Appointment Request Scheduling Setup and Support Guide

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

Your Responsibilities for Safe Use

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

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Appointment Request Scheduling Setup and Support Guide

Before implementing appointment requests, non-U.S. organizations should contact their Epic representative and mention parent SLG 5362800 to discuss locale-specific implications.

Requests for appointments in Epic can come from a variety of sources, but they all end up in the same place in Cadence. Appointment requests appear in workqueues, the Front Desk activity, the Snapboard, and other activities for users to schedule appointments and can come from the following sources:

- Schedulable procedure or medication orders
- Patient-initiated visits, such as a follow-up appointment for an issue, a consult with a specialist
- MyChart Appointment Requests
- Transcribed orders
- Dental visits
- Oncology treatment plans and therapy plans
- Quick CRMs
- Outpatient follow-up visit information
- Manually created for intake

MyChart appointment requests are different from the appointment requests described in this guide, although starting in May 2024, MyChart appointment requests are scheduled through appointment request workqueues like Cadence appointment requests. For additional information about MyChart appointment requests, refer to the Use Appointment Request Messages in Addition to Direct Scheduling topic.

In November 2019 and earlier, appointment requests in Cadence were known as schedulable orders. Starting in February 2020, we changed the terminology to appointment requests to more broadly cover the range of sources that requests for appointments can come from. This table shows how the terminology has changed:

Orders Terminology	Requests Terminology
Order	Request
Schedule orders workqueues	Appointment request workqueues
Link Appointment to Orders activity	Link Appointment to Requests activity
Remove order from scheduling	Cancel request
Restore order to scheduling	Reinstate request

Related topics

You might also be interested in the following related information:

- Dental Scheduling Setup and Support Guide
- Procedures Setup and Support Guide
- Order Up Setup and Support Guide

In the Foundation System

Order scheduling workflows are fully configured in the Foundation System. The Foundation System includes example reports and activities, common procedures set up for scheduling, and departments that use silent scheduling and silent walk in. Go to the Foundation Hosted environment to try out these workflows.

How It Works

Having a basic understanding of orders might help you better understand and set up order scheduling. This is a brief introduction to some orders terminology and functionality. If you need additional education on orders, talk with your Epic representative about available classes or educational materials.

Order Modes

Orders have one of two modes: inpatient or outpatient. The order mode represents the contact where the clinician created the order, which is also called the ordering contact.

- The system creates an inpatient order when the clinician places the order in an admission or EpicCare Inpatient.
- The system creates an outpatient order when the clinic places the order in an encounter or EpicCare Ambulatory. Discharge orders are also outpatient orders.

Order Status

There are three order statuses: Normal, future, or standing.

- A normal order is an order intended to be performed in an encounter. For example, Dr. Seeger orders a strep test to be performed while a patient is in his office.
- A future order is an order with one occurrence intended to be performed in the future. For example, Dr. Seeger orders a CT exam for a patient, to be performed next week. Future orders can only be placed in outpatient mode. If you schedule a future order in inpatient mode, the system allows you to schedule the appointment but the order is never released to the appointment.
- A standing order is a future order with more than one occurrence.
  - Some outpatient orders start as standing orders. For example, Dr. Seeger orders weekly physical therapy for a patient for the next two months.
  - All inpatient orders start as standing orders. For example, Dr. Seeger orders a Protime to be performed weekly while a patient is admitted.

Parent and Child Orders

The system understands future and standing orders in terms of a parent order and its child orders. The future or standing order is the parent order and the instances of that order are the child orders. These child orders are normal orders because they represent the order about to be performed for an encounter.

- For example, Dr. Seeger orders a CT exam for a patient, to be performed next week. The CT exam order is the parent future order and the actual CT exam is the child normal order.
- Another example, Dr. Seeger orders weekly physical therapy for a patient for the next two months. The order for physical therapy is the parent standing order and the instances of physical therapy (eight total) are child normal orders.

Releasing Orders

Orders need to be released before clinicians can perform the orders. The system releases normal orders right away because they are being performed now. Clinicians can manually release orders for admissions and other inpatient encounters or the system can automatically release orders during an inpatient stay on a regular schedule. For ambulatory encounters, the system typically releases orders when schedulers attach the order to an appointment or when front desk staff check in an appointment attached to the order. Standing inpatient orders can only release onto the same contact where they were placed.

Gather Requests for Appointments to Be Scheduled

In this section, we'll cover how to set up procedures for scheduling, transcription and scheduling of paper orders, oncology treatment plan scheduling, and how to automatically create appointment requests for follow-up visits. For information about other types of appointment requests, refer to the following topics or documents:

Source of Appointment Request	Where to Find Setup Documentation
Procedures	Set Up Procedures for Appointment Scheduling
Transcribing paper orders	Enable Transcription and Scheduling of Paper Orders
Beacon treatment plans	Enable Scheduling of Treatment Plan Appointment Requests
Follow-up appointment requests	Automatically Create Appointment Requests for Scheduling Follow-up Visits
Clinic-administered medications	Schedule Clinic-Administered Medications to Be Given at Specific Visits
Wisdom dental visits	Dental Scheduling Setup and Support Guide
Beacon therapy plans	Integrate Therapy Plan Appointment Scheduling with Cadence
Quick CRMs	Use Quick CRMs to Speed Up Documentation
Intake appointment requests	Use Appointment Requests for Intake
External referrals (starting in May 2020)	Automatically Create Appointment Requests for Scheduling External Referrals

Set Up Procedures for Appointment Scheduling

This section covers the core build that you need to complete for scheduling procedures.

Enable Scheduling of Procedures

When a clinician orders a procedure for a patient, the system marks this procedure order as schedulable when the procedure is linked to a visit type. This visit type link is essential because it tells the system that orders for this procedure are schedulable. The system also uses the linked visit type to determine how to schedule the appointment from the order. For more information about and recommendations for procedures and visit types, refer to the Visit Types, Orders, and Appointment Requests topic.

You can configure other scheduling behavior in the procedure when you link the visit type. For example, you can decide whether to schedule only outpatient orders or which visit type security to check during scheduling.

Prerequisites

You'll need to work with clinical product teams like EpicCare Ambulatory and EpicCare Inpatient when deciding which orders to schedule. These teams usually own and create the procedure records you use to make orders schedulable.

Radiant and Cupid users often schedule orders. Schedulers and clinical staff in these areas might use Cadence's order scheduling functionality to make appointments for their procedures. Other products like Beacon, Kaleidoscope, and Stork might also use Cadence's order scheduling functionality to schedule appointments for procedures. You'll want to work with these teams to meet their order scheduling needs.

Also, you need to create visit types so you can link them to procedures. Refer to the Visit Types Setup and Support Guide for additional information on creating visit types.

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Procedures and select a procedure record.
2. On the Scheduling Defaults form (May 2022 and earlier: the Scheduling form), in the Default Visit Types (I EAP 10900) field, enter the visit types to use when scheduling the procedure order. If you want to use different visit types when the clinician places the procedure as an inpatient order, enter those visit types in the Override Visit Types for Inpatients (I EAP 10908) field (In May 2022 and earlier: this field is called Inpatient overrides).
3. In the Schedule Outpatients Only? (I EAP 10909) field, enter Yes if you want to schedule this procedure only if the clinician places it as an outpatient order.
4. In the Check Visit Type Specialty Restrictions? (I EAP 10911) field, determine which visit type restrictions to check when scheduling the procedure order.
    - Enter Yes if you want to check both visit type specialty restrictions and a scheduler's security classification restrictions.
    - Enter Security Only if you want to check only security classification restrictions.
    - Enter No if you don't want to check either set of restrictions.
5. In the Combine Procedures? (I EAP 10910) field, enter Yes if you want to combine procedure orders into one appointment when scheduling multiple procedure records that use the same visit type at the same time.
6. In the Prompt if Multiple Visit Types? (I EAP 10930) field, enter No if you want to schedule all visit types associated with this procedure in the order listed in the procedure. Enter Yes if schedulers should choose which visit types to use during scheduling. You might use this option when departments share the same procedure but use different visit types for scheduling.

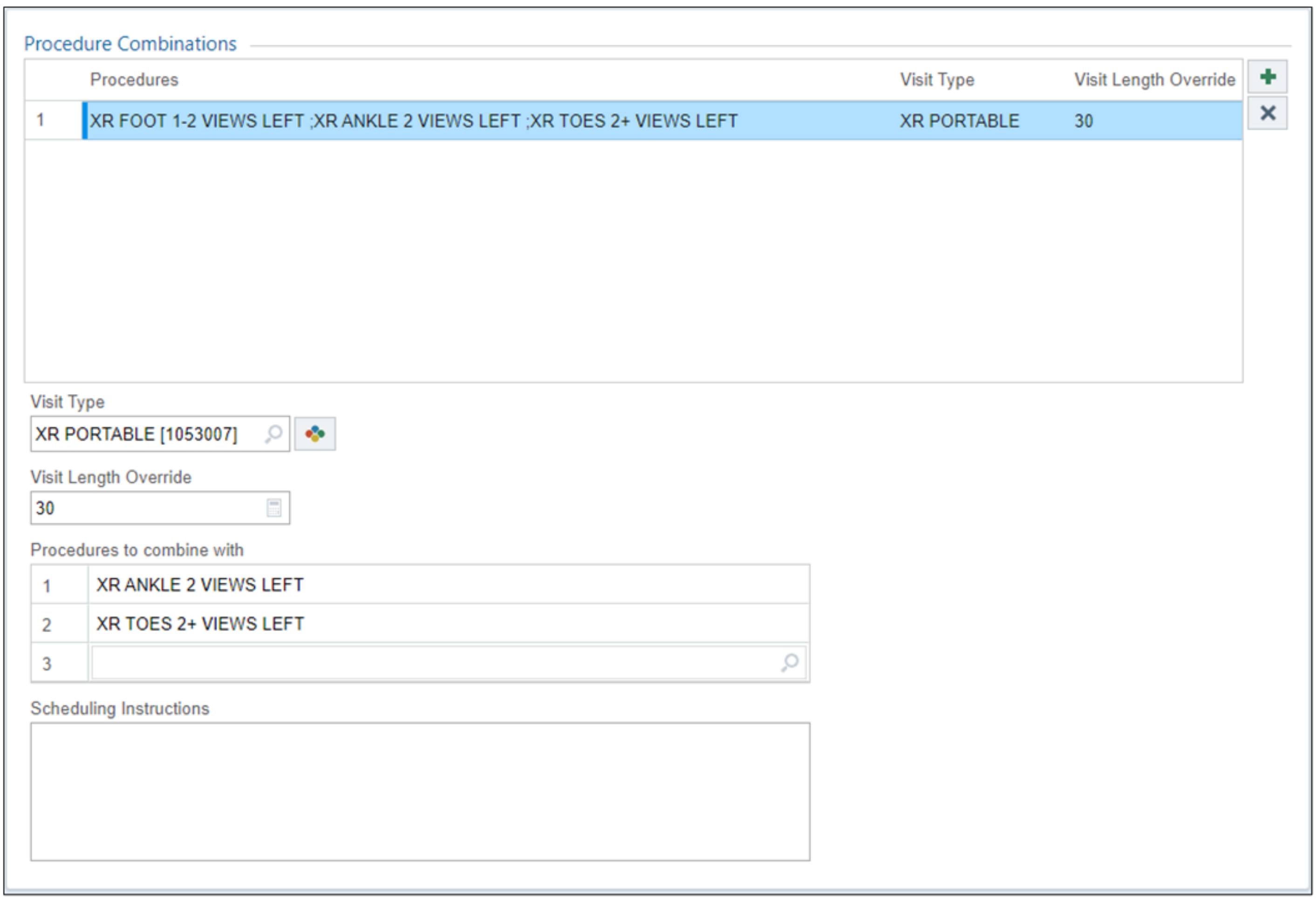
The Foundation System has most outpatient and imaging-related procedures are set up for scheduling. Refer to the Foundation Hosted environment and the Foundation System Build Trackers for details on schedulable procedures.

Combine Procedures into One Appointment

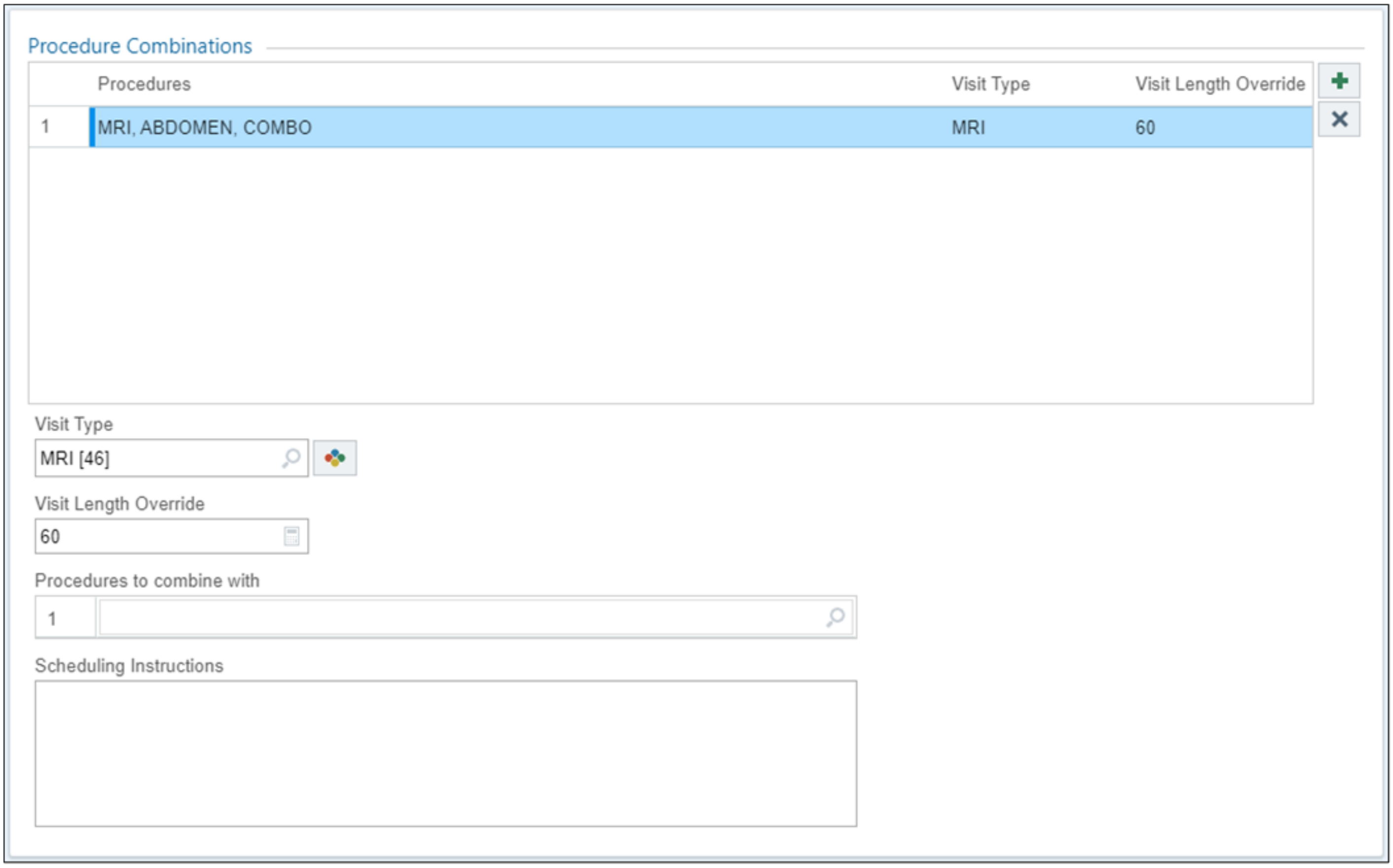
You can override individual procedure settings when scheduling certain procedures together. This functionality allows you to schedule one appointment for multiple clinical orders. You could use this in multi-disciplinary areas or in radiology, where groups of procedures are often scheduled together, to make scheduling easier and save clinicians time in their schedules.

You can also use this functionality to override certain visit type settings with information specific to the procedure. You do this by defining the procedure combination using only the selected procedure. For example, you have an MRI visit type with a certain length and scheduling instructions. You want to use this visit type for your MRI procedure but you want a different visit type length and different scheduling instructions. First, you link the MRI visit type to your MRI procedure. Then, you enter a different length and scheduling instructions on the Combinations form. This allows you to override the visit type settings for the procedure without creating extra visit types.

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Procedures and select a procedure record.
2. Select the Procedure Combinations form.
3. Click Add to define a new combination. The new combination appears in the table at the top of the form.
4. In the Procedures field, list the procedures to combine when scheduling all the procedures in one appointment. The selected procedure appears by default. If you are overriding visit type settings for the selected procedure, don't list any additional procedures.
5. Select the visit type to use for the combination. Enter the length of the combined appointment and any scheduling instructions.



This image shows a combination of three x-ray procedures. When scheduling the three procedures together, they are combined into one appointment which uses the portable x-ray visit type and lasts 30 minutes rather than the length of time set in the visit type.



This image shows an override of the MRI visit types. When scheduling the procedure, the system uses the MRI visit type, rather than the visit type on the procedure form, and the appointment lasts 60 minutes rather than the length of time set in the MRI visit type.

Enable Scheduling of Procedure Categories

Procedure categories are groupers for certain types of procedures. Some examples include GI Procedure Orderables, Lab Blood Orderables, and PT Orderables. You can associate each procedure with a procedure category.

Procedure categories simplify maintenance of your procedures by sharing settings across procedures. This way, you can apply one change to several procedures by editing the procedure category. For example, you might want to enter default visit types at the procedure category level, and then enter more specific settings for individual procedures.

Prerequisites

You need to create procedure categories in the Procedure Category (EDP) master file before you can enable them for scheduling. Members of your clinical-products project team (like EpicCare Ambulatory) usually build these records with an import. Refer to the Procedures (EAP) Master File Setup and Support Guide for additional information on creating procedure categories.

Also, you need to create visit types so you can link them to procedure categories. Refer to the Visit Type Setup & Support Guide for additional information on creating visit types.

1. In Hyperspace, follow the path Epic button> Admin > Schedule Admin > Master File Edit > Procedure Categories and select a procedure category record.

2. On the Scheduling form, in the Default visit types (I EDP 10900) field, enter the visit types to use when scheduling a procedure order with this category. If you want to use different visit types when the clinician places the procedure as an inpatient order, enter those visit types in the Inpatient overrides field.
3. In the Sched outpatients only? (I EDP 10909) field, enter Yes if you want to schedule a procedure only when the clinician places it as an outpatient order.
4. In the Check VT spec restr? (I EDP 10911) field, determine which visit type restrictions to check when scheduling a procedure order with this category.
    - Enter Yes if you want to check both visit type specialty restrictions and a scheduler's security classification restrictions.
    - Enter Security Only if you want to check only security classification restrictions.
    - Enter No if you don't want to check either set of restrictions.
5. In the Combine categories? (I EDP 10910) field, enter Yes if you want to combine procedure orders into one appointment when scheduling multiple procedure records that use the same visit type for the same time.
6. In the Prompt if multiple VT? (I EDP 10930) field, enter No if you want to schedule all visit types associated with this procedure in the order listed in the procedure. Enter Yes if schedulers should choose which visit types to use during scheduling. You might use this option when departments share the same procedure but use different visit types for scheduling.

The Foundation System has multiple procedure categories set up for scheduling. Refer to the Foundation Hosted environment and the Foundation System Build Trackers for details on procedure categories.

Adjust Scheduling of Orders Based on Order Class

In addition to the procedure and procedure category level setup, you can define order class overrides for order scheduling. This allows you to adjust scheduling for certain order classes.

You can adjust scheduling for certain procedures based on order class. For example, you can prevent a procedure from being schedulable if placed in a certain order class or set different visit types for certain order classes. Or you could allow silent scheduling for a procedure only if the order is a certain order class.

Note that in May 2022 and earlier, the Scheduling Defaults form mentioned in these steps is called the Schedule form.

Prevent Order Scheduling with Order Class Overrides

1. In Hyperspace, open a procedure or procedure category.
    - To set up overrides for procedures, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Procedures and select a procedure record.
    - To set up overrides for procedure categories, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Procedure Categories and select a procedure category record.
2. On the Scheduling Defaults form, in the Order Class Overrides table, select an order class. Leave the visit type column blank. This prevents scheduling for procedure orders with the associated order class
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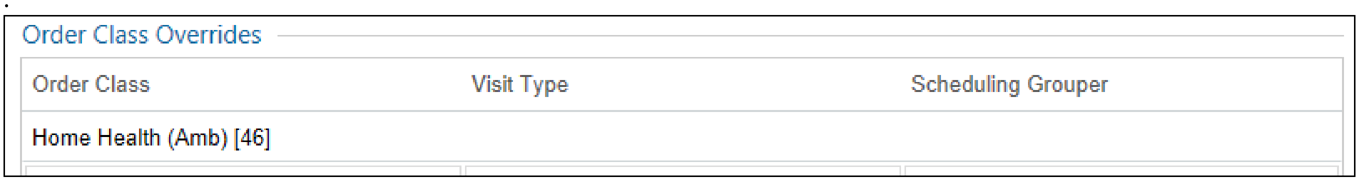


Set Up Order Class Overrides for Procedures and Procedure Categories

1. In Hyperspace, open a procedure or procedure category.
   - To set up overrides for procedures, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Procedures and select a procedure record.
   - To set up overrides for procedure categories, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Procedure Categories and select a procedure category record.
2. On the Scheduling Defaults form, in the Order Class Overrides table, select an order class.
3. Select the visit type or scheduling grouper to use for a procedure order with the associated order class.

Order Class Overrides

Order Class	Visit Type	Scheduling Grouper
Point Of Care [2]	LAB [1023]	

Mark Certain Procedures As Needing Recurring Appointments by Default

This option is helpful for procedure orders for which both of the following things are true:

- They are frequently placed as standing orders and need to be scheduled with recurring appointments.
- Those appointments are scheduled from the parent order, rather than from the child orders.

You can save schedulers a click by marking the procedure as needing recurring appointments by default. With this option, the Recur check box is automatically selected when the scheduler begins to schedule the procedure. Starting in February 2019, this option also allows clinicians to schedule recurring visits in Order Up. This option is likely especially helpful for procedures and appointments in behavioral health departments.

Also, with this option, schedulers are less likely to need to adjust the number of recurrences to schedule. After you specify the maximum number of default recurrences for the procedure's appointments, the system automatically adds all of the occurrences that still need to be scheduled for the procedure, up to that maximum number. Schedulers can then change the number if needed.

