To use automatically generated scheduling tickets, you must have a default Cadence user configured for MyChart with security to schedule appointments. For more information, refer to the Select a Default Cadence User for Direct Scheduling topic.

Scheduling tickets are only generated when orders are placed in the outpatient ordering mode and the order type of the procedure allows scheduling outpatient orders, as described in the Enable Scheduling of Future and Standing Orders topic.

Enable Ticket Scheduling for Individual Procedures

To determine how procedures are made available to schedule for patients, complete the setup below.

1. From the MyChart System Manager Menu, select Master File Entry > Procedure Related > Procedure and open a procedure you want to use for ticket scheduling.
2. Access the MyChart Settings screen.

3. In the Generate Sched Ticket? (I EAP 32200) field, enter 0-Manual Release, 1-Automatic or Manual Release, or 2-Never Release. The default is 0-Manual Release.
4. In the Sched Ticket Disp Name (I EAP 32205) field, enter the name patients see for the procedure during the ticket scheduling workflow in MyChart. If this field is left blank, the name specified in the Patient Friendly Name (I EAP 32060) field on this screen is used. The Patient Friendly Name field determines how the procedure appears in other places in MyChart, such as on the Test Results or Appointment Details pages. If that field is left blank, the procedure record name is used.

Enable Ticket Scheduling for Procedure Categories

If you don't specify a ticket scheduling method for the individual procedure, the system looks to the procedure category. With Cadence appointment request scheduling, which is on by default, the default for procedure-based requests is to allow them to be manually released to MyChart.

1. From the MyChart System Manager Menu, select Master File Entry > Procedure Related > Procedure or Procedure Category and open a procedure or procedure category you want to use for ticket scheduling.
2. Access the MyChart Settings screen.
3. In the Generate Sched Ticket? (I EAP 32200 for procedures, I EDP 32200 for procedure categories) field, enter 0-Manual Release, 1-Automatic or Manual Release, or 2-Never Release. The default is 0-Manual Release.

Configure Scheduling Tickets for Standing and Medication Orders

You can configure scheduling tickets to be released for standing orders and medication orders using procedure record settings. This saves schedulers time and makes scheduling multiple appointments through MyChart more convenient for patients. If the procedure (EAP) settings aren’t configured, the system checks procedure category (EDP) settings. You might want to configure these settings at the procedure category level if you have an entire procedure category for which all procedures should have the same auto-release settings.

To implement this feature, complete the following steps:

1. In Hyperspace, open a procedure or procedure category (search: Procedures or Procedure Categories).
2. Access the Online Scheduling form.
3. Ensure that the Generate scheduling ticket (I EAP 32200 or I EDP 32200) field is set to Automatic or Manual Release. This setting is required to automatically release tickets for multiple occurrences of a standing order.
4. Configure the following fields as necessary. Note that this is required only for tickets to be released automatically:
   a. Enter one of the following options in the Recurring Order Auto-Release Limit option (I EAP 32206 or I EDP 32206) field:
      - Not allowed. Choose this option to prevent the order from being released automatically if it is a standing order.
      - Capped. Choose this option to allow the patient to schedule only a certain number of occurrences overall. After the capped limit is reached, the patient cannot schedule any more appointments from the standing order. For example, if the capped limit is set to three, the patient can schedule only three occurrences until more are released to them.
      - Rolling. Choose this option to allow the patient to schedule a certain number of occurrences at a time. For example, if the rolling limit is set to four, the patient can schedule up to four occurrences of an order at a time. When one of those appointments is checked in, another

occurrence is automatically released.

- None. Choose this option to allow the patient to schedule all occurrences of a standing order when they receive the ticket in MyChart. If you leave this field blank, this is the default.

b. If you set the previous field to Rolling or Capped, enter a number in the Recurring order auto-release scheduling limit (I EAP 32207 or I EDP 32207) field. This number indicates how many occurrences the patient can schedule.

Defer or Block Scheduling Ticket Release Based on Rules

When you set up automatic scheduling ticket generation for procedures, the system generates the ticket as soon as a clinician signs an order for the procedure. If you don't want to generate the scheduling ticket right away, or if you don't want to create a scheduling ticket at all for certain situations, you can use rules to defer generation until certain rule criteria are met or block generation altogether. For example, if a patient shouldn't be allowed to schedule an order until the referral linked to the order has been authorized, you can set up a rule to prevent the immediate ticket generation.

Complete the following tasks to set this up:

- Create Order context rules to identify orders that should not immediately generate tickets.
- Add your rules to procedures, procedure categories, or Cadence system Definitions.
- Set up a batch job to routinely evaluate schedulable orders that have changed and now need a scheduling ticket generated for them. This batch job also retracts any scheduling tickets that were previously generated for orders that now meet the criteria of your suppression rules. It does not retract automatically sent scheduling tickets that were manually created or that are linked to a dental treatment plan. For more information on how these types of appointment requests behave, see the Automatically Release Manually Created and Dental Visit Appointment Requests topic.

Create Rules to Identify Orders

Create Order context rules to identify orders that should not generate tickets until the rule criteria have been met. For example, you might create a rule to check whether the referral for the order has been authorized before generating the scheduling ticket. For more information about creating rules, refer to the Create or Edit a Rule topic.

Starting in February 2025, if your department requires complex setup when it comes to scheduling multiple orders in one appointment, such as a radiology, cardiology, or another specialty clinic, consider using rule property 52175-Potential Scheduling Matches to start your ticket scheduling build. Refer to the Enable Ticket Scheduling for Imaging Appointments topic for more details about this property.

Add Your Rules to Procedures, Procedure Categories, or Cadence System Definitions

To specify a rule in a procedure or procedure category record:

1. In Hyperspace, open a procedure or procedure category (search: Procedures or Procedure Categories).
2. Go to the Online Scheduling form.
3. Enter your rule in the Ticket generation rule (I EAP 32201 or I EDP 32201) field.

To specify a rule in Cadence System Definitions:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > General form.

3. Enter your rule in the Sched ticket generation rule (I SDF 10345) field.

Set Up a Batch Job to Evaluate Appointment Requests

Set up a batch job to evaluate which requests can be sent based on the associated rule now returning true.

1. In Cadence Text, select Utility Menu > Batch Jobs > Job Enter/Edit and create a batch job.
2. On the Job Definition screen, enter template 652-ES Send Appointment Request to Patient in the Template to use field.
3. On the Single and Multiple Response Values screen, you can set a value for the Maximum days to look back mnemonic. This is an optional mnemonic that controls how many days the system looks back for orders and appointment requests to evaluate. If an order or request was created before the number of days you enter here, or if it was created before you enabled ticket scheduling, it is not evaluated. We recommend setting this mnemonic to 365 or less so the system doesn't evaluate every appointment request in your system.
4. Define a batch for the job and run the batch. For more information about running batches, refer to the Batch Scheduler Setup: Essentials topic.

This batch handles appointment requests that are manually created or associated with a dental visit differently. While this batch sends this type of appointment request automatically once the associated rule passes, it does not retract the appointment request if it later fails the rule. Instead, if the appointment request later fails the rule it is immediately no longer available for scheduling in MyChart. This is different than appointment requests for schedulable procedures, medication orders, and transcribed order, which are retracted by this batch job if the associated rule fails. For more information about automatically releasing these types of requests to MyChart, refer to the Automatically Release Manually Created and Dental Visit Appointment Requests topic.

The following criteria are checked to help ensure patients can successfully schedule the ticket when the ticket generation rule is true and the request has not already been sent to MyChart:

1. The visit type associated with the appointment request can be used with scheduling tickets. Ticket scheduling uses the visit type listed first in the procedure or procedure category. Starting in August 2024, both advanced and non-advanced visit types can be used for ticket scheduling for non-procedural requests. Procedural appointment requests that come from a clinical order must still have an advanced visit type attached to be eligible for ticket scheduling. In May 2024 and earlier, the visit type associated with the appointment request must be advanced and have a pool attached.
2. At least one provider associated with the appointment request is enabled for ticket scheduling.
3. At least one provider associated with the appointment request is active for scheduling in the department listed in the pool (I SER 40 and 41), as described in the Cadence considerations section of the Provider and Resource (SER) Master File Strategy Handbook.
4. At least one provider department pair on the request has matching blocks if you optimize scheduling so that patients are not shown providers who have no slots available, as described in Prevent Patients from Scheduling with Providers with No Available Time Slots.
5. The expiration date of the appointment request still allows scheduling based on when scheduling in MyChart is allowed, as described in Customize the Date Range for Scheduling Appointments.
6. If the order is associated with a referral, it is not expired, it is in a status that allows scheduling, it has remaining authorized visits, and it is not sensitive.

These checks are not performed if the appointment request is already released to MyChart or if it fails the rule. The appointment request will no longer be processed by the batch and is not released to MyChart if any of the criteria are not met.

Allow Schedulers to Manually Send Orders That Fail the Ticket Generation Rule

By default, schedulers cannot manually send a schedulable procedure or medication order to MyChart for scheduling if it fails the ticket generation rule. This is typically sufficient and is easiest for schedulers, as the system automatically manages what procedures can be scheduled by patients. However, there are times when schedulers might need to override a failing ticket generation rule and manually send the order as a ticket if this automatic management is deemed inappropriate by your organization. You can override a failing ticket generation rule with a manual release override rule configured at the procedure, procedure category, or Cadence System Definition level . If you do this, the system uses the first override rule found based on a hierarchy, first checking for the rule configured at the procedure level, then the procedure category level, and finally the Cadence System Definition level. An override rule could be useful if, for example, one area of your organization wants tickets to automatically send for procedures while another area needs schedulers to manually send these orders as tickets. In this scenario, the ticket generation rule could be configured to send tickets automatically only for certain departments, while the manual release override rule could allow tickets to be manually sent based on criteria defined in the rule.

Complete the following tasks to set this up:

- Create Order context rules to identify orders that a scheduler can override the ticket generation rule for.
- Add your rules to procedures, procedure categories, or Cadence System Definitions.

Create Rules to Identify Orders

Create Order context rules to identify orders that a scheduler can override the ticket generation rule for. Refer to the Create or Edit a Rule topic for more information.

Add Your Rules to Procedures, Procedure Categories, or Cadence System Definitions

To specify a rule in a procedure or procedure category record:

1. In Hyperspace, open a procedure or procedure category (search: Procedures or Procedure Categories).
2. Select the Online Scheduling form.
3. Enter your rule in the Manual release override rule (I EAP 32203 or I EDP 32203) field.

To specify a rule in Cadence System Definitions:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > General form.
3. Enter your rule in the Manual release override rule (I SDF 10347) field.

Regenerate Scheduling Tickets for No-Show and Left Without Being Seen Appointments

When a patient doesn't arrive for an appointment for a procedure that was scheduled from a ticket in MyChart and the appointment gets marked as a no-show, or when they arrive for the appointment but leave before being seen, you might want to allow the patient to reschedule their appointment from MyChart. To do this, set up a Patient-context rule to identify such appointments and specify the rule in Cadence System Definitions. When the appointment is marked as a no-show or left without being seen, the system evaluates the rule.

- If the appointment meets the criteria of the regeneration rule and the initial ticket generation rule, a scheduling ticket is sent to the patient to reschedule their appointment. Refer to the Defer or Block Scheduling Ticket Release Based on Rules topic for information about how the system initially generates scheduling tickets.

- If the appointment does not meet the criteria of the regeneration rule or if it meets the criteria of the regeneration rule but not the initial ticket generation rule, a scheduling ticket is not sent to the patient. The Ticket Generation Status (I ORD 32070) item is set to 1-Ticket Generation Pending for the procedure order. If you change your rule build later such that the appointment now meets the criteria of both rules, a scheduling ticket is sent to the patient the next time your batch job based on template 652-ES Send Appointment Request to Patient runs.

To make it easier for you to get this content, we've created a Turbocharger package for a rule that returns true if a patient has three or less cancellations or no-shows for a specific visit. If your organization is in the United States and a member of your EpicConnect team has completed the necessary EpicConnect setup, you can download this package from the available packages tab in the Turbocharger activity or directly from this topic. For information about mapping and importing the package, refer to the 242744-Rule to Regenerate Scheduling Tickets topic.

To set up this feature:

1. In Hyperspace, go to the Rule Editor (search: Rule Editor).
2. Create a Patient-context rule that uses property 98700-Appointment Unkept Count. This property counts the number of times that an appointment was marked as a no-show or canceled and also the number of times an appointment was marked as a no-show or canceled for each appointment request that is linked to, or was previously linked to, the appointment. The highest number of these is used to compare against the value you set for the property. This allows you to set up your rule so that scheduling tickets are not regenerated if a patient has had too many no-show or canceled appointments. For example, you might set the operator to Less Than and the value to 3 so that tickets are not regenerated if the patient has three or more no-show or canceled appointments. Set the following parameters to determine how no-show and canceled appointments are counted:
   - Include No Shows? Enter Yes to count no-show appointments.
   - Include Cancels? Choose how to include canceled appointments in the count. Leave this parameter blank if you don't want to count canceled appointments.
     - 1-All. Count all canceled appointments.
     - 2-Patient Initiated. Count canceled appointments that were canceled with a reason that indicates the patient initiated canceling the appointment. Refer to the Create Reasons for Schedulers to Choose From When Canceling Appointments topic for additional information.
     - 3-Late. Count canceled appointments that were canceled late based on your settings. Refer to the Define Late Cancellations and No-Shows for Your Organization topic for additional information.
3. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
4. Select the Appointment Requests > General form.
5. Enter your rule in the No-show appt ticket regeneration rule (I SDF 10346) field.

Configure How Patients Without a MyChart Account Schedule Tickets

Patients who don't yet have a MyChart account or a proxy to schedule for them can also receive tickets to schedule procedures or lab tests at a time that works best for them.

Patients who are eligible for MyChart instead log in to a MyChart session by providing demographic information, as described in the Send Reminders to Patients to Complete eCheck-In Before Their Visit topic.

During a patient's visit, front desk staff can collect contact information for the patient's friends and family members who should receive updates and other information for the patient using visit contacts, as described in the Send Patients, Friends, and Family Updates About an Admission or Appointment topic. The patient and their visit contacts can receive the scheduling ticket through email or text message and schedule it on the patient's behalf. Ticket links for patients without an account last for 45 days or until the order expiration date if that is more restrictive. After clicking the link, the patient or proxy is asked to verify the patient’s date of birth and can then schedule the ticket.

When using this feature, you can:

- Change the content that's sent with the ticket link in emails and SMS messages.
- Prompt front desk staff to collect visit contacts during a patient's visit so that friends and family can schedule on the patient's behalf.
- Configure a rule in a department's confirmation record to remind front desk staff to collect visit contacts.
- Allow family members to request proxy access after scheduling on behalf of a patient.
- Use appointment entry decision trees and visit type questionnaires.
- Customize the demographic authentication workflow.
- Combined procedures are enabled for tickets without an account as described in the Combine Procedures for Ticket Scheduling topic.
- Standing orders are supported for tickets without an account as described in the Configure Scheduling Tickets for Standing and Medication Orders topic.

Note the following limitations with this feature:

- In November 2023 and earlier, tickets can only be sent to patients without an account if they are automatically generated by signing an order and cannot be created and sent manually.

To enable procedures to automatically generate tickets, review the Enable Ticket Scheduling for Individual Procedures topic. To enable procedure categories to automatically generate tickets, review the Enable Ticket Scheduling for Procedure Categories topic.

Prerequisites

Starting in May 2022, patients without an account at organizations that use single sign-on (SSO) do not receive scheduling tickets by default because the workflow steps they interact with do not respect any SSO authentication or branding. If you are interested, contact your Epic representative and mention parent SLG 6012273.

If your organization uses SSO and you want to enable tickets for all patients:

1. From the MyChart System Manager Menu, select General System Definitions and go to the General System Definitions screen.
2. In the Mnemonic/Module (I WDF 100) field, add mnemonic MYC_T4A_SSO_ENABLED.
3. Set the corresponding Value (I WDF 110) field to 1.

Change the Content of the Email and SMS Messages

You can create SmartTexts for the message body and subject to use in the email and SMS messages sent to patients.

- SmartTexts for plain text ticklers must have a functional type of 8000-WP Patient Internet Email Tickler Template.
- SmartTexts for HTML ticklers must have a functional type of 8001-WP HTML Email Ticklers. This should be the first type listed in the SmartText record.
- SmartLink NOACCTTICKETDEEPLINK (named MyC Tickets Without Account Link) provides a link to schedule a ticket without an account.
- SmartLink INVFNAME (named Prospect First Name) displays the patient's first name.
- SmartLinks EXPDATE (named Prospect Expiration Date) displays the expiration date of the scheduling ticket.

For example, the Foundation System contains the following SmartTexts for different communication methods:

- 22669-MyChart Tickets for All (HTML)
- 22671-MyChart Tickets for All (Plain)
- 22673-MyChart Tickets for All (SMS)
- 22764-MyChart Tickets for All (Header)

To see how these SmartTexts are configured, log in to the Foundation Hosted environment as your organization's Cadence analyst (ESADM) and open each record in the SmartText activity (search: SmartText).

> To make it easier for you to get this content, we've created a Turbocharger package for these SmartTexts. This package is available for download from May 2021 to May 2023. For information about importing this package, refer to the 251478-Ticket Scheduling Notifications for Patients Without a MyChart Account topic.

To use the override SmartText records you created:

1. From the MyChart System Manager Menu, select Login and Access Configuration.
2. Go to the Non-Account Notification Settings screen.
3. In the Workflow (I WDF 18050) field, enter Guest tickets.
4. In the Email Header (I WDF 18051) field, "Email Body" (I WDF 18052) field, and SMS Body (I WDF 18053) field, enter SmartText records to override the default content.

Don't Send Scheduling Ticket Notifications to Patients Ineligible for Demographic Authentication

Starting in November 2022

May 2022 by SU E10211954

By default, patients who don't meet demographic authentication requirements still receive guest access scheduling ticket notifications. You can choose to not send ticket scheduling notifications to patients who do not quality for demographic authentication. Starting in February 2024, choosing to not send notifications affects all patients who do not quality for demographic authentication. In November 2023 and earlier, the setting affects only patients that do not qualify for demographic authentication based on the rule set in the Demographic

Authentication Excluded (I WDF 11040) field, as described in the Exclude Groups of Patients from Secure Link Authentication topic.

The system determines whether a patient has sufficient demographics documented using the Demographic Authentication Fields field (I WDF 11035) in Patient Access System Definitions. See the Add Additional Required Fields to the Demographic Authentication Page topic for more on which demographic information is used by patients when logging in with this method.

To prevent patients who are ineligible for demographic authentication from receiving scheduling ticket notifications:

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. Go to the Ticket Scheduling Settings screen.
3. Set the Use demographic authentication requirements for guest? (I WDF 15144) field to Yes.

Configure Ticket Generation for Adolescents Without an Account

Some procedures might not be appropriate to send to adolescent patients without a MyChart account. For example, a teenage patient might have a parent's email address on file instead of their own, and sending a pregnancy-related scheduling ticket to that email could inappropriately reveal patient information to the family member. Adolescents at your organization are defined by the settings described in the Limit Adolescent Access to MyChart Features topic.

To determine which procedures and procedure categories generate tickets for adolescents without an account:

1. From the MyChart System Manager Menu, select Master File Entry > Procedure Related > Procedure to open a procedure or Procedure Category to open a procedure category.
2. Access the MyChart Settings screen.
3. In the Send Adolescent Ticket? (I EAP or EDP 32202) field, enter Yes.

Allow Family Members to Request Proxy Access

Pre-login proxy request forms are automatically enabled in ticket scheduling without an account workflows if message type 55-Patient CRM is mapped to a message type definition, as described in the Configure Default Message Type Settings topic of the In Basket Setup and Support Guide. By default, the form called CustSvcPublicRequestMinorAccess from the \config\<locale> directory of your MyChart instance is used.

To use a custom public form:

1. Use the instructions in the Create Custom Forms to Collect Patient Information in MyChart topic to collect the patient information you need to create proxy relationships, and save your custom form in the \config\<locale> directory.
2. From the MyChart System Manager Menu, select Login and Access Configuration.
3. Go to the Guest Visits Settings for Proxies screen.
4. In the Affiliate Site Name (I WDF 10400) filed, enter a site ID that corresponds to an entry on the MyChart Access URL Configuration screen Site ID table (I WDF 2500).
5. In the Disable Proxy Request Form? (I WDF 10405) field, select Yes to remove the option for a user to request proxy access after ticket scheduling.
6. In the Custom Form Name (I WDF 10410) field, enter the name of the custom form from step 1.

Show Visit Type Questionnaires and Decision Trees for Patients Without an

Account

Decision trees and visit type questionnaires need to be reviewed and updated before visit types that use them can be scheduled without logging in to MyChart, such as when a ticket is sent to a family member listed as a visit contact for the ordering encounter.

Both decision trees and visit type questionnaires have the potential to expose patient information through patient rules, questions, SmartLinks, or SmartTexts. For example, imagine that a patient's family member is scheduling a visit for a pregnant patient and doesn't know the patient is pregnant. A decision tree for this visit could check whether the patient is pregnant and provide follow-up instructions that reference the pregnancy, thus inappropriately revealing this to the family member. To avoid this scenario, you can update your decision tree to use more general follow-up instructions before enabling this decision tree for scheduling tickets without an account.

To enable a decision tree to appear for all patients using scheduling tickets:

1. In Hyperspace, open a visit type's parent-level decision tree (search: Appointment Entry Decision Tree). You don't need to follow these steps for every decision tree embedded within the parent-level decision tree.
2. Go to the Decision Tree tab and review the tree to ensure it does not reveal sensitive information, as determined by your organization and legal team. Make sure to review decision trees or questionnaires that are launched from decision tree or questionnaire nodes within the tree or launched by a visit type the decision tree switches to.
3. If needed, revise the decision tree to remove sensitive information. Optionally, you can use the rule property 32021-Is Patient Logged into MyChart without Account in rules your tree evaluates to set up different logic for patients not logged in to MyChart.
4. Go to the Basic Information tab and select the Enable for patients in guest access scheduling workflows checkbox (called Enable for patients outside of an authenticated MyChart session in May 2024 and earlier versions).

To enable a questionnaire to appear for all patients using scheduling tickets:

1. In Hyperspace, open a visit type questionnaire (search: Questionnaire Editor).
2. Review the questionnaire, including linked questions and questionnaire conditions in the Edit Questionnaire form and visit type conditions in the Visit Type Conditions form. Make sure to review decision trees or questionnaires that are launched by a visit type the questionnaire switches to.
3. If needed, revise the questionnaire to remove sensitive information.
4. Go to the Edit Questionnaire form and select the Enable for patients in guest access scheduling workflows checkbox (called Enable for patients outside of an authenticated MyChart session in May 2024 and earlier versions).

Remind Users to Collect Visit Contacts During Check-In

You can add a rule to a department's check in confirmation record to prompt users to collect visit contacts during check in.

1. Open your confirmation record:
    - Starting in February 2024: In Hyperspace, open the Confirmation Editor activity and open your confirmation record.
    - November 2023 and earlier: In Chronicles, open the Workflow Confirmation Database (HCF) master file and open your confirmation record.

2. Add rule 32900 – Are Visit Contacts Required for Ticket without Patient Portal Account? as a warning:
   - Starting in February 2024: Go to the Rules tab. Add rule 32900-Are Visit Contacts Required for Ticket without Patient Portal Account? and set it as a Warning.
   - November 2023 and earlier: Go to the Patient Confirmation Rule Specifications screen. In the Error/Warning (I HCF 251) field, enter Warning. In the corresponding Rule (I HCF 270) field, enter rule 32900-Are Visit Contacts Required for Ticket without Patient Portal Account?