To use this option for a procedure or procedure category, follow these steps:

1. In Hyperspace, open the procedure or procedure category by following the path Epic button > Admin > Schedule Admin > Master File Edit > Procedures or Procedure Categories.
2. Set the Automatically recur? (I EAP 33333 or I EDP 33333) field to Yes.
3. Set the Max default visits (I EAP 33334 or I EDP 33334) field to the maximum number of default recurrences for the procedure's appointments.
4. Click Accept.

Automatically Generate a Referral for Appointment Requests

If you are using Epic's Referrals product, you can set up your system to automatically generate referral records when clinicians place an order that generates an appointment request. Then, when front desk users schedule the appointment from the order, the system links both the referral and the order to the appointment. This method works well for physician-to-physician referrals, such as when a primary care provider orders a consultation with a specialist for the patient.

Prerequisites

Make sure you have an order class you can use for referrals. Typical referral-related order classes include Internal Referral, External Referral, and Sensitive.

To generate referrals from orders, you must first link the referral order class to procedure categories or procedures. Then, you configure the system to generate referrals for that order class.

Associate Order Classes with Procedure Categories or Procedures

1. In Clinical Administration, follow the path Management Options > Edit System Definitions > Procedures, Scheduling, Tasks > Categories (EDP) and open a procedure category.
    - You can also associate referral order classes with procedures by following the path Management Options > Edit System Definitions > Procedures, Scheduling, Tasks > Procedures (EAP) and opening a procedure.
2. Access the Category Setup screen and enter the allowed order classes for the procedure category.
    - If you're in the Procedures (EAP) master file, you can enter allowed order classes for the procedure on the EpicCare Settings screen.
3. On the Order Class Defaults screen, enter a default order class for outpatient contexts and a related default priority.
4. Enter a default order class for inpatient contexts and a related priority.
    - If you're in the Procedures (EAP) master file, go to the Order Class and Priority Defaults screen to complete this step for the procedure.

You can also specify a default order class and priority to use for a particular department. If you specify department-specific order class and priority defaults, the system references the following settings in this order to determine which defaults to use:

- Department-specific defaults for the procedure
- Inpatient or outpatient default for the procedure, based on the context in which the clinician places the order
- Department-specific defaults for the procedure category
- Inpatient or outpatient default for the procedure category, based on the context in which the clinician places the order

Define Order Classes that Generate Referrals

1. In Hyperspace, open Referrals System Definitions (search: Referrals System Definitions) and go to the Order Entry> Referral Creation form.
2. In the Generate referral for order classes (I POS 1100) field, enter the order classes that automatically generate a referral. Procedure orders with the order classes you specify here generate referrals.

Enable Scheduling of Future and Standing Orders

You can allow schedulers to make appointments from parent standing/future orders. Scheduling from the parent order allows schedulers to schedule all of the occurrences at the same time. The parent order stays on workqueues and reports until the scheduler makes all the appointments.

If you want inpatient schedulers to schedule each individual order as it is released by the system, you can configure the system so that only outpatient standing and future orders appear on workqueues and work lists.

This means the inpatient schedulers won't see an order for scheduling until the system releases the normal child order from the parent order.

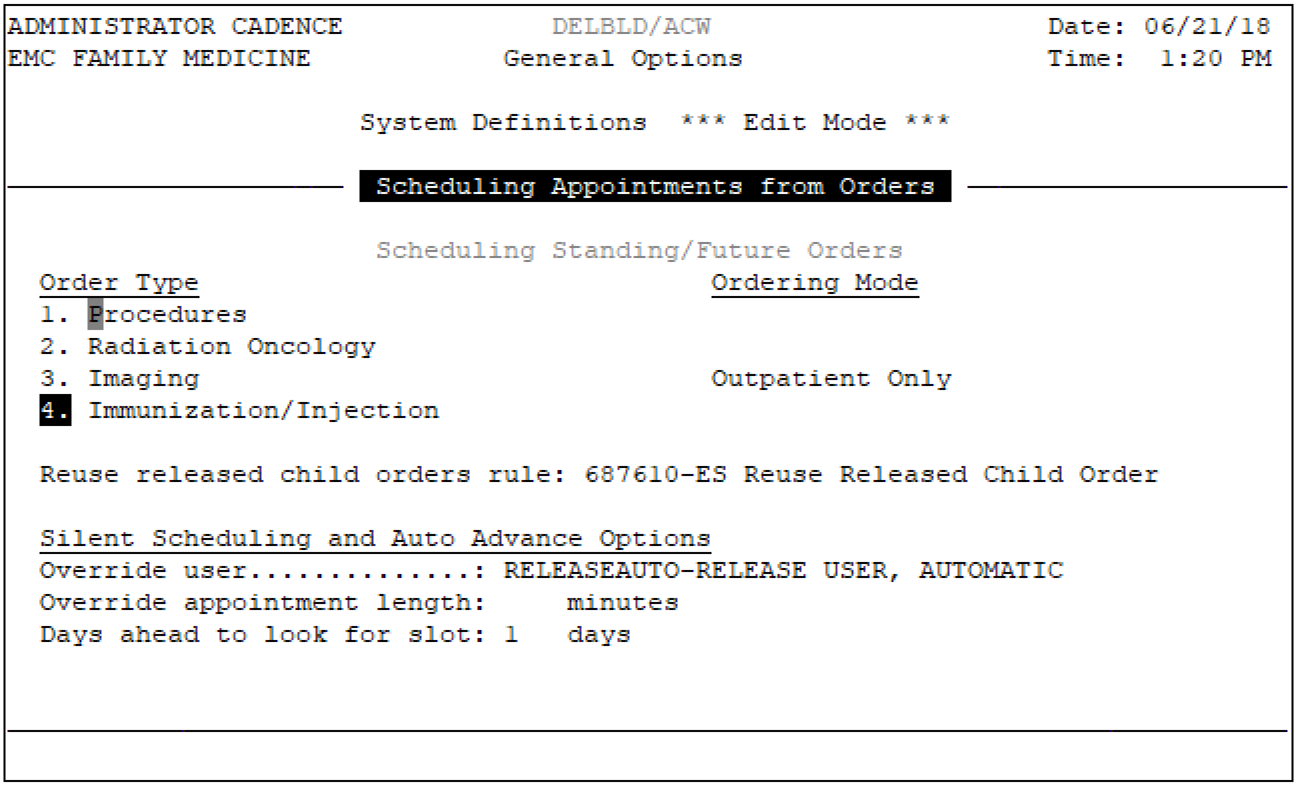
For example, let's assume you decide that schedulers should schedule standing or future lab orders in all modes. Here's what happens to the scheduling flag for those procedure orders:

- When a clinician places the procedure order in inpatient mode, the system flags the standing order for scheduling as appropriate and these orders appear on reports and workqueues.
  - This option means the scheduler schedules the parent order and the order stays on reports and workqueues until the scheduler makes appointments for all the occurrences. The system doesn't show the normal child orders as needing scheduling and automatically links these orders to the appointments when released.
- When a clinician places the procedure order in outpatient mode, the system flags the standing/future orders for scheduling as appropriate. These orders appear in reports and workqueues.
  - This option means the scheduler schedules the parent order and the order stays on reports and workqueues until the scheduler makes appointments for all the occurrences. The system doesn't show the normal child orders as needing scheduling and automatically linked these orders to the appointments when released.

If you chose to schedule the standing/future orders for only outpatient orders, in the inpatient example, the parent order doesn't appear on workqueues and reports. Schedulers don't see an order for scheduling until the system releases the child normal orders. For inpatient mode orders, the child order always releases to the same contact as the parent order.

Specify the Order Types Allowed for Scheduling Future and Standing Orders

1. In Clinical Administration, follow the path Management Options > Edit System Definitions > Procedure, Scheduling, Task > General Options and access the Scheduling Appointments from Orders Screen.
2. In the Order Type (I LSD 1710) column, enter an order type. If you don't enter an order type, the system shows only the normal orders for scheduling.
3. Press Tab to move to the associated Ordering Mode (I LSD 1711) column. Determine if standing/future orders for the order type are schedulable when placed in outpatient mode, inpatient mode, or all modes. If you enter an order type but leave the ordering mode blank, the system flags standing and future orders for all modes as schedulable.



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ADMINISTRATOR CADENCE               DELBLD/ACW                      Date: 06/21/18
EMC FAMILY MEDICINE              General Options                    Time:  1:20 PM

                      System Definitions  *** Edit Mode ***

                     Scheduling Appointments from Orders

                      Scheduling Standing/Future Orders
  Order Type                                  Ordering Mode
  1. Procedures
  2. Radiation Oncology
  3. Imaging                                  Outpatient Only
  4. Immunization/Injection

  Reuse released child orders rule: 687610-ES Reuse Released Child Order

  Silent Scheduling and Auto Advance Options
  Override user...............: RELEASEAUTO-RELEASE USER, AUTOMATIC
  Override appointment length:     minutes
  Days ahead to look for slot: 1   days
```

In Epic 2015 only, if you change these settings in your system for imaging orders in Radiant or Cupid, you can run the Reset Scheduling Flag utility to update existing orders to use your new settings. Starting in Epic 2017, the system records whether children of a parent order are schedulable, so if child orders get released after you change these settings, they are still schedulable or not schedulable based on how the settings were configured when the parent order was placed.

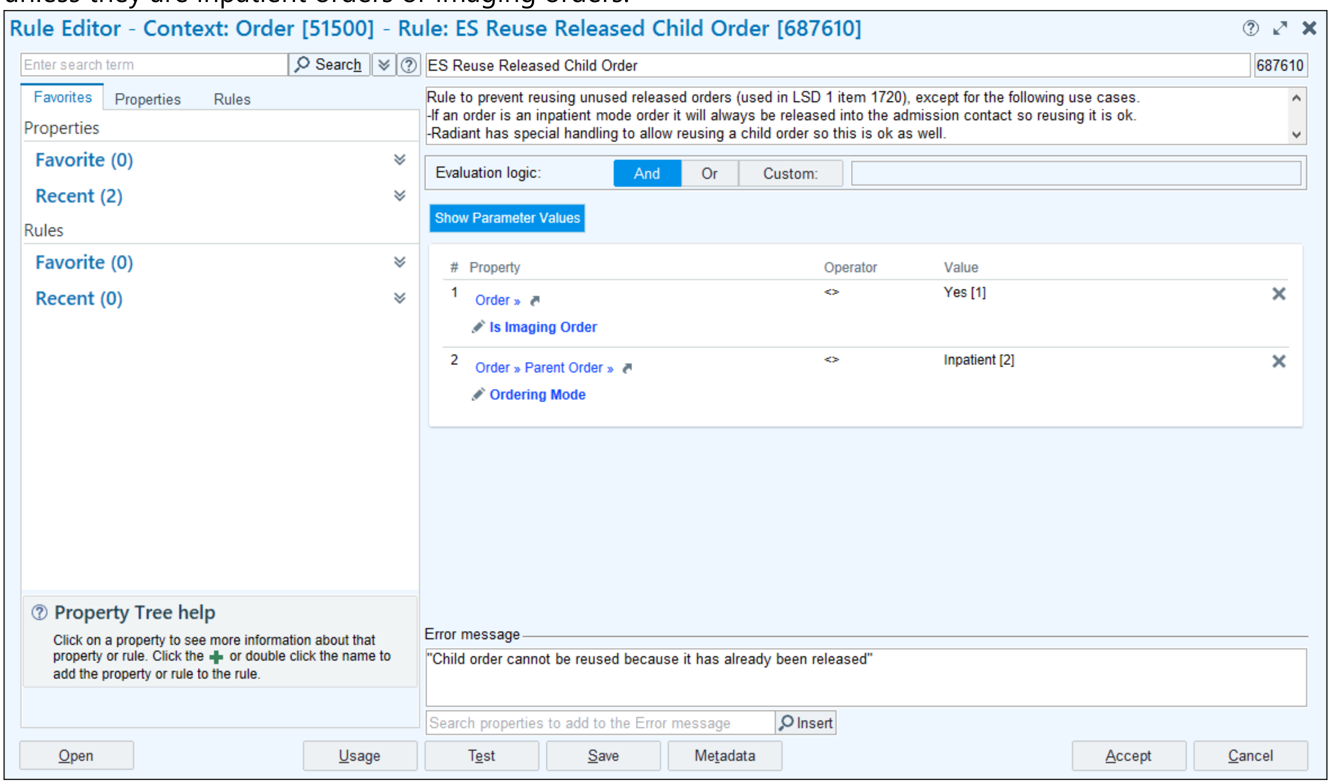
In the Foundation System, you can schedule standing/future orders for order types like Imaging, Cardiac Services, and ECG only in outpatient mode. For other order types like Consult, PT, Lab, and GI, you can schedule standing/future orders for all modes. Refer to the previous image and the Foundation Hosted environment for more information.

Prevent the System from Reusing Released Outpatient Orders

When a scheduler cancels an appointment for a released future outpatient or an instance of a released standing outpatient order, the order can be reused for scheduling as long as it has not been canceled or completed and it has not been resulted. If there are additional scenarios where you do not want the system to reuse these orders, you can specify a rule in EMR System Definitions. Starting in August 2019 and in May 2019 with special update E8802163, an error message appears in the Cancel Appts activity and the Reschedule button is unavailable when a scheduler selects an appointment for an order that has been released and cannot be reused per the rule. In this scenario, schedulers should request a new order from the clinician. A warning message appears in the Reassign Template activity when a scheduler reassigns a provider's appointments for orders that have been released and cannot be reused per the rule.

If you use the ScheduleMultipleAppointments web service, a warning message is returned when a user reschedules an appointment, the order cannot be reused, and there are no more orders to release. In this scenario, the appointment is rescheduled and the original future or standing order is linked to it. When a user checks in the appointment later, they see an error message that an order could not be released.

1. In Hyperspace, create an Order context rule that identifies released orders that cannot be reused. For additional information about creating rules, refer to the Create or Edit a Rule topic. In the Foundation System, we created rule 687610-ES Reuse Released Child Order, which prevents orders from being unused unless they are inpatient orders or imaging orders:



2. In Clinical Administration, follow the path Management Options > Edit System Definitions > Procedure, Scheduling, Task > General Options and access the Scheduling Appointments from Orders Screen.
3. Enter your rule in the Reuse released child orders rule (I LSD 1720) field.

Prevent Clinicians from Placing Normal Orders for Schedulable Procedures

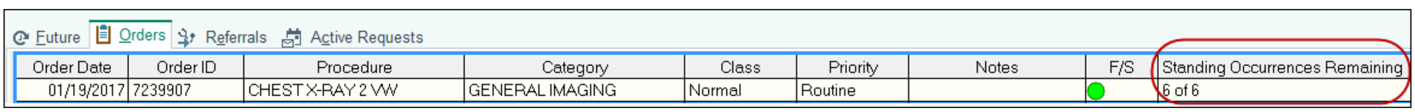
Normal orders are intended to be performed during the encounter in which they are placed. For example, if a clinician has an office visit with a patient who reports having a sore throat, the clinician might order a strep test to be performed during the same office visit. This order would be placed as a normal order and would not be scheduled. Because normal orders aren't intended to be scheduled, there can be unintended consequences for billing if a normal order is used for scheduling.

Epic recommends setting up an order validation extension to prevent clinicians from placing normal orders for the order type and order class combinations that your organization schedules appointments for. Work with your EpicCare Ambulatory team to complete the following steps:

1. In Chronicles, create a copy of extension 3868-Order Status and Order Class Checks.
2. Configure the Order Types Inc/Exc parameter and the Allowed Order Classes parameter so that the order type and order class combinations that your organization schedules appointments for are included in the check.
3. Leave the Check Status parameter blank so that only standing and future orders for the order types are allowed.
4. In Clinical Administration, open the relevant profile and go to Procedure, Scheduling, Task > Order Validation > Order Validation screen.
5. Enter your copy of extension 3868 in the Accept Order Validation Extensions (I LPR 830) field.

Show How Many Occurrences of a Standing Order Still Need to Be Scheduled

When a scheduler is scheduling occurrences of a standing order, you can show him the number of occurrences that still need to be scheduled, either within an appointment request workqueue or on the Orders tab of Appointment Desk.



This option is most helpful in departments where schedulers frequently schedule standing orders from the parent order rather than from the child order, such as in behavioral health departments.

To show the column described above in a appointment request workqueue, follow these steps:

1. In Hyperspace, open the Workqueue Detail activity (search: Requests/Orders WQ Maintenance).
2. Open the workqueue to which you want to add the column.
3. Click Configure View > Edit View and edit the view to which you want to add the column.
4. In the Properties section, click and drag the Standing Occurrences Remaining property to the Columns section.
5. Click Accept.

To show the column described above in the Appointment Desk in a specific department, follow these steps:

1. In Hyperspace, select Epic button > Admin > Schedule Admin > Master File Edit > Department and open the department for which you want to show the column.
2. Select Appt Desk Config and click the Edit Report button in the Schedule Orders Tab section.
3. Select the report that the department uses and select the Display tab.
4. Select the Standing Occurrences Remaining column in the Available Columns list and click the right arrow button to add the column to the Selected Columns list.
5. Use the up and down arrows to change the location of the Standing Occurrences Remaining column as needed.
6. Click Save.

To show the column described above in the Appointment Desk system-wide, follow these steps:

1. In Hyperspace, select Epic button > Admin > Schedule Admin > Cadence System Definitions.
2. Under Appointment Desk, select the Configuration form.
3. Click the Edit Report button in the Schedule Orders Tab section.
4. Select the report that the department uses and select the Display tab.
5. Select the Standing Occurrences Remaining column in the Available Columns list and click the right arrow button to add the column to the Selected Columns list.
6. Use the up and down arrows to change the location of the Standing Occurrences Remaining column as needed.
7. Click Save.

Prevent the Automatic Release of Child Orders at Check In

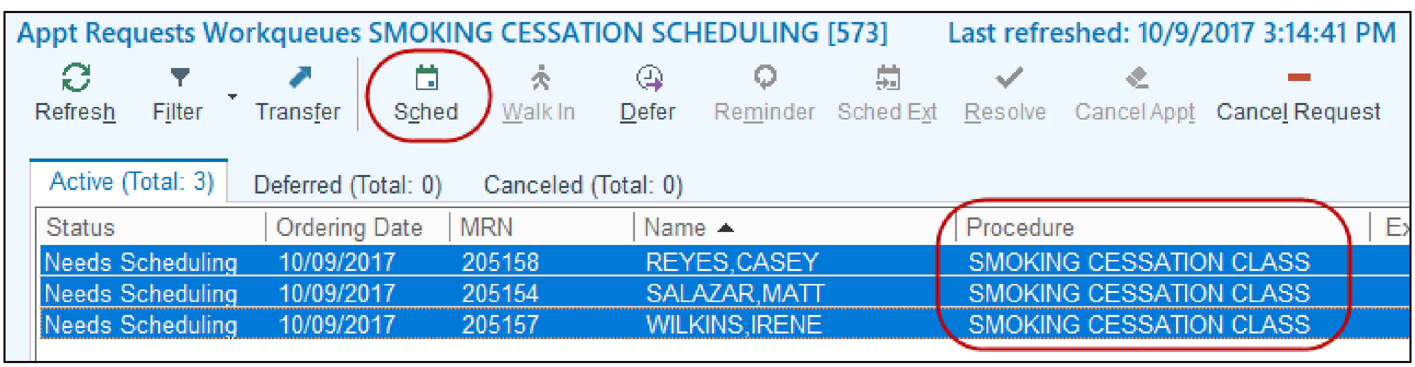
Starting in February 2024

If you schedule lab orders from appointment requests, you can set specific procedures or procedure categories to not release child orders when the appointment is checked in. This way, the person performing the order can confirm that they can do the procedure before manually releasing the order. You can also automatically unlink the order from the appointment if it isn't released by the time Cadence End of Day (EOD) processing runs. For more information on this configuration, refer to the Build Lab Procedures topic.

Schedule Procedure Orders for Group Appointments for Multiple Patients at Once

Starting in Epic 2018

When patients need to be scheduled as a group for an appointment, but the patients are identified individually by clinicians who place procedure orders for the visits to be scheduled, you can allow users to schedule appointments for the patients all at once from a workqueue or Snapboard Requests Depot. When a visit type is set up as a group session visit type, schedulers can select multiple appointment requests for procedures that are linked to the group session visit type and schedule them together in Book It (starting in February 2022) or Make Appointment (November 2021 and earlier).



To allow schedulers to make appointments for procedures that should be scheduled as group appointments, you need to create procedures for clinicians to order and make the procedures schedulable by assigning a group session visit type.

Work with your EpicCare Ambulatory team to create the procedures you need. To make the procedures schedulable, refer to the Enable Scheduling of Procedures topic.

To identify a visit type as a group session visit type, refer to the Set Up Group Sessions topic.

Complete Orders on Appointment EOD Based on an Orders-Context Rule

Starting in May 2023

February 2023 by SU E10403997

November 2022 by SU E10310846

This topic applies only to organizations outside of the United States.

If you want orders to be evaluated against a rule when End of Day processing or appointment completion advance an appointment to a completed status, you can use a rule in system definitions. For example, if you want only orders that are ordered by a specific department to be marked complete by end of day processing, you can create a rule based on that ordering department and enter it in system definitions so that orders are evaluated against that rule for auto completion. If an order was ordered by the department specified in the rule, the order is marked as Complete. If an order was not ordered by the department specified in the rule, the order isn't marked as Complete.

To access this setting:

1. Create an orders-context rule or find an existing one that you would like to use.
2. In Clinical Administration, follow the path Management Options > Edit System Definitions (LSD) > Procedure, Scheduling, Task > General Options and go to the Scheduling Appointments from Orders screen.
3. In the Complete orders upon EOD rule (I LSD 1722) field, insert an orders-context rule here that you would like orders to be evaluated against for auto completion.

Enable Transcription and Scheduling of Paper Orders

Even after going live on Epic, outside providers might still fax in paper orders or give them directly to patients. These paper orders need to be entered into the system so all patient care information is accessible in the patient's Epic record. Transcribing these orders also makes it possible to schedule them as if they were placed directly through Epic, which provides a number of time-saving conveniences:

- The right visit type is automatically selected.
- The procedure and diagnosis from the ordering physician carry over.
- The link to the order is carried over if an appointment is rescheduled.

Some organizations find that the best way to handle paper orders is to have non-clinical staff like schedulers and registrars transcribe them into Epic. This is especially true in order-driven procedural areas like radiology, lab, and therapy departments. The Transcribe Order workflow gives these users a convenient way to enter paper orders into Epic and save a scanned copy of the original for future reference.

For legal reasons, this workflow also distinguishes between orders entered by non-clinical staff and clinical staff, who still use Orders Only encounters. Your organization's compliance department should review this workflow to determine when non-clinical users should be permitted to transcribe clinical orders.

Referral Entry, Ancillary Orders, and the Appointment Request activity are additional ways to enter outside orders into the system. Refer to the Referrals and Orders from Other Organizations topic for recommendations about which workflow works best for particular users.

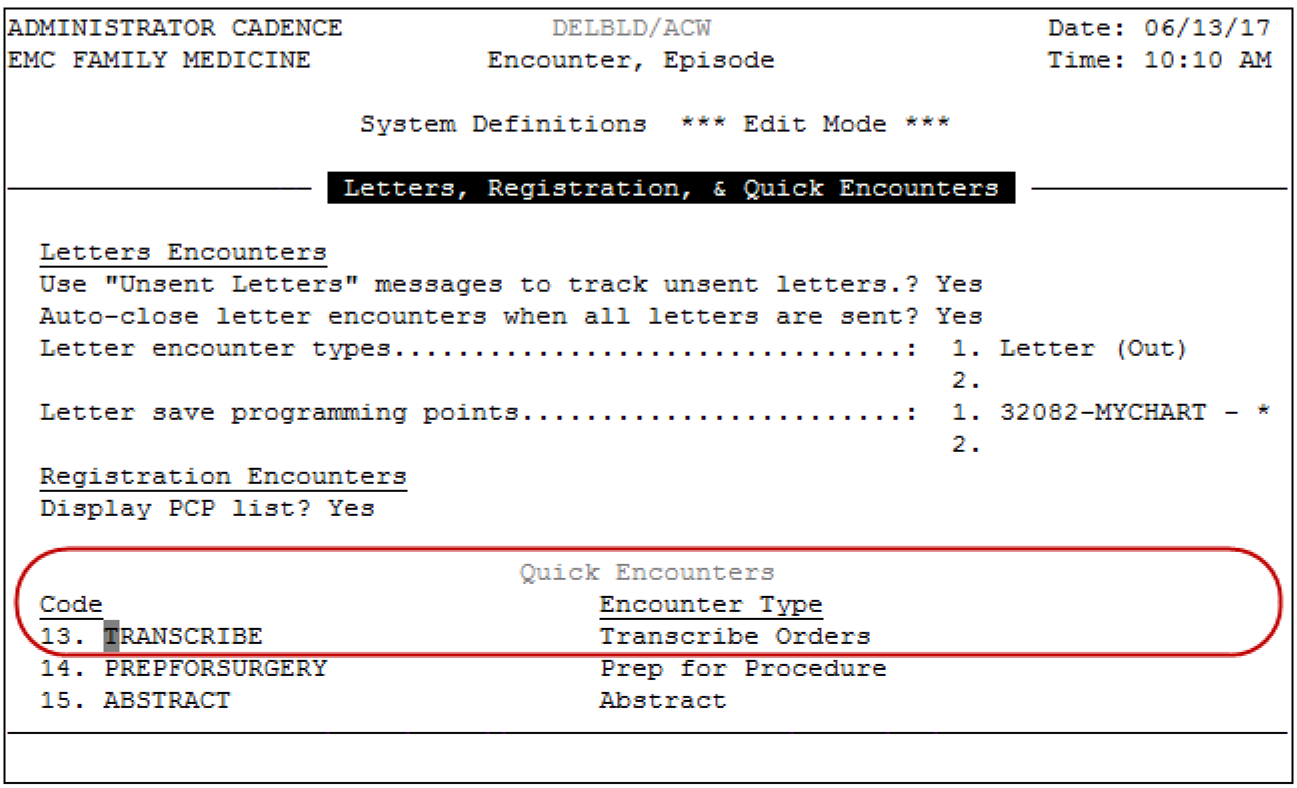
Set Up a Transcribe Order Encounter

Creating a specific Transcribe Order encounter type lets you customize a workflow that guides your users through the process of entering and scheduling external orders.

1. Click the Epic button and navigate to Admin > General Admin > Category List Maintenance.
2. Enter Patient Master [EPT] in the Database field and CONTACT TYPE [30] in the Item field.
3. Type an ID number that isn't already in use into the Add/Edit category field and click Go. The Create New Category prompt appears.
4. Title your new encounter "Transcribe Order" and give it appropriate synonyms and an abbreviation.
5. Click Accept. The Create New Category prompt closes.
6. Click Save.

Designating the new encounter as a quick encounter allows your users to create a Transcribe Order encounter by simply clicking a button on their toolbar. This convenience saves time for your users, especially if they transcribe orders frequently.

1. In Clinical Administration, follow the path Management Options > Edit System Definitions > Encounter, Episode, and page down to the Letters, Registration, & Quick Encounters screen.
2. Add a new line to the Quick Encounters table with the code Transcribe and the Transcribe Orders encounter type you created.