Notify Patients When a Scheduling Ticket Is Available

When patients have a scheduling ticket available, they'll see a card in the health feed that prompts them to schedule. You also have the following options for notifying patients that they have a scheduling ticket in MyChart:

- Use Hello World content and the Hello World SMS gateway to send them a text message. This option is available starting in February 2023.
- Use the tickler message framework to send them an email or text message. To send tickler messages by text, you need to work with a third-party vendor, and then you specify the tickler message content for emails and text messages in SmartText records.

If a patient without a MyChart account doesn't have any communication preferences on file, by default the system only sends notifications for scheduling tickets through email and not through text messages. You can choose to instead send notifications through text messages in this situation.

If a ticket sent to a patient automatically combines with another ticket that the patient has already received a notification for, a notification will not be sent for the new ticket. For more information on automatically combining tickets, see the Combine Procedures for Ticket Scheduling topic.

Additionally, by default scheduling ticket email and text message notifications are sent about 15 minutes after the ticket is created. You can change this delay if needed.

Notify Patients with a Text Message Using Hello World

Starting in February 2023

Prerequisites

To notify patients and proxies when new content is available using Hello World, you must be licensed for the Core and Content Management modules, which are included in the standard Hello World license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

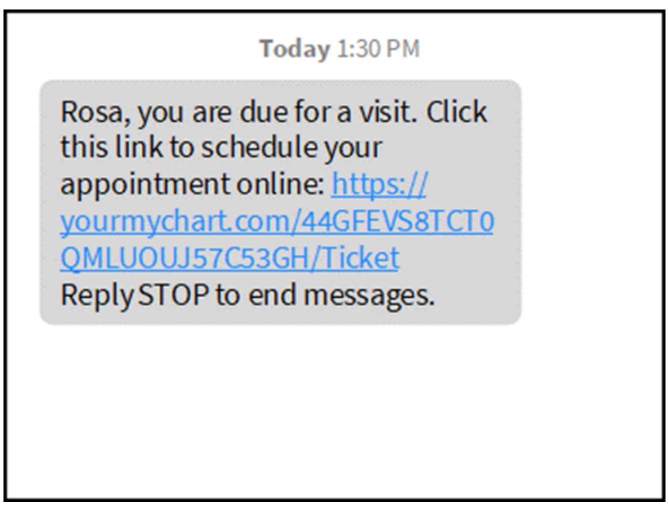
If you're not using Hello World's SMS gateway, you need to work with a third-party vendor to send text messages. Refer to the Set Up Outgoing Text Messages topic for additional information.

You can send notifications about new scheduling tickets to patients by text message. The standard communication templates for scheduling tickets are:

<table>
<tr><th>Version</th><th>Change</th><th>Communication Template</th></tr>
<tr><td>May 2025
February 2025 with SU E11304474
November 2024 with SU E11209545
August 2024 with SU E11112641</td><td>Allows patients to decline appointment requests</td><td>60333-New Scheduling- SMS - Prompt (November 2024 and onwards)
60314-New Scheduling Ticket - SMS - Prompt (August 2024)</td></tr>
<tr><td>May 2024</td><td>Sends scheduling tickets with availability information based on capacity as seen in the Notify Patients Based on Capacity topic.</td><td>32036-New Scheduling Ticket - Availability Information
32034-New Scheduling Ticket - Low Availability</td></tr>
<tr><td>February 2023</td><td>Allows patients who have a MyChart account to schedule an appointment for their scheduling ticket.</td><td>32012-New Scheduling Ticket</td></tr>
<tr><td></td><td>Allows patients who don't have a MyChart account to schedule an appointment for their scheduling ticket.</td><td>32013-New Scheduling Ticket - For All</td></tr>
</table>

Starting November 2023, you can also send reminders to patients for unscheduled tickets by text message. The standard communication templates for ticket reminders are:

Version	Change	Communication Template
• May 2025 • February 2025 with SU E11304474 • November 2024 with SU E11209545 • August 2024 with SU E11112641	Allows patients to decline appointment requests.	• 60335-Appointment Request Reminder - SMS - Prompt (November 2024 and onwards) • 60316-Appointment Request Reminder - SMS - Prompt (August 2024)
February 2025	Combined previous communication templates into a broadcast communication template.	32081 - Appointment Request Reminder - SMS - Broadcast
May 2024	Sends appointment request reminder with availability information based on capacity as seen in the Notify Patients Based on Capacity topic.	32037-Appointment Request Reminder - Availability Information
November 2023	Allows patients with or without a MyChart account to schedule an appointment for their scheduling ticket.	35365-Appointment Request Reminder (MyChart Link).



A sample scheduling ticket text message using the released communication template

Review the released content with stakeholders at your organization and determine whether any changes are needed. Whether you use the content as released or need to make changes to it, you need to create an override of communication templates as described in the Create Override Communication Templates topic.

You need to have Hello World security as described in the Give Users Hello World Security topic to work with communication templates. If you don't have this security, work with your Hello World team to complete these steps for you.

1. Work with your Hello World team to ensure that Hello World's SMS gateway has been set up for your organization to send text messages to patients.
2. Review the released communication templates with stakeholders at your organization to determine whether you can use the sample content. Refer to the steps in Manage Message Content to create overrides of the communication templates attached to communication workflow 32041-New Scheduling Ticket.
3. When you're ready to use the content, work with your Hello World team to approve the communication templates as described in the Approve Message Content topic so you can move them to your production environment with Data Courier.

Notify Patients with a Tickler Message Using SmartText

You can send patients a tickler message by text or email when they have a new scheduling ticket. Ticklers are sent for both manually created tickets and automatically generated tickets. Ticklers are also sent for scheduling tickets after an appointment that was linked to a scheduling ticket is canceled.

You can create SmartText records that include the content you want to send in tickler messages about scheduling tickets. You can specify different SmartText records to use for patients and proxies. After you create your SmartText records, associate them with tickler concept 28517-Scheduling Ticket in Patient Access System Definitions. Refer to the Create Text Message Ticklers and Create Email Tickler Messages topics for additional information.

Starting in May 2024, tickler concepts are added to include sending scheduling tickets with availability information based on capacity as seen the Notify Patients Based on Capacity topic. These tickler concepts are 32888-New Scheduling Ticket - Low Availability and 32889-New Scheduling Ticket - Availability Information.

Starting in November 2023, you can send patients reminder tickler messages by text or email when they have an unscheduled ticket. Follow the instructions above to create SmartText records specific to reminders, then associate them with tickler concept 32886-Ticket Reminder in Patient Access System Definitions.

Starting in May 2024, tickler reminders for unscheduled tickets can check for availability and include the first available date to schedule. The tickler concept is 32890-Ticket Reminder - Availability Information.

You can customize the text of scheduling ticket ticklers for specific kinds of procedures or visit types. Refer to the Customize the Text of Scheduling Ticket Tickler Messages for Specific Procedures or Visit Types topic for complete instructions.

Notify Patients Without an Account with a Text Message Unless They've Opted Out

Starting in February 2023

November 2022 by SU E10302741

May 2022 by SU E10220985

To give patients control over the notifications they receive, scheduling ticket notifications for patients without a MyChart account respect the patient's communication preferences. However, some patients without an account might not have communication preferences on file. By default, those patients only receive email notifications for new scheduling tickets, since they haven't yet had the opportunity to opt in to receiving text messages.

This means that if a patient without an account doesn't have any communication preferences and only has a mobile phone number on file, they do not receive any notification, but you can change this behavior so these patients get text message notifications for new scheduling tickets by default.

> **!** We recommend working with your legal and compliance teams to determine whether they consider it acceptable to send patients text messages by default even though patients haven't specifically opted into receiving them.

If you want patients without a MyChart account, communication preferences, or an email address on file to receive notifications for new scheduling tickets through text messages by default:

1. In Hyperspace, open the Communication Concept Editor (search: Communication Concept Editor).
2. Open concept 28517-New Scheduling Ticket.
3. If an override doesn't already exist for the concept, click Create Override.
4. In the Media Settings section, change the Text Message media status to "Default on".

For organizations that use Hello World, patients still need to opt in to receiving text messages to receive notifications about new scheduling tickets.

Notify Patients Based on Capacity

Starting in May 2024

To reduce unactionable notifications, reminders for scheduling ticket reminders will be held back when there is no time slot capacity. Upon ticket generation, a notification will be sent so patients are informed of the care that has been recommended. The content of the first notification can dynamically change based on whether there is capacity available. If there is no capacity detected, the notification will inform the patient they have a ticket but will not have a call to action. However, the initial notification will still have the link to scheduling ticket and if the patient were to follow that link they can opt in to receive offers when they are available as seen in the Notify Patients When an Unscheduled Ticket Has Availability topic.

Three new tickler concepts to inform the patient of the availability of the ticket. The new tickler concepts cover the following scenarios:

- A new scheduling ticket with availability for the patient to schedule
- A new scheduling ticket with low scheduling availability
- A ticket reminder with availability for the patient to schedule

Hello World includes sample content for one-way text messages. In scenarios where there is low availability, the primary communication template is 32034 - New Scheduling Ticket - Low Availability. When there is capacity, the primary communication template is 32036 - New Scheduling Ticket - Availability Information. For ticket reminders with capacity, the primary communication template is 32037 - Appointment Request Reminder - Availability Information.

To send email and push notifications for capacity-based appointment requests, you need to create SmartTexts and add them to your patient profile (WDF record). To easily do this you can get the turbo charger that we made. This turbo charger from the foundation system creates the SmartText records and inputs them in WDF. If you chose to make these records yourself, follow these steps:

1. Create your SmartTexts by following the instructions in the Create and Edit a SmartText topic.

- Be sure to use the new SmartLink, @MYCTICKETFIRSTAVAILABLEDATE@, in the records you use for availability information to show the patient when the next available date is to schedule.
- You can also reference the Hello World content.

2. Next, input your SmartTexts into the tickler table according to the Send Different Tickler Messages for Different Types of Information topic. The communication concepts you will need to set for capacity notifications are:
   - 32888-New Scheduling Ticket - Low Availability
   - 32889-New Scheduling Ticket - Availability Information
   - 32890-Ticket Reminder - Availability Information

To set this up for patients without a MyChart account. you also need to configure the Non-Account Settings described in the Change the Content of the Email and SMS Messages topic. The workflows for capacity scheduling are:

- 205-Guest Tickets Low Availability
- 206-Guest Tickets Availability Information
- 207-Guest Ticket Reminder Availability Information

Because the system cannot determine which answer a patient or ordering provider, if they are available, would choose for Question and Questionnaire nodes of a decision tree, the decision tree can be configured to specify which connection the system should use when determining capacity as seen in the Allow the System to Answer Questions in Appointment Entry Decision Trees topic. The system can also use past answers to a decision tree question of that specific scheduling ticket when determining capacity. You can configure how many days past answers are valid for. By default, the answers don't expire.

Change the Delay Time for Patient Scheduling Ticket Notifications

To help ensure patients receive only one notification per scheduling ticket, the system delays sending scheduling ticket notifications by a default of 15 minutes. You can change this delay if you want.

Note that this value is not a precise number of minutes after which ticket notifications are immediately sent. Instead, the ticket is sent with the first system background job that runs after the specified number of minutes to maintain good system performance.

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. Go to the Ticket Scheduling Settings screen.
3. In the Number of minutes to delay patient notifications (I WDF 15142) field enter the number of minutes you want the system to delay sending notifications.

Send Offers to Patients When Slots Become Available

Starting in May 2024

If a patient has an unscheduled ticket and there is no availability for scheduling based on the ticket's details, it can be frustrating for the patient to have to frequently check MyChart to see if a time slot that fits into their schedule has opened up. With Ticket Pass, when a ticket can't be scheduled because there's no availability, the patient can opt in to notifications for that ticket, allowing the system to automatically notify them via ticklers when a time slot opens up that meets their needs.

To set up the task that will send offers, refer to the Notify Patients When an Unscheduled Ticket Has Availability topic.

To set up ticklers, refer to the Send Different Tickler Messages for Different Types of Information topic or get the Ticket Pass Tickler Turbocharger.

Considerations
Ticket Pass does not work with panels, standing orders, combined procedures, or ticket bundles. Ticket pass only works with visits that have an in-person telehealth mode. Patients will be sent ticklers when an offer is sent. The settings (HST) record that controls the content is Ticket Pass Offer. To set up the ticklers for offers, refer to the Automatically Send Scheduling Ticket Notifications for New Availability topic.

Give Patients and Users Security to Use Ticket Scheduling

Both patients and users need security to access scheduling ticket features.

Patients must have security point 17-Make Appointment Using Ticket in their patient access class to use scheduling tickets in MyChart. To schedule an appointment from a message, they also need security point 103-Appointment Through Message. You can also give patients the following security points so they can access additional features related to scheduling tickets:

- 25-Driving Directions
- 67-Provider Details

To add security points:

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and enter the appropriate security points.

Schedulers and clinicians need to have Cadence security to view and modify scheduling tickets. Refer to the Grant Schedulers Access to Appointment Requests topic for the required security.

Starting in November 2020, you can use the Build Wizard in Hyperspace to update users' Cadence security classes to ensure they can create and manage tickets in the appointment request framework. To get started, open the Build Wizard (search: Build Wizard) and search for feature 320042-Patient-Schedulable Appointment Requests - Update User Security (application: MyChart).

Track and Review the Reasons Why Patients Decline Scheduling Tickets

Starting in May 2023

Patients can clear the clutter in their health feed by declining scheduling tickets they don’t intend to use. They can do this by selecting the decline button on the home page, the scheduling landing page, and, if the ticket is order-based, the Upcoming Tests and Procedures page. When a patient declines a ticket, they must select a reason to let your front desk staff know why they don’t intend to use the ticket. For example, a patient might get a scheduling ticket for the flu vaccine but decline the ticket because they already got their dose at their pharmacy. The ticket is then removed from the health feed and the scheduling landing page. Front desk staff can see when a scheduling ticket was declined and the reason why the patient declined on the Active Requests tab in the Appt Desk or in an appointment request workqueue.

Epic-released reasons include Not Interested, Already Completed, and Other. You can also choose to create your own reasons or hide the Epic-released ones. Additionally, if you want to show this information in an appointment request workqueue, you need to add columns using two new properties.

Create or Hide Reasons for Declining Scheduling Tickets

To add new reasons for declining:

1. In Hyperspace, open the Category List Maintenance activity (search: Category List Maintenance), and open the Patient Decline Reason (I ORD 67014) category list.
2. Add a new category value for your reason for declining. Refer to the Add a Value to a Category List topic for more information.

To hide reasons for declining:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Ticket Scheduling Settings screen.
2. In the Hidden Patient Decline Reasons (I WDF 15170) field, enter reasons you want to hide from patients.

You can hide Epic-released values, but you cannot delete them from the category list.

Add Columns to Appointment Request Workqueue Views

1. In Hyperspace, open the WQ View Editor (search: WQ View Editor).
2. Click Edit View to edit your existing view in your appointment request workqueue.
3. In the View Editor window, select and drag properties 98648-Appt Request - Is Declined by Patient and 98650-Appt Request - Decline Reason from the Properties tree to the Property field in the Columns table. By default, values appear in the Label, Width, Alignment, and Format cells after a property is added to the table. To customize the name of a column, edit the Label cell.

Combine Procedures for Ticket Scheduling

Patients sometimes have multiple procedures that can be done at the same time, such as scans of two different body parts. To help make it easier to schedule these procedures, you can have MyChart show a single appointment for combined procedures. This is supported for patients with a MyChart account and, starting in May 2022, for patients without a MyChart account.

Considerations
To combine procedures into a single appointment, you must have the MyChart - Make Appointment Using Ticket license, which is included in the standard MyChart license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

You can configure procedures in either of the following ways to have them combined into a single appointment for ticket scheduling:

- Give the procedures the same associated visit type and set the Combine categories? (I EAP 10910 or I EDP 10910) field set to Yes as described in the Enable Scheduling of Procedures topic.
- Add the procedures to a procedure combination (I EAP 11073) as described in the Combine Procedures into One Appointment topic.

Note that it's important to consider your current scheduling workflows when you decide which procedures to combine for MyChart. For example, a current workflow for schedulers might involve scheduling one order and then manually linking related orders to the same appointment. You might now combine all of those procedures for ticket scheduling so schedulers don't have to manually link them.

You have additional options for determining how procedures are combined for ticket scheduling, including the option not to combine procedures if their expected dates are too far apart and whether to combine tickets with mismatched non-approximates dates.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Ticket Scheduling Settings screen.
2. In the Maximum days to combine scheduling tickets (I WDF 15140) field, enter the maximum number of days to use when combining order-generated tickets for scheduling in MyChart. If an order's expected date differs from another order's expected date by more than this number of days, the orders are not combined for ticket scheduling. By default, 6 days is used.
3. In the Combine tickets with mismatched non-approximate dates? (I WDF 15141) field, enter Yes or No to determine whether tickets are combined. If this field is set to Yes, orders with exact (non-approximate) expected dates can be combined only with orders with a matching exact (non-approximate) expected date or orders with approximate expected dates within the window defined by the Maximum days to combine scheduling tickets (I WDF 15140) setting. If this field is set to No or left blank, orders with exact (non-approximate) dates behave the same as orders with approximate expected dates when combining order-generated tickets for scheduling.

Show Patient Scheduling Status in Scheduler Workspaces

You can use the Build Wizard in Hyperspace to update the Appointment Desk activity and appointment workqueues with columns that include Cadence appointment requests information. To get started, open the Build Wizard (search: Build Wizard) and search for feature 320050-Patient-Schedulable Appointment Requests - Update Appt Desk and Workqueues (application: MyChart).

To allow schedulers to see whether an appointment request was released to the patient in the Appointment Desk, add report column 1804-Appt Request is Sent to Patient. You can optionally add report columns 6008-Appt Request Date Sent to Patient or 6009-Appt Request Days Since Sent to Patient to the Appointment Desk to help them see how long since the appointment request was released.

1. In Hyperspace, open the Report Builder (search: Report Builder).
2. Select report template 65-ES Appointment Desk Active Req Tab to show the status on the Active Requests tab or 66-ES Appointment Desk Finalized Req Tab to show the status on the Finalized Requests tab.
3. Go to Report Settings.
4. On the Display tab, add column 1804, 6008, and/or 6009 to the Selected Columns list and Accept.

To allow schedulers to see the status of an appointment request in an appointment request workqueue, you can also add the following columns to workqueues:

- 98642-Appt Request - Date Sent to Patient
- 98643-Appt Request - Days Since Sent to Patient
- 98644-Appt Request - Is Sent to Patient (Basic)?

Refer to the Customize the Columns in Appointment Request Workqueues topic for instructions.

Restrict Which Requests Schedulers Can Release to MyChart

After you complete the switch to Cadence appointment requests, you might decide that there are certain requests that schedulers should not be able to release to patients for scheduling through MyChart. You can create a rule that defines which requests schedulers should be prevented from releasing, and then specify that rule at the system level or visit type level for dental requests, or the visit type level for any other type of request. The rule applies only to appointment requests not related to clinical orders. For clinical orders, the ticket generation rule described in the Defer or Block Scheduling Ticket Release Based on Rules topic takes precedence.

If the user attempts to send an appointment request to a patient in MyChart for scheduling that meets the criteria of a rule you create, they'll see that the Send to MyChart button is disabled.

To create a rule and specify it at the visit type level, follow these steps:

1. In Hyperspace, go to the Rule Editor (search: Rule Editor).
2. Create a new Appointment Request-context rule that returns true for the visit types that users should not be able to release to patients in MyChart. For more information about working with rules, refer to the Create or Edit a Rule topic.
3. Go to the Visit Type Editor (search: Visit Type Editor) and select the visit type you want to restrict.
4. Go to the Online Scheduling form.
5. In the Rule to Prevent Sending Requests to Patient (I PRC 32215) field, enter the rule you created.

You might also decide that dental appointment requests should not be able to be released to patients based on criteria other than visit type. You can create a rule that defines which dental requests should not be released. For example, you might want to prevent appointment requests from being released until all procedures planned in the visit have received prior authorization, or you might want to allow only the next incomplete visit in a sequence to be scheduled by the patient. For visit types that already contain a Rule to Prevent Sending Requests to Patient (I PRC 32215), that rule takes precedence.

To create a rule and specify it at the system level, follow these steps:

1. In Hyperspace, go to the Rule Editor (search: Rule Editor).
2. Create a new Appointment Request-context rule that returns true for the visits that users should not be able to release to patients in MyChart. For more information about working with rules, refer to the Create or Edit a Rule topic.
3. Go to Cadence System Definitions (search: Cadence System Definitions).
4. Go to the General form under Appointment Requests.
5. In the Request Type (I SDF 10344) field, enter Dental.
6. In the Prevent Releasing Rule (I SDF 10348) field in the same row, enter the rule you created.

Allow Schedulers to Quickly Release Appointment Requests from the Appointment Desk

We recommend adding the Send to MyChart option to the Appointment Desk to allow schedulers to more quickly send an active appointment request to the patient. This allows the scheduler to release an appointment request to MyChart without opening the request in a separate activity first.

To add the Send to MyChart option to the Active Requests tab:

1. In Hyperspace, open the Appointment Desk settings in Cadence System Definitions or for a department:
   - Open Cadence System Definitions and select the Appointment Desk > Configuration form.
   - Open a department record and select the General > Appointment Desk form.
2. Click the Edit report button for the Active Requests tab.
3. On the Criteria tab, add the Send to MyChart option to the list of right-click actions or toolbar actions.

Allow Schedulers to Create Request Bundles for Patients to Schedule Multiple Appointment Requests

You can use request bundles to send multiple appointment requests to a patient to schedule in MyChart so that patients can schedule all of the requests in one workflow, similar to how they would schedule a panel visit. Examples of appointment requests that you might bundle include an x-ray and orthopedics consult or a breast ultrasound and mammogram.

When a scheduler notices that a patient has multiple appointment requests that are related and should be scheduled in a specific order, they select multiple requests in an appointment request workqueue or on the Active Requests tab of the Appointment Desk and click Create Bundle. In the Request Bundle window, schedulers can adjust the order of the visits, set spacing rules for how much time there should be between visits, enter any instructions for the patient, and send the bundle to MyChart. If more procedures are ordered later and need to be added to the bundle, schedulers select a request in the bundle and also the new requests to add and click Update Bundle. The Update Bundle button is also available in the Appointment Request activity when schedulers edit a request that is already in a bundle. If schedulers remove a request from an existing bundle, the request is removed from the patient's MyChart account.

If certain procedures that are ordered in the same encounter should always be bundled, you can set up automatic request bundles to save schedulers the time of manually creating bundles.

You can enable request bundles at the system or department level, so consider which areas of your organization would benefit most from using requests when determining where you set this up.

Starting in November 2022 and in May 2022 with special update E10209256, you can send request bundles to patients without a MyChart account. For more information about when patients without an account can receive scheduling ticket requests, refer to the Configure How Patients Without a MyChart Account Schedule Tickets topic.

Starting in August 2023, patients can reschedule all appointments within a bundle or reschedule an individual appointment from a bundle.

> Because canceling a request bundle without an account is not yet supported, we recommend sending a different appointment confirmation email to patients without an account if they can't cancel their appointment through MyChart. For more information about how to configure an override SmartText to accomplish this, refer to the Allow Patients Without a MyChart Account to Cancel an Appointment topic.

What Can't Be Bundled?