```
ADMINISTRATOR CADENCE              DELBLD/ACW                     Date: 06/13/17
EMC FAMILY MEDICINE             Encounter, Episode                Time: 10:10 AM

                      System Definitions  *** Edit Mode ***

                   Letters, Registration, & Quick Encounters

  Letters Encounters
  Use "Unsent Letters" messages to track unsent letters.? Yes
  Auto-close letter encounters when all letters are sent? Yes
  Letter encounter types..............................:  1. Letter (Out)
                                                          2.
  Letter save programming points......................:  1. 32082-MYCHART - *
                                                          2.
  Registration Encounters
  Display PCP list? Yes

                              Quick Encounters
  Code                                  Encounter Type
  13. TRANSCRIBE                        Transcribe Orders
  14. PREPFORSURGERY                    Prep for Procedure
  15. ABSTRACT                          Abstract
```

Create the Transcribe Order Activity and Button

First, you create the Transcribe Orders activity where your user will do her work.

Next, you can create the button your user will click to open the Transcribe Order activity.

Finally, you replace the old Orders Only button with your new Transcribe Order button.

Create the Transcribe Orders Activity

1. In Chronicles, access the Activity (E2N) master file.
2. Select Enter Data.
3. Select Duplicate Activity and copy activity 20149-UCW_LAUNCH_ORDERS_ENCOUNTER.
4. Give your new activity an ID of 1172014901 and name it MODEL_UCW_LAUNCH_ORDER_TRANSCRIPTION_ENCOUNTER.
5. Page down once to return to the Enter Data Menu.
6. Select Edit Activity and open the activity you just created.
7. Modify your new menu with the captions shown in the following screenshot:

```
 Activity: MODEL_UCW_LAUNCH_ORDER_TRANSCRIPTION_EN*
------------------------------General Information--------------------------------
Activity descriptor: MODEL UCW LAUNCH ORDER_TRANSC* Trademark: EpicCare
            Caption: Transcribe Orders        Act. tabs group:
    Display caption: Transcribe Orders              Min width:
            Tooltip: Transcribe Orders             Min height:
    Display tooltip: Transcribe Orders          Activity icon: MR_QUICKENC_ORD*
        Description: Order Transcription Encounter, respecting the UCW
                     default activity
   Kind of activity: Normal                         Form style: 0
              Style:                           Supports read-only:
     F1 help module:                             Supports roaming:
-----------------------------------ProgID Setup----------------------------------
            Control progID:
   Control init parameters:
           Control license:
         Redirector progID: EMRRedirectors82.MRUCWLaunchOrdersEnc
   WS discriminator progID: EMRRedirectors82.MREncWorkspaceDisc
------------------------------Override Information-------------------------------
 Overrides activity descriptor:

----------------------- Press <F13> for Extended Input --------------------------
  Contact your system representative before modifying records in this database.
```

8. Page down to the Filter Setup screen.
9. Press Tab until you reach the Parameters column of the PATIENTCONTACT row in the Desired/Required Information section.
10. Press Shift+F3 to access the extended input.
11. Replace 111 with the ID of your new Transcribe Order encounter type, and replace "ORDERS" with "TRANSCRIBE". The code should look like this: `2521|QuickEncFltr^HENCFILT#^2521|app^HUPAT3("TRANSCRIBE")|FormatOrders^HENCFILT|HeaderOrders^HENCFILT|2000|||s x=$$FndTyp^LAANC1("TRANSCRIBE","",1)|bpp^HUPAT3`

```
Activity: MODEL_UCW_LAUNCH_ORDER_TRANSCRIPTION_EN*
                              Filter Setup

Filter Kind                    Value
 1. License                    2|Base
 2. Security Point             OthEnc|~DepID|2|1
 3.

Filter expression: 1 AND 2
      True effect: Enable            False effect: Hide

                     Desired/Required Information
Info Name       Info    Req? Use  Publish To    ReqType  Flags  Parameters
                Type         Svc WS Kinds  Node
PATIENT         Object           ANY            0        1
BTG-RECORD      Object                                          100
PATIENTCONTACT  Object           ANY                     2163   2521|QuickEnc*
BTG-CONTACT     Object                                          100


               Press <F13> for Extended Input
 Contact your system representative before modifying records in this database.
2521|QuickEncFltr^HENCFILT#^2521|app^HUPAT3("TRANSCRIBE")|FormatOrders^HENCFILT
```

Create the Transcribe Order Menu

1. In Chronicles, access the Menu (E2U) master file.
2. Select Enter Data.
3. Select Duplicate Menu and copy menu 17605-MR_IT_QUICKENC_ORDERS.
4. Give your new menu an ID of 1171760501 and name it MODEL_ES_TRANSCRIBED_ORDERS_ENC.
5. Page down to return to the Enter Data Menu.
6. Select Edit Menu and open the menu you just created.
7. Page down once and update your menu record with the activity descriptor you created earlier, 11720149-MODEL_UCW_LAUNCH_ORDER_TRANSCRIPTION_ENCOUNTER.

```
Menu Name: MODEL_ES_TRANSCRIBED_ORDERS_ENC
─────────────────────────── Menu Information ──────────────────────────

                       Caption: Transcribe Order
               Display Caption: Transcribe Order
               Toolbar Tooltip: Transcribe an Order
       Display Toolbar Tooltip: Transcribe an Order
                         Image: EMRIMAGELIB82.IMGS,MR_QUICKENC_ORDERS
                  Toggle group:
                         Style:
                       Context:
 Act. Tabs Header Visibility:
─────────────────────────── Item Information ──────────────────────────
                  Shortcut key:
           Activity descriptor: MODEL_UCW_LAUNCH_ORDER_TRANSCRIPTION_ENCOUNTER
                Run parameters:
           Activity Form Title:
                Launch options:
                       Message:
                Message Params:
────────────────────── Press <F13> for Extended Input ──────────────────
  Contact your system representative before modifying records in this database.
```

8. Page down until you return to the Enter Data Menu.
9. Repeat step 3-6 to copy menu 17140-MR_MNU_QUICK_ENCOUNTERS.
10. Give your new menu an ID of 1171714001 and name it ES_MNU_QUICK_ENCOUNTERS.
11. Open your second new menu for editing.
12. Page down to the Menu Information screen.
13. Replace menu 17605-MR_IT_QUICKENC_ORDERS with menu 1171760501-MODEL_ES_TRANSCRIBED_ORDERS_ENC.

```
Menu Name: ES_MNU_QUICK_ENCOUNTERS
──────────────────────────── Menu Information ────────────────────────

Items                                 Prevent Removal  Add Back On  Message ID
 1. MR_IT_QUICKENC_TELEPHONE
 2. MR_IT_QUICKENC_REFILL
 3. MR_IT_QUICKENC_LETTERS
 4. MODEL_ES_TRANSCRIBED_ORDERS_ENC
```

Replace the Orders Only Button with the Transcribe Orders Button

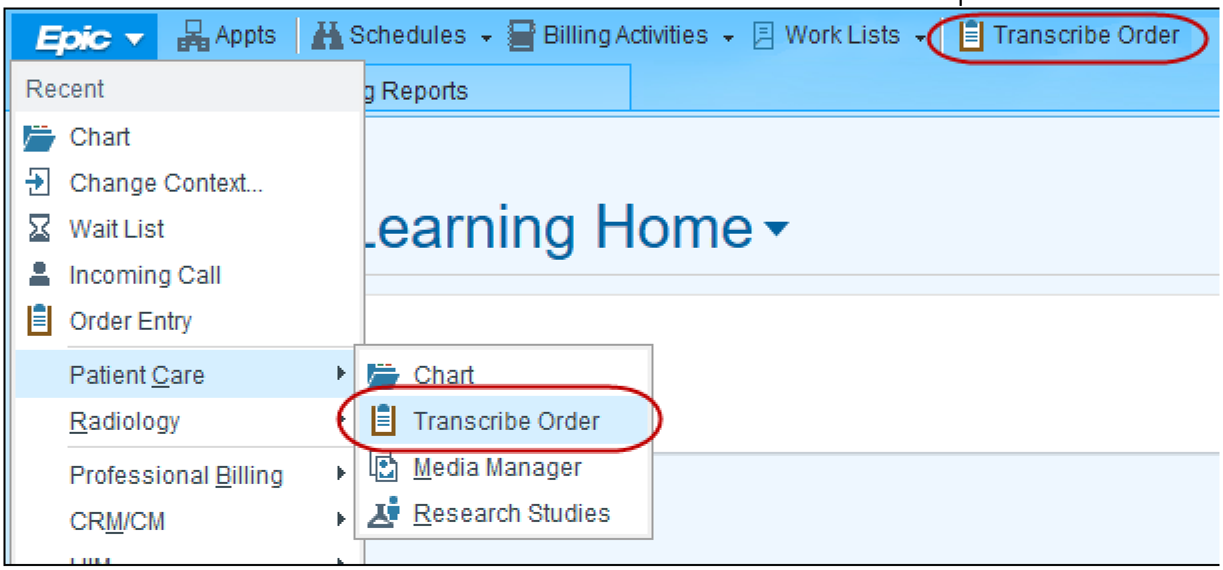
Identify the user roles that should use the Transcribe Order activity. You can find out what role a particular user has by going to Epic button > Admin > Access Management > User Security, opening the user record, and selecting the User Role form.

Follow these steps to update each of the user roles you identified:

1. In Hyperspace, go to Epic button > Admin > Access Management > Role Editor, and open the user role you want to update.
2. Find the line in the Menu Information table that contains the old menu, 17605-MR_IT_QUICKENC_ORDERS,

as an extension to the EDUSERTOOLBAR, and replace it with 1171760501-MODEL_ES_TRANSCRIBED_ORDERS_ENC, the new menu you created.

3. Replace menu 17140-MR _MNU_QUICK_ENCOUNTERS with menu 1171714001-ES_MNU_QUICK_ENCOUNTERS in the Menu Descriptor column and set the Override? column to Yes.
4. Click Finish. The toolbar and Patient Care menu should look like this for the updated user:



Create a Navigator for a Customized Workflow

The next step is the creation of a navigator to guide the user through the new Transcribe Orders workflow.

1. In Clinical Administration, go to Navigators > Dup Navigator.
2. Duplicate Foundation System navigator template 1179004001-T_MODEL_ES_ORDERS_ONLY.
3. Give your new navigator template an ID and name it T_MODEL_ES_TRANSCRIBE_ORDER.
4. Repeat these steps to duplicate each record in the following table.

Original	Copy	Caption and Abbreviation
1179004001-T_MODEL_ES_ORDERS_ONLY	T_MODEL_ES_TRANSCRIBE_ORDER	
1179004002-TOPIC_MODEL_ES_ORDERS_ONLY	TOPIC_MODEL_ES_TRANSCRIBE_ORDER	
2103430002-SEC_AMB_ORDER_REVIEW_JUMP	SEC_ES_ORDER_REVIEW_JUMP	Order Review
710-SEC_ORDERS_ENTRY	SEC_ES _ORDERS_ENTRY [1177100101]	Orders
52011-SEC_OR_ECONSENT	SEC_ES_SCAN_ORDER [1175201101]	Scan Order

1. Return to the Navigators menu and select Navigators (LVN).
2. Open SEC_ES_ORDER_REVIEW_JUMP and page down once to the Section Setup screen.
3. Change the Caption and Abbreviation fields to the item in the Caption and Abbreviation column in the earlier table.

4. Repeat the last three steps for the other two rows in the table with something in the Caption and Abbreviation column.
5. Return to the Navigators menu and select Dup Configuration.
6. Duplicate each configuration in the following table.

Original	Copy	Notes
34116-Case Consent	ES SCAN ORDER [1173411601]	
34300-IP Patient Education Link	ES ORDER REVIEW JUMP [1173430001]	After copying, change the activity descriptor in configuration 1173430001-ES ORDER REVIEW JUMP to UCW_ORDER_REVIEW.
2100000003-AMB Meds and Orders	ES TRANSCRIBE ORDERS ORDER ENTRY [1170000003]	

1. Return to the Navigators menu and select Navigator Configurations (VCN).
2. Open 1173411601-ES SCAN ORDER, the configuration you just created.
3. Page down to the Consents Navigator Section Settings screen.
4. Change the Entry context field to Consent.
5. Enter Outside Order in the Document types list. If it's called something else in your environment instead of the Model value Outside Order, use that instead.
6. Enter Outside Order in the Create Buttons field. This should be the same as the document type you listed in the previous step.
7. Exit the record.
8. Open the 1170000003-ES TRANSCRIBE ORDERS ORDER ENTRY configuration you created earlier.
9. Page down to the Order Field Display Options - 1 screen and edit it to match the following screenshot:

```
Configuration Name: ES TRANSCRIBE ORDERS ORDER ENTRY        ID: 1170000003
                   Order Field Display Options - 1

 Long-Term....................? No        Taking..............? No
 Start Date...................? No        End Date............? No
 Ordering Date/Time...........? No        Pharmacy............? No
 Ordering Date................? No        Med Note............? No
 Discontinue Reason...........? No        Order Report........? No
 Discontinue Date.............? No        Summary.............? No
 Last Administered Date/Time..? No        Admin Icon..........?
 Administration Instructions..? No        Refills.............? No
 Dispense as Written..........? No        Ord/Sold Date.......? No
 Prior Authorization Status...?           Dispense............? No
 Hide From Proxies............?           Last Dispense.......? No
 Admin Instructions Icon......?           Last Dose Request...?
 Patient Sig..................?           Intervention Icon...?
 Abbreviated Dosage...........?           Ordering Location...?
 End Date Warning.............?           Ordering Department.?
 Start Date/Time..............?
```

10. Page down to the Order Field Display Options - 2 screen and edit it to match the following screenshot:

```
Configuration Name: ES TRANSCRIBE ORDERS ORDER ENTRY          ID: 1170000003
                      Order Field Display Options - 2

 Notes to Pharmacy Icon.......?           Notes to Pharmacy.?
 Authorizing Provider.........?           Needs Review Icon.?
 Not From Current Enc Icon....?           Verified Icon.....?
 Associated Diagnosis Icon....?           Status for Visit..?
 Height/Weight Changes Icon...?           Order ID..........?
 PRN..........................?           End Date w/Doses..?
 Discharge Status.............?           Order Set.........?
 Order Details................?           Last Dose.........?
 Dose, Route, Frequency.......? No
 Dose, Frequency..............? No
 Dose.........................?
 Route........................?
 Frequency....................?

 Freq w/PRN Reasons, Rate & Admin Duration....?
```

11. Page down again to the Action Options - 1 screen and edit it to match the following screenshot:

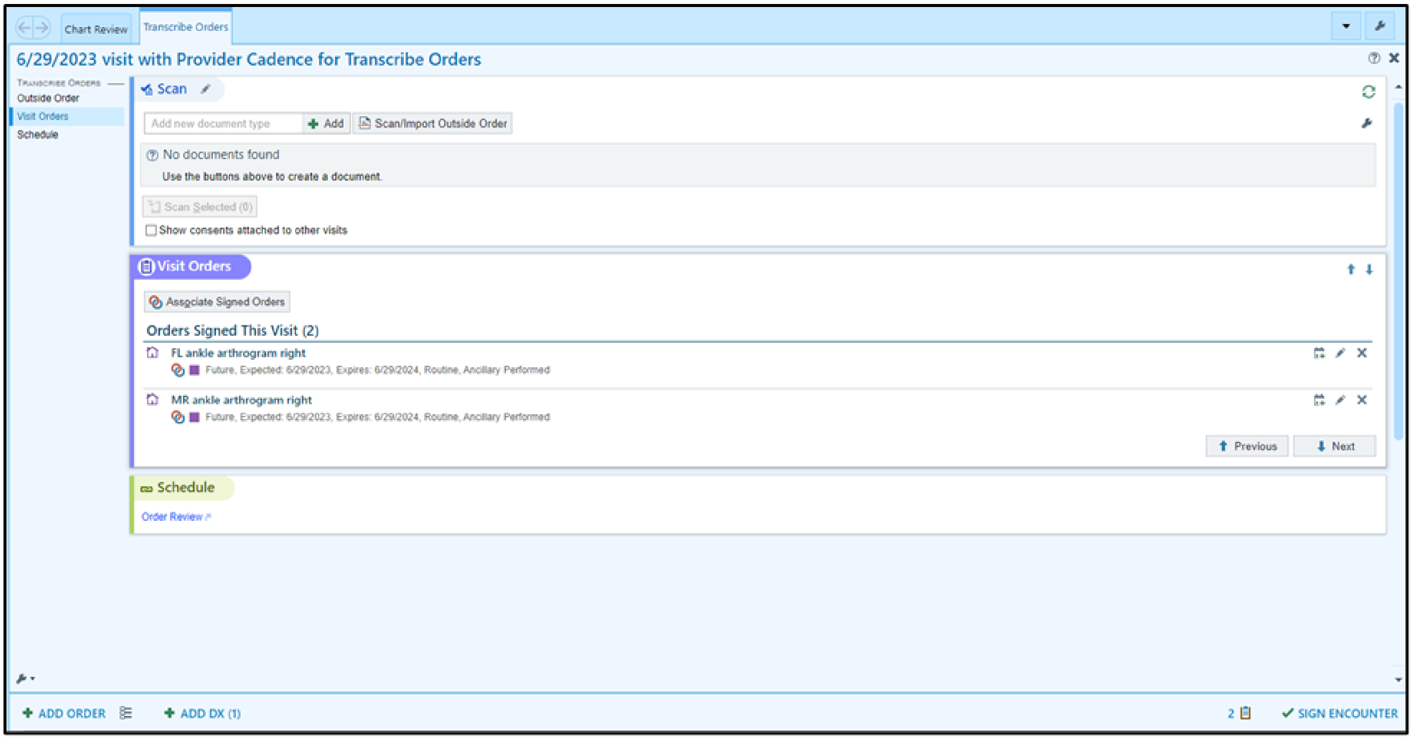
```
Configuration Name: ES TRANSCRIBE ORDERS ORDER ENTRY          ID: 1170000003
                              Action Options - 1

 Change/Modify......? No       Intervention Actions........?
 Reorder............? No       Adjust Sig..................? No
 Discontinue........? No       Associate...................? Yes
 Request Dose.......?          Prior Authorization.........?
 Pharmacy...........? No       Med List Comments...........: Hide
 Administer.........?          Patient-Reported Med Entry..? No
 Providers..........? Yes      Mark as Reviewed............? No
 Signed and Held....? No       Print MAR Label.............?
 Interactions.......? No       Edit Admin Instructions.....?
 Order Hx...........?          Edit Infusion Rate..........?
 Label Hx...........?          Send MAR Messages...........?
 Dispense...........?          Mark All Taking.............?
 Adjust Times.......?
```

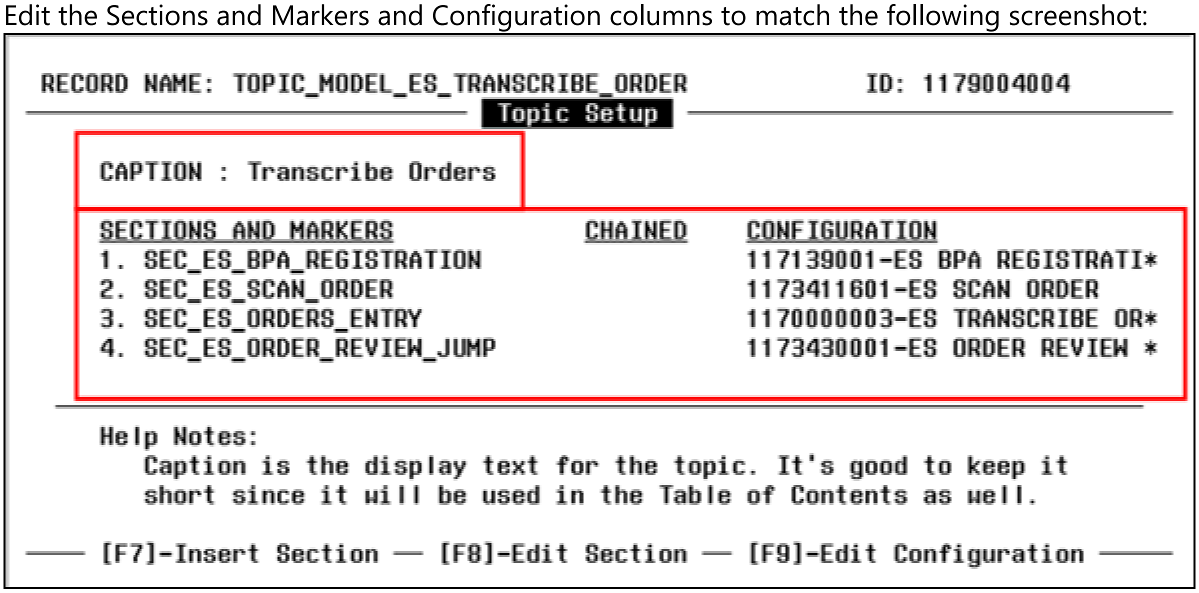
12. In Chronicles, open Prelude and navigate to Serv Area/Location Sys Defs Edit.
13. Open your service area or location and open Registration GUI Options.
14. Page down until you reach the Document Information Database Settings screen, and add the Outside Order or your system's equivalent in the Document Type column.

Then, make sure users have permission to create documents with the Outside Order type. Refer to the Grant Users Access to Specific Document Types topic for general instructions.

Now that you've created all the necessary sections, it's time to put together all the pieces of the Transcribe Orders navigator. The navigator is the screen we see when we transcribe orders. When your navigator is complete, it should look like the screenshot below:



1. Access the Navigator Template Definition master file (LVN).
2. Select Enter Data and then Edit VN Record.
3. Open TOPIC_MODEL_ES_TRANSCRIBE_ORDER [1179004004].
4. Page down once to the Topic Setup screen.
5. Enter Transcribe Orders in the Caption field.
6. Edit the Sections and Markers and Configuration columns to match the following screenshot:



```
RECORD NAME: TOPIC_MODEL_ES_TRANSCRIBE_ORDER           ID: 1179004004
                              Topic Setup

   CAPTION : Transcribe Orders

   SECTIONS AND MARKERS          CHAINED    CONFIGURATION
   1. SEC_ES_BPA_REGISTRATION               117139001-ES BPA REGISTRATI*
   2. SEC_ES_SCAN_ORDER                     1173411601-ES SCAN ORDER
   3. SEC_ES_ORDERS_ENTRY                   1170000003-ES TRANSCRIBE OR*
   4. SEC_ES_ORDER_REVIEW_JUMP              1173430001-ES ORDER REVIEW *

   Help Notes:
      Caption is the display text for the topic. It's good to keep it
      short since it will be used in the Table of Contents as well.