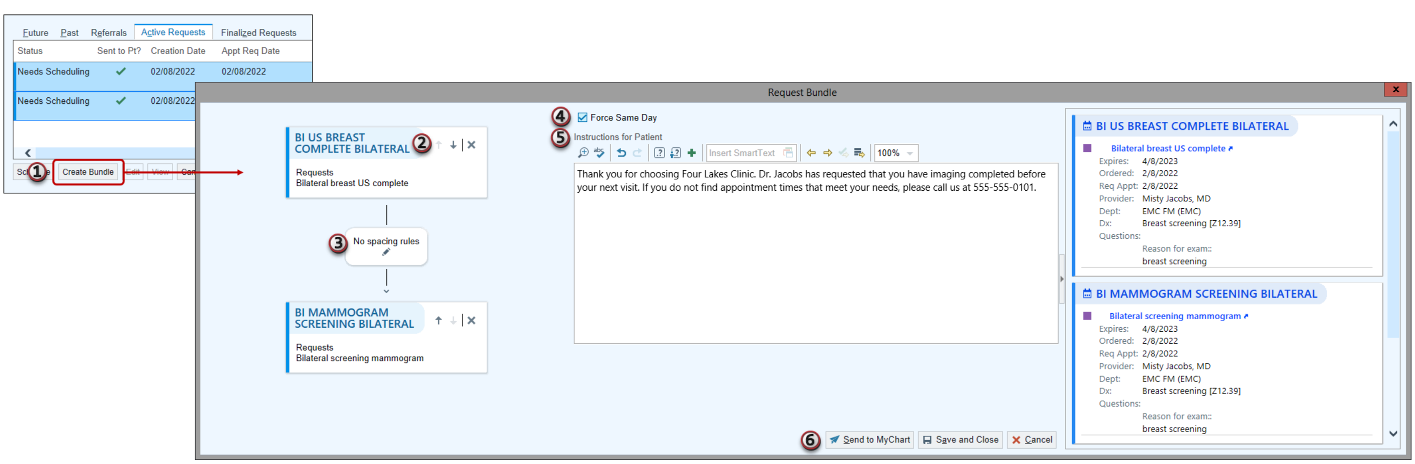
There are a couple situations where schedulers cannot include appointment requests in a request bundle:

- Panel orders and standing orders that have multiple occurrences cannot be included in manual or automatic request bundles.
- Requests that were manually created can't be sent as part of a request bundle to patients without a MyChart account.
- The system cannot include follow-up requests in automatic request bundles because they don't have a visit type associated with them when they are initially created by the system. If a scheduler wants to add a follow-up request to an automatic or manual request bundle, they need to edit the request and add a visit type first.
- The linked procedure or procedure category has more than one visit type specified in the Default Visit Types (I EAP 10900 or I EDP 10900) item.

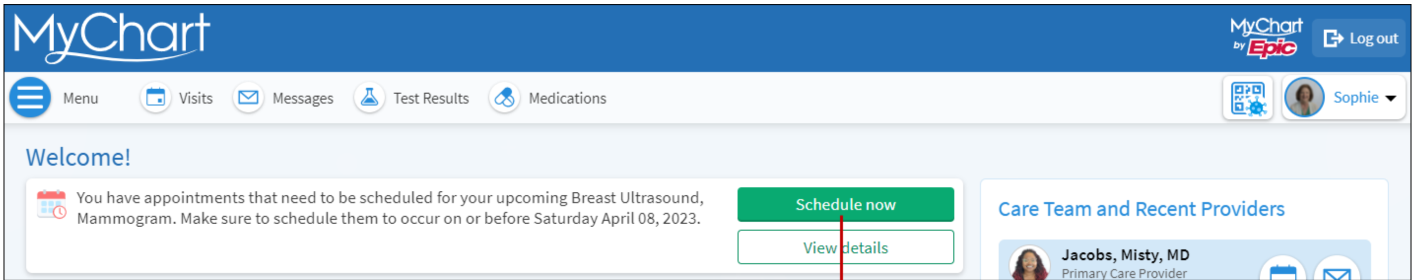
How Are Request Bundles Different from Panels?

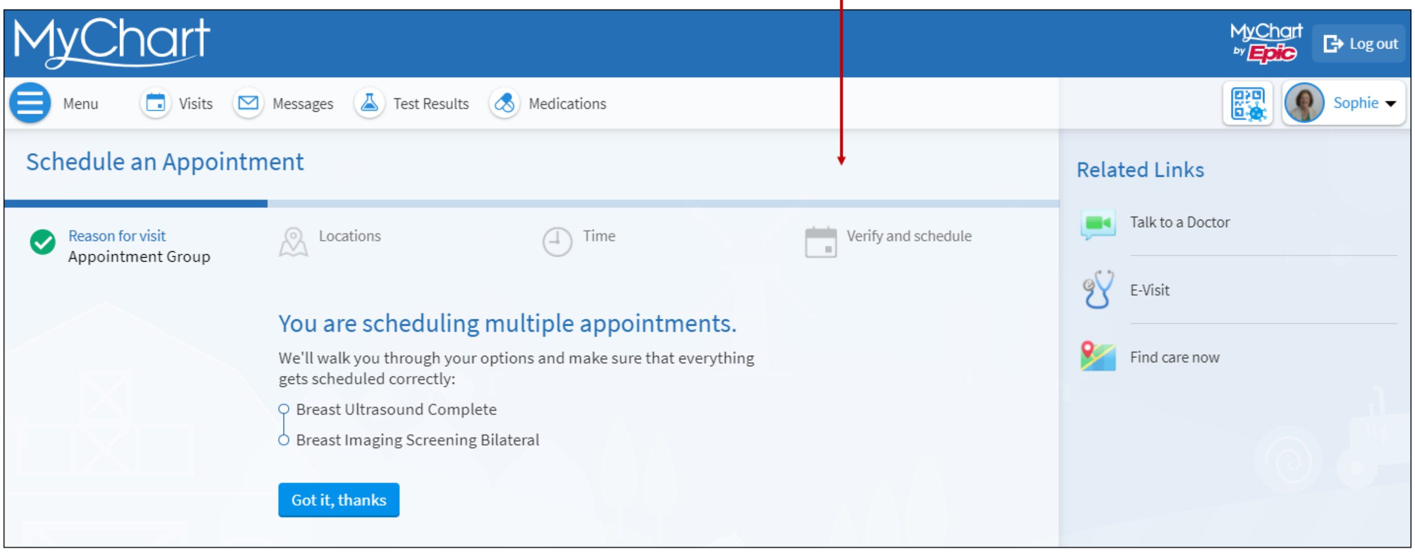
The difference between panels and request bundles is that panels are typically scheduled from one order, and all visits scheduled for the panel are linked to the order, whereas request bundles can include multiple orders that are each linked to only one visit. Request bundles respect the sequencing and spacing rules that are specified in the visit type for each appointment request. If any of the procedures for the appointment requests in a request bundle are configured to be combined into one visit type for scheduling, they are combined into one visit in the request bundle.

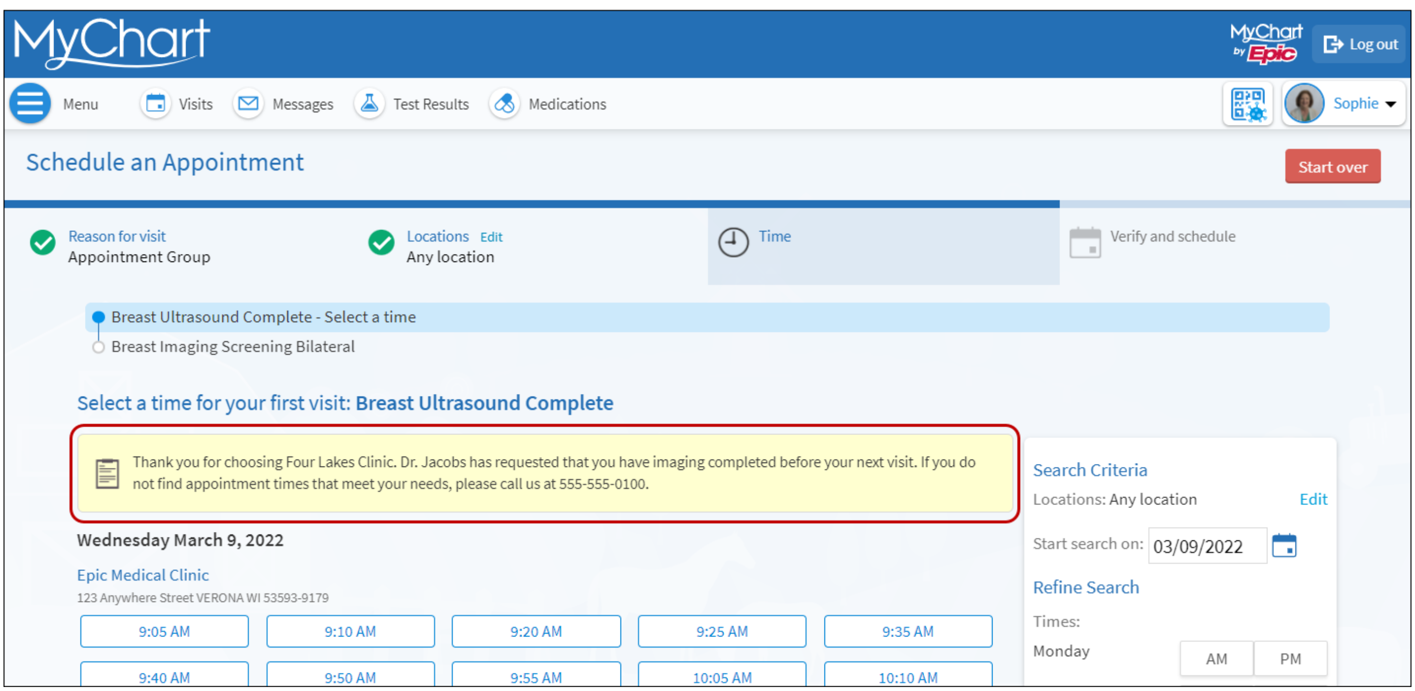
To use request bundles, you must have the Cadence Ticket Bundle license, which is included in the standard Cadence license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.



Manual request bundle workflow: 1. Schedulers select multiple appointment requests for the same patient in an *appointment request workqueue or on the Active Requests tab of the Appointment Desk and click Create Bundle. The Request Bundle window opens. 2. Schedulers can adjust the order that the visits should be scheduled in. 3. Schedulers can add spacing rules to define how much time there should be between visits. 4. If the patient should be required to schedule all of the visits for the same day, the scheduler can select the Force Same Day checkbox. 5. The scheduler can enter instructions for the patient to follow in MyChart. 6. The scheduler clicks Send to MyChart to make the requests available to the patient to schedule in MyChart.*







In MyChart, the patient sees the request bundle as a group of tests and procedures that need to be scheduled *together. If a scheduler entered instructions for the patient in the request bundle, the instructions appear when the patient is selecting times for their visits.*

Make Sure Schedulers Have Access to the Send to MyChart Button

For schedulers to create and update request bundles, you need to make the Send to MyChart button available in appointment request workqueues or on the Active Requests tab of the Appointment Desk. When schedulers select multiple appointment requests, the label of the Send to MyChart button changes to Create Bundle or Update Bundle.

- The Send to MyChart button (menu record ES_IT_APPT_REQUEST_RELEASE_TO_PATIENT) is included on the default toolbar for appointment request workqueues. If you've customized that toolbar, you might need to add the Send to MyChart button to it. Refer to the Customize the Appointment Request Workqueue Toolbar topic for additional information.
- Refer to the Allow Schedulers to Quickly Release Appointment Requests from the Appointment Desk topic for information about adding the Send to MyChart button or right-click option to the Appointment Desk if you haven't done so already.

Enable Request Bundles at the System or Department Level

You can enable request bundles for schedulers across your organization at the system level. If you want to enable request bundles only for certain departments, you can keep request bundles off at the system level and enable it for those departments. Or, if you enabled request bundles at the system level and want to turn it off for some departments, you can disable it for those departments. You might need to work with your Cupid and Radiant teams on department-level configuration.

1. In Hyperspace, open Cadence System Definitions or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Appointment Requests > Ticket Bundle form.
3. In the Allow Ticket Bundles? (I SDF 17100 or I DEP 10700) field, enter Yes.

Automatically Create Request Bundles at the System or Department Level

If certain procedures that are ordered at the same time should always be bundled, you can set up automatic request bundles so that schedulers don't need to create a bundle manually. The system creates automatic request bundles after a provider signs an encounter. When you set up automatic request bundles, you define two groupers of procedures or procedure categories and the relationship between the two for when they should be scheduled. You can also specify an optional Order-context rule to conditionally exclude certain requests that don't meet the criteria of the rule.

Create Groupers of Procedures or Procedure Categories to Automatically Bundle

Create or identify grouper (VCG) records of the procedures or procedure categories that you automatically want to create request bundles for. Refer to the topic Build a General Grouper for additional information.

Create Rules to Conditionally Exclude Certain Requests from Automatic Bundles

If there are some scenarios in which you don't want to automatically bundle requests, you can create Order-context rules to exclude requests that meet the criteria of the rule. Refer to the Create or Edit a Rule topic for additional information.

Enable Automatic Request Bundles at the System or Department Level

You can configure settings for automatic request bundles at the system or department level. If the department level settings are blank, the system level settings are used. If configured, the system uses the ordering department's settings when determining whether to create request bundles.

> Starting in May 2023, in February 2023 with SU E10402169 in November 2022 with SU E10309187, if there are invalid relationships in the Auto Bundle table, requests aren’t combined into bundles and an error is logged to the request audit trail. Double-click on each request to expand it and resolve the build error so the bundle can be created.

> Starting in May 2023, in February 2023 with SU E10404884, and in November 2022 with SU E10311579, you can use the send to patient settings and rules in the procedure from either Hyperspace or MyChart system settings to stage a bundle for manual review prior to scheduling. When a bundle is staged but needs manual review, schedulers click Update Bundle on the Active Requests tab of appointment desk to release the requests to the patient and allow the requests to be scheduled as a bundle. This ensures that bundles are not scheduled too early in both Hyperspace and MyChart.

1. In Hyperspace, open Cadence System Definitions or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Appointment Requests > Ticket Bundle form.
3. In the Enable Automatic Bundles? (I SDF 17110 or I DEP 10710) field, enter Yes. This field is available only if the Allow Ticket Bundles? (I SDF 17100 or I DEP 10700) field is set to Yes.
4. If you are defining settings for a department record, you can choose to use the settings from another department record by entering that department in the Use Department Settings (I DEP 10713) field.
5. The settings below apply to requests that have procedures or procedure categories that are configured to be combined into one appointment, as described in the Combine Procedures into One Appointment topic.
    - In the Max Days To Combine (I SDF 17111 or I DEP 10711) field, specify the maximum numbers of days allowed between the expected dates for requests. If the expected dates are too far apart, the requests are not combined. The default value is 6.
    - In the Enforce Exact Days (I SDF 17112 or I DEP 10712) field, enter Yes to require that requests with non-approximate expected dates be combined only with other requests that have the same non-approximate expected dates or requests that have approximate expected dates and are within the Max Days to Combine threshold.
6. Add rows to the Auto Bundle Relationship Settings Table to specify the procedures or procedure categories that are automatically bundled and when they should be scheduled in relation to requests for other procedures or procedure categories. The system evaluates this table starting at the top and stops when it finds a matching row.
    - Proc/Category Group 1 (I SDF 17120 or I DEP 10720). Enter the first grouper of procedures or procedure categories.
    - Rule 1 (I SDF 17121 or I DEP 10721). Enter an optional Order-context rule to use with the first grouper. Only requests that meet the criteria of the rule are included in the bundle.
    - Visit Type 1 (I SDF 17122 or I DEP 10722). Enter an optional visit type to limit the requests from the first grouper than can be bundled. Only requests for procedures or procedure categories that can be scheduled with the selected visit type are included in the bundle.
    - Relation (I SDF 17123 or I DEP 10723). Select how requests from the two groupers in the row should

be scheduled in relation to one another.

    - Before. Requests in the first grouper need to be scheduled to occur before requests in the second grouper.
    - After. Requests in the first grouper need to be scheduled to occur after requests in the second grouper.
    - Interval. The order in which requests are scheduled doesn't matter as long as they are scheduled within the minimum and maximum hours and minutes you specify.

  - Proc/Category Group 2 (I SDF 17124 or I DEP 10724). Enter the second grouper of procedures or procedure categories.
  - Rule 2 (I SDF 17125 or I DEP 10725). Enter an optional Order-context rule to use with the second grouper. Only requests that meet the criteria of the rule are included in the bundle.
  - Visit Type 2 (I SDF 17126 or I DEP 10726). Enter an optional visit type to limit the requests from the second grouper than can be bundled. Only requests for procedures or procedure categories that can be scheduled with the selected visit type are included in the bundle.
  - Min Hours and Minutes (I SDF 17127 or I DEP 10727). Enter the minimum number of hours and minutes that requests in the first grouper need to be scheduled to occur before or after requests in the second grouper.
  - Max Hours and Minutes (I SDF 17128 or I DEP 10728). Enter the maximum number of hours and minutes that requests in the first grouper can be scheduled to occur before or after requests in the second grouper.
  - Max Expected Date Difference (I SDF 17129 or I DEP 10729). Enter the maximum number of days allowed between the expected dates for the first and second groupers. If multiple requests from a grouper are combined into one appointment, the earliest expected date from all of the requests is used. If the expected dates are too far apart, the requests are not bundled. The default value is 0.

Decide Whether to Force Same Day Scheduling

The Force Same Day checkbox determines whether the patient should be required to schedule all visits in the bundle on the same day. If this checkbox isn’t selected, the patient can schedule their bundled visits across multiple days. When creating bundles automatically, if the minimum time between visits is more than 10 hours, the Force Same Day checkbox isn’t set. Starting in November 2022, and in May 2022 with SU E10218229, the system also checks the maximum time between visits when determining whether the box should be checked by default. If the maximum time between visits is more than 10 hours, the same day checkbox isn’t set by default for that bundle. This only applies to automatic request bundles. When creating bundles manually, the checkbox is never selected by default.

Customize the Report for the Request Bundle Window

By default, report 62035-ES Ticket Bundle Editor appears in the Request Bundle window, and it includes print groups 62116-ES Ticket Bundle Summary and 62117-ES Request Originating Encounter Info. If needed, you can customize copies of the print groups, add them to a copy of report 62035, and add your copy of report 62035 to Cadence System Definitions. Refer to the Data Handbook for information about the parameters available for customizing each print group.

1. In Cadence Text, go to Cadence Management > Reports, Print Groups > Dup Print Groups and create a copy of print group 62116 or 62117.
2. Edit your copy of print group 62116 or 62117 and modify the parameters as needed.
3. From the Reports, Print Group menus, select Dup Reports, and create a copy of report 62035.

4. Edit your copy of report 62035 and replace print group 62116 and 62117 with your copy.
5. In Hyperspace, open Cadence System Definitions.
6. Select the Appointment Requests > Ticket Bundle form.
7. In the Ticket Bundle Report Override (I SDF 17101) field, enter your copy of report 62035.

Allow Partial Auto Ticket Bundles

Starting in May 2025

To help ensure that patients schedule appointments with the spacing and sequencing that you intend, configured automatic request bundles include requests that can't be scheduled by the patient by default starting in May 2025. This prevents partial auto ticket bundles. For example, a clinician might order a lab, consult, and imaging procedure for a patient and require that the lab and imaging procedure be completed at least 24 hours before the consult visit. If your organization allows patients to schedule their own labs and consults, but not imaging procedures, all three procedures remain bundled together, allowing a scheduler to schedule all procedures together ensuring the proper spacing and sequencing is used.

If you use a workflow that requires partial ticket bundles, you can turn off this behavior. If you turn off this behavior, in the example above, only the requests for the lab and consult visit would be automatically bundled and sent to the patient. With this partial bundle, patients and schedulers might schedule the visits without the proper spacing and sequencing.

To turn off the default behavior and allow partial auto ticket bundles, complete the following steps:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Ticket Bundle form.
3. Set Exclude Non-Releasable Procedures? (I SDF 17115) to Yes

Automatically Release Manually Created and Dental Visit Appointment Requests

> ! The following section only applies to appointment requests for Advanced Visit Types.

You might decide that there are certain appointment requests that do not need to be reviewed by a scheduler and can be automatically released to patients in MyChart. You can create a rule that defines which requests can be automatically released, and then specify that rule at the system level for dental requests, or at the visit type level for any other type of request.

If a user creates an appointment request that meets the criteria of the rule you create for that visit type, the request is automatically sent to the patient in MyChart.

1. In Hyperspace, go to the Rule Editor (search: Rule Editor).
2. Create a new Appointment Request-context rule that returns true for the requests that should be automatically sent to patients. For more information about working with rules, refer to the Create or Edit a Rule topic.
3. Go to the Visit Type Editor (search: Visit Type Editor) and select the visit type you want to send automatically.

4. Go to the Online Scheduling form.
5. In the Allow Automatic Release Rule (I PRC 32216) field, enter the rule you created.

You might also decide that some dental appointment requests can be released to patients in MyChart based on the same criteria regardless of visit type. In that case, you can create a rule that defines which dental appointment requests can be automatically released to a patient in MyChart. For visit types that already contain an Allow Automatic Release Rule (I PRC 32216), that rule takes precedence.

1. In Hyperspace, go to the Rule Editor (search: Rule Editor).
2. Create a new Appointment Request-context rule that returns true for the requests that should be automatically sent to patients. For more information about working with rules, refer to the Create or Edit a Rule topic.
3. Go to Cadence System Definitions (search: Cadence System Definitions).
4. Go to the General form under Appointment Requests.
5. In the Request Type (I SDF 10344) field, enter Dental.
6. In the Allow Auto Releasing Rule (I SDF 10349) field in the same row, enter the rule you created.

To ensure that modified appointment requests that have not been released to MyChart are re-evaluated for automatic release, follow the steps in the Set Up a Batch Job to Evaluate Orders section of the Defer or Block Scheduling Ticket Release Based on Rules topic.

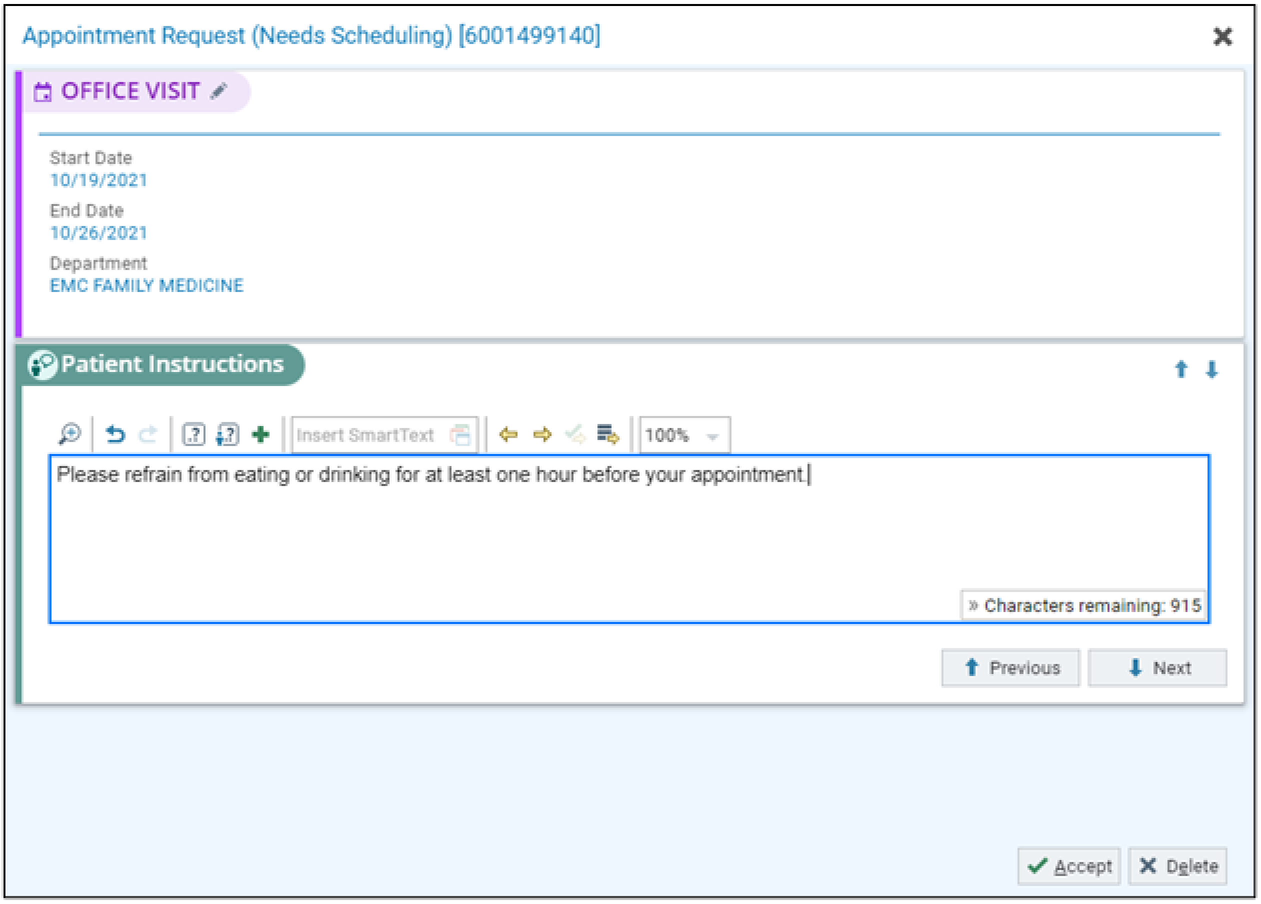
Allow Users to Create Tickets Outside of Appointment Desk

You can allow users who do not typically use the Appointment Desk activity, such as clinicians, to access a simpler version of the Appointment Request activity to create tickets in other workspaces, such as from within an encounter. To give users access to this version of the activity, extend menu ES_IT_APPT_REQUEST_MANUAL_TICKET in the desired locations, as described in Modify a User's Options on an Existing Menu or Toolbar.

Appointment requests created in this activity are automatically sent to the patient after the user clicks Accept. Users are warned or stopped if the patient cannot schedule the appointment request based on the visit type, date range, and providers entered. Starting in November 2021, schedulers can optionally add instructions in the Patient Instructions section. For example, this could help the patient know what they need to do before an appointment so they can choose the best time for them to schedule. Users can enter free text or enter a SmartText. To allow users to enter SmartTexts in this section, update your existing SmartTexts to allow the Ticket Scheduling Instruction functional type, or create a new SmartText:

1. In Hyperspace, open the SmartText you want to use for patient instructions (Search: SmartText).
2. On the Restrictions tab of the SmartText editor, add context 3015-Ticket Scheduling Instruction to the Functional Type list.

The instructions a user enters appear in addition to the MyChart patient instructions (I PRC 32010) for the visit type when the patient views the appointment request in MyChart.



Users are shown only relevant sections for tickets. Clicking Accept sends the ticket to the patient.

Review Your Build with the Ticket Scheduling Availability Check Utility

Starting in May 2024

The Ticket Scheduling Availability Check utility lets you troubleshoot potential scheduling issues for an order by returning whether the order is available to schedule as a ticket in MyChart. If the order is not available for scheduling in MyChart, the utility provides information on why it is not available to help you correct the issues.

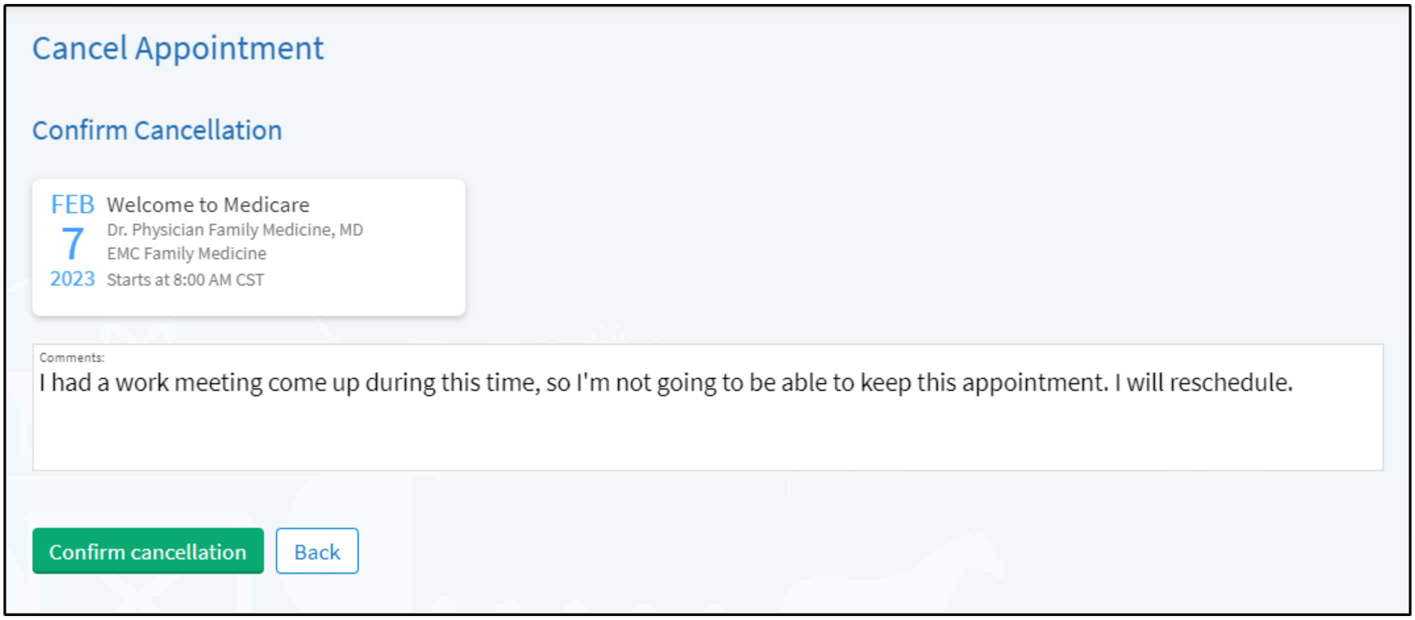
To access the utility, go to the MyChart System Manager Menu and select System Utilities > Scheduling Utilities > Ticket Scheduling Availability Check.

Once you specify the order ID, you can optionally specify a patient and MyChart user to check scheduling availability against. If the order is unavailable to the patient for scheduling, the reason will display to help you troubleshoot ticket scheduling configuration.

MyChart Scheduling Setup: Direct Cancellation and Rescheduling

Let Patients Cancel Appointments Directly

Epic recommends that you give patients the ability to cancel their own appointments directly, just as they can schedule them directly. With the Cancel Appointments feature, a patient can find an appointment on their schedule in MyChart and cancel it. After the patient provides a reason for canceling the appointment and confirms the cancellation, the appointment is removed from their schedule and their physician's schedule.



Prerequisites

When patients cancel an appointment, a default Cadence user record that you select is used to modify the appointment information in Epic. This user should already be specified if you've completed the setup for direct scheduling. Refer to the Select a Default Cadence User for Direct Scheduling topic for more information.

Appointment cancellation also sends a message to In Basket. Because of this, you must define an In Basket pool for each department in order for patients to cancel:

1. From the MyChart System Manager Menu, select Master File Entry > Department
2. Open the department record.
3. In the Default Scheduling (I DEP 53000) field, enter the scheduling pool of users who can respond to the patient's message.

Give Patients Security to Cancel Appointments

Add security point 106-Appointment Direct Cancel to patient access classes to give patients the ability to cancel appointments:

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.

3. Go to the MyChart Features Screen and add security point 106.

Limit the Types of Appointments a Patient Can Cancel

If there are visit types that you do not want patients to be able to cancel through MyChart, you can disable them individually. The visit types are set up to be cancelable by default.

This value is part of a hierarchy. The logic to determine whether a patient can cancel an appointment progresses as follows:

- Visit type overrides in the department master file
- Department master file
- Visit type master file
- Patient Access System Definitions

Limit Appointment Cancellation by Visit Type

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type for which you want to prevent appointment cancellation.
2. Access the Scheduling Settings 1 screen.
3. In the Allow canceling? (I PRC 32025) field, enter No.

Limit the Types of Appointments a Patient Can Cancel by Department

In each department, you can override the system-wide settings for which visit types patients can cancel.

For example, if you have the visit type entered on the Cancellation Settings screen in the Visit Type Overrides table for a department with No in the Cancel column, then only that visit type cannot be canceled for the department.

1. From the MyChart System Manager Menu, select Master File Entry > Department, and open a department record.
2. Access the Cancellation Settings screen.
3. To prevent patients from canceling a specific visit type in this department complete the Visit Type Overrides table:
   - In the Visit Type (I DEP 53085) column, enter a visit type.
   - In the Cancel? (I DEP 53086) column, enter No.
4. If you want to prevent patients from canceling any visit types in this department, enter No in the Allow cancellation? (I DEP 53081) field above the Visit Type Overrides table.

Limit When Patients Can Cancel Appointments

You can determine up until what point a patient can cancel an appointment that they have with your organization. For example, you can configure your system so that patients can cancel appointments until four hours before the appointment begins. You can override the system-wide setting for specific departments or visit types.

To configure the system-wide time for patients to cancel appointments:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Cancellation 1 screen.
2. In the Cancel appointment until (I WDF 1310) field, enter the number of hours before a scheduled appointment that a patient can cancel it. If you leave this field blank, patients can cancel appointments up

until the time of the appointment.

Limit When Patients Can Cancel Appointments by Visit Type

If you have certain visit types for which you want to allow a different cancellation window, you can override the system behavior in the visit type record.

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. Access the Scheduling Settings 1 screen.
3. In the Allow canceling? (I PRC 32025) field, enter Yes if the visit type can be directly canceled.
4. In the until__hour(s) before appt. (I PRC 32026) field, enter the number of hours before the appointment that a patient can cancel an appointment with this visit type.

Limit When Patients Can Cancel Appointments by Department

You can create department-specific overrides to specify a different number of hours that an appointment can be canceled before the appointment time for the department as a whole or for a specific visit type. These settings override system-wide and visit type-specific settings.

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Cancellation Settings screen.
3. In the Allow cancellation? (I DEP 53081) field, enter Yes.
4. In the until__hour(s) before appt. (I DEP 53083) field, enter the number of hours before the appointment that a patient can cancel an appointment in this department.
5. If you want to override the cancellation window for a specific visit type in this department, complete the Visit Type Overrides table:
    - In the Visit Type (I DEP 53085) column, enter the visit type to override.
    - In the Cancel? (I DEP 53086) column, enter Yes.
    - In the Hour(s) until (I DEP 53087) column, enter the number of hours before the appointment that a patient can cancel an appointment of this visit type in this department.

Limit Appointment Cancellation Based on Rules

You can use a rule to control whether patients can directly cancel appointments through MyChart based on certain criteria, such as the department in which the appointment is scheduled or patient information. To do this, you use a copy of extension 32011-MyChart Appointment Cancellation Filter by Rule. This extension record has the following configurable parameters:

- 1-Rule ID. Required. Determines the rule record to use to determine whether a patient can cancel an appointment in MyChart.
- 4-Cancel Appt Filter Action. Determines whether the rule represents that an appointment should be cancellable or not. If this parameter is set to 0, as released, and the rule evaluates to True, the patient is able to cancel the appointment. If this parameter is set to 1 and the rule evaluates to True, the patient is unable to cancel the appointment.
- 5-Rule Error Handling. Required. Determines the action to take when a rule returns an error. If this parameter is set to 0, as released, and an error occurs, the extension determines the behavior as if the rule evaluated to False. If this parameter is set to 1 and an error occurs, the extension record determines the behavior as if the rule evaluated to True.

Considerations
You can limit which appointments proxies can cancel in MyChart by using rule property 32100-MyChart Proxy Context Relationship Type in the rule you create. This rule property returns the type of the current proxy relationship from the MyChart Proxy - Relation (I EPT 28510) item when a proxy accesses a patient's chart. If a patient accesses his own information, this property returns null.

To set up this feature, you must first create a rule record to filter appointment cancellation by rule. This rule must use the appropriate context, as defined by the Rule ID parameter in the extension. Refer to the Create or Edit a Rule topic for detailed instructions on creating rules.

1. In Chronicles, access the Extension (LPP) master file and duplicate extension 32011.
2. In your duplicate extension, modify the parameters as appropriate.
3. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Cancellation screen.
4. In the Allow appt cancellation extension (I WDF 880) field, enter your copy of extension 32011.

Let Patients Cancel Individual Sequential Appointments

By default, patients can cancel only an entire set of sequential appointments. If it is appropriate for patients to cancel individual appointments in the set, you can allow them to do so.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Cancellation 1 screen.
2. In the Can cancel individual sequential appt? (I WDF 879) field, enter Yes.

Define Reasons for Patients to Cancel Appointments

Cadence always requires a cancellation reason for canceled appointments, including appointments canceled by patients in MyChart. In earlier versions, you can optionally require cancellation reasons.

Patients can choose from a list of cancellation reasons you specify or enter a free-text reason. Your Cadence team might already have created cancellation reasons that you can use in MyChart. Work with your Cadence team on this and refer to the Create Reasons for Schedulers to Choose From When Canceling Appointments topic if you need to create more cancellation reasons in the Reason for Cancellation (I EPT 7300) category list. If you want to prevent patients from entering a free-text reason so that they use your predefined list of cancellation reasons instead, complete the setup in the Prevent Patients from Entering Free-Text Reasons for Canceling Appointments section below.

Optionally, you can define a default cancellation reason. A cancellation reason is required in MyChart if no default cancellation reason is specified, and patients choose from the list of reasons specified in the Allowed reasons for appointment cancellation setting. If you don't want patients to be affected by the cancellation reason requirement, complete the setup in both the Specify a Default Cancel Reason and Specify a List of Cancellation Reasons for Patients to Choose From sections below.

Specify a Default Cancellation Reason

After you have identified which reasons to use in MyChart, specify a default reason and optionally make additional reasons available for patients to select. Default reason for cancellation is required for patients to cancel appointments by responding to Hello World text messages, as described in the Automatically Confirm or Cancel Appointments Based on Patient Responses topic.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Cancellation 1 screen.
2. In the Default reason for cancellation (I WDF 876) field, enter a default reason.

Specify a List of Cancellation Reasons for Patients to Choose From

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Cancellation 1 screen.
2. In the Allowed reasons for appointment cancellation (I WDF 875) field, list the reasons you want to allow for cancellation. If you don't want patients to have to select a reason but your system requires one, leave this field blank but make sure to enter a default reason in the Default reason for cancellation (I WDF 876) field.

Prevent Patients from Entering Free-Text Reasons for Canceling Appointments

By default, patients can enter free-text reasons for canceling appointments on the Confirm Cancellation page. You can remove this feature to require patients to select a reason for canceling that you defined.

To remove the Comments text box system-wide:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Cancellation 1 screen.
2. In the Allow cancellation comments? (I WDF 878) field, enter No. Note that this setting also determines whether patients see the Comments text box when they reschedule appointments.

To remove the Comments text box for individual departments:

1. From the MyChart System Manager Menu, select Master File Entry > Department and open a department record.
2. Access the Cancellation Settings screen.
3. In the Allow cancellation comments? (I DEP 53080) field, enter No. Note that this setting also determines whether patients see the Comments text box when they reschedule appointments.

If nothing is specified for an individual department, the system-wide setting is used. If nothing is specified in either the individual department or the system-wide setting, then the Comments text box appears.

Determine Whether Notifications Are Sent When Patients Cancel Appointments

You can determine whether a provider is sent an In Basket message or a patient is sent a MyChart message after a patient cancels an appointment or accepts a Fast Pass offer. Patients see the MyChart message on the Sent Messages page in MyChart and your schedulers receive the In Basket message.

In Basket messages are routed according to the following hierarchy:

1. The pool set in the Default Scheduling field in the department record (I DEP 53000)
2. Recipients for either of the following MyChart message types:
   - Patient Appointment Schedule Request
   - Patient Appointment Cancel Request
     These recipients are set in either Patient Access System Definitions or the patient profile record in the Message Recipient column on the Message Routing screen.
3. Default message recipient set in either Patient Access System Definitions or the patient profile record (I

WDF 170).

Considerations
You can determine whether patients are allowed to reply to these and other appointment-related notifications. For more information, refer to the Determine Whether Patients Can Reply to Appointment Notifications topic.

You can turn on notifications for canceled appointments at the department level in addition to the system level. By default, if there are no department-level settings for cancellation notifications and the Create In Basket messages? (I WDF 846) field is blank, a cancellation notification will be sent.

To turn on notifications system-wide:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Cancellation 2 screen.
2. In the Create In Basket messages? (I WDF 846) field, enter 2-Send EOW. If left blank, this field will also send an In Basket cancellation message.

To turn on notifications at the department level:

1. From the MyChart System Manager Menu, select Master File Entry > Department and access the Cancellation Settings screen.
2. In the Create In Basket and MyChart messages (I DEP 53861) field, enter one of the following values:
    - 2-EOW only. MyChart creates only an In Basket message.
    - 3-None. MyChart creates no messages.

Customize the Cancellation Failure Message

When a patient tries to cancel an appointment but the cancellation fails, a message is automatically sent to the patient to let him know. You can optionally add custom text to this message.

1. From the MyChart System Manager Menu, selection Scheduling Configuration and access the Appointment Cancellation 2 screen.
2. In the Text to add to the cancellation failure message (I WDF 877) field, enter your text.

Customize Text for Appointment Cancellation Workflows

To customize text for appointment cancellation, edit the strings under the CancelAppointment\CancelAppointment node in the Strings Manager. For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

Let Patients Reschedule Appointments Directly

You can simplify the process for rescheduling appointments by allowing patients to reschedule them directly through MyChart. By using this feature, you can improve patient satisfaction and reduce the amount of work for schedulers and registrars. With direct rescheduling, patients no longer need to complete one of the following workflows:

- Cancel the original appointment through MyChart and schedule a new one from scratch.
- Call and work with scheduling staff to reschedule through Cadence.

Starting in February 2023, patients can reschedule appointments scheduled through open scheduling or tickets without an account without needing a MyChart account. Patients can use a link in their appointment confirmation email, as described in the Notify Patients of Appointment Confirmation topic, to view their appointment details and reschedule the visit.

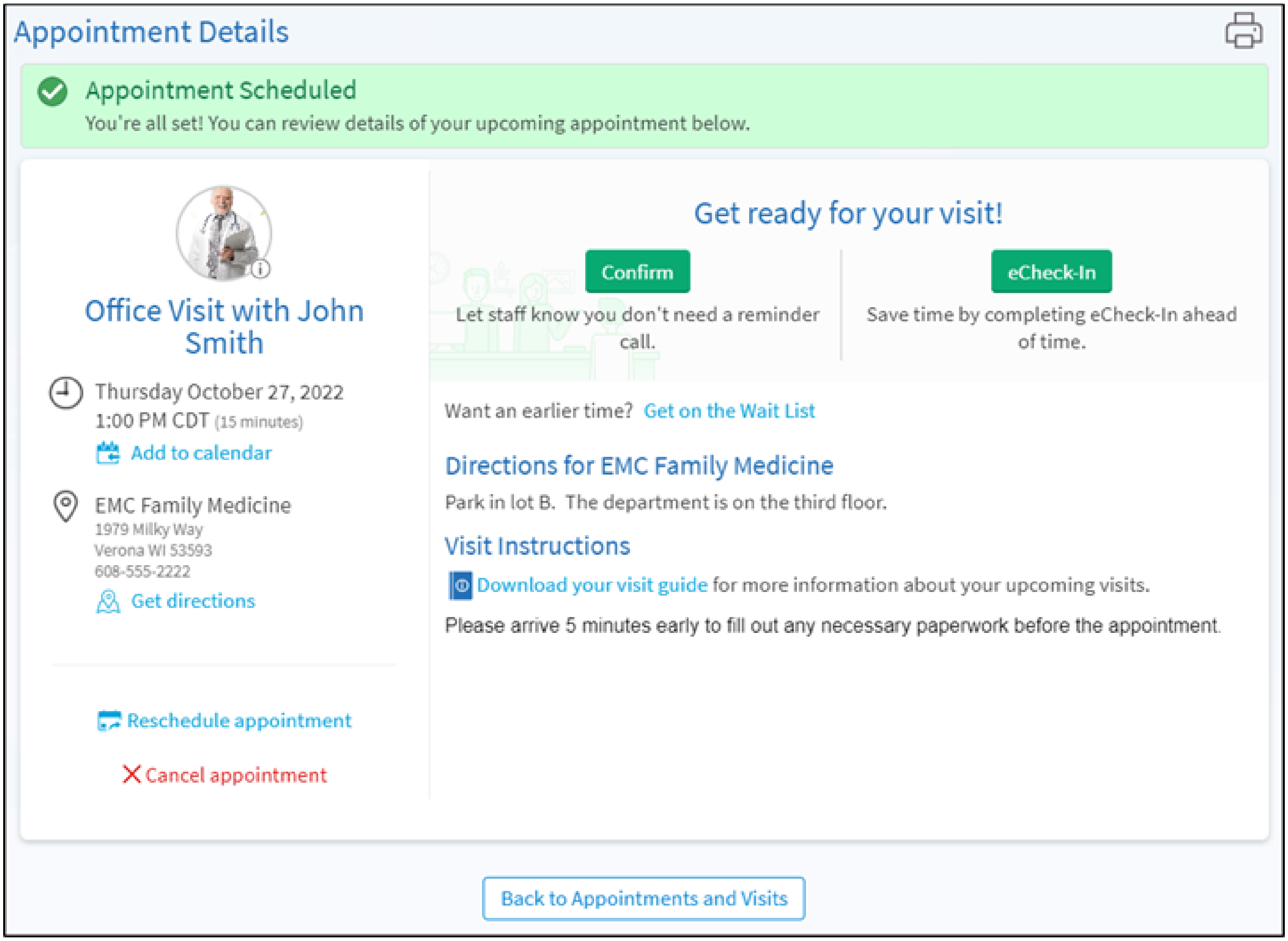
Appointment rescheduling uses the Appointment Details page to let patients select a new time for a previously scheduled appointment. To limit circumstances in which a patient reschedules a time-sensitive appointment or test, patients cannot directly reschedule appointments that are part of a recurring series or panel. Furthermore, you can choose to allow appointment rescheduling for each unique visit type.

For patients who want to reschedule an appointment, the process is simple and intuitive because it builds on the existing direct scheduling framework. To reschedule an appointment, patients click Reschedule on the Appointment Details page. After they have done so, they are presented with a series of pages where they are prompted to:

- Select a range of dates to search for available slots and their preferred days of the week and times of day.
- Choose an appointment from the list of available appointment dates.
- Enter a reason (and, depending on your configuration, a comment) for rescheduling.

After entering this information, patients are brought to a summary page for the new appointment where, when applicable, they are notified that they must:

- Reconfirm questionnaire responses.
- Restart eCheck-In.
- Reconfirm the appointment date and time.



When patients confirm the rescheduled appointment, an In Basket and/or MyChart message is created using your existing configuration for direct scheduling messages.