 [F7]-Insert Section — [F8]-Edit Section — [F9]-Edit Configuration
```

   - SEC_ES_OurPractice Advisory_REGISTRATION is an optional OurPractice Advisory that appears when a patient over age 65 lacks a Medicare coverage so that your user can follow up and get the patient's coverage information. You can find out why and how to create it by referring to the Alert Users When a Patient Over 65 Lacks Medicare Coverage topic.

7. Page down until you return to the Edit Data Menu.
8. Select Edit VN Record and open 1179004003-T_MODEL_ES_TRANSCRIBE_ORDER.

9. Page down to the Template Setup screen.
10. Add 1179004004-TOPIC_MODEL_ES_TRANSCRIBE_ORDER, the topic you created earlier, under Topics and Markers.
11. Return to Hyperspace and go to Epic button > Admin > General Admin > Navigator Template.
12. Open 1179004003-T_MODEL_ES_TRANSCRIBE_ORDER.
13. Click on the name of each section you would like to rename. It expands.
14. In the Caption field, type the name you want to appear as the title of each section to end users. In the Foundation System workflow, the captions are:
    a. Register
    b. Scan Order
    c. Order
    d. Order Review
15. Click Accept.

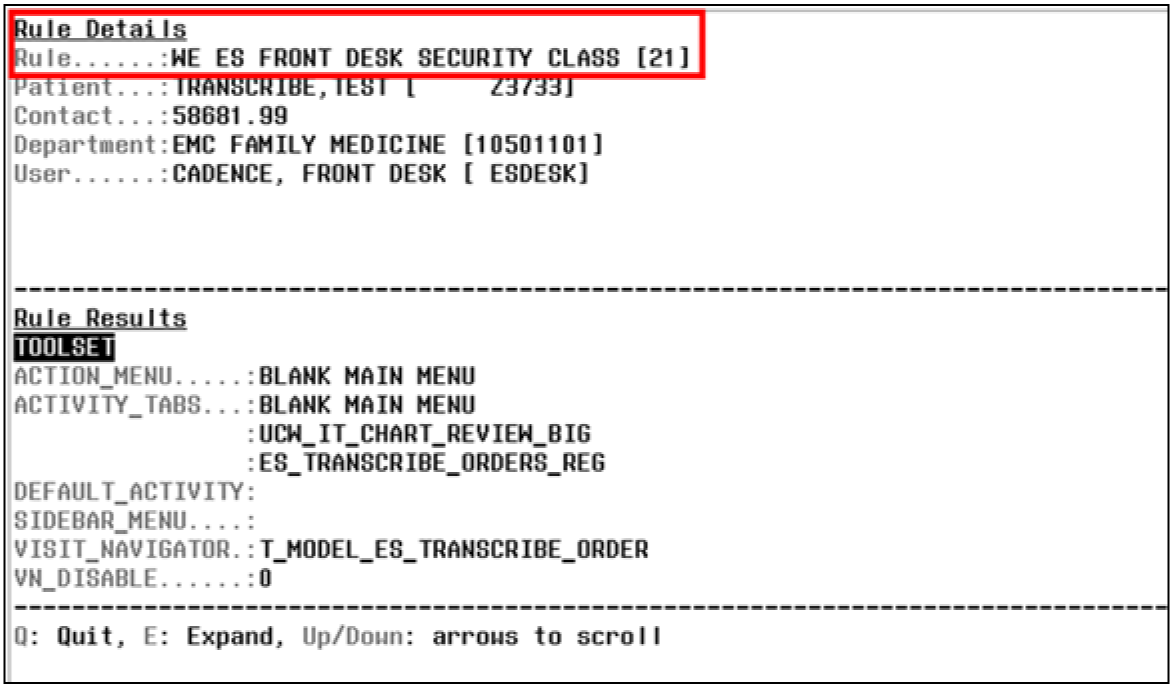
Customize Activities for Clinical Encounters

Now that you've created a Transcribe Order encounter and put together an activity and a navigator to guide users through the workflow, it's time to link all of them together. To do that, you can create a workflow engine rule that opens the Transcribe Order navigator when your user creates a Transcribe Order encounter.

Ask a member of your EpicCare Ambulatory or EpicCare Inpatient team to complete this task.

First, you should find out which workflow engine rule currently fires when your user opens a patient's chart.

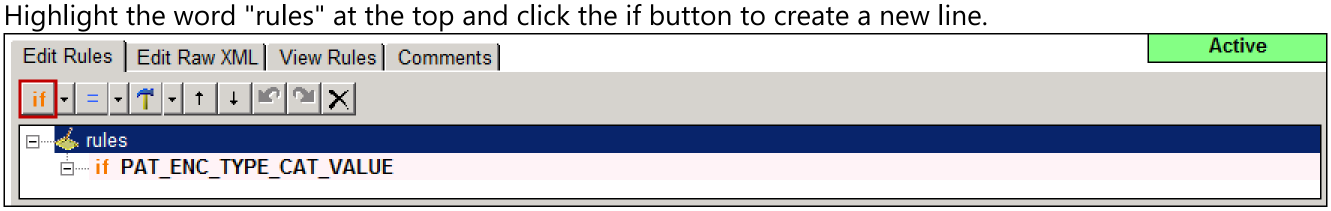
1. Log in to Hyperspace as the user you're updating the Transcribe Order workflow for.
2. Click the Epic button and navigate to Patient Care > Chart. Open any patient's chart.
3. Open Clinical Administration > Troubleshooting Utilities > Workflow Engine Rule Tracer.
4. Enter "t" in the From date field. In the Patients field, enter the name of the patient whose chart you just opened in the format last name, first name.
5. Select the entry tested for your user. The Rule Details screen appears, allowing you to identify the rule that fires when your user opens a chart. In the following image, you can see that the user ESDESK hits workflow engine rule 21-WE ES FRONT DESK SECURITY CLASS when opening the patient's chart in the Foundation



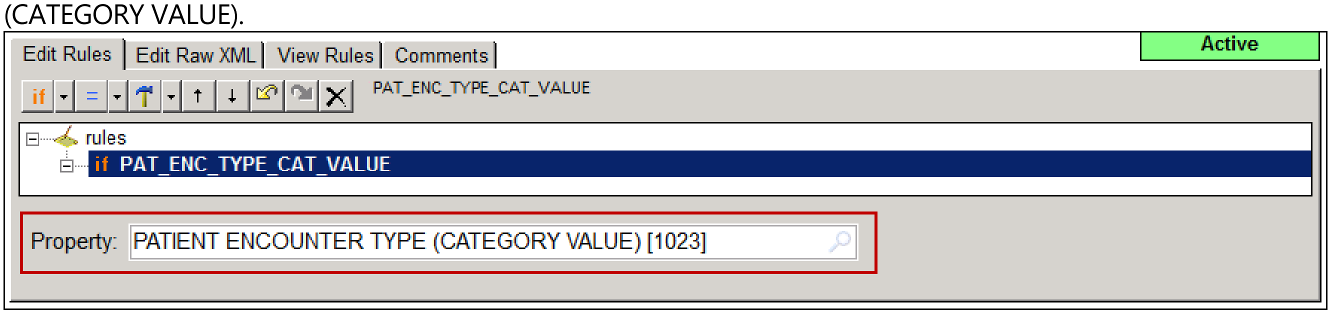
System.

Now that you've identified the current workflow engine rule, you can edit it so the right activity opens when a user creates a Transcribe Order encounter.

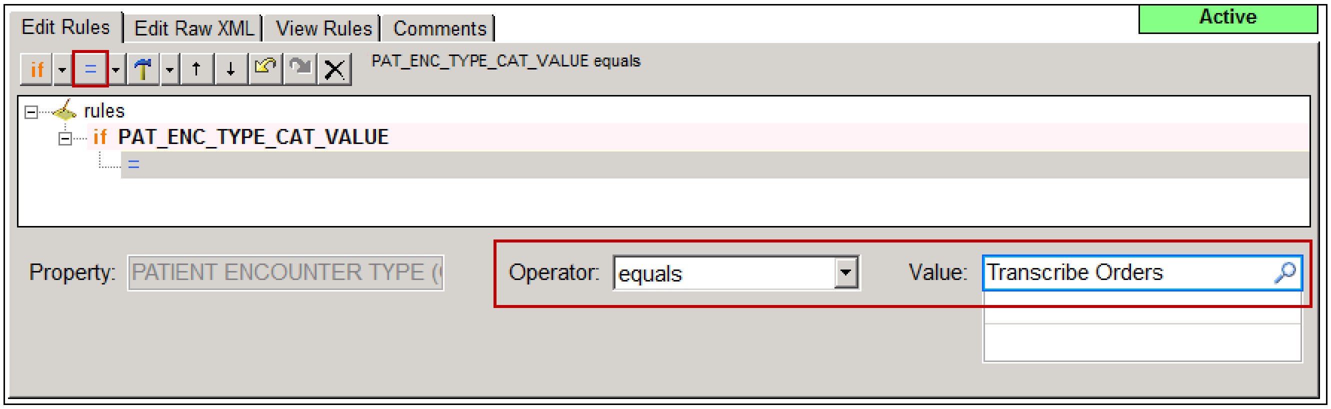
1. Log into Hyperspace as an admin user, click the Epic button, and navigate to Tools > Patient Care Tools > Workflow Engine Rules.
2. Select the radio button for Edit an existing rule and enter the workflow engine rule you just identified.
3. Select the most recent active contact and click Accept.
4. Highlight the word "rules" at the top and click the if button to create a new line.



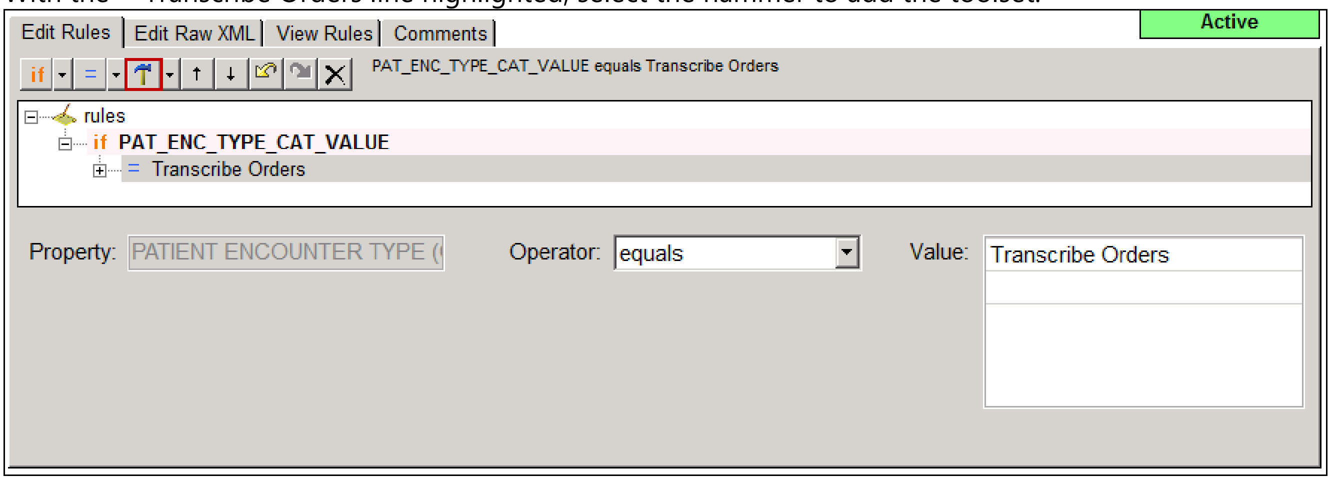
5. With the "if" line highlighted, update the Property field to look to 1023-PATIENT ENCOUNTER TYPE (CATEGORY VALUE).



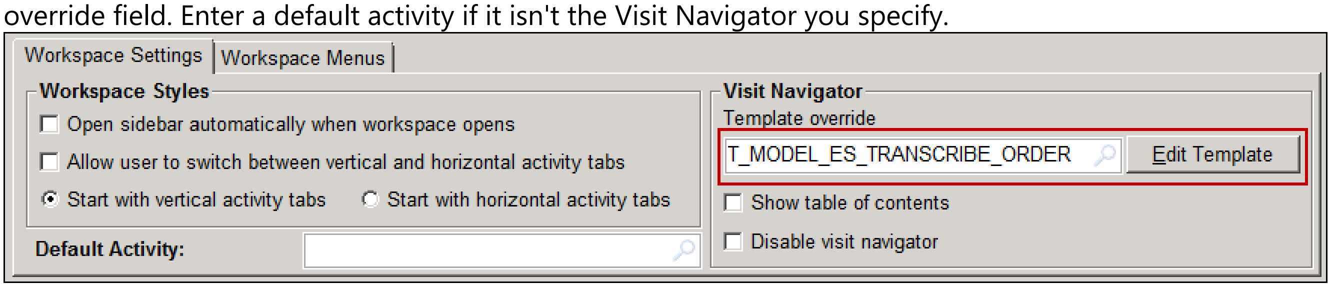
6. With the "if PAT_ENC_TYPE_CAT_VALUE" line highlighted, select the = button to add a new line. In the Value field, enter Transcribe Orders. The workflow engine rule now says "Use this rule if the user hits a patient encounter type of Transcribe Orders."



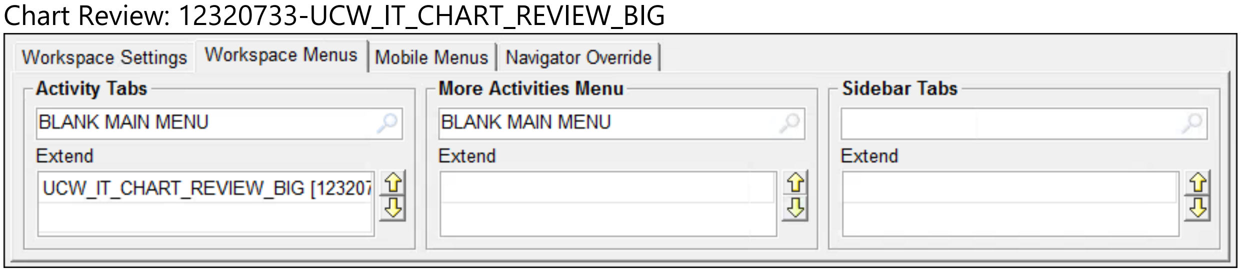
7. With the = Transcribe Orders line highlighted, select the hammer to add the toolset.



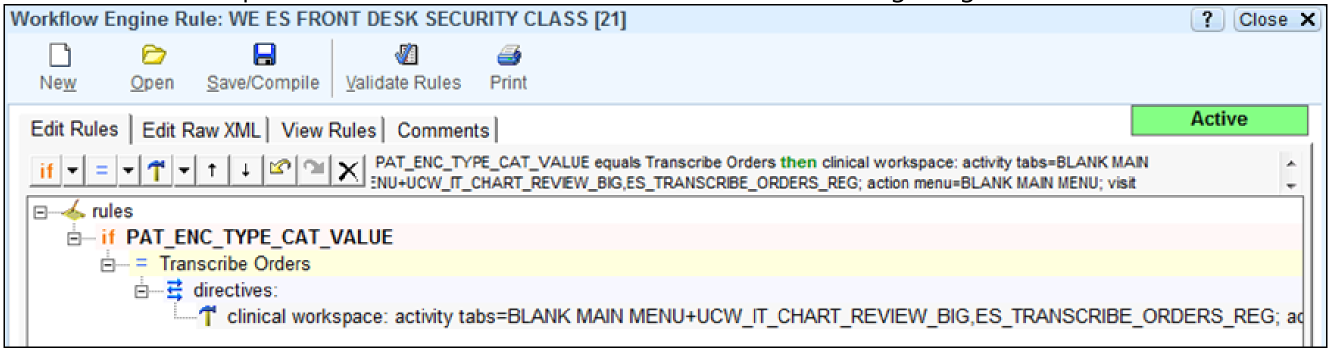
8. Highlight the new line with the hammer icon and select the Workspace Settings tab.
9. Enter the navigator template you created, 1179004003-T_MODEL_ES_TRANSCRIBE_ORDER, in the Template override field. Enter a default activity if it isn't the Visit Navigator you specify.



10. Select the Workspace Menus tab to specify which buttons you would like to see on the left-hand side of your screen.
11. Under Activity Tabs, enter BLANK MAIN MENU.
12. Enter BLANK MAIN MENU under More Activities Menu. Under Extend, list the menus you want to make available to end users:
    - Chart Review: 12320733-UCW_IT_CHART_REVIEW_BIG



13. Click the Save/Compile button. Your screen should look like the following image:



Create Order Review Reports

Your users can use the Transcribe Orders report to check which orders have been scheduled and which ones still need to be scheduled.

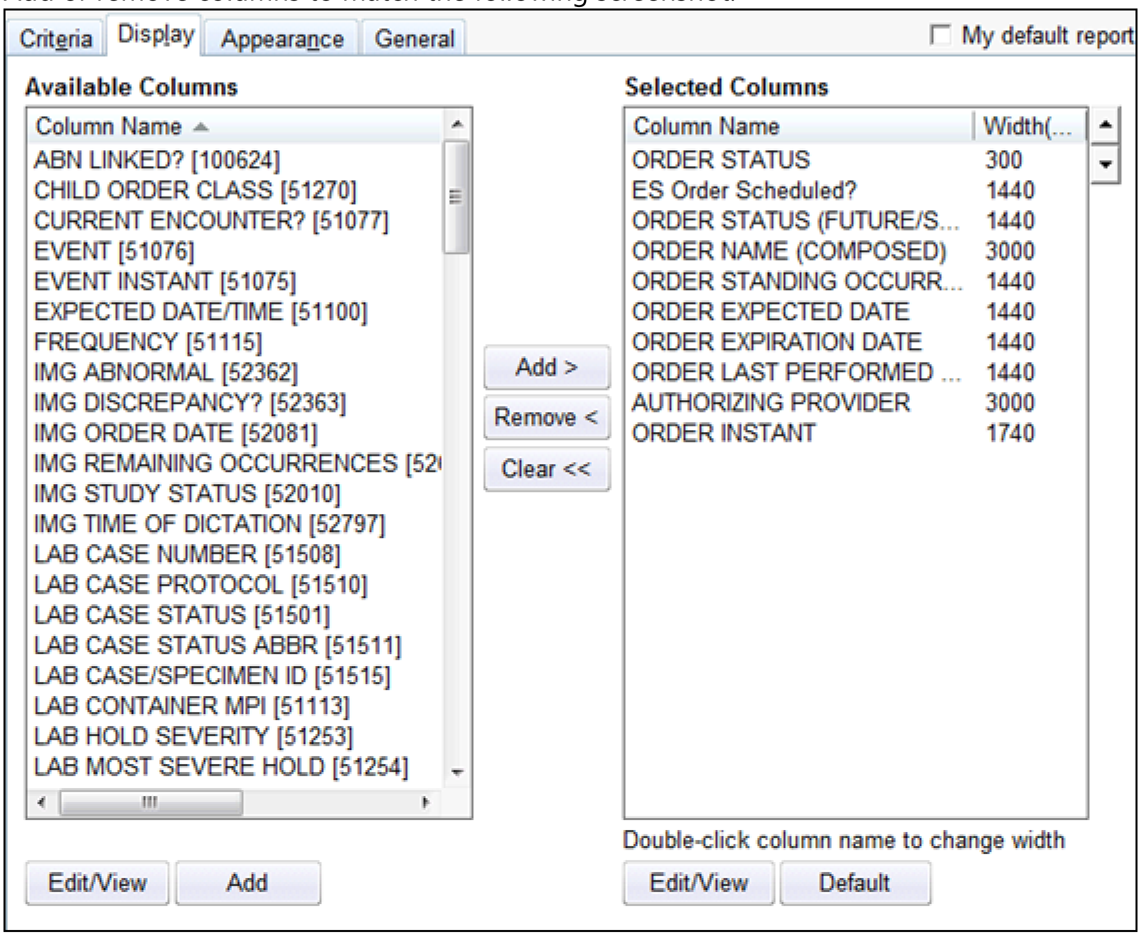
First, create a column that shows whether an order has been scheduled so that your user can quickly identify which orders she needs to work on.

1. Click the Epic button and navigate to Report Management > Reporting Workbench > Column Editor.
2. Select the Create New Column tab.
3. Enter "ES Order Scheduled?" in the Column name field.
4. Click Accept, then click OK to allow the system to automatically generate a column ID.
5. Enter a field type of Data Item.
6. Enter ORD in the Master file field and 156 in the Item field.
7. Click Accept.

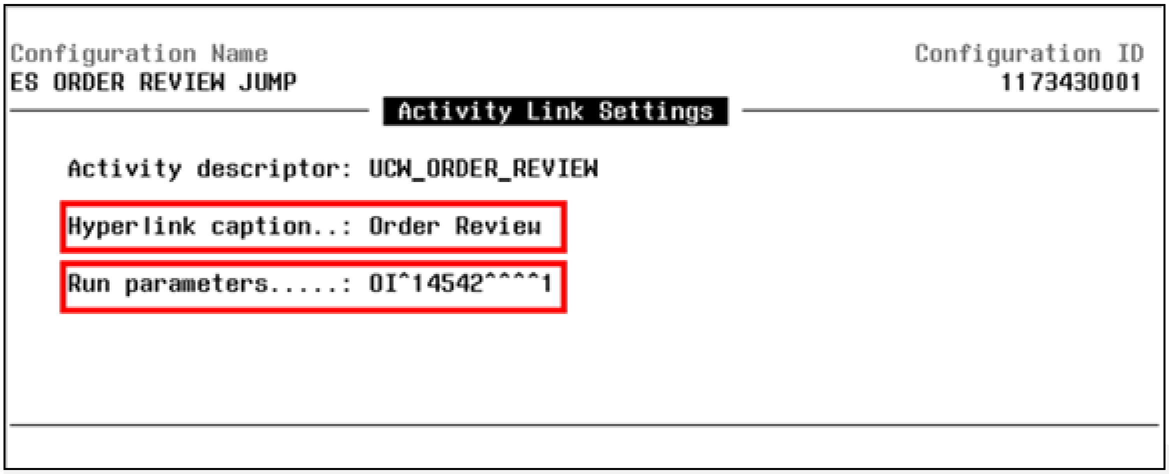
Now that you've created the column, you can create the Transcribe Orders report to put it in.

1. Click the Epic button and navigate to Patient Care > Chart. Open any patient's chart.
2. Open the More Activities menu and select Open Orders.
3. Click the down arrow to the right of the Views button and select Settings. The Order Inquiry prompt opens.
4. Click Save As and name your new report Transcribe Orders Report. Note the number of the Report Info (HRX) record.
5. Select the Criteria tab.
6. On the Encounters filter, select the Show only the current encounter radio button and check the Also show standing/future orders from all encounters checkbox.
7. Leave the Date and Time filter blank.
8. On the Order Status filter, select the Active checkbox.
9. On the Order Type filter, include any order types you have listed as schedulable in the EMR System Definitions (LSD) master file record 1.
10. On the Ordering Mode filter, show only outpatient orders.
11. On the Standing/Future Orders filter, check both Show expired future/standing orders and Show child orders.
12. On the Accessioning Status filter, check both Orders that were not sent to Beaker and Orders that were set to Beaker.

13. Click Buttons in the Presentation section. Consider adding the following buttons, which are configured in the Foundation System, for users in Order Review:
    - ES_IT_APPTDESK2 to access the patient's Appointment Desk.
    - ES_IT_SCHED_APPT to schedule an appointment.
    - ES_IT_SCHED_WALKIN to schedule a walk-in appointment.
    - IP TB ORDER INQ-DISCONTINUE to discontinue an order.
    - IP TB ORDER INQ CC RESULTS to add providers who should receive results when the order is performed.
14. Select the Display tab.
15. Add or remove columns to match the following screenshot:



16. Click Save.
17. Access the Visit Navigator Configuration (VCN) master file.
18. Select Enter Data and then Edit Configuration.
19. Open ES ORDER REVIEW JUMP, the VCN record you created earlier.
20. Page down once to the Activity Link Settings screen.
21. Update the Hyperlink caption field to Schedule Order.
22. In the Run parameters field, enter the Report Info (HRX) ID of your Transcribe Orders report after the OI^. Do not modify any of the other pieces of that code. It should look like this: `OI^[HRX ID]^^^^1`

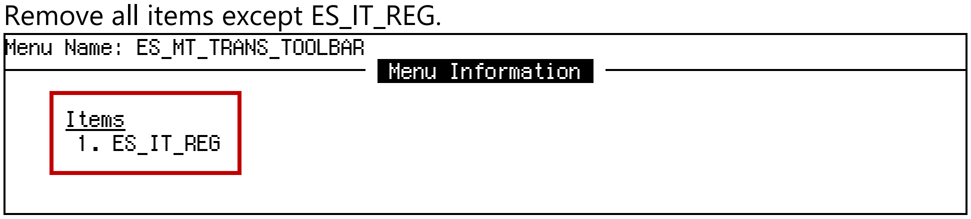


Give Users Access to Registration from the Transcribe Order Workflow

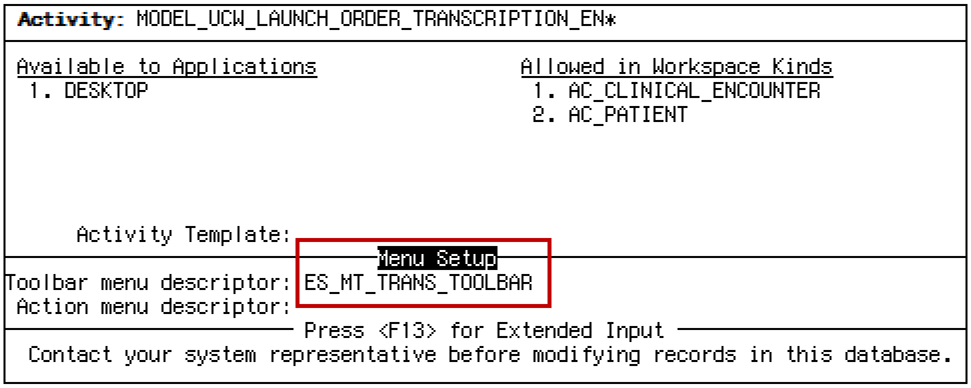
You can give users like schedulers and registrars access to registration from the Transcribe Order workflow so that they can quickly and easily add or review coverages before entering orders. Entering coverage information as soon as possible allows the system to check for coverage-based referral requirements, pre-authorization, and medical necessity before the patient comes in for her appointment, helping ensure full and prompt payment from payers. This especially applies to Medicare patients, who may need to fill out an Advance Beneficiary Notice (ABN) for orders that may not be covered by Medicare.

If your users who transcribe orders will also be responsible for registration, Epic recommends that you give them easy access to registration from the transcription workflow. If they will not be responsible for registration, you should not.

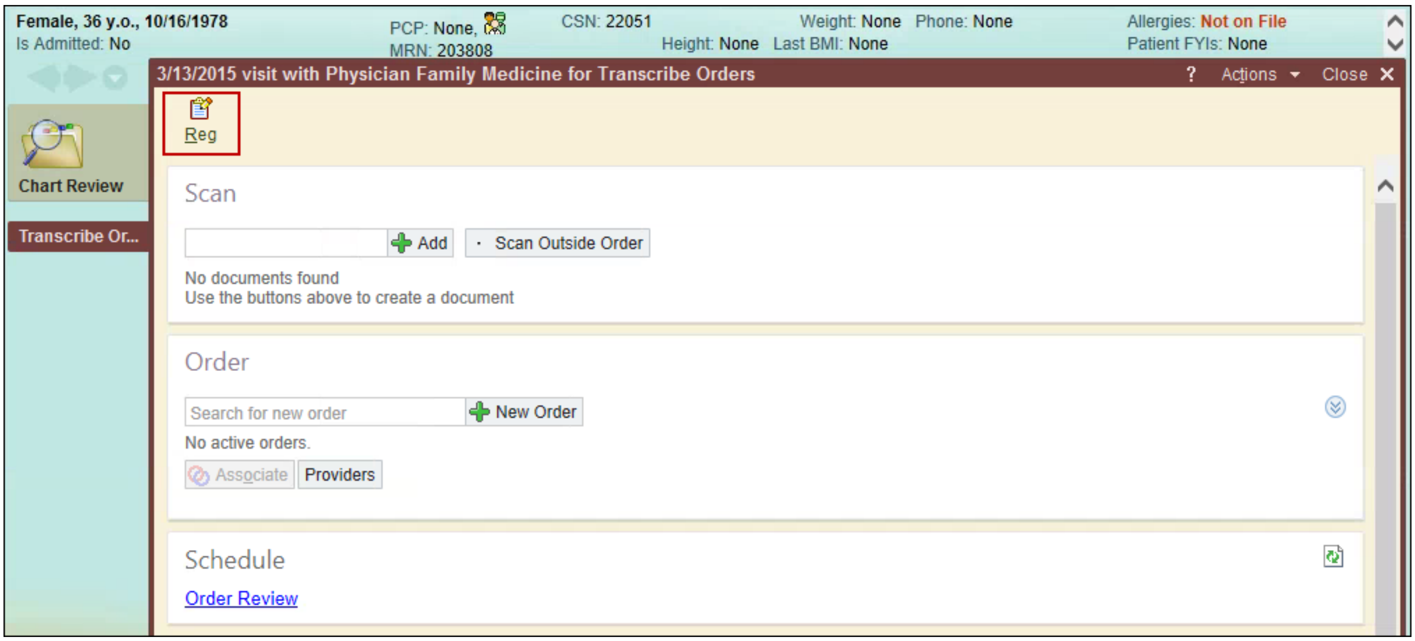
1. In Chronicles, access the Menu (E2U) master file.
2. Select Enter Data > Duplicate Menu and duplicate menu 1094-ES_MT_CHKINTOOLBAR.
3. Give your new menu an ID and name it ES_MT_TRANS_TOOLBAR.
4. Page down once to return to the Edit Data Menu.
5. Select Create/Edit Menu and open the menu you just created.
6. Page down to the Menu Information screen.
7. Remove all items except ES_IT_REG.



8. Switch databases. Access the Activity (E2N) master file.
9. Select Enter Data > Create/Edit Activity.
10. Open activity MODEL_ UCW_LAUNCH_ORDER_TRANSCRIPTION_ENCOUNTER, which you created in the Create the Transcribe Order Activity and Button topic.
11. Page down to the Menu Setup screen.
12. Enter the ES_MT_TRANS_TOOLBAR menu you created in the Toolbar menu descriptor field.



When you're done, your Transcribe Order activity should have a Registration button on the toolbar, like in this screenshot:



Grant Users EpicCare Security to Transcribe Orders

Your schedulers and front desk staff must have EpicCare security to place and take actions on orders. In the Foundation System, there are two EpicCare security classes that you can assign to Cadence users who need to transcribe orders. Refer to the Foundation Hosted environment for details about the following EpicCare security classes:

- 1179004001-ES Front Desk w/ Transcribe
- 1179007001-ES Clinic Manager w/ Transcribe

Monitor Transcribed and Scanned Orders from the Department Appointments Report

If your schedulers and front desk staff transcribe and scan paper orders into an order transcription contact and then schedule the appointment from the order contact, you can help them identify appointments attached to a scanned paper order with a column on the Department Appointments report. The column helps front desk staff make sure the paper order is scanned when the staff check in the patient. If the paper order isn't scanned, staff can find and scan the order so that the order information is complete before the encounter occurs.

When you add a copy of extension record 42101-ES Scanned Order DAR Column (Template) to a report column, the column shows if an appointment is linked to an order and if a specific scanned document type exists for the encounter.

Schedulers see different values in the column depending on the status of the scanned order.

- Nothing appears if the appointment doesn't have a linked order.
- 0 appears if the linked order is not placed from an order transcription encounter.
- 1 appears if the linked order is placed from an order transcription encounter and the encounter has a scanned copy of the paper order.
- 2 appears if the linked order is placed from an order transcription encounter and the appointment (not the encounter) has a scanned copy of the paper order.
- 3 appears if the linked order is placed from an order transcription encounter but neither the encounter nor the appointment has a scanned copy of the paper order.
- 4 appears if the signed verbal order has a mode that does not require a scan.
- 5 appears if the verbal order has a mode that does not require a scan and the order is not cosigned.

Considerations

To help schedulers interpret the numbers in the columns, you should assign icons to these numbers when you create the report column. For example, when the column finds that the appointment or the order needs a scanned copy of the paper order, the report column could show a red "x" to let the scheduler know she needs to do something with the appointment. When the column finds a 0, 1, or 2, the report column could show a green check mark to let the scheduler know the appointment and order don't need additional attention.

1. In Chronicles, duplicate extension record 42101. In the duplicate record, configure the parameters as needed. This extension record has five configurable parameters:
   - 3-Order Transcription Encounter Type List. Required. Defines encounter types used for order transcription. Enter category numbers from the Contact Type (I EPT 30) item.
   - 4-Order Scan Document Type. Required. Defines the document type used for scanned paper orders. Enter a category number from the Document Type (I DCS 100) item.
   - 5-Do All Orders Need Scan?. Optional. Determine if all attached orders need an associated scan when an appointment is attached to multiple transcribed orders. Enter 1 if all attached orders need an associated scan. Enter 2 if not all attached orders need an associated scan. By default, this parameter is set to 1 and all linked orders need an associated scan.
   - 6-Document Status List. Optional. Determines the document statuses to limit the search to. Document statuses are found in the Document Statuses (I DCS 110) item. By default, this parameter is blank and all statuses are included in the search.
   - 7-Check for Order Level Scans? Optional. Determine if this extension record should look for scans attached to the Orders record as well as the encounter. Enter 1 if you want to look at the order level. Enter 2 if you want to look at just the encounter level. By default, this parameter is set to 2 and the extension record checks the encounter level.
   - 8-Verbal Order Mode List. Define the verbal order modes that don't require a scan. Enter a caret (^) delimited list of the verbal order mode IDs that don't require a scan.
2. In Hyperspace, open the Department Appointments report and open the Report Settings window.
3. On the Display tab, create a new report column. Use your duplicate extension record for the new column. Link values to icons so that the report column displays images rather than numbers.

4. Add your new report column to a report and save the report.

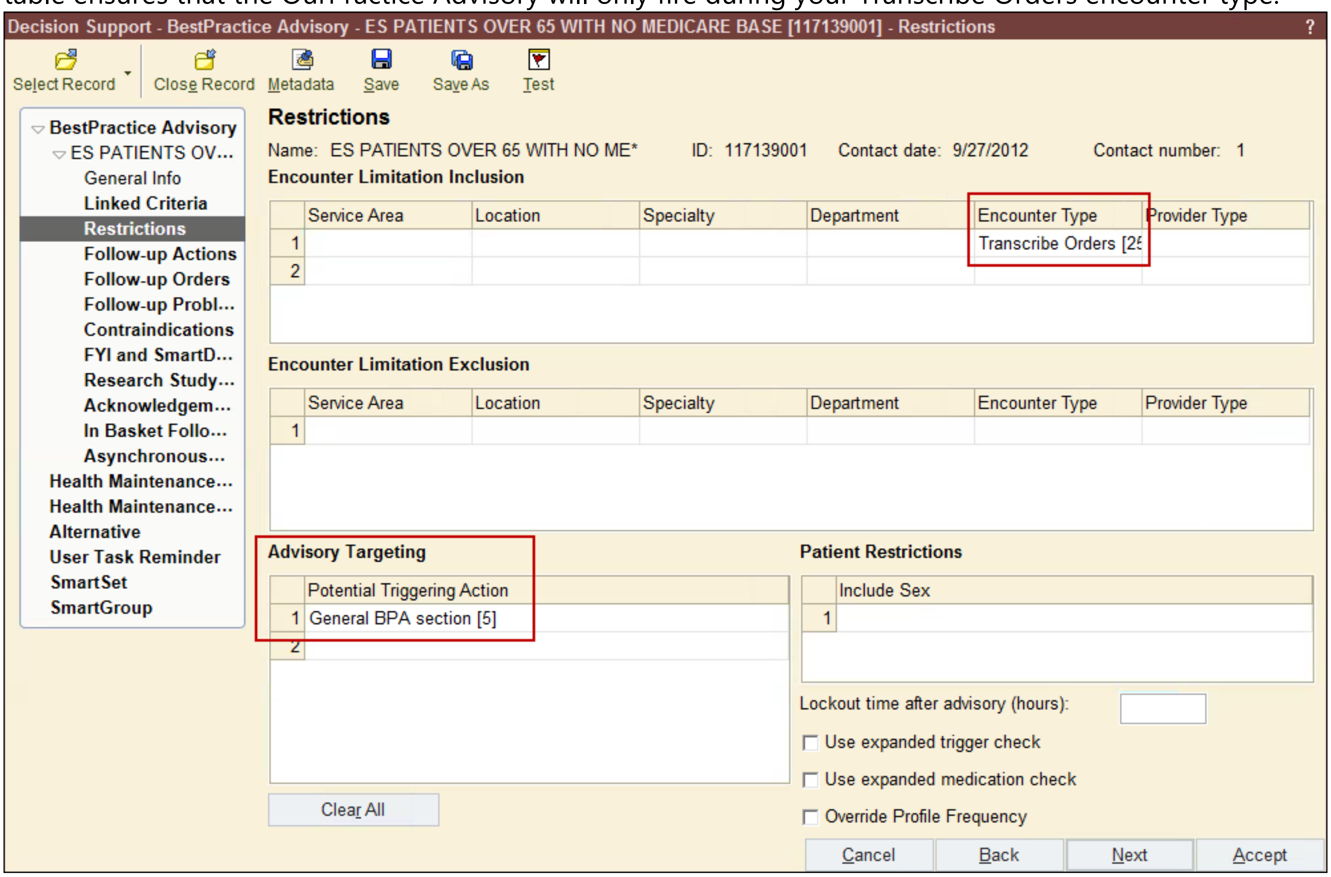
Alert Users When a Patient Over 65 Lacks Medicare Coverage

You can create an OurPractice Advisory that alerts users when a patient is over 65 and doesn't have a Medicare coverage. This OurPractice Advisory will jump front desk users to the registration activity so they can enter an appropriate Medicare coverage. This helps the scheduler or registrar determine whether Medicare covers the ordered procedure so that she can let the patient know and collect an Advance Beneficiary Notice (ABN) from the patient if necessary, which complies with Medicare regulations and keeps the patient from being surprised by unexpected costs.

Make sure that you have the security to create OurPractice Advisories, or find someone who does.

Prerequisites
You should not create this OurPractice Advisory if the registration workflow described in the Give Users Access to Registration from the Transcribe Order Workflow topic is not complete.

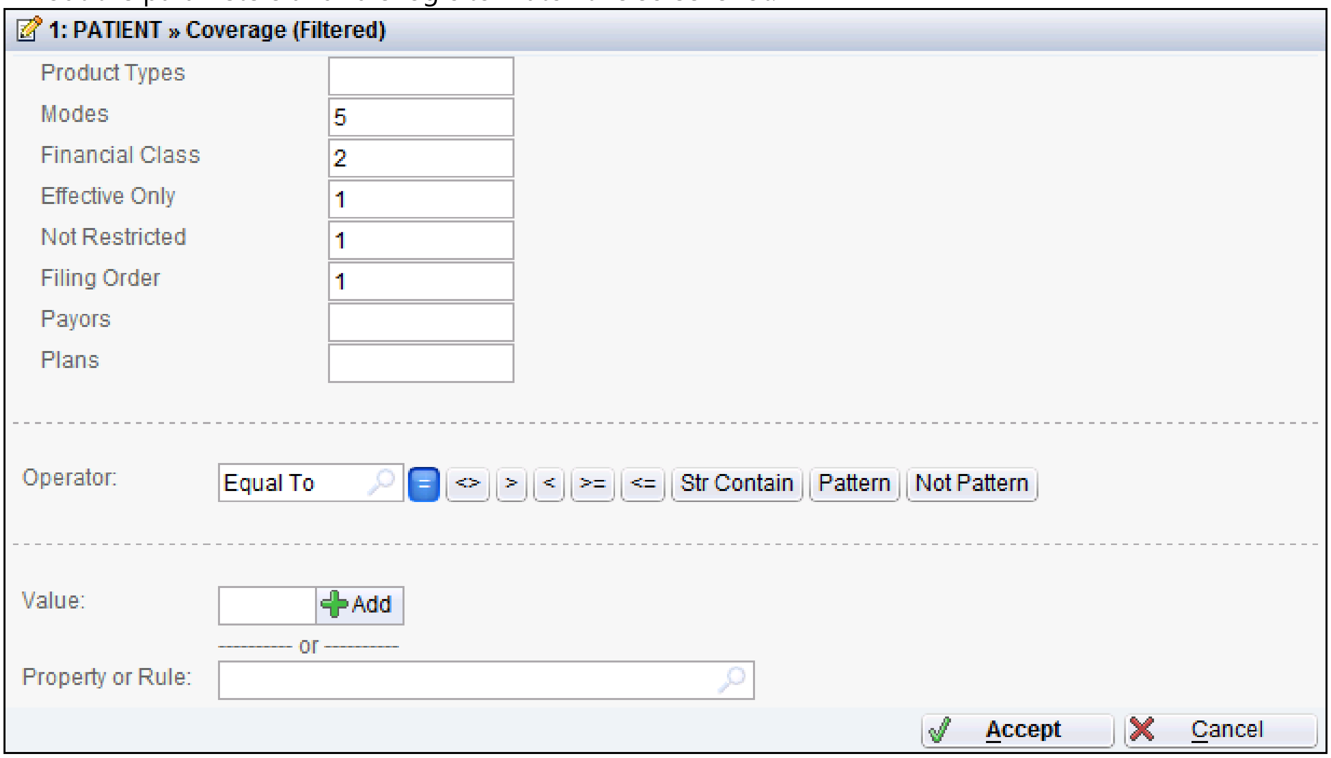
1. In Hyperspace, go to Epic button > Tools > Decision Support > OurPractice Advisory.
2. Select the Create tab and enter ES Transcribe Orders Base in the Name field and Base in the Record type field. Click Accept.
3. Enter a description of why the OurPractice Advisory is firing in the Display text field.
4. Navigate to the Restrictions form.
5. Fill out the Restrictions form to match the screenshot below. Filling out the Encounter Limitation Inclusion table ensures that the OurPractice Advisory will only fire during your Transcribe Orders encounter type.



6. Move to the Follow-up Actions form and enter REG_AS_WORKFLOW, the registration activity you created

earlier, in the Activity column.

7. Go to Epic button > Tools > Rule Editor Tools > Rule Editor.
8. Select the Create Rule radio button.
9. Enter ES Transcribe Orders Criteria Rule in the Rule field and Patient OurPractice Advisory in the Context field.
10. Click Accept. The Rule Editor activity opens.
11. Expand the PATIENT tree on the Properties tab and scroll down until you find Coverage (Filtered).
12. Click the green plus sign to the left of Coverage (Filtered).
13. Fill out the parameters and rule logic to match this screenshot:



14. Accept the parameters and rule logic you just entered.
15. Click Save, then Accept. The Rule Editor closes.
16. Go to Epic button > Tools > Decision Support > OurPractice Advisory.
17. Select the Create tab and enter a name of ES Transcribe Orders Criteria and a record type of Criteria.
18. Click Accept, then Accept again.
19. On the General Info form, enter 65 in the From age field and select the Released check box.
20. Navigate to the Other Criteria form and enter the rule you created earlier in the Include generic rule field.
21. Click Accept.
22. Go to Epic button > Tools > Decision Support > OurPractice Advisory.
23. Open ES Transcribe Orders Base, the OurPractice Advisory base you created earlier.
24. On the General Info form, select the Released check box.
25. Navigate to the Linked Criteria form and add ES Transcribe Orders Criteria, the OurPractice Advisory Criteria record you just created, in the Linked Criteria column.
26. Click Accept.

Enable Scheduling of Treatment Plan Appointment Requests

To simplify treatment plan scheduling and keep schedulers up to date about plan changes, you can configure the system so providers can send scheduling requests for treatment days to schedulers from within a treatment plan using procedure orders. Schedulers are notified of changes to orders that occur after the appointment for the order has been scheduled. For example, if a clinician adds an infusion medication that adds 30 minutes to the visit, a scheduler sees the modified order and can reschedule the appointment to account for the changed length.

To simplify scheduling treatment appointments further, you can configure infusion visit scheduling requests that automatically calculate the length of the visit using medication offsets and durations of medications in the treatment day.

An appointment request can also be configured to show a column that indicates whether a given order is the first infusion in its respective plan. This allows for schedulers to allot more time because the patient might need to be monitored for reactions to the medication.

Before completing the steps below for Cadence, work with your Beacon team to build procedure records, set up automatic calculation of infusion appointment duration, and enable treatment plan appointment scheduling. For additional information, refer to the Integrate Treatment Plan Appointment Scheduling with Cadence topic.

Create Visit Types for Treatment Plan Appointment Requests

Create visit types for the appointments requested by clinicians in a treatment plan, such as office visits and infusion visits. Let your Beacon team know which visit types to use with their schedulable procedures. For more information and recommendations for visit type configuration for clinic-administered medications, refer to the Visit Types, Orders, and Appointment Requests topic.

The visit types you use to schedule appointments for the treatment plan orders can dynamically calculate the length of the appointment from the orders in a treatment plan. For example, instead of creating infusion visit types for every possible infusion length, you can create one advanced visit type with a pool of infusion chairs and use the CALC mnemonic to determine the length of the infusion from the infusion durations entered for each medication in the infusion duration table in Beacon or directly in the procedure. If you choose to not use automatic duration calculations, you can also use scheduling questionnaires to change the length of a visit based on an answer.

Dialysis visit lengths can be automatically calculated based on therapy plan orders. In the Foundation System, you can see an example of the CALC mnemonic linked to visit type 33001-Oncology Tx Treatment Plan in the Infusion Resources pool or on visit type 1017-Dialysis Therapy Plan in the Hemodialysis resources pool.

For additional information, refer to the Visit Types Setup and Support Guide.

Build an Appointment Request Workqueue for Treatment Plan Appointment Requests

You'll find the following Order context rule properties useful when creating rules for an appointment request workqueue for treatment plan appointment request orders. You can also use these properties as columns in the workqueue to provide schedulers with a quick view of information about treatment plan orders.