Any copays or prepayments made by the guarantor on the original appointment are transferred to the rescheduled appointment if the appointments are in the same service area. If the rescheduled appointment is in a different service area, your staff need to transfer or refund the original payment.

Note that questionnaire answers and other patient-entered data, such as appointment comments, do not change during rescheduling. If patients add any comments while rescheduling, they are attached to the In Basket message as rescheduling comments.

Additionally, depending on the visit type and your configuration, the patient might have the ability to choose a different center and/or provider.

Your patients can also use the MyChart mobile app to reschedule appointments. If an appointment's visit type is enabled for rescheduling, patients see a Cancel or Reschedule icon next to the Add to Calendar icon on the Future Appointment screen. When they tap the icon and choose Reschedule Appt, they are brought to the mobile-optimized web page for rescheduling and prompted through the workflow described above.

To reschedule an appointment, patients must be able to cancel it. For more information, refer to the Limit the Types of Appointments a Patient Can Cancel topic.

Enable Appointment Rescheduling for Patients

Add security point 189-Allow Rescheduling to your patient access classes to allow patients to reschedule appointments.

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and add security point 189.

Choose Which Visit Types Allow Appointment Rescheduling

When a patient reschedules an appointment in MyChart, all visit types are schedulable by default with any provider and department.

You can change this behavior by enabling or disabling rescheduling for specific visit types or by configuring rescheduling to respect direct scheduling configuration.

Enable or Disable Rescheduling for a Specific Visit Type

To disable rescheduling for a visit type:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. In the Enable reschedule through MyChart (I PRC 32220) field, enter No.

Note that you can also enable rescheduling for a visit type that is not listed in the Visit Type (I WDF 15005) field in Patient Access System Definitions. To do so, open the visit type record and enter Yes in the Enable reschedule through MyChart (I PRC 32220) field.

Restrict Rescheduling to Providers and Departments That Are Enabled for Direct Scheduling

To have rescheduling follow direct scheduling behavior:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Workflow Configuration screen.
2. In the Rescheduling respects scheduling settings? (I WDF 15160) field, enter Yes. When this field is set to Yes, any visit types in which the Enable reschedule through MyChart (I PRC 32220) field is not set to No can be rescheduled through MyChart with providers and departments that have direct scheduling enabled. Furthermore, for video visits that are directly integrated with your system, rescheduling is allowed only with providers that are enabled for telemedicine scheduling, as described in the Let Patients Directly Schedule Video Visits from MyChart topic, rather than providers that have direct scheduling enabled. The default value for the Rescheduling respects scheduling settings? (I WDF 15160) field is No, and any visit types in which the Enable reschedule through MyChart (I PRC 32220) field is not set to No can be rescheduled with any provider in any department.

Use Rules to Define When Appointments Can Be Rescheduled

You can use a rule to limit when rescheduling is available for specific visit types. This rule is part of a hierarchy that is evaluated in the following order to determine whether rescheduling is allowed for a given visit type:

1. Enable reschedule rule (I PRC 32230) field in the visit type record
2. Enable reschedule through MyChart (I PRC 32220) field in the visit type record
3. Enable rescheduling rule (I WDF 15150) in Patient Access System Definitions
4. Can Direct? (I WDF 15020) field in Patient Access System Definitions

First, create a rule that uses the Patient context and evaluates to true when a visit type should allow rescheduling.

For more information about working with rules, refer to the Create or Edit a Rule topic.

Then, specify your rule at the visit type or system level.

To specify a rule at the system level:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Workflow Configuration screen.
2. In the Enable rescheduling rule (I WDF 15150) field, enter the rule you created above.

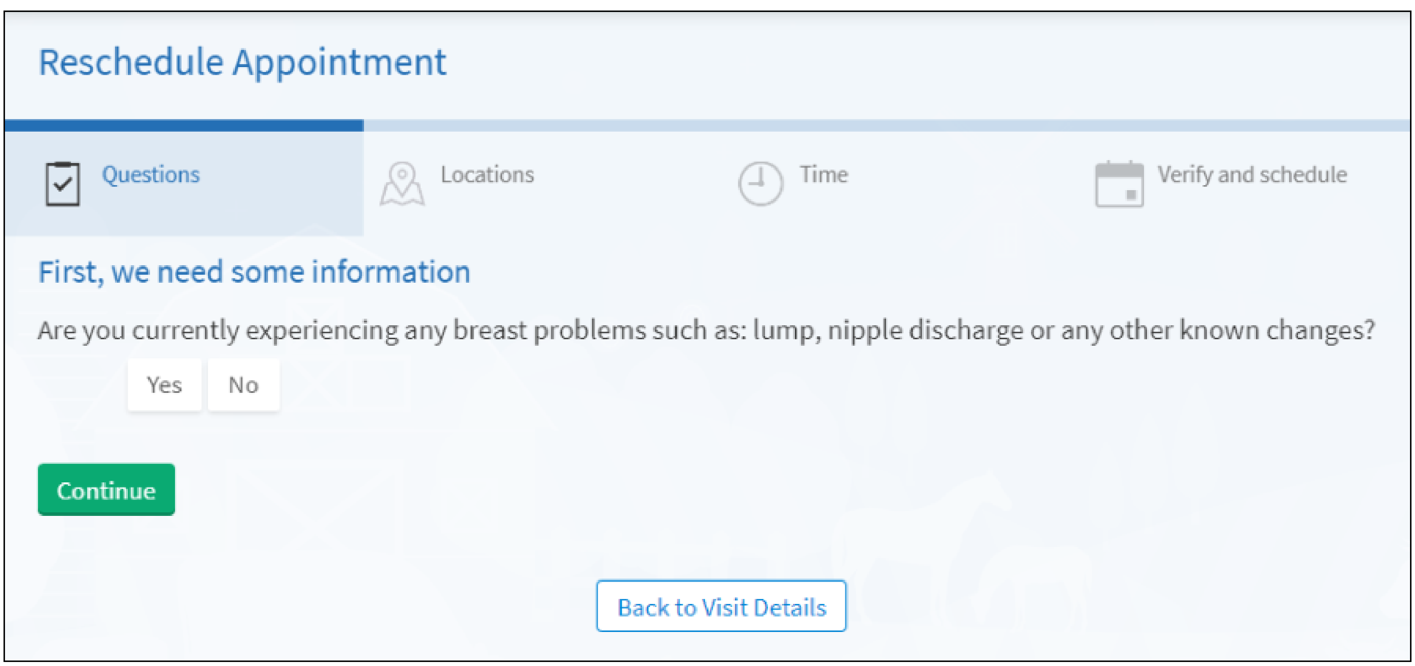
To specify a rule at the visit type level:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. Access the Scheduling Settings 1 screen.
3. In the Enable reschedule rule (I PRC 32230) field, enter the rule you created above.

Run a Visit Type's Decision Tree or Visit Type Questionnaire During Rescheduling

Starting in November 2022

When a patient starts to reschedule an appointment, they're taken straight to the available appointment times by default. However, you can instead choose to run the visit type's linked decision tree or questionnaire before showing available slots during rescheduling. Just like in other online scheduling workflows, running a decision tree or questionnaire during rescheduling can help guide patients to a more appropriate scheduling outcome, especially if a patient's condition has changed since the initial appointment was scheduled. For example, if a patient wants to reschedule her next mammogram because she's experiencing recent breast pain, a decision tree or questionnaire can guide her through an escalated care pathway instead of continuing to reschedule the routine mammogram.



To run decision trees or questionnaires during rescheduling, you can configure a setting at the visit type level. If the visit type setting is configured, the decision tree set in the Known patient decision tree (I PRC 32080) field or the questionnaire set in the MyChart visit type questionnaire (I PRC 32075) field runs during rescheduling. This applies whether the original appointment was scheduled by a patient through MyChart or by a scheduler through Hyperspace.

Note that using a decision tree or questionnaire to change the scheduled visit type to a panel visit type is not supported.

Starting in February 2023, patients can reschedule visits without needing to log in to MyChart. Both decision trees and visit type questionnaires have the potential to expose patient information through patient rules, questions, SmartLinks, or SmartTexts. For example, imagine that a patient's family member is scheduling a visit for a pregnant patient and doesn't know the patient is pregnant. A decision tree for this visit could check whether the patient is pregnant and provide follow-up instructions that reference the pregnancy, thus inappropriately revealing this to the family member. You can configure a setting on the questionnaire or decision tree to allow it to run in cases where a patient is not logged into MyChart.

Considerations

There are different settings that determine whether a decision tree or questionnaire can add other providers for scheduling:

- If a patient scheduled the original appointment through open scheduling, and during rescheduling a decision tree or questionnaire attempts to add a provider with the Allow open scheduling or request? (I SER 32068) field set to No (Allow Open Scheduling through MyChart? in August 2024 and earlier versions), the provider does not get added for scheduling.
- If a patient scheduled the original appointment through ticket scheduling or direct scheduling, and during rescheduling a decision tree or questionnaire attempts to add a provider with the Allow Ticket Scheduling (I SER 32070) field or the Allow Direct Scheduling through MyChart (I SER 32065) field set to No, the provider is only added if your organization doesn't restrict rescheduling to providers enabled for those types of scheduling. For more information, refer to the Restrict Rescheduling to Providers and Departments That Are Enabled for Direct Scheduling section of the Choose Which Visit Types Allow Appointment Rescheduling topic.
- If a visit type's Allow resched provider/location change (I PRC 32410) field is set to No, but a decision tree node or questionnaire condition attempts to change which providers are available, the decision tree or questionnaire's configuration is respected. If a decision tree or questionnaire is present but doesn't attempt to change which providers are available, the original setting's value is respected, and the patient can't change the provider or location during rescheduling.

Because not all questions are valuable to ask a patient again during rescheduling, we recommend reviewing a decision tree or questionnaire's questions first before enabling its linked visit type to run the decision tree or questionnaire during rescheduling.

- A patient's answers to screening questions about COVID-19 symptoms before an office visit or breast pain before a mammogram might reasonably change between scheduling the original appointment and rescheduling, so we recommend enabling this feature in these scenarios.
- A patient's answers to questions narrowing down the reason for visit to a particular specialty or subspecialty aren't likely to change between scheduling the original appointment and rescheduling, so we don't recommend enabling this feature in this scenario.

Use the Build Wizard in Hyperspace to update visit types to run their decision tree or questionnaire during rescheduling. To get started, open the Build Wizard (search: Build Wizard) and search for feature 320056-MyChart Scheduling - Assign Decision Trees and Visit Type Questionnaires to Visit Types (application: MyChart).

To manually configure a visit type:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open the visit type record.
2. Go to the Rescheduling Settings screen.
3. In the Run decision tree or questionnaire? (I PRC 32235) field, enter Yes.

To enable a decision tree to appear for patients rescheduling an appointment outside of MyChart:

1. In Hyperspace, open a decision tree (search: Appointment Entry Decision Tree).
2. Go to the Decision Tree tab and review the tree to ensure it does not reveal sensitive information, as determined by your organization and legal team. Make sure to review decision trees or questionnaires that are launched from decision tree or questionnaire nodes within the tree or launched by a visit type the decision tree switches to.
3. If needed, revise the decision tree to remove sensitive information. Optionally, you can use the rule property 32021-Is Patient Logged into MyChart without Account in rules your tree evaluates to set up different logic for patients not logged in to MyChart.
4. Go to the Basic Information tab and select the Enable for patients outside of an authenticated MyChart session checkbox.

To enable a questionnaire to appear for all patients using scheduling tickets:

1. In Hyperspace, open a visit type questionnaire (search: Questionnaire Editor).
2. Review the questionnaire, including linked questions and questionnaire conditions in the Edit Questionnaire form and visit type conditions in the Visit Type Conditions form. Make sure to review decision trees or questionnaires that are launched by a visit type the questionnaire switches to.
3. If needed, revise the questionnaire to remove sensitive information.
4. Go to the Edit Questionnaire form and select the Enable for patients outside of an authenticated MyChart session checkbox.

Configure a Patient's Options for Rescheduling

When rescheduling, the choices a patient can make regarding appointment location and provider are determined by the visit type.

For more information about creating advanced visit types and centers, refer to the Build Advanced Visit Types and Organize Departments into Centers for Easier Scheduling topics, respectively.

For more information about configuring advanced visit types and centers for direct scheduling, refer to the Enable Direct Scheduling for Visit Types and Customize Direct Scheduling Options Related to Centers and Departments topics, respectively.

Considerations

Starting in February 2023, a patient is not able to change their provider or location regardless of visit type settings in the following scenarios:

- The patient is rescheduling outside of an authenticated MyChart session.
- The visit was scheduled through open scheduling.

1. From the MyChart System Manager menu, select Master File Entry > Visit Type and open an advanced visit type record.
2. Go to the Cancellations & Scheduling Settings screen.
3. In the Allow provider selection? (I PRC 32400) field, enter Yes if you want to allow patients to select an individual provider for a visit type during rescheduling. Note that this setting also applies to open scheduling, ticket scheduling (when a pool is used for scheduling tickets), panel scheduling, self-triage, and new provider scheduling. By default, this setting is set to No. Starting in November 2022, use this setting to disallow provider selection for simple visit types as well as advanced types.
4. In the Allow resched prov/location change? (I PRC 32410) field, enter Yes if you want to allow patients to change the provider or the location during rescheduling.
    - If the appointment is for an advanced visit type with pools or a simple visit type that was scheduled through a Cadence appointment request that contains multiple providers, setting this field to Yes allows patients to change both the provider and location when rescheduling.
    - If the appointment is for a simple visit type associated with a single provider, setting this field to Yes allows patients to change the location based on the provider's availability.
    - If this field is set to No or left blank, patients can't change the provider or location.

Define Reasons for Patients to Reschedule Appointments

You can configure the reasons for rescheduling and allow or disable free-text comments.

The list of reasons for rescheduling and the availability of the comments field are defined by your configuration of the appointment canceling workflow.

- To edit the list of cancellation/rescheduling reasons or change the default reason used when a patient does not specify a reason when canceling/rescheduling an appointment through MyChart, refer to the Define Reasons for Patients to Cancel Appointments topic.
- To configure comments field availability, refer to the Prevent Patients from Entering Free-Text Reasons for Canceling Appointments topic.

Configure Messages Generated by Appointment Rescheduling

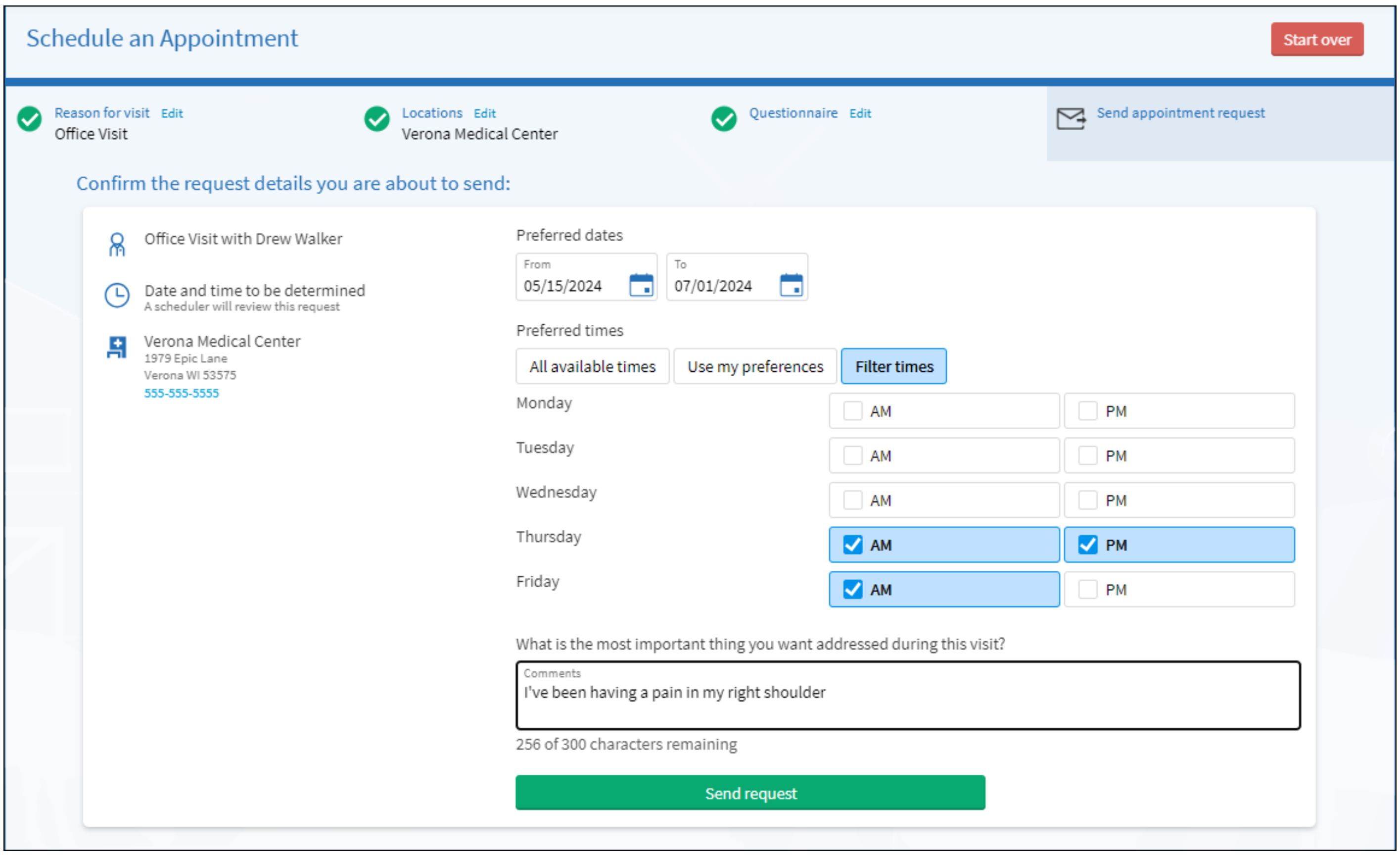
The messages sent after a patient has successfully rescheduled an appointment are defined by the same logic and configuration for other messages generated by the direct scheduling workflow.

MyChart Scheduling Setup: Other Scheduling Features

In this section, we'll show you more configuration options for MyChart scheduling. These options might not be built in the Foundation System, but they might be appropriate alternatives to the Foundation System build or useful in specific scenarios.

Use Appointment Request Messages in Addition to Direct Scheduling

In addition to letting patients use direct scheduling to create appointments in your system, you can have patients send appointment requests that your scheduling staff can review and either approve or reject.



Starting in May 2024, MyChart appointment requests are routed to appointment request workqueues as Cadence appointment requests. In Basket messages are no longer sent. Schedulers monitor appointment request workqueues and follow up on unscheduled requests there. To save schedulers time identifying appropriate visit types, Cadence appointment requests are associated with the default visit type (I WDF 15005) of the Reason for Visit (I WDF 15000) that the patient chooses when requesting their appointment in MyChart. If there is no default visit type set for the Reason for Visit, the system Default Visit Type (I WDF 820) is used.

Starting in May 2025, you can use the Build Wizard to quickly identify and correct Reasons for Visit without default visit types as well as set a system-level Default Visit Type. To get started, open the Build Wizard and search for feature 320027-Update MyChart Appointment Request Visit Type Defaults (application: MyChart, Cadence).

In February 2024 and earlier versions, a scheduler at the clinic receives the appointment schedule request in In Basket. The scheduler then schedules an appointment and contacts the patient or contacts the patient to schedule a different appointment.

By default, MyChart routes the appointment requests to In Baskets according to the following scheme:

1. First, it checks the Default Scheduling (I DEP 53000) field in the department record.
2. Second, it checks whether anything is set in the Message recipients settings table in the profile record.
3. Third, it checks the default message recipient in the profile record.

You can also use advanced routing options for these types of messages. For more information, refer to the Message Routing Configuration topic.

Give Patients Security to Create Appointment Requests

To allow patients to create appointment requests, add security point 15-Appt Sched Request to their patient access classes.

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and enter security point 15.

Determine Who Receives Appointment Requests (Starting in May 2024)

Starting in May 2024, appointment requests are sent to appointment request workqueues that need to be reviewed by schedulers. Here's how to set up appointment request workqueues and other related build so that MyChart appointment requests are easy for users to process.

Decide What Appointment Request Workqueues You Need to Build

Depending on your existing appointment request workqueue build, you have a few options for how to route MyChart appointment requests to appointment request workqueues:

- Allow MyChart appointment requests to be routed to existing appointment request workqueues.
- Route MyChart appointment requests to a single new appointment request workqueue. This option works for organizations that don't have existing appointment request workqueues.
- Route MyChart appointment requests to different appointment request workqueues for each department in which MyChart appointment requests are enabled. This option works for organizations that don't have existing appointment request workqueues.

Use Existing Appointment Request Workqueues

If your organization already has workqueues for appointment requests, MyChart appointment requests are automatically routed to the existing workqueues like any other appointment request based on your workqueue configuration. You can also complete the following steps to differentiate MyChart appointment requests from ones coming from other sources, as well as to make sure they are falling onto appropriate workqueues.

- Differentiate requests coming from MyChart versus other sources by adding a column to your workqueue view that uses property 98618-Appt Request - Method. Refer to the Customize the Columns in Appointment Request Workqueues topic for more information.
- Make sure no requests fall through the cracks by configuring a report based on Reporting Workbench template 55072-ES Request Search and adding property 98271-Is Appt Request On A Workqueue to find any requests not currently on a workqueue. See the Add Criteria to a Report topic for more information.

Create a Single Workqueue to Catch All Requests Created in MyChart

If you want to keep appointments requests created in MyChart separate from appointment requests from other sources, or if you have no existing appointment request workqueue build and want to start using this feature before completing a larger workqueue build project, you can create a single appointment request workqueue that captures all requests created in MyChart.

Follow the below steps to create your workqueue:

1. Create an appointment request workqueue following the instructions described in the Build an Appointment Request Workqueue topic.
2. Assign schedulers to monitor the appointment request workqueue following the instructions in the Assign Schedulers to Appointment Request Workqueues topic.
3. Create a workqueue rule in the Rule Editor(search: Rule Editor).
4. Create a new rule with a context of Appointment Request
5. Add property 98163-Appt Request - How Requested
    1. In the Operator field, enter =.
    2. In the Value field, enter Patient Portal - Direct Scheduling [9]
6. Add the rule to your workqueue in the Appointment Request Workqueue Maintenance activity (search: Requests WQ Maintenance).
7. Open your workqueue.
8. Navigate to the Rules section and click Add Existing.
9. Enter the rule you just created and click Accept.
10. Select the Active checkbox to make sure your rule is active.

Create Workqueues for All Departments that allow MyChart Appointment Requests

Another option, whether you have preexisting appointment request workqueue build or not, would be to create a workqueue for each department that allows MyChart appointment requests. You can filter requests based on responsible department so that each department can monitor their own requests.

Create an appointment request workqueue for each department:

1. Create an appointment request workqueue following the instructions described in the Build an Appointment Request Workqueue topic.
2. Assign schedulers to monitor the appointment request workqueue following the instructions in the Assign Schedulers to Appointment Request Workqueues topic.
3. Open your workqueue in the Appointment Request Workqueue Maintenance activity (search: Requests WQ Maintenance).
4. Navigate to the Criteria section.
5. In the Responsible Department criterion, add the departments whose requests should fall onto this

workqueue.

6. Click Accept.

When a MyChart appointment request is created, the system attempts to set an appropriate responsible department on the request based on the department and provider selected by the patient. If one cannot be determined, no responsible department is assigned. Complete the following steps to set a default responsible department so you can create a workqueue that catches all requests that need a responsible department identified:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > Creation form.
3. Enter a department into the Default Responsible Department (I SDF 41601) field.

Optional Tasks for MyChart Appointment Requests

Prevent Duplicate Appointment Requests

If you want to prevent patients from submitting appointment request messages in MyChart for the same appointment, you can specify a rule to block any requests that meet the rule's criteria. Specify criteria in the rule that, when true, add a numeric value to the total threshold. If enough criteria return true and the total value exceeds the threshold you set then the request is considered a duplicate by the system.

You can use Epic-released rule 31014-Appointment Request Duplicate Detection - Exact Match with a threshold of 40 to mark requests made on the same day that match exactly as duplicates. This rule has eight criterion that each add a value of five to the threshold when true. By setting the threshold to 40, a request must match all of the criteria to be considered a duplicate.

You can also make a copy of this rule to adjust the parameters to match your organization's duplicate checking needs. For more information on modifying rules, refer to the Create or Edit a Rule topic.

To configure the system to detect duplicate requests:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > Creation form.
3. In the Duplicate Checking Scoring Rule (I SDF 41602) field, enter an Appointment Request Duplicate Detection-context rule.
4. Enter a threshold in the Duplicate Checking Threshold (I SDF 41603) field to determine when requests should be marked as duplicates.

Limit Time that Decision Tree Answers are Saved

If the questions in a decision tree are time sensitive, you can choose how many days the responses to those questions can be saved and re-used before the system launches the decision tree again during scheduling. The number of days is customizable at the visit type level and the default is to save the answers indefinitely.

1. From the MyChart System Manager Menu, go to Master File Entry > Visit Type.
2. Open the visit type you want to edit and go to the Scheduling Settings 2 screen.
3. Enter a value in the Answers valid for... days (I PRC 32095) field.

Determine Who Receives Appointment Requests (February 2024 and Earlier)

The system builds a list of recipients for an appointment request by using three factors:

- Settings to send the request to the patient's PCP
- Past visits and future appointments
- Custom logic in an extension

Configure Providers to Receive Appointment Requests

Providers can be selected as a recipient for an appointment request, but they must be configured to receive these requests before MyChart can send the request to them.

To configure providers to receive appointment requests for their patients:

1. From the MyChart System Manager Menu, select Master File Entry > Provider and open a provider record.
2. Access the MyChart Settings screen.
3. In the "Include in recipient list for" section, enter Yes in the Appointment Request? (I SER 32090) field. If this field is left blank, the behavior is determined by the Allow/include provider by default? (I WDF 808) field on the Scheduling Options 5 screen in Patient Access System Definitions.

Send Appointment Requests to PCPs

To send appointment requests to a patient's primary care provider (PCP):

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Request Lookback Options screen.
2. In the Include PCP? (I WDF 1845) field, enter Yes.
   If you enter Yes, then MyChart looks in the PCP's provider record to see if she should be included in the recipient list.

Send Appointment Requests Based on Past and Future Appointments

MyChart can send appointment requests to encounter providers from past visits and future appointments.

To configure how encounter providers are selected as recipients for appointment requests:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Request Lookback Options screen.
2. In the Look back on visits for __day(s) (I WDF 1815) field, enter the number of days that the system looks back for past visits. The default is 180 days.
3. In the Look at future appointments for__day(s) (I WDF 1825) field, enter the number of days that the system looks forward for future appointments. The default is 180 days. Note that entering a value greater than 0 lets patients schedule additional appointments for any available appointment in this window of time, even if it's before their first qualifying visit with that provider.
4. In the Enc Types for Appt Request Provider List (I WDF 7050) field, list the types of encounters that the system should evaluate when determining whether a provider should be included in the list for appointment requests. The default encounter types are office visits and appointments.

Use Custom Logic to Send Appointment Requests

You can use an extension of type 32042-MyChart Appt Req Prov List to modify the recipient list for appointment requests.

To use these extensions to modify the recipient list:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment

Request Lookback Options screen.

2. In the Extension (I WDF 1855) field, specify the extension or a copy of it.

Here are some examples of extensions you might want to use:

- 32534-MyChart - Appointment Request filter Provider by DEP ID allows you to specify department IDs or ranges of department IDs that you want to filter out of the Appointment Request page. If excluded by this extension, providers from these departments do not appear on the list for appointment requests unless they are associated with another department that is not filtered out.
- 32535-MyChart Appointment Request Filter by DEP Name allows you to specify string values to use to filter departments from the Appointment Request page based on the department name. If excluded by this extension, providers from these departments do not appear on the list for appointment requests unless they are associated with another department that is not filtered out.

Refer to the extensions' help text for information about configurable parameters.

Note that if you use the Include PCP? (I WDF 1845) setting in Patient Access System Definitions to add the patient's primary care provider to the selection list for appointment requests, that provider will still appear even if the provider's primary department is filtered out based on your configuration of extension 32534 or 32535.

Route Appointment Request Messages to Pools

By default, appointment requests are routed to your default pool for MyChart messages. You can use advanced routing options to route messages differently at the provider, department, and system levels. For more information, refer to the Message Routing Configuration topic.

Determine Reasons for Visit Patients Can Choose for Appointment Requests

Determine which reasons for visit patients can choose from when they request an appointment through MyChart. To determine whether appointment requests are allowed for a given reason for visit, the system uses a hierarchy that is evaluated in the following order:

1. Request Appointment? (I DEP 53710) setting in the department record
2. Can Request? (I WDF 15025) setting in Patient Access System Definitions
3. Default system behavior, which is Yes

Patients can request appointments for both advanced visit types and simple visit types. To determine whether patients can request appointments at the system level:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Reason For Visit Configuration screen.
2. Locate the row for which you want to determine appointment request behavior. In the Can Request? (I WDF 15025) field, enter Yes or No. Starting in November 2022, you can set this field to Yes for simple visit types in addition to advanced visit types that have the Allow provider selection? (I PRC 32400) field set to Yes.

To override appointment request behavior at the department level:

1. From the MyChart System Manager Menu, select Master File Entry > Department, and open a department record.
2. Access the Reason For Visit Scheduling Overrides screen.
3. Locate or create a row in the table for the visit type for which you want to override the appointment

request behavior.

4. In the Request Appointment? (I DEP 53710) column, enter Yes or No. For more information about the other columns in this table, refer to the Configure Reason for Visit Overrides for Redesigned Scheduling topic.

You can also include an "Other" reason for visit option to help patients complete the appointment request workflow in cases where they don't see the reason for visit they need. When this feature is enabled, patients see the "Other" option in the reason for visit list on the scheduling landing page and at the end of the reason for visit list when provider-first scheduling is used. When a patient chooses the "Other" option, he must enter a free-text reason for visit in a required field before he can submit the appointment request.

To enable the "Other" option:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Appointment Request Options screen.
2. In the Include "Other" reason for visit? (I WDF 1849) field, enter Yes. This is the setting used in the Foundation System. The default value is No.

Track a Patient's Reason for Requesting an Appointment and Getting on the Wait List

Starting in November 2024

If your organization manually triages appointment requests on workqueues or wait list entries using the Wait List activity, you can set up a list of reasons that patients can select from when submitting an appointment request or joining the wait list in MyChart. Schedulers can use the reasons that patients enter to inform their scheduling decisions from appointment requests or the wait list. For example, if a patient selects "Worsening symptoms" as their reason for joining the wait list, a scheduler might use this reason to prioritize scheduling this patient.

If you have operational goals that this feature fulfills, contact your Epic representative and mention SLG 9295508.

Restrict Which Departments Allow Appointment Requests

After you've allowed appointment requests for at least one reason for visit, patients can send appointment requests for that reason for visit to all departments. However, you might have departments that shouldn't receive these messages, such as departments without dedicated front desk staff to respond to the appointment requests. In these cases, you can prevent patients from sending appointment requests to the department. To do so:

1. From the MyChart System Manager Menu, select Master File Entry > Department (DEP) and open the department you'd like to disable.
2. Go to the Appointment Request Settings screen.
3. In the Is appointment request allowed? (I DEP 53220) field, enter No.

To set this field in a large number of departments, you can use import specification DEP,1000.

Limit Patients to Requesting Appointments from a List of Providers

When sending an appointment request, a patient can select which provider she wants to see. By default, she can also choose an Other option and select another provider for the requested appointment.

You can remove this option so that patients must choose from the list. Note that this option applies to both the Appointment Request and Health Maintenance Appointment Request pages.

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Request Lookback Options screen.

2. In the Include "Other"? (I WDF 1848) field, enter No.

Use Rules to Define When Patients Can Request Appointments

You can use a rule to further limit when appointment requests are available for specific reasons for visit. For example, you could create a rule that makes appointment requests for well-child visits available only to patients under the age of 18. This rule is part of a hierarchy that is evaluated in the following order to determine whether appointment requests are allowed for a given reason for visit:

1. Request Appointment? (I DEP 53710) field in the department record
2. Request Rule (I WDF 15035) field in Patient Access System Definitions
3. Can Request? (I WDF 15025) field in Patient Access System Definitions
4. Default system behavior (Yes)

First, create a rule that uses the Patient (No Default Contact) context and evaluates to true when the reason for visit should be allowed for appointment requests and false when the reason for visit should be hidden for appointment requests. For more information about working with rules, refer to the Create or Edit a Rule topic.

Then, specify your rule in Patient Access System Definitions:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Scheduling Reason For Visit Configuration screen.
2. In the Request Rule (I WDF 15035) field, enter the rule you created above.

Allow Patients to Suggest Alternate Providers

This task applies only to Health Maintenance appointment requests.

When patients send a scheduling request, they can choose a caregiver from the Would see list. If the patient's requested provider is unavailable, the scheduler can schedule an appointment with the caregiver from the Would see list instead.

To enable the Would see list:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Appointment Request Options screen.
2. Press F8 to go to the Legacy Appointment Request Options screen.
3. In the Appointment Request Would Accept With Options section, enter any caregivers that your facility would allow to see such a patient, such as Nurse Practitioner, On-Call Provider, Next Available Provider, or No One Else. If a provider is marked as being Inactive in their provider (SER) record, they are not available in either the Medical Advice Request recipient list or the Appointment Request recipient list.

Require Patients to Enter Comments for Appointment Requests

To ensure that appointment requests contain clinically relevant information, you can require patients to complete the Comments field. This feature is set up in the Foundation System.

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Appointment Request Lookback Options screen.
2. In the Appointment comments field required? (I WDF 1856) field, enter Yes. The default value is No.

Note: This field also determines whether the Comments field is required for preventive care appointment requests.

Limit When Patients Can Request Appointments

Define Time Ranges for Appointment Requests

You can define time ranges to reflect the days and time ranges your clinics are open so that patients can select only from that range when they request an appointment. For example, a clinic might have evening hours only a few days a week. Note that this configuration is system-wide, so you cannot have different hours for different departments.

Edit Base.xml to define time ranges. In the <PrefTimesConfig> element, you use the <times> element to define time ranges and the <days> element to assign time ranges to days.

- In the <times> element, create a <range> element for each time range. The attributes for these elements are:
  - element. The unique number of the time range. The numbers must start at 1.
  - display. The name of the range as it appears in MyChart.
  - abbrev. The abbreviation for the time range (for example, AM or PM).
  - begintime. The start of the time range.
  - endtime. The end of the time range.
  - messageoverride. Text to override the time range. If you have secondary locales set up in MyChart, configure this string to be in the language that your Hyperspace users who receive appointment requests will understand.
- In the <days> element, create an element for each of the seven days, even if you do not allow patients to request appointments for all days. The name of the element is the name of the day. The attributes are:
  - display. The abbreviated name of the day as it appears in MyChart.
  - ranges. A comma-delimited list of ranges, selected by the element attribute for each range.

In this example, patients can request appointments from 8–10 on Monday, Wednesday, and Friday, 8–5 on Tuesday and Thursday, and 8–12 on Saturday.

```
<PrefTimesConfig>
<times>
<range element="1" display="Morning" begintime="8:00 AM" endtime="12:00 PM"/>
<range element="2" display="Afternoon" begintime="12:00 PM" endtime="5:00 PM"/>
<range element="3" display="Evening" begintime="6:00 PM" endtime="10:00 PM"/>
</times>
<days>
<monday display="Mon" ranges="1,2,3"/>
<tuesday display="Tue" ranges="1,2"/>
<wednesday display="Wed" ranges="1,2,3"/>
<thursday display="Thu" ranges="1,2"/>
<friday display="Fri" ranges="1,2,3"/>
<saturday display="Sat" ranges="1"/>
<sunday display="" ranges=""/>
</days>
</PrefTimesConfig>
```

Enable Preferred Times for Appointment Requests

These steps apply only to Health Maintenance appointment requests.

To enable the preferred days and time ranges to appear in MyChart, edit Config.xml. Under the <MiscConfig> element, find the <options> element. The following elements under <options> enable the display of preferred days and preferred time ranges.

```
<MiscConfig>
<stdfiles>
<supportfiles>.
<stdredirects>
<options>
<option name="ApptSchedPrefTimes" enabled="true" hint="Give patients capability to choose preferred times in a
<option name="ApptSchedPrefDates" enabled="true" hint="Give patients capability to choose preferred dates in ap
<option name="ShowRespondByPref" enabled="false" hint="Allow patients to select a respond by preference for p
```

Set the enabled attributes for ApptSchedPrefTimes and ApptSchedPrefDates to true to enable this feature.

Set the enabled attribute for ShowRespondByPref to true to also allow patients to indicate the method by which they would like a response.

Show the Clinician Associated with a Patient Schedule Request Message (February 2024 and Earlier)

To make it easier for schedulers to find specific MyChart scheduling messages, you can show the name of the clinician associated with a Patient Schedule Request message in a column in In Basket.

Extension 32059-MyChart - IB Message Schedule Request Provider defines this column. You can customize the extension to format the clinician's name and add a message if no clinician is associated with the message.

As an optional step, you can copy extension 32059 and modify its parameters to customize the column.

1. In Chronicles, access the Extension (LPP) master file and duplicate extension 32059.
2. Configure the parameters in your copy of the extension as needed:
    - 2-No Provider Message. Optional. Determines the text to show in the column when there is no clinician associated with the appointment in the In Basket message. Enter free text. By default, nothing appears in the column if there is no clinician associated with the appointment.
    - 3-Name Format. Optional. Determines the format used for the clinician's name. Enter 1 to show the name in First Name Last Name format (for example, Pat Smith). Enter 2 to show the name in Last Name, First Name format (for example, Smith, Pat). By default, this parameter is set to 0, and the name appears in the format specified in the Display format of provider name field on the Facility-Wide Extensions & Flags 2 screen of your compiled configuration record (Clinical Administration > Management Options > Complete Configuration (HDF)).

To add the column to Patient Schedule Request messages:

1. In Hyperspace, select Epic button > Admin > In Basket > Message Type Definitions and open your copy of message type definition 52-Patient Schedule Request. If you are currently using message type definition 52, duplicate it and open the copy you create.
2. Under General Settings, select the Listing Columns form.
3. In the Additional Columns section, enter the following information:
    - Column Name: A name, such as Provider
    - Extension: 32059 or your copy of it
    - Format: Just Title
4. Click Accept.

Let Patients Request or Schedule Appointments for Preventive Care That Is Due

If you use the Preventive Care feature in MyChart, you can let patients request or schedule appointments for the specific care topics for which they are due. For more information about the Preventive Care feature, refer to the Remind Patients of Preventive Care topic.

Let Patients Request Appointments for Health Maintenance

Starting in August 2024

Starting in August 2024, appointment requests for preventive care services are available from the MyChart website and the MyChart mobile app, and they rely on the same logic as other MyChart appointment requests. This means if a patient has security point 15-Appointment Schedule Request, which allows them to request an appointment through the Visits activity, they have the same access in the Preventive Care activity. A preventive care service can be requested if it has an associated reason for visit (I HMT 32050) or if you allow "Other" as a reason for visit (I WDF 1849). For more information on this setup and security requirements, refer to the Use Appointment Request Messages in Addition to Direct Scheduling topic.

You can update your Health Maintenance build to prevent a Health Maintenance topic from being schedulable or requestable in MyChart.

1. In Hyperspace, go to the Health Maintenance Topic Editor (search: HM Topic).
2. Open the topic you want to update.
3. On the Patient Outreach tab, deselect the Allow Scheduling in MyChart (I HMT 32060) checkbox.

May 2024 and Earlier

In May 2024 and earlier versions, appointment requests for preventive care services are available only from the MyChart website and not the MyChart mobile app. They also have some minor differences compared to other MyChart appointment requests. When a patient requests an appointment by selecting the check-box for a topic and clicking Request Appointment in the Preventive Care activity, the name of the Health Maintenance topic is used as the reason for visit. The In Basket message scheduling staff receive for the request also includes the name of the Health Maintenance topic as the reason for the request.

To enable appointment requests for preventive care, add security point 41-HealthReminders Request Appointments to your patient access classes.

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and add security point 41.

Let Patients Schedule Appointments for Health Maintenance

You can allow patients to schedule appointments for Health Maintenance topics directly in MyChart rather than merely requesting them. If a patient has the appropriate security and you've enabled direct scheduling for a Health Maintenance topic, the Request Appointment button is replaced with a Schedule Appointment button. Clicking the button begins the standard direct scheduling workflow. To directly schedule preventive care appointments from the mobile app, patients must update the MyChart mobile app to version 8.9 or higher.

Patients need only security point 16-Make Appointment to schedule appointments directly. Add the appropriate security point to patient access classes.

To enable direct scheduling for Health Maintenance topics in bulk, use Build Wizard feature 320004-Direct Schedule Simple Health Maintenance in MyChart.

To manually enable direct scheduling for an individual Health Maintenance topic:

1. In Hyperspace, access the Health Maintenance Topic Editor (search: HM Topic) and open the appropriate topic record.
2. On the Patient Outreach form, enter a reason for visit in the MyChart Scheduling Reason for Visit (I HMT 32050) field in the MyChart Integration section. The reason must be listed as a reason enabled for scheduling in the Reason for Visit (I WDF 15000) field in Patient Access System Definitions. This is the reason for visit used to generate the appointment when the patient clicks Schedule Appointment.
3. Click Accept.

Customize Text for Appointment Requests

To customize text for appointment requests, edit the strings under the Scheduling\Scheduling\Index node in the Strings Manager. For more information about working with the Strings Manager, refer to the Customize .NET

Pages Using the Strings Manager topic.

For more information about working with DisplayConfig.xml, refer to the Customize Classic ASP Pages Using DisplayConfig.xml topic.

To customize text for Health Maintenance appointment requests, edit the following node in the DisplayConfig.xml:

```
<mode value="apptsched" printerfriendly="yes" icon="appointments.png">
```

Use Appointment Cancellation Messages Instead of Cancel Appointments

The recommended and default method for patients to use MyChart to cancel appointments is the Cancel Appointments feature, which lets patients to cancel appointments directly from MyChart.

As an alternative that gives more control to your staff, your organization can offer patients the ability to send appointment cancellation requests. If you choose this feature, patients send messages from MyChart to your clinic for schedulers to cancel a particular appointment.

On the Upcoming Appointments page, a patient clicks an appointment to view the Appointment Details page, then clicks Cancel This Appointment to be taken to the Appointment Cancellation Message page.

On this page, the patient enters a message to explain why they need to cancel the appointment and clicks Send to send a message to your schedulers.

The recipient of the cancellation message reviews the message in In Basket and decides whether to cancel the appointment. The recipient then follows up with the patient to confirm that the appointment is canceled or reschedule the appointment as needed.

Enable Appointment Cancellation Messages for Patients

Add point 11-Appt Cancel Request to the patients' Patient Access class. This security point gives patients access to the appointment cancellation message feature.

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and enter security point 11.

If the patient has access to Direct Appointment Cancellation (has security point 106-Appointment Direct Cancel in their access class), then they do not need and hence are not able to send Appointment Cancel Request messages to your departments that allow direct cancellation.

If the patient has both access class points and wants to cancel an appointment in a department that allows direct cancellation, the Direct Cancellation feature overrides the Appointment Cancel Request feature. When the patient clicks Cancel on the Appointment Details page, they are taken to the Direct Cancellation Page rather than the Cancel Appointment Request Messaging Page.

If the patient has both access class points and wants to cancel an appointment in a department that does not allow direct cancellation, the patient can still send an Appointment Cancel Request message.

Replace Cancel Appointments with Appointment Cancellation Messages

August 2024 and Earlier

If the only way a patient can access the cancellation workflow is through the Cancel Appointment button on the Appointment Details page, then the system automatically uses Appointment Cancellation messages when appropriate.

If you use the separate Cancel Appointments page, you need to change settings in pageengine.xml and Config.xml to stop using the cancel appointments feature.

To configure MyChart to use appointment cancellation messages:

1. On your web server, open the PageEngine.xml file.
2. Find the <option> element with the mode attribute set to apptcancelpage.
3. Change the lickey attribute from ApptDirCancel to ApptCancel. The element should look like this:

```
<option mode="apptcancelpage" title="Cancel Appointments" progid="EWPSchedule82.WPApptCancelPage" lic
key="ApptCancel">
     <support unit="table" />
</option>
```

Set Time Limits for Canceling Appointments

You can determine when an appointment is too close to its scheduled time for patients to be able to use MyChart to request that it be canceled. For example, you can configure your system so that patients can cancel appointments up to 4 hours before the appointment begins.

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. Access the Appointment Cancellation 1 screen.
3. In the Cancel appointment until (I WDF 1310) field, enter the number of hours before a scheduled appointment that a patient can cancel it. If you leave this field blank, patients can cancel appointments up until the time of the appointment.

Limit Appointment Cancellation by Department

When patients use Appointment Cancellation messages, you want to be sure that each department has someone to receive those messages. If some departments do not use Appointment Cancellation messages, you can prevent patients from being able to send Appointment Cancellation messages to them.

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. Access the Appointment Cancellation 1 screen.
3. In the Allow Appt cancellation extension (I WDF 880) field, enter an extension that determines whether the patient can request that an appointment be canceled. You can use released extension 32220-MyChart - Require Dept Routing for Cancel Requests to let patients request an appointment cancellation only if the appointment's department has a pool or recipient for the request messages selected in the Default Scheduling Pool field (I DEP 53000) on the MyChart Routing Table screen.

Route Appointment Cancellation Messages to a Pool

By default, appointment requests are routed to your default pool for MyChart messages. You can use advanced routing options to route messages differently at the provider, department, and system levels. For more information, refer to the Message Routing Configuration topic.

Determine How to Handle Multiple Requests in One Appointment Cancellation Message

By default, MyChart sends an appointment cancellation message for each appointment the patient wants to cancel, so a department receives multiple messages when a patient wants to cancel multiple appointments. If one person in a department handles all the appointment cancellation messages, you can configure MyChart to send only one appointment cancellation message. The message is sent to the department of the first provider listed on the appointment to be canceled.

Perform one of the following tasks.

Send a Message for Each Cancellation Request

MyChart is configured this way by default:

1. On your web server, edit your Config.xml file.
2. Find the <options> element in the <MiscConfig> element.
3. Set the option SingleAppointmentCancellation to false.
4. Set the option OneCancelMsgPerAppt to true. The elements should look like this:
```
<MiscConfig>
    <options>
        <option name="SingleAppointmentCancellation" enabled="false" hint="if true, only allow cancella
tion for one appointment at a time. This only applies if the cancel request feature is being used. Th
is is needed for department-level-messaging routing." />
        <option name="OneCancelMsgPerAppt" enabled="true" hint="If true, send one cancel message per ap
pointment when the patient chooses to cancel multiple at once." />
```
5. Recycle the application pool.