- 98306-Appt Request - Status. Returns an order's scheduling status (I ORD 164) of Needs Scheduling, Scheduled, Order Modified, or Order Canceled.
- 98380-Treatment Plan. Returns the name of the treatment plan from which the order was released.
- 98381-Treatment Day. Returns the cycle and day of the treatment plan from which the order was released.

- 98382-Changes Since Scheduling (list for WQ column). Returns a list of attributes that have been modified on the order since it was last scheduled. This property provides the list of attributes formatted as a string that is suitable for display in a workqueue column.
- 98383-Changes Since Scheduling. Returns a list of attributes that have been modified on the order since it was last scheduled. This property provides the attributes as a list of category values that are suitable for writing rules or other purposes.

In the Foundation System, we created workqueue 445-Oncology Orders to catch active oncology orders and appointment requests.

Refer to the Build an Appointment Request Workqueue from Scratch topic for general information about creating appointment request workqueues.

Allow Modified Treatment Plan Orders to Return to Cadence for Rescheduling

Beacon treatment plan orders that have already been scheduled are returned to scheduling reports and workqueues when a clinician cancels an order (the scheduling status is Order Canceled) or makes a change to an order that causes the scheduling status to change to Order Modified. The following actions can change the scheduling status to Order Modified, and they are all enabled by default:

- Changing the request date
- Changing the length of the appointment request
- Changing the tolerance such that the scheduled appointment is now outside the tolerance
- Changing the infusion medications
- Changing answers to order-specific questions
- Changing the scheduling instructions

Other actions don’t change the scheduling status to Order Modified, including the following:

- Changing the treatment department

You can choose to ignore appointment length changes that are less than a specified number of minutes. You can also turn off these checks.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form.
3. In the Changes that affect scheduled orders from treatment plans section, select the check boxes for the changes that should set the order scheduling status to Order Modified and return the order to Cadence for scheduling.
4. If you select the Requested appointment length changes check box, you can enter a value in the Ignore changes that are less than X minutes field to allow the system to ignore length changes that are small enough that they won't affect the schedule and don't need to be rescheduled.

Show Treatment Plan Order Information in Reports

You can use the report columns listed below to show information about treatment plan orders to schedulers. The columns can be used in the Orders tab of the Appointment Desk, the Appointment Request workqueue, the High Priority Orders report on the imaging Front Desk, and the Orders report on the scheduling Front Desk and the imaging Front Desk:

- 1318-Order Scheduling Status
- 1636-Order Treatment Plan

- 1637-Order Treatment Day
- 1638-Order Changes Since Scheduling

You can also use Foundation System report 1156320301-ONCBCN Patient Sidebar Appointment Desk or a similar report available to schedulers in the Appointment Desk patient sidebar. This report shows a patient's active treatment plans, order summary, future encounters, recent encounters, and active treatment days. For additional information, refer to the Patient Sidebar Report Setup topic.

Show an Icon in Reports When Appointments Have Returned Orders

Report column 1627-Appt Has Returned Orders shows an icon when an appointment has returned orders linked to it. This column can be used in the Department Appointments report and the Future and Past tabs of the Appointment Desk.

We recommend using the Foundation System configuration by adding the column in these places:

- The Future tab of the Appointment Desk
- The Department Appointments report for Infusion and Oncology areas (42084-Check In - Infusion and Oncology)

For additional information about adding this column to the Department Appointments report, refer to the Design Department Appointments Reports topic.

For additional information about adding this column to the Appointment Desk, refer to the Design the Look and Use of the Appointment Desk Tabs topic.

Identify Patients Who Have Unscheduled Orders for Certain Treatments

Use the following reports based on Reporting Workbench template 53100-Oncology Generic Criteria to identify patients who don't have certain appointments scheduled for their treatments:

- Find Patients with Authorized Treatment Plans and No Appointment Report
- Find Patients Scheduled for Treatment in the Next Seven Days with No Lab Appointment Report
- Find Patients Scheduled for Treatment in the Next Seven Days with No Clinic Appointment Report

Automatically Create Appointment Requests for Scheduling Follow-up Visits

The system can create follow-up appointment requests using follow-up information that clinicians enter in EpicCare Ambulatory. This is useful if your front desk staff don't check out patients after their appointments and schedule their follow-up visits then. Instead, your schedulers can use appointment request workqueues to schedule the follow-up visits later. If your schedulers do check out patients, they can click the Follow Up button in the Check Out activity to schedule follow-up appointment requests.

We recommend using this feature only for scheduling follow-up visits with the encounter provider or the patient's PCP. Use orders that generate appointment requests for requesting referrals to specialists and for scheduling tests or procedures. For additional information refer to the Referrals and Orders Set Up and Support Guide and the Set Up Procedures for Appointment Scheduling section.

Starting in February 2025 and November 2024 with special updates E11200760, E11201903, E11200249, C11200249-HSWeb, E11200036, C11200036, E11200251, E11200031, E11200247, E11203482, and E11203693, we recommend that you instead use schedulable follow-ups as described in the Allow Clinicians to Discretely Document Schedulable Follow-Ups in the Follow-Up Section section of the Special Configuration for the Follow-Up Navigator Section topic to create appointment requests for follow-up visits.

This feature is designed only for scheduling outpatient follow-up visits, so your clinicians must be creating the follow-up in a SmartSet, Express Lane, or one of the following Follow-up navigator sections to create follow-up appointment requests:

- 105-SEC_FOLLOW_UP
- 20106-SEC_FOLLOW_UP_PLAN

In Cadence, you need to turn on this feature at the system or department level. You can turn it on at the system level and turn it off for a few departments that don’t want to use it. Or, you can leave it off at the system level and turn it on for a few departments that want to use it. In addition, starting in 2020, you can exclude PRN follow-up appointment requests from being generated at the system or department level. You might also need to update your workqueues to catch follow-up appointment requests and update your HTML displays or reports to show follow-up information if you’re not using the standard ones.

To generate follow-up appointment requests, you must have the MR Follow-up Generate Appt Request license, which is included in the standard EpicCare Ambulatory license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Turn Follow-up Appointment Requests On at the System Level

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form.
3. Enter Yes in the Auto Generate Follow-up Appointment Requests? (I SDF 10198) field.

Turn Follow-up Appointment Requests On or Off for a Department

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Appointment Requests > Scheduling form. In August 2018 and earlier, select the Orders/Requests > Schedule form.
3. Enter Yes or No in the Generate follow-up requests? (I DEP 10198) field.

Exclude PRN Follow-up Appointment Requests

Because follow-up PRN appointments might not actually occur, you can declutter appointment request workqueues by preventing the creation of PRN follow-up appointment requests at the system or department level. The setting defined at the department level overrides the system level setting.

To exclude PRN follow-up appointment requests at the system level:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form.
3. Enter Yes in the Ignore PRN Follow-up Requests? (I SDF 10224) field.

To exclude PRN follow-up appointment requests at the department level:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Appointment Requests > Scheduling form.
3. Enter Yes in the Ignore PRN follow-up requests? (I DEP 10224) field.

Update Your Workqueues to Catch Follow-up Appointment Requests

Your appointment request workqueues might not be set up to catch follow-up appointment requests. Create new workqueues or verify that your existing workqueues are set up correctly. The system sets the following items for follow-up appointment requests, which you can use to set up criteria and rules for your workqueues:

- Appointment Request Method (I ORD 67200) is set to 6-Follow-up
- Appointment Request Source (I ORD 67201) is set to 2-Internal Provider
- Referring Provider (I ORD 3000) is set to the encounter provider if the provider is a referring provider
- Request Responsible Department (I ORD 67002) is set to the encounter department
- Request Creation Department (I ORD 67964) is set to the encounter department
- Request Destination Specialty (I ORD 67260) is set to the encounter department's specialty
- Scheduling Instructions (I ORD 155) contains the text from the Check-out notes field in the Follow-up navigator section
- Ordering Comment (I ORD 150) contains the text from the For field in the Follow-up navigator section

When evaluating whether an appointment request should appear on an appointment request workqueue based on the Referred-To Specialty criteria of that workqueue, the Request Destination Specialty (I ORD 67260) on the request is used when Dept Specialty Referred To (I ORD 3140) is blank. Dept Specialty Referred To is not populated on automatically created follow-up appointment requests, so this enables appointment request workqueues to catch follow-up appointment requests that are created for departments that have specified specialties.

Refer to the Build Appointment Request Workqueues topic for details about setting up workqueue criteria and rules to identify the requests that appear in a workqueue.

Add Follow-up Information to Your Custom HTML Display or Report

If you've customized the HTML displays or reports that appear in the Expand window, in appointment entry, or in your appointment request workqueues, you might need to update your copies to show certain follow-up information to users. If the diagnostic follow-up reason (I EPT 18210) and order instructions (I EPT 18211) that clinicians select are useful to your schedulers, follow the instructions below to add an HTML table or print group that shows this information. Other items that clinicians enter are shown in other places in your displays and reports that are not specific to follow-up requests and do not require extra setup.

If you're using a copy of any of the following HTML displays, add HTML table 63051-AS Request Follow-up Details to it:

- 7-AS Orders: Expand Popup
- 76-AS Orders: Workqueues & Front Desk
- 77-AS Orders: Appointment Entry

If you're using a copy of either of the reports listed below, add print group 63044-ES Request Follow-up Details to it:

- 63000-ES Order Information
- 63014-ES Appointment Entry Orders

Refer to the following topics for details:

- Customize the HTML Display for the Expand Request Window
- Design the Orders HTML Window in Appointment Request Workqueues and the Front Desk
- Design the Orders HTML Window for Scheduling

Automatically Create Appointment Requests for Scheduling External Referrals

Starting in May 2020

In the Foundation System

We have built automatic appointment request generation in the Foundation System. To see an example of the build:

1. Log in to the Foundation Hosted environment as your Cadence Administrator user (ESADM).
2. Open Cadence System Definitions and go to the Appointment Requests > Creation form.

If your organization receives referrals from external organizations electronically using Care Everywhere or an interface, you can automatically generate an appointment request that links to that referral to help streamline scheduler workflows. By implementing this feature, your organization can schedule appointments for external referrals as part of your existing workflows and not have to worry about taking additional steps to manually create an appointment request or place generic orders and maintain scheduling and authorization information across internal and external records.

To generate appointment requests for external referrals, you must have the Cadence Create Request from CE Referral 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 you complete the setup below, your system automatically creates appointment requests from external referrals by evaluating a Referral-context rule and generating an appointment request only when that rule returns true for the external referral. Before you begin your build, decide how to build a rule so that appointment requests are created only for the external referrals that your organization plans to schedule. Note that auth/certs and Beacon referrals from an external organization cannot create appointment requests even if they match the conditions of your rule.

You should also consider whether the appointment requests that your system automatically creates this way can and should be scheduled through your organization's existing processes or if you need to create new processes, such as dedicated workqueues that include only appointment requests created for external referrals if your organization has a separate team for processing external referrals.

To automatically generate appointment requests from external referrals:

1. In Hyperspace, create a rule in the Referral context that evaluates whether the system creates an appointment request for an external referral. Refer to the Create or Edit a Rule topic for instructions.
2. Open Cadence System Definitions (search: Cadence System Definitions) and go to the Appointment Requests > Creation form.
3. In the Rule to Create Request from Referral (I SDF 10199) field, enter the rule you created.

Track a Patient's Reason for Requesting an Appointment

Starting in November 2024

You can let schedulers view and track patient-entered reasons for an appointment request. Schedulers can use the reasons that patients enter to inform their scheduling decisions from appointment requests. To learn more about collecting reasons for appointment requests, refer to the Track a Patient's Reason for Requesting an Appointment and Getting on the Wait List topic.

Build Appointment Request Workqueues

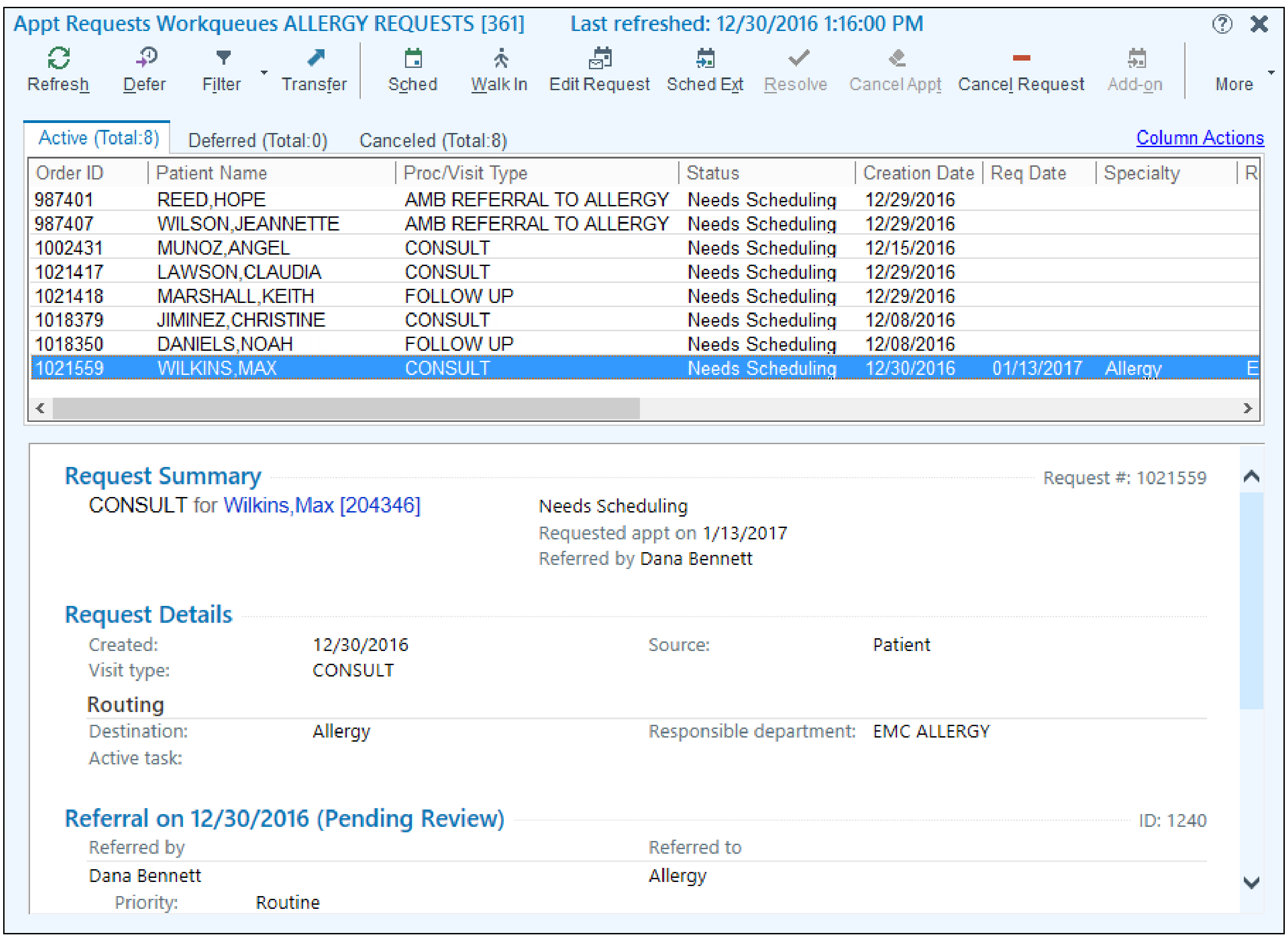
Schedulers use workqueues to find, schedule, and manage appointment requests. Schedulers can see their workqueues in the Workqueue List activity in Hyperspace.

Appointment workqueues are records in the Extensible Workqueue Framework (WQF) master file.

Schedulers access appointment request workqueues from the Workqueue List in Hyperspace. When schedulers open a workqueue, they can see a list of appointment requests, and details about the selected request appear at the bottom of the screen. There are separate tabs for active requests, deferred requests, and requests that have been canceled and don't need to be scheduled. Appointment requests can appear in multiple workqueues if they meet the rules for multiple workqueues.

Schedulers can take action on appointment requests using the activity toolbar or the right-click menu. Security points control some of these actions, such as the ability to cancel requests. Schedulers can also double-click a request to open Book It (starting in February 2022) or Make Appointment (November 2021 and earlier) and schedule the appointment.

Department and clinic managers have a variety of reporting options to monitor productivity with these workqueues. They can use the Seven Day History available from the Workqueue List to get an idea of workqueue activity over the past week. A Reporting Workbench report template allows managers to see the number of appointment requests in workqueues and track progress.



Preparing for Appointment Request Workqueue Build

This section includes strategy information for organizations that are setting up appointment request workqueues for the first time, either as a new install or transitioning from the Schedule Orders work list.

Seeing This Feature in the Foundation System

The Foundation System is set up to use workqueues to schedule orders. Appointment request workqueues filter appointment requests by specialty, with each specialty having one workqueue for internal requests and one for incoming or redirected requests. Refer to the Foundation Hosted environment to see these workqueues and try out workflows.

The following Foundation System Cadence security classes have access to Schedule Order Workqueue Maintenance, can access all appointment request workqueues, and can customize columns in the workqueues.

- ES Clinic Manager
- ES Project Team/Administrator

The following Foundation System users have access to most workqueues:

- HOD, Schegistrar
- Cadence, Central Scheduler
- HOD, Scheduler

Specialty users, such as the various front desk users and specialty clinicians, have access to the workqueues for orders in their specialty.

The Foundation System uses the ES Appointment Request Workqueue Monitoring report to monitor activity in the workqueues. The following reporting dashboards show information from this report in a dashboard component:

- ES Front Desk Dashboard
- ES Only Clinic Manager Dashboard
- ES Centralized Scheduler Dashboard
- ES Supervisor Dashboard

Integration Considerations

Many other applications place orders that need to be scheduled. Front desk users in these areas use Cadence and appointment request workqueues to schedule those orders. Beacon, Cupid, Kaleidoscope, Radiant, and Stork are some of the specialized applications that might be included in this bucket. Consider these applications when making decisions on where and how to use schedule order workqueues.

If your organization uses the Snapboard, you might need to build workqueues for those activities as well.

Key Contributors

Your Cadence team should take the lead on this project. You might need to involve your Beacon, Cupid, Kaleidoscope, Radiant, or Stork teams as well. These procedure-based areas often schedule appointments from orders and might benefit from using the workqueues. You'll need to work with these applications to determine whether they will use appointment request workqueues and, if so, who will own the decision-making, build, and training for their workflows. If these other applications don't want to use appointment request workqueues, you can rollout the in-scope workqueues by department and allow these areas to keep using Schedule Orders work lists.

If you haven't yet talked with your Orders team about which orders need to be scheduled, you'll also need to make those basic order scheduling decisions before you talk about the workqueues.

Timelines and High-Level Build

The following are Epic's estimates of the time it might take to implement appointment request workqueues. Actual implementation time varies based not only on the considerations below, but also on factors such as whether you're implementing additional functionality at the same time, whether you're also completing an upgrade, and the experience and availability of your project team members.

After you decide to use workqueues, there are some technical steps you need to take to set up your system to use workqueues. If you have access to Chronicles, you can perform these one-time tasks on your own. If you don't have access to Chronicles, your Epic representative can help you with these tasks. Refer to the Create a Queue Definition for Appointment Request Workqueues topic for more information.

Person: Task	Time Estimate
Administrators, project teams, and users: Make decisions about workqueues, including which departments will use appointment request workqueues and how to build the workqueues.	A few days to a week. If you plan to involve procedure-b Cupid, you might need to add mo
Project teams: Configuring facility and department settings.	A few minutes per department.
Project teams: Build appointment request workqueues.	A few hours per workqueue. If you are converting work lists to time.