Combine Multiple Cancellation Requests into One Message

1. On your web server, edit your Config.xml file.
2. Find the <options> element in the <MiscConfig> element.
3. Set the option SingleAppointmentCancellation to true.

4. Set the option OneCancelMsgPerAppt to false. The elements should look like this:

```
<MiscConfig>
<options>
<option name="SingleAppointmentCancellation" enabled="false" hint="if true, only allow cancellation for one appointment at a time. This only applies if the cancel request feature is being used. This is needed for department-level-messaging routing." />
<option name="OneCancelMsgPerAppt" enabled="true" hint="If true, send one cancel message per appointment when the patient chooses to cancel multiple at once." />
```

5. Recycle the application pool.

Direct Patients to Scheduling Workflows with a Predefined Visit Type

To help ensure that patients use the right visit type when requesting or directly scheduling an appointment, you can include a link that will take the patient to the scheduling workflow with a predefined visit type. Consider the following examples:

- You might have a landing page that explains the importance of regular checkups. This page can include a link to the direct scheduling workflow with the visit type you use for annual physicals already selected.
- You might send patients a MyChart message in the fall that prompts them to go get their annual flu shot. From this message, you can include a link to the scheduling workflow with the visit type you use for flu clinic appointments.

You can use query string parameters to configure this, as described in the Query String Parameters satellite article.

- To take the patient to the appointment request workflow with a predefined visit type, format the URL for the link to this page as follows, replacing XXX with the ID of the category value from the Reason for Visit (I WDF 840) item: https://<domain>/<instance>/Request?workflow=Procedure&selRfvId=XXX
- To take the patient to the direct scheduling workflow with a predefined visit type, format the URL for the link to this page as follows, replacing XXX with the ID of the category value from the Reason for Visit (I WDF 840) item. Note that you must be using the visit type first workflow for this URL to work: https://<domain>/<instance>/Scheduling?workflow=Procedure&selRfvId=XXX

Assign Questionnaires to Patients Based on Appointment Type

You can automatically assign certain questionnaires to patients who book appointments of a particular type. For information about configuring this feature, refer to the Allow MyChart to Associate Questionnaires with Appointments topic.

Customize the Centralized Scheduling Page

The centralized scheduling page in MyChart helps simplify the scheduling process by presenting all scheduling options in a single view. If a patient has any active scheduling tickets, each available ticket automatically appears at the top of the page. If there are any reasons for visit that allow starting with a provider, providers for those reasons for visit are listed on the main page. Otherwise, each reason for visit appears as a separate button so patients can easily schedule an appointment for a specific visit type, regardless of whether it is configured for direct scheduling or appointment requests.

Starting in November 2022, images automatically appear on reason for visit buttons and you can customize them in Patient Access System Definitions. In May 2022 and previous versions, you can use icon files on the web server or create and save your own images on the file server to add images to the reason for visit buttons. You can also customize text that appears on the landing page.

Customize Text for the Centralized Scheduling Page

If you want to customize the text that appears on the centralized scheduling page, you can do so in the Strings Manager. The strings are located under Scheduling > Scheduling > Index. For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

Change Images on the Scheduling Buttons

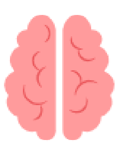
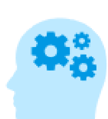
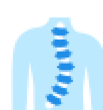
Starting in November 2022

We recommend that you update images on reason for visit buttons to make the scheduling page look more friendly and help patients determine which option to choose. By default, generic stethoscope images in different colors appear. A standard list of images is available to use and illustrated in the table below. You can also add your own custom image. If you do, your image should be approximately 80 x 80 pixels in size.

To customize images in Patient Access System Definitions:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Reason for Visit Configuration 2 screen.
2. For each reason for visit, in the Standard Image (I WDF 15060) field, enter an image to appear with the reason for visit in MyChart. If no image is entered, a generic stethoscope images is used.
3. If you want to use your own custom image, in the Custom Image Path (I WDF 15061) field, enter the file name for an image located in the <locale>/images folder on your webserver. The following file extensions are supported: jpg, jpeg, png, and svg. You can also use an absolute URL, for example, https://yourwebsite.com/Images/MyChart/Scheduling.

The following table shows the standard images for scheduling buttons that you can use in Patient Access System Definitions:

1-Addiction 	2-Allergy 	3-Allergy Injection 	4-All Specialties 	5-Audiology 	6-Bariatrics 
7-Behavioral Health 	8-Blood and Marrow 	9-Cardiology 	10-Chiropractic 	11-Colonoscopy 	12-Consult 
13-Covid Test	14-Covid	15-Dental	16-	17-	18-Follow Up

	Vaccine		Dermatology	Emergency	
19-Gastroenterology	20-Generic Blue Circle	21-Generic Blue Stethoscope	22-Generic Green Circle	23-Generic Green Stethoscope	24-Generic Purple Circle
25-Generic Purple Stethoscope	26-Generic Red Circle	27-Generic Red Stethoscope	28-Genetics	29-Hematology	30-Immunization
31-Infectious Disease	32-Lab	33-Mammogram	34-Mental Health	35-Nephrology	36-Neurology
37-New Problem	38-Nutrition	39-Obstetrics	40-Office Visit	41-Oncology	42-Optometry
43-Orthopedics	44-Pain Medicine	45-PCP	46-Pediatrics	47-Physical Therapy	48-Podiatry
49-Prenatal	50-Primary	51-Request	52-	53-Sick Visit	54-Sleep

	Care	Appointment	Rheumatology		Medicine
55-Surgical Oncology	56-Telehealth	57-Urgent Care	58-Urology	59-Well Child	60-Wellness
61-OBGYN	62-OBGYN Alternative	63-Wound Care	64-e-Visits	65-On My Way	66-Self-Triage
67-Social Work	68-Diabetes	69-Pulmonology	70-Education	71-Home Care	72-Imaging
73-Otolaryngology	74-Palliative Care	75-Speech and Language	76-Travel Medicine	77-Vascular Care	78-MyChart Logo
79-Generic Award Ribbon	80-Generic Rainbow	81-Generic Heart in Circle			

Add Images to the Scheduling Buttons

You can add an image on each reason for visit button to help visually differentiate the available scheduling options. We recommend that you add images for reasons for visit on the scheduling landing page as described in the Change Images on the Scheduling Buttons topic. If you want to add images to any of the scheduling buttons, create a PNG or JPG image file to use and save it in the images folder on your web server (for example, \web\content\images). This image should be approximately 80 x 80 pixels in size and the name of the file should be rfv_icon_xxx.png or rfv_icon_xxx.jpg, where xxx is the category value from the Reason for Visit (I WDF 840) category list.

Epic has released icon files for the most common reasons for visit, as listed below. To use one of these icons, locate the file in the web\content\images folder on the web server and rename the file per the naming convention described above so that it includes the category value from the Reason for Visit category list.

- Office Visit/Follow-up Visit (rfv_icon_clipboard.png)
- Video Visit (rfv_icon_video_visit.png)
- Mammogram (rfv_icon_mammogram.png)
- Gynecology/Well Woman (rfv_icon_flower.png)
- Well-Child Check-up/Prenatal Visit (rfv_icon_bottle.png)
- Flu Shot/Vaccination/Injection (rfv_icon_injection.png)
- Lab (rfv_icon_lab.png)
- Urgent Care (rfv_icon_first_aid.png)
- Emergency (rfv_icon_siren.png)

Note that if you use the On My Way feature, any icons you configure for reasons for visit on the scheduling landing page also appear for On My Way if the reason for visit is available in both places.

Show a Custom Step to Patients Before They Schedule an Appointment

If you want to allow patients to directly schedule appointments only under particular terms and conditions, you can create a custom step to show those terms and conditions to patients before they schedule an appointment. The custom step appears at the beginning of the direct scheduling workflow. It shows your message and asks the patient to click Continue to proceed with the workflow or click Back to cancel the workflow.

> ! The patient's response to the custom step is not saved. As a result, while you can use the custom step to show terms and conditions to a patient, you should not use it to verify that the patient agrees to them.

1. In the Strings Manager, navigate to the Scheduling > Scheduling > Index node.
2. Locate the CustomStepStrings string and complete the Custom Keys table:
   - In the Key column, enter a value. The key you enter is mapped to the visit type the text should appear for through the VisitTypeCustomStepString string.
   - In the Text column, enter the text you want to appear on the page. You can use HTML formatting to add headings and paragraph breaks.
3. Locate the VisitTypeCustomStepString string and complete the Custom Keys table:

- In the Key column, enter the external visit type ID for the visit type for which you want the custom step to appear.
- In the Text column, enter the key from the CustomStepStrings string to pull in your text for the associated visit type.

4. If you want to override the default text for the header (Additional Information), complete the Custom Keys table for the VisitTypeCustomStepHeader string:
   - In the Key column, enter the external visit type ID for the visit type for which you want to override the header.
   - In the Text column, enter your custom header.
5. If you want to override the default text for the Continue button on the scheduling step page, complete the Custom Keys table for the VisitTypeCustomStepContinue string:
   - In the Key column, enter the external visit type ID for the visit type for which you want to override the header.
   - In the Text column, enter your the text you want to show on the button.

You custom text appears on a page after visit type questionnaires, if available, or after the reason for visit and location are selected.

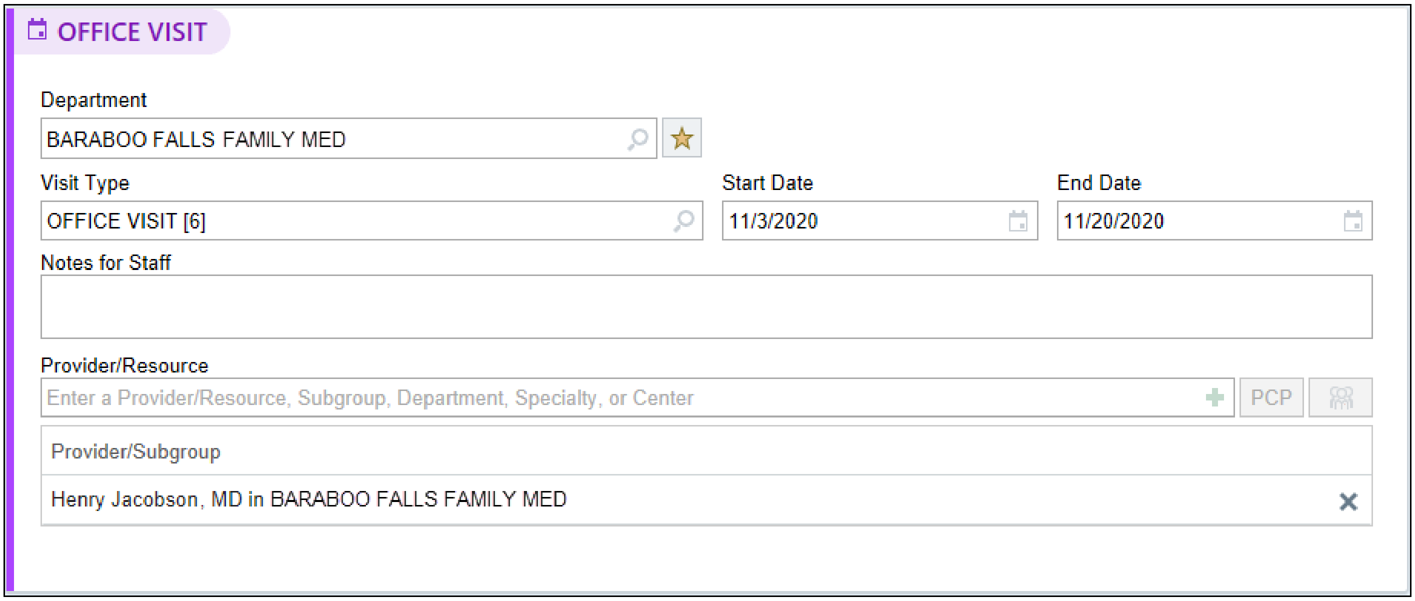
For more information about working with the Strings Manager, refer to the Customize .NET Pages Using the Strings Manager topic.

Have Clinicians Send Messages to Patients to Schedule Appointments

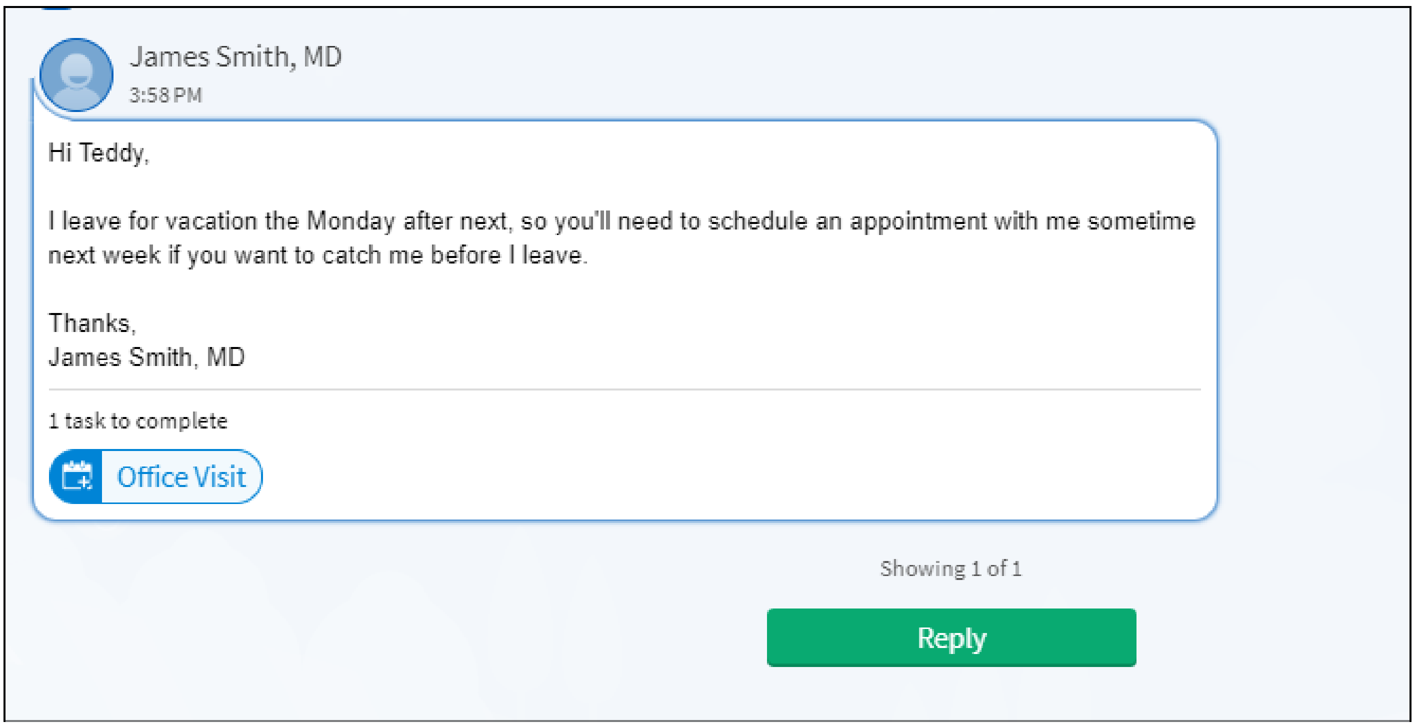
A clinician can prompt a patient to schedule an appointment by sending her a message in MyChart that includes a link the patient can use to schedule with the appropriate provider and visit type. This helps your staff remind patients to schedule visits and helps patients use the correct provider and visit type for the appointment.

You can use this scheduling method as an alternative or a supplement to direct scheduling. You must enable Ticket Scheduling to use this feature. For information on enabling this feature see the Verify That Providers Are Enabled for Ticket Scheduling topic.

In this feature, clinicians or their support staff create a secure patient message for the patient and click Appointment to open the Appointment Details window.



On this window, they specify details for the visit they want the patient to schedule. The message appears to the patient with an attached task to schedule the visit.



When the patient clicks the task, she can use ticket scheduling to select a time and date for the appointment. After the appointment is scheduled, the task appears in the message with a green check mark next to it and cannot be used to schedule another appointment.

Clinicians need Cadence security class to create and send the scheduling ticket to the patient. Refer to the Grant Schedulers Access to Appointment Requests topic for information. Clinicians must also have Cadence security for appointment entry. Set the Enter appointments field to Yes on the Appointments form in their Cadence security classification.

Refer to the MyChart Messaging Setup and Support Guide for additional options for configuring how clinicians send messages to patients.

To let patients use the task to schedule an appointment, add security point 103-Appointment Through Message to your patient access classifications.

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and enter the appropriate security points.

Let Patients Schedule Classes Through MyChart

You can use MyChart to let your patients schedule classes online, saving your support staff time by eliminating phone calls. How to display class offerings to patients in MyChart is different between versions.

Use Group Session Visit Types for Class Scheduling
Starting in August 2024

Patients can use direct scheduling, open scheduling, or ticket scheduling to see and make appointments for your class offering using group session visit types. Using group session visit types, patients can view and manage their scheduled classes in MyChart using the Visits activity and front desk staff and central schedulers can reschedule or cancel group appointments. To create a group session, set the Group session type (I PRC 7100) field in the visit type record to 1-Group Session, Can Separate. Refer to the Set Up Group Sessions topic for more information on how to define a group session visit type.

As you configure group sessions, consider reserving and restricting time in a provider's schedule using blocks, as described in the Reserving and Restricting Time in a Provider's Schedule for Specific Appointments Using Blocks topic. Blocks allow you to indicate on a provider's schedule which appointment types should fall at a specific time of day and allow patients and schedulers to schedule into those slots. Ensure the session time slot has the correct number of openings on the provider's template to allow multiple patients to schedule the session. Refer to the Create Slots in a Template topic for more information on how to edit slots on a template.

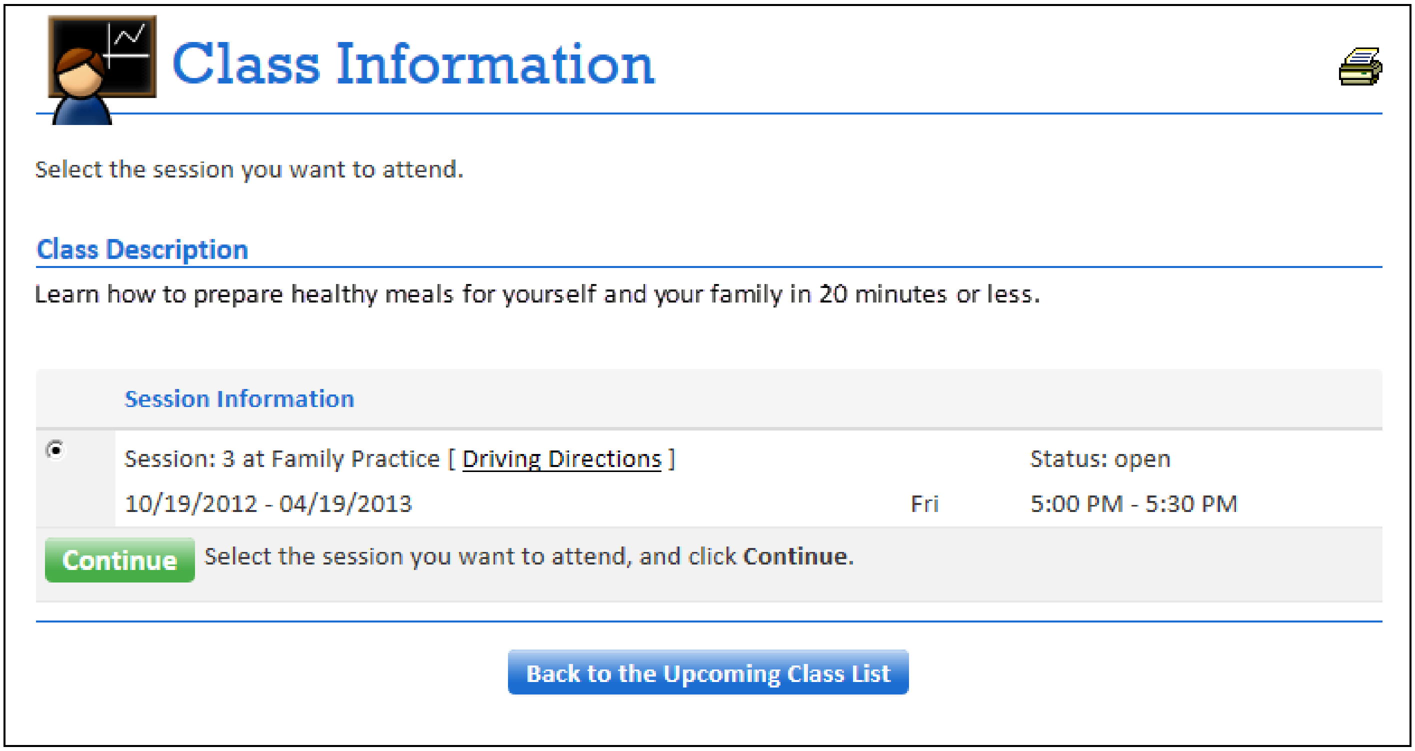
Refer to the MyChart Scheduling Strategy topic to determine if direct scheduling, open scheduling, or ticket scheduling is best for making group sessions available to patients in MyChart.

Use Upcoming Classes Activity for Class Scheduling
May 2024 and earlier

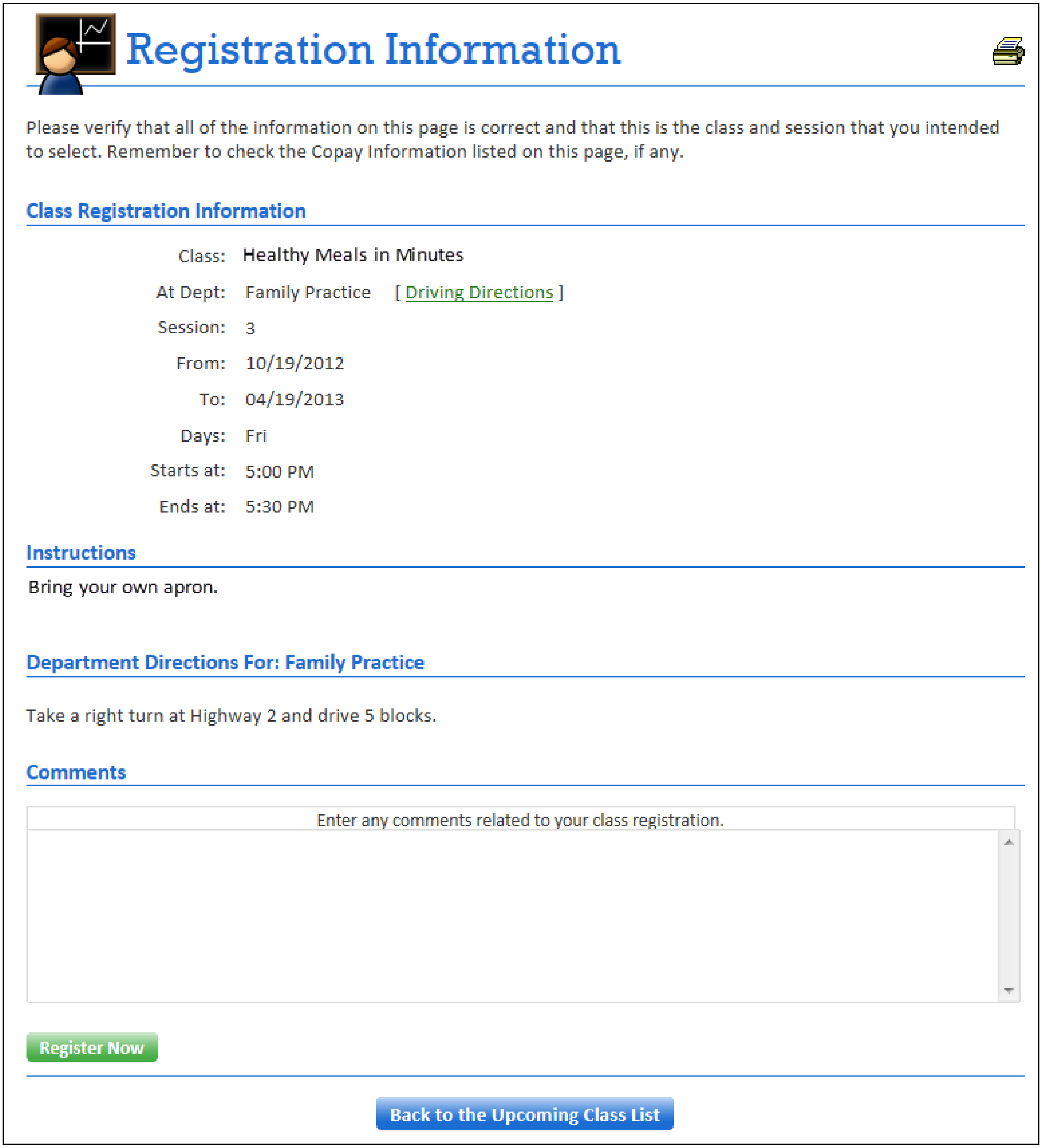
Considerations
Starting in August 2024, the Upcoming Classes page is no longer available to patients in MyChart. Consider using direct scheduling, open scheduling, or ticket scheduling to allow patients to schedule classes using group session visit types.

The Upcoming Classes page shows patients classes you offer that they can take. It includes the class name and the description of each class. You can enhance this page to allow patients to schedule classes directly from this page.

In MyChart, the patient selects Appointments > Upcoming Classes. The patient selects any available class to view the Class Information page.



If you enable this feature, patients can select a time for the class and click Continue to register for the class.



The scheduled class then appears on their list of appointments.

Determine Which Departments Allow Classes and Scheduling Times

To configure which classes appear on the Upcoming Classes page and which classes patients can register for on MyChart:

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Class Options screen.

2. In the Date offset to schedule classes (I WDF 860 and I WDF 865) fields, enter the number of days past the present day that you'd like to use as the earliest and latest date that patients can view and schedule classes.
3. In the Depts allowing classes (I WDF 870) list, enter the departments that allow patients to sign up for classes through MyChart.

Give Patients Security to Schedule Classes

To enable this feature for patients, add the following security points to their patient access classes:

- 78-View Classes
- 74-Schedule Classes
- 25-Driving Directions (if you have driving directions enabled, as described in the Let Patients View Driving Directions to a Clinic topic)

To do so:

1. From the MyChart System Manager Menu, select Enter/Edit Access Class.
2. At the classification prompt, enter the name of the access class you want to edit.
3. Go to the MyChart Features Screen and enter the appropriate security points.

Customize Text for Upcoming Classes

You can also customize the text that appears at the top of the Upcoming Classes page by editing the text under the following node in DisplayConfig.xml: `<text type="mode" value="classes">`.

For more information about working with DisplayConfig.xml, refer to the Customize Classic ASP Pages Using DisplayConfig.xml topic.

Customize Text for Scheduling Workflows

If you want to customize the text that appears in the new scheduling workflow, you can do so by modifying the strings under the following nodes in the Strings Manager:

- Scheduling\Scheduling\Index
- Core\UI\TimePreferenceWidget
- Insurance\Coverages\Index (for insurance verification)

In addition to customizing basic page text, you can also override the location name that appears (Scheduling\Scheduling\Index\LocationName string), which might be helpful depending on how you've handled location grouping.

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

Show Only the Arrival Time in MyChart Scheduling Workflows

To encourage patients to arrive early enough to complete various check in tasks before their appointment time, you can configure MyChart and MyChart Mobile to show only the arrival time in scheduling workflows, such as direct scheduling, open scheduling, Fast Pass, On My Way, and video visits. If the appointment does not have a specified arrival time, the appointment time is shown instead.

Note that this setting also controls whether only the arrival time is shown on the After Visit Summary (AVS). Refer to the Show Only the Arrival Time for an Upcoming Appointment on the AVS topic for more information.

To configure this feature:

1. In Clinical Administration, go to Management Options > Edit System Definitions > Encounter, Episode.
2. Go to the AVS Report Configuration screen.
3. In the Prioritize Arrival Time? (I LSD 35110) field, enter Yes.

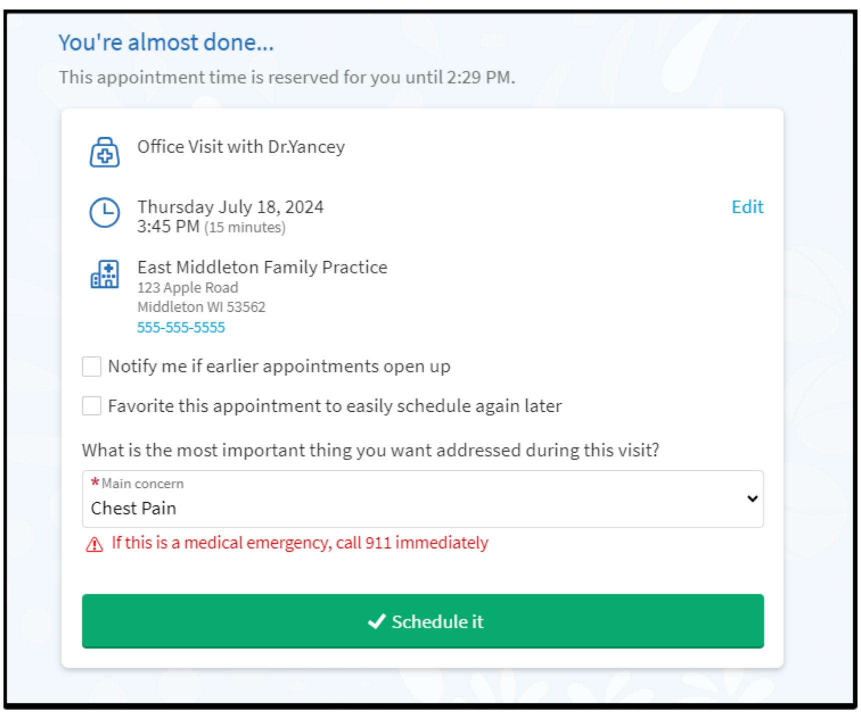
Add Chief Complaint to Scheduling Workflows

Starting in August 2024

Add a list of common chief complaints to visit types or panels used in MyChart scheduling to allow patients to select a chief complaint for their appointment which is filed to the patient's chart. The chief complaint can be seen as a comment in the Appointment Desk, helping clinic staff prepare for a patient's arrival more appropriately. You can also build an urgent chief complaint list which contains a subset of complaints for which a warning message should appear in MyChart, such as chest pain. Adding a warning message for patients can help guide them to the correct destination for care.

For example, say that a patient logs into MyChart to schedule a same-day urgent care appointment for their sprained ankle. After they select their specific urgent care appointment, a drop-down list of chief complaints appears. The patient can choose "Sprained Ankle" from that list of complaints, which can help clinic staff prepare for their arrival, such as grabbing crutches or a wheelchair.

If a visit type has an urgent chief complaint list, clinic staff can prepare for an acute case's arrival, or the system can guide the patient to a more appropriate place to receive care. For example, if a patient chooses chest pains from the chief complaint list, a warning message appears in MyChart, prompting the patient to call 911 if this is a medical emergency.



To use this feature, you first need to ensure that you have a preference list containing chief complaints and a preference list containing urgent chief complaints that are a subset of the chief complaints. Keep in mind that urgent chief complaints are used for a visit type only if all of the chief complaints entered in the visit type's urgent chief complaints preference list are also included in visit type's chief complaints preference list. Additionally, if the chief complaint preference list you are using includes Other as an option, keep in mind that patients will be required to enter a free-text comment.

Considerations
If you use On My Way, you might have already built a chief complaint preference list and linked it to your On My Way visit type. Consider reusing that chief complaint preference list for this purpose

More information on how to build a list of complaints can be found in the Create System Preferences List for Non-Orderable Items topic.

To add a chief complaint list to a visit type:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. Access the Scheduling Settings 2 screen.
3. In the Chief complaint list (I PRC 32600) field, enter the preference list you created for chief complaints.

To add an urgent chief complaint list to a visit type:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type and open a visit type record.
2. Access the Scheduling Settings 2 screen.
3. In the Urgent chief complaint list (I PRC 32601) field, enter the preference list you created for urgent chief complaints.

To add a chief complaint to a panel:

1. From the MyChart System Manager Menu, select Master File Entry >Panel and open a panel record.
2. Access the Panel Settings screen.
3. In the Chief Complaint list (I PRC 32600) field, enter the preference list you created for chief complaints.

To add an urgent chief complaint list to a panel:

1. From the MyChart System Manager Menu, select Master File Entry >Panel and open a panel record.
2. Access the Panel Settings screen.
3. In the Urgent chief complaint list (I PRC 32601) field, enter the preference list you created for urgent chief complaints.

Hide Appointment Slots That Fall Within the Current Wait Time

Starting in August 2024

Appointment slots that fall within an urgent care queue-enabled department's wait time can be hidden from patients who are scheduling same-day appointments online. This can improve patient satisfaction by ensuring patients can't schedule appointments within the clinic's wait time, preventing patients who are scheduling online from being seen before the walk-in patients who are waiting in the clinic. In a queue-enabled department, same-day slots are excluded from patient scheduling workflows by default. In departments that don't use the urgent care queuing system, slots are not hidden by default.

If you want to show appointment slots within wait times for departments that use the urgent care queueing system or want to hide appointment slots that fall within the wait time for other departments, follow these steps:

1. From the MyChart System Manager Menu, go to Master File Entry > Department, open a department record, and go to the Online Scheduling Settings 2 screen.
2. In the Hide slots within wait time (I DEP 53295) field, enter 1-Yes to hide slots within the wait time or enter 0-No to show them.

This setting does not apply to On My Way or On-Demand Video Visit workflows. For information about the setting used in those workflows, refer to the Show Appointment Slots Even If They Fall Within the Current Wait Time topic.

Override Scheduling Lookback and Look Forward Ranges for Specialties

Lookback and look forward ranges determine which providers are available for patients to schedule in MyChart based on past and future appointments with those providers. You can configure different lookback and look forward ranges for specialties that differ from the ranges you use for non-specialty departments. For example, specialties that have annual checkups might want a lookback of more than a year, but specialties that don't have many regular patients might prefer shorter lookback periods because they want patients to call in for non-follow-up visits.

To set specialty-specific ranges for direct scheduling:

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. Go to the Direct Scheduling Lookback Days screen.
3. In the Override look back and look forward days by Department Specialty section, specify the Department Specialty (I WDF 7830), # of Days to Look Back (I WDF 7832), and # of Days to Look Forward (I WDF 7834).

To set specialty-specific ranges for appointment requests:

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. Go to the Appointment Request Lookback Options screen.
3. In the Override look back and look forward days by Department Specialty section, specify the Department Specialty (I WDF 1816), # of Days to Look Back (I WDF 1817), and # of Days to Look Forward (I WDF 1818).

Allow MyChart Scheduling for Advanced Visit Types with Pools That Don't Return Providers

Starting in November 2023

To make sure that your pool configuration only finds appropriate providers for patients scheduling in MyChart, advanced visit types with pools that do not return any providers don't appear to patients as options in MyChart scheduling by default. If you have advanced visit types with pools that don't return providers, we recommend that you update the pools so that they do return providers, because doing so makes it more likely patients will schedule appointments with the right providers. Refer to the Organize Pools of Providers or Resources topic for general instructions on building these pools.

If you want to set up your pools that do not return any providers, you can use a system level setting to allow patients to schedule appointments for these advanced visit types. With this setting set, when a patient schedules an appointment for such a visit type in MyChart, the system determines a provider to schedule with by looking at providers the patient has previously seen (if the patient is using direct scheduling) or by looking for providers in the specialty or department (if the patient is using open scheduling).

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Options 2 screen.
2. Set the Allow scheduling for advanced visits with empty pools (I WDF 7810) field to Yes.

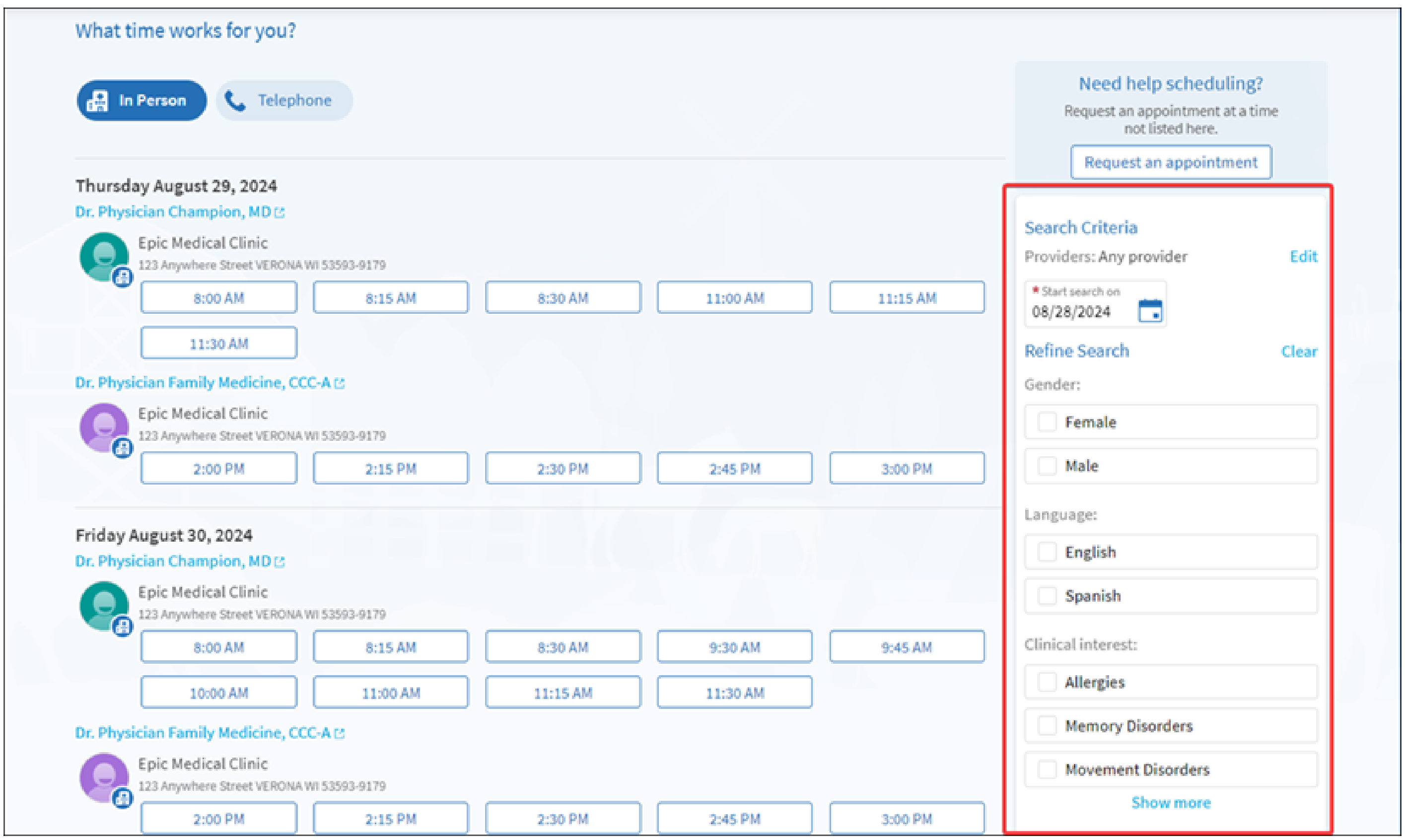
Optimize Provider Filters for Patient Self-Scheduling

Scheduling workflows include provider filters on the time selection step that patients can use to narrow their search while scheduling an appointment. Patients can filter on provider gender, language, type, and clinical interest, allowing them to find the provider who best meets their needs. If no filters are available (due to providers not having the required information recorded), and there is more than one provider to choose from, patients can edit provider selection using a link that appears under the search criteria.

These filters are available for:

- Open scheduling (starting in August 2021)
- New provider scheduling (starting in November 2021)
- Direct scheduling, ticket scheduling, rescheduling, and self-triage scheduling (starting in May 2022)

Provider filters are not available in on-demand video visit scheduling or On My Way scheduling.



Provider filters in direct scheduling

To designate a language as a default language:

1. In Hyperspace, open Provider Finder System Definitions (search: Provider Finder System Definitions).
2. In the Filters section, enter individual languages in the Languages to hide (I HDF 3244) field to apply that language for all providers.

Review the provider records of providers enabled for direct, ticket, and open scheduling and determine whether your organization should add or update the information in the relevant filter items for the new patient-facing context. For assistance with provider record setup, reach out to your organization's Cadence analyst.

To update a provider's gender:

1. In Cadence Text, go to Cadence Management > Provider and open a provider record.
2. Access the Provider Information screen.
3. Enter the appropriate value in the Sex (I SER 1340) field.

To update a provider's language:

1. In Hyperspace, open a provider record (search: Provider) and go to the Scheduling > Languages form.
2. Enter the appropriate value in the Languages (I SER 1350) field.

To update a provider's clinical interest:

1. In Hyperspace, open a provider record (search: Provider) and go to the Demographics page.
2. Enter the appropriate value in the Clinical Interests (I SER 26200) field.

To update a provider's provider type:

1. In Hyperspace, open a provider record (search: Provider) and go to the Demographics page.
2. Enter the appropriate value in the Provider Type (I SER 1040) field.

To update a large number of provider records at once, you can use an import specification. All relevant filter items are included in import specification SER,1000-TEMPLATE - PROVIDER. For more information about using an import specification, refer to the Standard Import Guide.

Direct Patients to Other Workflows with MyChart Links

Starting in May 2022

MyChart Links direct patients to different workflows in MyChart or to external links when they select a particular reason for visit on the scheduling landing page. For example, if a patient selected "Urgent Care" as the reason for visit, a MyChart Link to the On My Way activity could quickly direct a patient to where to go to receive urgent care.

There are four MyChart Links that you can use, E-Visits, On-Demand Video Visits, On My Way, and Symptom Checker, that direct patients to those MyChart activities. To use these MyChart Links, map them to reasons for visit at either the system or patient profile level. If you want to use a MyChart Link to direct patients somewhere else, you can create a custom MyChart Link and then map it to a reason for visit.

To create a custom MyChart Link:

1. Create a custom activity record to determine where patients are directed.
2. Create a custom menu item to link to link to your custom activity record.
3. From the MyChart System Manager Menu, select Master File Entry > MyChart Link (PRC) and create a new

MyChart Link.

4. In the Status (I PRC 930) field, select 1-ACTIVE.
5. In the MyChart menu link (I PRC 32750) field, enter the custom menu item (E2U) you created.
6. Optionally, in the Restriction rule (I PRC 1020) field, enter an Appointment Entry Begin context rule that, when true, will prevent the MyChart Link from appearing. For more information about working with rules, refer to the Create or Edit a Rule topic.

To attach a MyChart Link at the system level:

1. From the MyChart System Manager Menu, select Scheduling Configuration.
2. On the Scheduling Reason For Visit Configuration screen, enter a reason for visit in the Reason for Visit (I WDF 15000) column and a MyChart Link in the Visit Type (I WDF 15005) column.

To attach a MyChart Link at the patient profile level:

1. From the MyChart System Manager Menu, select Patient Profile Settings and open a patient profile.
2. On the Scheduling Reason For Visit Configuration screen, enter a reason for visit in the Reason for Visit (I WDF 15000) column and a MyChart Link in the Visit Type (I WDF 15005) column.

Choose the Right Visit Type for Patients Using Conditional Panels

Starting in May 2025

February 2025 by SU E11300665 and E11301657

You can use conditional panels to help patients schedule the appropriate visit type based on a rule that evaluates criteria such as the appointment date or patient answers to decision trees and questionnaires. For example, your organization schedules different visit types based on the length of time that a patient has been pregnant. When the patient schedules the conditional panel in MyChart, they select a single reason for visit. Then, each available appointment slot includes the appropriate visit type for the length of gestation that day. This way, the patient only selects the day and time that works for them and the system applies the correct visit type.

Considerations
Patients can't use conditional panels when scheduling appointments in self-triage. Patients scheduling conditional panels can't get Fast Pass offers and don't see the option to schedule with the provider's team. Providers and schedulers can't use conditional panels with ticket scheduling or recurring appointments.

The rule criteria determines whether a visit is shown to patients for the date being searched. After a conditional panel has been scheduled, the rules are also respected when a patient reschedules or changes the appointment.

To create a conditional panel:

1. In Hyperspace, open the Panels activity and open or create a panel.
2. Set the Is Conditional? flag to Yes.
3. Add visit types to the panel.
4. For each visit type, create an inclusion rule. To create inclusion rules in the Panel Visit Inclusion Check context, refer to the Create or Edit a Rule topic.

5. Refer to the Group Commonly Scheduled Visit Types Using Panels topic to fill out the other fields in the conditional panel.

Show Appointment Slots Past an Administrative Pathway's Breached Date

Prerequisites
Your organization must be licensed for Springboard to use this feature.

Starting in May 2025

February 2025 by SU E11301611

November 2024 by SU E11207237

When a scheduler books an appointment for a patient that would be past the linked administrative pathway's due date, a warning appears that the chosen date would result in the administrative pathway becoming breached before treatment takes place. By default, MyChart ignores these breached warnings (the warnings are only visible in Hyperspace) and shows patients time slots after the linked administrative pathway's due date by default. This helps ensure patients have the opportunity to schedule an appointment regardless of the administrative pathway's due date.

We recommend keeping the default setting, but if you want to turn it off, you can configure MyChart to prevent offering appointments after the administrative pathway's due date:

1. In Hyperspace, open Springboard System Definitions for your facility (search: Springboard System Definitions).
2. Select the MyChart Settings form.
3. Select 1-Always Respect Breach Date Warning in the Handle breach date warning for open and ticket scheduling (I EAF 31241) field.

You can also configure MyChart to prevent offering appointments after the administrative pathway's due date only if there are available appointments before the administrative pathway's due date:

1. In Hyperspace, open Springboard System Definitions for your facility (search: Springboard System Definitions).
2. Select the MyChart Settings form.
3. Select 3-Show Breached Slots When Patient Is Already Breached in the Handle breach date warning for open and ticket scheduling (I EAF 31241) field.

Changes to this setting will be respected only if Autoscheduler Allow Overrule Pass (I WDF 847) has a value of 1-Don't allow overrule. This item can be found in the MyChart System Manager Menu under Scheduling Configuration on the Scheduling Options 1 screen.

MyChart Scheduling Support: Ongoing Tasks

In this section, we'll cover the tasks that you might need to perform on a regular basis.

Monitor Appointment Requests

MyChart administrators and other managers can review a high-level summary of patients' MyChart appointment requests using the MyChart Messaging Report. They can use the report to review patients' use of the MyChart appointment request messaging feature.

You can configure the report to show which departments and providers patients are requesting appointments with, so managers can see whose patients are using MyChart most effectively and whose patients are using less efficient scheduling options.

For information about creating this report, refer to the MyChart Messaging Report topic in the Report Repository. Specifically, the Common Uses section provides information about how to configure the report show MyChart appointment request statistics data.