Project teams: Configure security classes.	A few minutes per security class.
Project and testing teams: Testing your build.	A few minutes to an hour per wor
Trainers: Prepare and train users.	A few days to a week.

Create a Queue Definition for Appointment Request Workqueues

Before you start using appointment workqueues, you need to allow the existing workqueue structure to recognize the new kind of workqueues.

You only need to do this once, when you first start using appointment request workqueues. After that, appointment request workqueues are always set up for your system.

Prerequisites
You need access to the command prompt to perform these steps. If you don't have access to the command prompt, contact your Cadence representative to help with this task.

Considerations
Before performing these steps, you might want to check to see if these queues are already set up in your environment.

Create a Queue Definition

1. Go to Chronicles > [any INI] > Utilities > Generic Queuing.
2. Follow the path Manage Queue Definitions > Enter/Edit Queue Definitions and enter SCHQ and create a queue definition.
3. On the Definition Information screen, enter the following information:
   - Template: 1001-ES FIFO QUEUE
   - Descriptor: SCHQ
4. In February 2020 and earlier versions:
   a. Press Page Down twice.
   b. In the Machine List field, enter the server that corresponds to the environment in which you are working.
   c. In Epic 2015 and earlier versions, enter EMP in the Logical Directory field.

Activate the Queue

1. From the Generic Queuing menu, follow the path Manage Queue Definitions > Activate/Deactivate Queue Definitions.
2. At the Definition prompt, enter SCHQ.
3. When prompted to confirm your selection, enter Yes.

Start the Queue

1. From the Generic Queuing menu, select Status of All Queues.
2. On the Status of All Queues screen, page down until you find the SCHQ entry.
3. Highlight the queue and press S to start the queue.
4. To confirm that the queue is running, verify that the Running Daemons column shows at least one.

Turn on Appointment Request Workqueues

You decide which departments use appointment request workqueues rather than the work list by turning on the workqueues in the department record or at the facility level. The system uses the user's login department when determining access to the workqueues.

Turning on the workqueues turns off the work list. You can't use both activities in the same department.

Considerations

You can turn on the workqueues at the department level or the facility level.

- Turn on appointment request workqueues at the department level if you want only certain departments to use the workqueue. Upgrading organizations that are rolling off the work list often choose this option.
- Turn on appointment request workqueues at the system level if you want all departments to move to the workqueue. New and implementing organizations often choose this option.

Turn on Appointment Request Workqueues at the Department Level

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Select the department that should use appointment request workqueues.
3. Select the Appointment Requests > Scheduling form.
4. Enter Yes in the Use workqueue? (I DEP 1195) field.

Turn on Appointment Request Workqueues at the System Level

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form.
3. Enter Yes in the Use Appt Request Workqueues? (I SDF 1195) field.

Turn on Appointment Workqueues for Imaging Users

For imaging departments to use appointment request workqueues instead of Schedule Orders and Technologist Work List reports, you must also enable the workqueues specifically for imaging departments:

1. In Hyperspace, open Imaging System Definitions (search: Imaging System Definitions).
2. Select the Work List Settings form. If you're using February 2024 or earlier versions, select the Report Settings form.
3. Enter Yes in the Use scheduling settings for Schedule Order WQs? (I RDF 1195) field.

Give Users and Administrators Security to View Appointment Request Workqueues

Users need Cadence security to access the Appt Request tab of the Workqueue List activity. This includes project team members who build workqueues and front desk users who schedule requests from the workqueues.

You can limit access to specific workqueues by listing specific users in the Requests WQ Maintenance activity. Refer to the Assign Schedulers to Appointment Request Workqueues topic for additional information.

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Workqueues form.
3. In the Appt Request WQ/Order work list (I ECL 5180) field, enter Yes to grant access to the Appt Request tab of the Workqueue List activity. Users with this security point can see all appointment request workqueues that they are assigned to and any workqueues that have no assigned users.
4. In the Access all Appt Request WQs (I ECL 5184) field, enter Yes to allow users to see appointment request workqueues that have assigned users but to which the user is not assigned.

Give Managers and Administrators Security to Create and Maintain Appointment Request Workqueues

Managers and administrators need Cadence security to create and maintain appointment request workqueues.

1. In Hyperspace, open Cadence security class (search: Cadence Security).
2. Select the Workqueues form.
3. In the Appt Request WQ maintenance (I ECL 5183) field, enter Yes to grant access to the Requests WQ Maintenance activity. In August 2019 and earlier, this security point also grants access to the Manage Users, Update WQ Status, and Manage Owning Area options under the Manage WQ button for appointment request workqueues in the Workqueue List activity.
4. In the Manage users from WQ List (I ECL 5188) field, enter Yes to grant access to the Manage WQ > Manage Users and Update WQ Status options for appointment request workqueues in the Workqueue List activity. This security point is available starting in November 2019. In earlier versions, this option is controlled by the Appt Request WQ maintenance security point.
5. In the Manage Owning Area from WQ List (I ECL 5189) field, enter Yes to grant access to the Manage WQ > Manage Owning Area option for appointment request workqueues in the Workqueue List activity. This security point is available starting in November 2019. In earlier versions, this option is controlled by the Appt Request WQ maintenance security point.

Enable the Outreach Sidebar for Appointment Request Workqueues

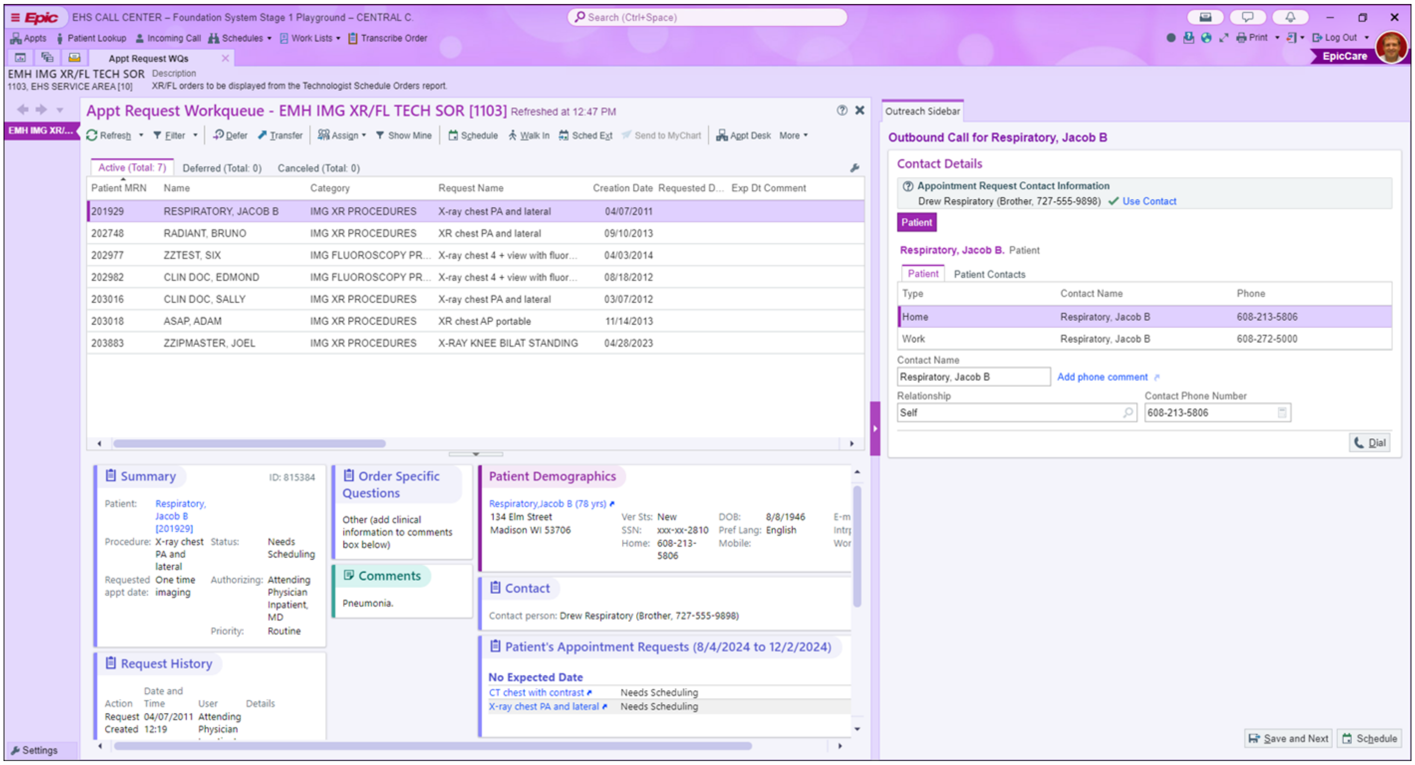
Starting in November 2024

Considerations
To use this feature, your organization must have the Customer Relationship Management [20A] license. Prior to completing this setup, work with your Cheers - Contact Management team to make sure required setup for you organization and target users has been completed using the Call Hub Setup: Essentials topic. Once that necessary setup has been completed, work together to complete the setup below.

You can enable the Outreach sidebar in appointment request workqueues to streamline outgoing call workflows and track calls using CRM cases. Work with your Cheers - Contact Management team to complete all required build and updates in the Setup the Outreach Sidebar for Outgoing Calls topic to enable this feature. After it is enabled, users can use a seamless workflow to dial out using the outreach sidebar in appointment request workqueues. This feature allows users to make outgoing phone calls while still viewing the workqueue item and reports in the same workspace, so they can easily see relevant appointment request information while they dial out. If they aren't able to reach the caller, they can document the call and track that call with a CRM all in the same workqueue workspace.

Agents select a recent contact, contact information on file, or click the Use Contact button to use the request contact person's info, if available. Agents click Dial using outbound CTI or call separately and click Document Call if outbound CTI is not enabled. Calls are saved to the patient record and linked CRM case, and related records are automatically attached to that CRM case. If no CRM case exists, a new one is created. If the call is answered, agents mark Call Answered, validate the patient's identity, add any phone comments for the patient as needed, and click the Schedule button in the sidebar. Agents complete their workflow, then finalize CRM documentation in

Contact Hub, address any additional issues by creating and completing new customer service cases, and close the workspace to return to their workqueue.



An appointment request workqueue with the Outreach sidebar enabled

Build an Appointment Request Workqueue

You build an appointment request workqueue by creating the workqueue record, adding users to the workqueue, defining criteria for the workqueue, and optionally creating rules for the workqueue. The workqueue framework is flexible so you can build the records as needed for how you schedule requests for appointments at your organization.

Existing appointment requests don't appear in workqueues until you either compile the workqueue record or run a batch job to recompile appointment requests. Compiling workqueues can use a lot of system resources. Epic recommends that you wait until the Batch Scheduler recompiles appointment requests at night. If you do need to compile individual workqueues, do so only when very few users are in the system. Refer to the Evaluate Appointment Requests for Workqueues topic to set up the batch job.

> When you keep the scope of the requests that could appear in a workqueue relatively small, criteria-based workqueues compile more quickly and use fewer system resources than rule-based workqueues. At a minimum, restrict the requests that are eligible to appear in a criteria-based workqueue to those that were created no more than 90 days ago. Workqueues with criteria that are too broad can negatively impact performance.
>
> When you use criteria and rules together in a workqueue, the system evaluates the rules only on the requests that meet the criteria for the workqueue.

The Foundation System includes several workqueues from which users can schedule appointment requests. Refer to the Foundation Hosted environment to see these appointment request workqueues.

Create a Workqueue

You can create a workqueue manually or, starting in February 2024, you can import workqueue build.

If you need to create many appointment request workqueues at once, such as during your initial implementation of Cadence, use the import specification WQF,1010-Appointment Request Workqueue Import. Refer to the Import Data into Chronicles topic for more information about imports.

To build an appointment request workqueue manually:

1. In Hyperspace, open the Appointment Request Workqueue Maintenance activity (search: Requests WQ Maintenance).
2. In November 2023 and earlier and in the Hyperspace client, click New. Starting in February 2024 in the Hyperdrive client, click Create a new workqueue..
3. Make sure the correct service area appears in the window. The service area does not affect how the workqueue collects requests. It's simply a grouper to help you manage workqueues.
4. Enter a name for your workqueue and click Accept.
5. In November 2023 and earlier and in the Hyperspace client, in the top right corner of the Detail section, click Edit. Starting in February 2024 in the Hyperdrive client, the activity opens to the summary screen. Click any of the headings to jump to that section or use the navigator on the right side of the screen. First, navigate to the Basic Settings section.
6. Enter a description for the workqueue, such as the types of requests that appear in the workqueue.
7. Determine who can access this workqueue. You can specify specific users, or, starting in Epic 2018, you can specify departments in which users must be logged in to access the workqueue. The system checks the list of users before the list of departments when determining whether a user has access to a particular workqueue. If you don't list any users or departments, only those users with access to all workqueues can access the workqueue.
8. Starting in May 2023, if you want to use grouper categories to supplement the owning area, enter groupers for the workqueue in the Grouper 1 (I WQF 951) and Grouper 2 (I WQF 952) fields. Starting in August 2024, May 2024 by SUs E10903347, E10903346 and C10903346, and E10901791, and February 2024 by SUs E10809069 and C10809069, E10809068, and E10807299, the Grouper 3 (I WQF 953), Grouper 4 (I WQF 954), and Specialty Grouper (I WQF 955) fields are also available. To create new grouper values, you need to configure the following associated category lists in Category List Maintenance:
   - Grouper 1: I BWQ 701
   - Grouper 2: I BWQ 702
   - Grouper 3: I WQF 953
   - Grouper 4: I WQF 954
   - Specialty Grouper: I DEP 110

   For more information about category lists, refer to the Modify a Category List’s Values topic. Depending on your organization's needs, groupers are used in the Workqueue Monitoring Report and within Workqueue List filters. For more information on the Workqueue Monitoring Report, refer to the Workqueue Monitoring Report Template.
9. Select the Active check box to make your workqueue available to users.
10. Click Accept.

Select Criteria for a Workqueue

If you need to restrict requests in a way that cannot be done with criteria, you can create rules for your workqueue. For more information, refer to the Add Rules to a Workqueue section.

1. In Hyperspace, open the Appointment Request Workqueue Maintenance activity (search: Requests WQ Maintenance).
2. Open a workqueue.
3. In November 2023 and earlier and in the Hyperspace client, in the top right corner of the Criteria section, click Edit. Starting in February 2024 in the Hyperdrive client, navigate to the Criteria section.
4. Select the criteria that requests must meet to appear on this workqueue. Refer to the Criteria Definitions section for more detail about how to use each criterion.
5. Click Accept.

Criteria Definitions

Criterion	Definition
Creation Date	By default, the All check box is selected, and requests are not filtered by when they were created. We recommend keeping the scope of requests that could appear in a workqueue relatively small. For example, you might restrict the requests that are eligible to appear in a workqueue to those that were created no more than 90 days ago. Clear the All check box to specify a date range to include requests that were created within the date range. You must enter a date in either the From date or To date field. Leave the From date field blank to search for requests placed through the date in the To date field. Leave the To date field blank to search for requests from the date in the From date field through today. For example, to include all requests created in the last 30 days, enter T-30 in the From date field and leave the To date field blank.
Expiration Date	Applies only to clinical orders. Requests do not have discrete expiration dates, but you can configure the system to mark old unscheduled requests as expired. For more information, refer to the Configure Clinical Orders Expiration Settings section in the Evaluate Appointment Requests for Workqueues topic. By default, the All check box is selected, and orders are not filtered by when they expire. Clear the All check box to specify a date range to include orders that have an expiration date within the date range. You must enter a date in either the From date or To date field. Leave the From date field blank to search for orders that expire through the date in the To date field. Leave the To date field blank to search for orders that expire on the date in the From date field and later. For example, to include orders that are expiring in the next month, enter M+1 in the To date field and select the Include requests with no expiration date? check box.
Expected Date	By default, the All check box is selected, and requests are not filtered by when they are expected to take place.

Criterion	Definition
	Clear the All check box to specify a date range to include requests that have an expected date within the date range. You must enter a date in either the From date or To date field. Leave the From date field blank to search for requests that are expected to take place through the date in the To date field. Leave the To date field blank to search for requests that are expected to take place on the date in the From date field and later. For example, to include all requests that are expected to take place in the next 30 days, leave the From date field blank and enter T+30 in the To date field.
Procedures	Applies only to clinical orders. Include orders that are linked to a given grouper (VCG) record, procedure, or procedure category. After selecting a grouper or procedure category to include, you can enter specific procedures to exclude.
Created/Ordered By Department	By default, the All check box is selected, and requests are not filtered by where they were created. Clear the All check box to specify areas from which to include requests. You can choose from: • Center • Department • Department Scheduling Grouper • Grouper • Parent Hospital/Clinic Area (ADT Parent) • Revenue Location • Service Area • Specialty After selecting creation areas to include, you can enter other creation areas to exclude. For example, you might include requests from the EHS Service Area but exclude requests from the EMC Physical Therapy department because that department does its own scheduling and has its own workqueue.
Order Class	Applies only to clinical orders. Enter a list of order classes (I ORD 60) to limit orders that appear in the workqueue to only those with one of the specified order classes.
Order Mode	Applies only to clinical orders. Determine whether inpatient and outpatient orders appear in the workqueue.
Referred To Department/Specialty	Use this criterion to filter requests based on the referred to area for the order or the referral linked to the request.

Criterion	Definition
	By default, the All check box is selected, and requests are not filtered by the referred to area. Clear the All check box to specify referred to areas from which to include requests. You can choose from: • Center • Department • Department Scheduling Grouper • Grouper • Parent Hospital/Clinic Area (ADT Parent) • Revenue Location • Service Area • Specialty. This can be the referred to specialty or the specialty of the referred to department. After selecting referred to areas to include, you can enter other referred to areas to exclude. For example, you might include requests from the EHS Service Area but exclude requests from the EMC Physical Therapy department because that department does its own scheduling and has its own workqueue. By default, the Include requests with no referred to dept/spec? check box is selected, and requests that do not have a referred to department and do not have a referred to specialty are included in the workqueue. Clear the check box to exclude requests that do not have a referred to department and do not have a referred to specialty.
Request Status	Applies only to appointment requests. By default, the All check box is selected, and requests are not filtered by their status. Starting in November 2023, August 2023 with special updates E10600400 and C10600400-HSWeb, May 2023 with special updates E10507369 and C10507369-HSWeb, and February 2023 with special updates E10412734 and C10412734-HSWeb, this includes Completed requests if they have incomplete tasks. Clear the All check box to specify active statuses that a request must have to appear in the workqueue: • Needs Scheduling • Scheduled • Order Modified • Order Canceled • Completed Clear the Include deferred requests? check box to exclude deferred requests from the workqueue.

Criterion	Definition
	Clear the Include canceled requests? check box to exclude canceled requests from the workqueue. Starting in November 2023 and earlier versions with the special updates listed above, if you opt to include Completed requests in your workqueue, the default for Days to Keep Completed Requests (I SDF 41260) is 30 days. This setting determines how long after its last modification a completed request stays on its workqueues. The default of 30 days ensures that completed requests that otherwise qualify for a workqueue don't stay there indefinitely, which prevents the workqueue from filling up with old requests. If you want to keep completed requests for a different amount of time, you can change this number.
Responsible Department	Applies only to appointment requests. Use this criterion to filter requests based on the responsible area. By default, the All check box is selected, and requests are not filtered by the responsible department. Clear the All check box to specify responsible areas from which to include requests. You can choose from: • Center • Department • Department Scheduling Grouper • Grouper • Parent Hospital/Clinic Area (ADT Parent) • Revenue Location • Service Area • Specialty. This can be the referred to specialty or the specialty of the referred to department. After selecting responsible areas to include, you can enter other responsible areas to exclude. For example, you might include requests from the EHS Service Area but exclude requests from the EMC Physical Therapy department because that department does its own scheduling and has its own workqueue.
Incomplete Tasks	Applies only to appointment requests. By default, the All check box is selected, and requests are not filtered by their incomplete tasks. Clear the All check box to specify tasks that must be incomplete for a request to appear in the workqueue.
Reminder Date	Starting in August 2024. Requests with a reminder date after the date entered here are not allowed on a workqueue.

Criterion	Definition
	If left blank, there is no "To Date" restriction. This field stores a date, but allows the use of offset strings, such as T-30. We recommend setting this to T so that only actionable requests are included in the workqueue.

Add Rules to a Workqueue

If you need to restrict requests in a way that cannot be done with criteria, you can create rules for your workqueue.

1. In Hyperspace, open the Requests Workqueue Detail activity (search: Requests WQ Maintenance).
2. Open a workqueue.
3. Navigate to the Rules section. In November 2023 and earlier and in the Hyperspace client, click Add to add a new rule to your workqueue. Starting in February 2024 in the Hyperdrive client, click Add New.
    - You can also add existing rules by changing to the Existing tab in November 2023 and earlier and in the Hyperspace client, or by clicking Add Existing starting in February 2024 in the Hyperdrive client.
4. Enter a name for your new rule and click Accept. You can also select an existing rule to copy.
5. Add and configure properties and rules as needed for your workqueue.
6. Select AND, OR, or Custom Evaluation logic.
7. Click Accept. You return to the Rules section.
8. Select the Active check box to make your rules active or inactive as desired. The workqueue record is complete.
    - A note about multiple rules: If you use multiple rules in a workqueue, requests stay in the workqueue until they don't qualify for any of the rules. If they qualify for one rule but not the others, the request still stays in the workqueue. If you want to use AND or Custom Evaluation logic between workqueue rules, you need to create one master rule, add the rules you want to evaluate within the master rule, and then choose AND or Custom Evaluation logic.

Test a Workqueue

1. In Hyperspace, open the Appointment Request Workqueue Maintenance activity (search: Requests WQ Maintenance).
2. Open a workqueue.
3. In November 2023 and earlier and in the Hyperspace client, click Test. Starting in February 2024 in the Hyperdrive client, click Test WQ.
4. Enter an appointment request ID in the search field and click Test. Use the report to determine whether the order meets the criteria and rules for the workqueue

After you complete your build, verify that your appointment request workqueues work as expected. If you maintain your own testing scripts, make sure to update your scripts to include appointment request workqueues. Consider testing the following additional workflows:

- Open a workqueue and find a request.
- Schedule a request from a workqueue.
- Defer a request to a later date.
- Transfer a request to another workqueue.

- Cancel a request that doesn't need to be scheduled.
- Reinstate a canceled request that needs to be scheduled.

Evaluate Appointment Requests for Workqueues

After you create a workqueue, existing requests that match the workqueue criteria and rules don't appear in the workqueue until you compile it. When you compile your workqueues, the system evaluates requests to determine which workqueues they need to appear in. You need to compile your workqueues regularly to ensure that the correct orders are appearing. For example, many criteria and rules are time based, meaning that even if no changes have been made to an order, it might no longer qualify now that time has passed. Set up a batch job to regularly evaluate appointment requests against workqueue rules. The batch job populates the workqueues with appointment requests and keeps the workqueues up-to-date and accurate. Orders that are transferred to a different workqueue are not evaluated against the rules of the destination workqueue and will remain on the destination workqueue even after a recompile.

> This is a system-intense batch job. Run this batch job only at night when system resources are available and users are not impacted.

Configure the Batch Job

1. In Cadence Text, follow the path Utility Menu > Batch Jobs.
2. Select the Jobs option and create a job based on batch template 805-ES Recompile Appointment Request Workqueues. In November 2023 and earlier, the batch template is named ES Recompile Schedulable Orders Workqueues.
3. Add this batch job to a batch.
4. Add the batch to a nightly run.

Refer to the Batch Scheduler Setup and Support Guide for more information about setting up batch jobs.

Configure Clinical Order Expiration Settings

The mnemonics in the batch job that determine when to clear the appointment status for a clinical order are set in Cadence System Definitions. The system sets the Request Base Status (I ORD 67001) item to Expired for an order, which causes it to fall off your appointment request workqueues. Marking orders as expired keeps old unscheduled orders that are unlikely to be scheduled from cluttering your workqueues. It also reduces the number of orders that the recompile batch job needs to process each night.

> Starting in May 2023, appointment requests for dental visits also expire based on the Expected Date Offset for Expiration (I SDF 10188) and Creation Data Offset for Expiration (I SDF 10189) settings described below. In February 2023 and earlier versions, appointment requests for dental visits never expire, regardless of how these settings are configured.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form.
3. Complete the following fields:
   - Expiration Date Offset for Expiration (I SDF 10187). For outpatient orders that have an expiration date, this is the number of days after the expiration date to set the Request Base Status (I ORD 67001) item to Expired for the order. If this field is blank, the system never marks orders that have

an expiration date as expired. In the Foundation System, this field is set to 30 days.

- Expected Date Offset for Expiration (I SDF 10188). For outpatient orders without an expiration date, this is the number of days after the order's expected date to set the Request Base Status item to Expired for the order. If this field is blank, the system never marks orders that don't have an expiration date but do have an expected date as expired. In the Foundation System, this field is set to 730 days.
- Creation Date Offset for Expiration (I SDF 10189). For outpatient orders without an expiration date or an expected date, this is the number of days after the order's signed date to set the Request Base Status item to Expired for the order. If this field is blank, the system never marks orders that don't have an expiration date or expected date as expired. In the Foundation System, this field is set to 730 days.

Manually Compile a Workqueue

You can use the Compile button in the Requests Workqueue Detail activity (search: Requests WQ Maintenance) if you make changes to a workqueue and want to compile it manually before the batch job runs. For the Compile button to function, you need to activate the ESWORKQUEUE queue definition.

1. In Chronicles, access the Workqueue (WQF) master file and go to Utilities > Generic Queuing > Manage Queue Definitions > Activate/Deactivate Queue Definitions.
2. At the Definition prompt, enter queue definition 1002-ES Orders Workqueue On-Demand Compilation, which has the descriptor ESWORKQUEUE.
3. Enter Yes to activate the ESWORKQUEUE queue definition.

Define the List of Owning Areas for Appointment Request Workqueues

Depending on how your organization schedules appointment requests, you might want to assign owning areas to workqueues. For example, you might say a certain center owns a specific workqueue or a certain building owns another one. The owning area for a workqueue doesn't drive any functionality or security but you can use this information for organizing, filtering, and maintaining workqueues.

Create Owning Areas

To define an owning area, edit the Owning Area (I WQF 65) item. Create a category for each owning area you want to assign to workqueues. For additional information about editing category lists, refer to the Modify a Category List's Values topic.

Specify the Owning Area for a Workqueue

1. In Hyperspace, open the Requests Workqueue Detail activity (search: Requests WQ Maintenance).
2. Open a workqueue.
3. Click Edit in the Detail section.
4. In the Owning area field, select the owning area for the workqueue.

Assign Schedulers to Appointment Request Workqueues

Schedulers can access only the workqueues they are assigned to, unless they have security to see all workqueues, so you need to assign schedulers to each workqueue. You can assign workqueues to one user or service area and then copy those assignments to other users.

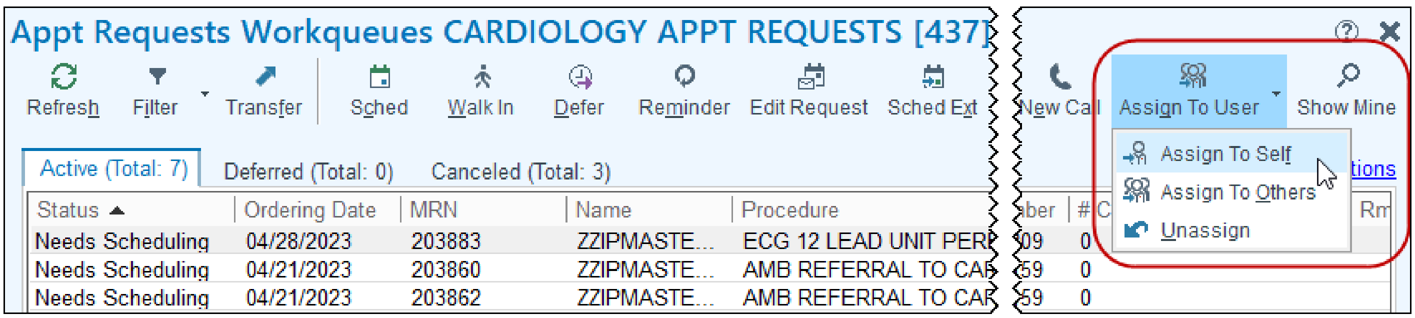
1. In Hyperspace, open the Workqueue List activity (search: Workqueue List).
2. Select the Appt Requests tab.
3. Select the workqueues you want to assign to users and click Manage WQ > Manage Users.
4. Enter the users that should be assigned to the selected workqueues.

Refer to the Foundation Hosted environment to see which users can access certain appointment request workqueues.

Determine How and When to Assign Requests to Individual Users

Starting in November 2018

Cadence users and supervisors can assign and unassign specific requests to themselves and others in schedule orders/appointment request workqueues.



There's no one right way to use this feature. For example:

- Some organizations might distribute every request on a workqueue among a group of users to encourage accountability and better track workqueue productivity.
- Other organizations might decide to assign requests only on an ad-hoc basis. For example, supervisors might assign some requests to specific users based on those users' areas of expertise.
- Workqueue users might become responsible for indicating that they're working on each request to avoid situations where multiple users try to work a request simultaneously.

Configure Request Assignment Security

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Workqueues form.
3. In the Assign entries (I ECL 6006) field, enter All to allow users to assign entries to any user or Self to allow users to assign entries only to themselves.
4. In the Unassign entries (I ECL 6007) field, enter All to allow users to unassign entries from any user or Self to allow users to unassign entries only from themselves.

Add Assignment Columns to Your Workqueue Views

Add columns to your workqueue views to show the currently assigned user and the assignment notes for requests so that everyone can see the user responsible for scheduling each request.

1. In Hyperspace, open an appointment request workqueue (search: Workqueue List).
2. In the upper right corner, click the Column Actions link.

3. Select View Profile to open the View Profile window.
4. Select the view you want to modify and click Edit.
5. In the View Editor window, select and drag the following properties from the Properties tree to the Columns table:
    - Order > Current Workqueue Item (for Views) > Currently Assigned To User
    - Order > Current Workqueue Item (for Views) > Most Recent Active Note

Add Assignment Buttons to Your Custom Toolbar

If you've customized the appointment request workqueue toolbar, you need to update your copy of menu record 5204-ES_MT_SCH_ORD_WQ to include the Assign To User and Show Mine toolbar buttons: menu records 5171-ES_MNU_WQI_ASGN_TO_USER and 97006-AR_ITM_SHOW_MINEALL, respectively.

Add Assignment Information to Your Custom HTML Display or Report

If you've customized the HTML display or report that appears in your appointment request workqueues, you need to update your copies to show assignment information to users.

If you're using a copy of HTML display 76-AS Orders: Workqueue & Front Desk, add the following HTML tables to it:

- 62010-ES WQI Assignment Notes
- 62020-ES WQI Assignment History

If you're using a copy of report 63000-ES Order Information, add the following print groups to it:

- 62058-ES WQI Assignment History
- 62065-ES WQI Notes

Refer to the Design the Orders HTML Window in Appointment Request Workqueues and the Front Desk topic for details.

Limit the Time a User Can Defer an Appointment Request

To prevent a user from inadvertently deferring a record in their workqueue longer than they intended (for instance, by entering y+10 when they meant to enter t+10), you can choose a maximum deferral date for appointment request workqueues.

For more information, refer to the Limit the Time a User Can Defer a Record topic.

Collect Reasons Why Schedulers Defer Appointment Requests at the Workqueue Level

Give managers and schedulers a better idea of what's preventing users from scheduling appointment requests by adding the option to enter a reason for each deferral. You can define values for users to choose from, like Patient is not available or Provider is not available. This reason is stored in the Deferral Reason (I WQI 308) item and is returned by the Orders context property 98626-Appt Request - Defer Reason (Workqueue), which you can add as a column to the view for the Deferred tab in your appointment request workqueues.

Users defer appointment requests in an appointment request workqueue by selecting a request and clicking Defer. When the Defer Until window opens, the Reason field appears for the user to select a reason why they are deferring the request.

To make the Reason field available to users, you must associate certain deferral reasons with appointment request workqueues for them to select. You can either create deferral reasons for appointment request workqueues or reuse deferral reasons that are already in use for other workqueue types, like referral workqueues.

Create or Modify Deferral Reasons

You have two options for creating and modifying deferral reasons for appointment request workqueues:

- To share deferral reasons used by other types of workqueues, edit the WQ Deferral Reasons (I ECT 41020) category list. For each deferral reason that you want to use, select it, and enter 50-Schedule Orders/Appointment Request in the Restrict category value to workqueue type field.
- To create deferral reasons that are specific to appointment requests, edit the Appt Request - Deferral (I ORD 67360) category list.

Refer to the Modify a Category List's Values topic for detailed information about editing category lists.

Add the Defer Reason Column to the Deferred Tab of an Appointment Request Workqueue

1. In Hyperspace, access the appointment workqueue you want to modify and select the Deferred tab.
2. Go to Column Actions > Customize.
3. Click Edit View.
4. Find the Appt Request - Defer Reason (Workqueue) property in the list of properties and drag it to the list of columns in the view.

Customize the Columns in Appointment Request Workqueues

The columns in an appointment request workqueue are defined in Record View (FCC) records known as views. Using the View Designer, you can make sure different groups of users see the specific information they need, even when multiple users access the same workqueue.

To access the View Designer window:

- Starting in August 2021, click the wrench icon in a workqueue and select the modify view option.
- In May 2021 and earlier versions, click the Column Actions link in a workqueue and select the Customize option.

You can specify a default view for each appointment request workqueue tab (Active, Deferred, and Canceled/Removed) and also specify override views for each tab in certain service areas, locations, and departments. You need Cadence security point Customize cols on order WQs (I ECL 5186) to access the View Designer from a workqueue.

A user sees either the default view determined by their login department, location, or service area or a static view that applies no matter where they are logged in to. We recommend that you choose a default view and then specify additional views only for a particular part of your organization upon request.

Data Courier Considerations
The system stores views as records in the Record View (FCC) master file. Note that if you migrate views using Data Courier, you need to also migrate the associated record in the Record View Profile (FCP) master file.

Create or Edit a View

Epic has released standard views for each tab of appointment request workqueues. You can create your own views or create a copy of the Epic-released views if you want to customize views for your organization.

1. In Hyperspace, open an appointment request workqueue (search: Workqueue List).
2. Open the View Designer window:
    a. Starting in August 2021, in the upper right corner, click the wrench icon and then select Edit View Profile.
    b. In May 2021 and earlier, click the Column actions link and then select Customize.
3. Click Create View to create a blank view.
4. Click Edit View to edit an existing view. Use this option for an Epic-released view that you want to create a copy of.
5. In the View Editor window, select and drag items 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.
    - To see an example of what data looks like in the Preview area, type sample text in the Sample cell.
    - To change the column width, drag the edge of a column in the Preview area to the right or left. The corresponding cell in the Columns table updates itself.
    - To change the order of columns, drag a column label in the Preview area to the right or left. The Columns table updates itself.

Change the Default View for a Workqueue Tab

The default view is the view that all users see when they access an appointment request workqueue tab unless you've specified an applicable override view.

1. In Hyperspace, open an appointment request workqueue (search: Workqueue List).
2. Select the tab you want to edit the view for (Active, Deferred, or Canceled/Removed).
3. In the upper right corner, click the wrench icon.
4. Select Edit View Profile.
5. In the View Profile window, change the view in the Default view field.

Specify View Exceptions for Service Areas, Locations, and Departments

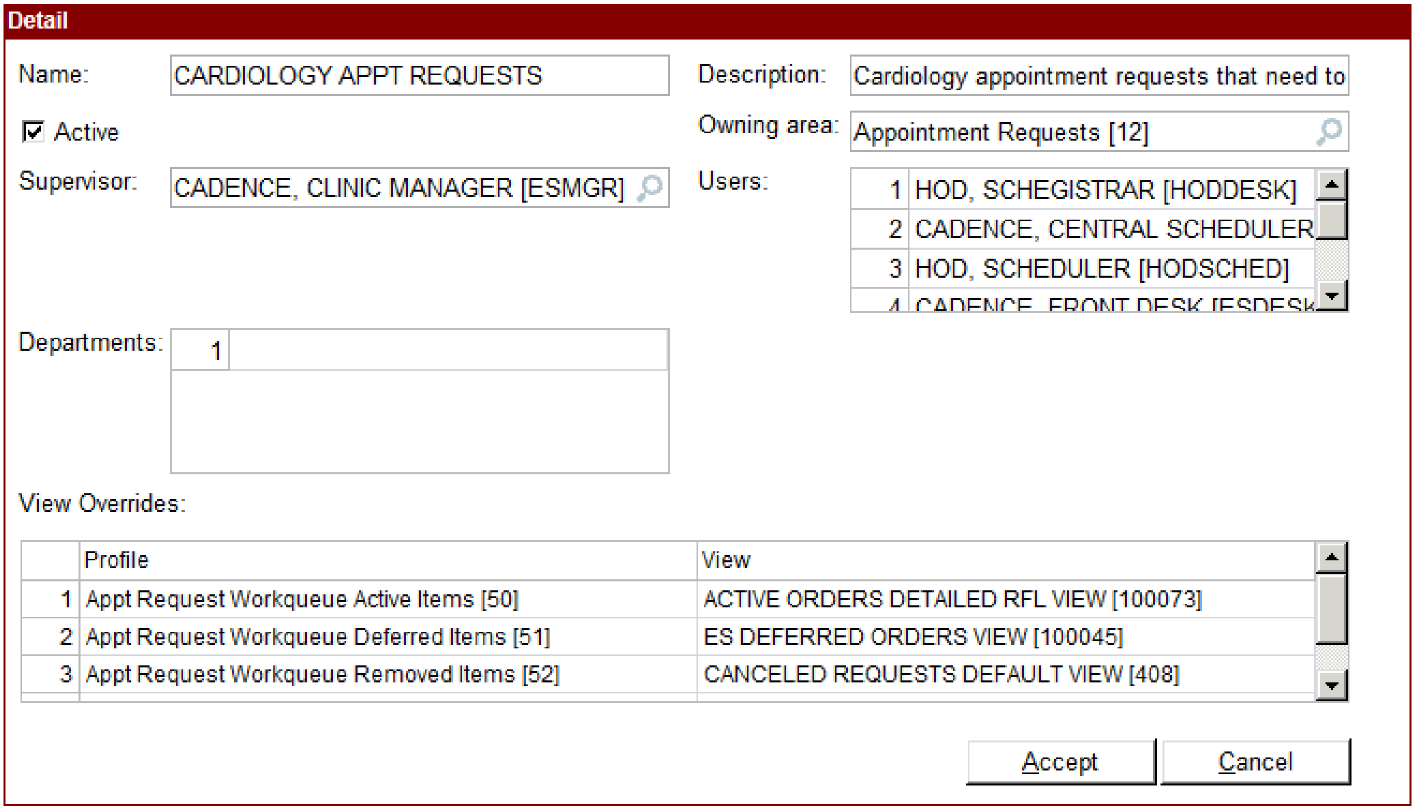
You can override the default view for an appointment request/schedule orders workqueue tab at the service area, location, or department level. The view a user sees depends on their login department.

1. In Hyperspace, open an appointment request workqueue (search: Workqueue List).
2. Select the tab you want to edit the view for (Active, Deferred, or Canceled/Removed).
3. In the upper right corner, click the wrench icon.
4. Select Edit View Profile.
5. In the View Profile window, in the Exceptions table, enter the service area, location, or department and an associated override view.

Use View Overrides to Define Static Views for a Workqueue

You can define static views for a workqueue that override the default view and service area, location, and department-level view.

1. In Hyperspace, open the Requests Workqueue Detail activity (search: Requests WQ Maintenance).
2. Open a workqueue.
3. Click Edit in the Details section.
4. Enter static views in the View Overrides table:
   - Profile. Select the tab you want to define a static view for (Active, Deferred, or Removed).
   - View. Select the view to use for the selected tab.



Show Additional Referral Information in the Workqueue

You can add referral-related information as columns in an appointment request/schedule orders workqueue view, allowing users to sort or filter rows based on this information. For example, front desk staff can sort by referral status to quickly find orders with referrals that have already been authorized.

To add these columns:

1. In Hyperspace, open an appointment request workqueue (search: Workqueue List).
2. Select the tab you want to edit the view for (Active, Deferred, or Canceled/Removed).
3. In the upper right corner, click the Column Actions link.
4. Select Customize.
5. On the View Profile window, click Edit View and select the view you want to edit.
6. In the Properties tree, expand the Referrals node and add the following properties to the Columns table:
   - Referral Status
   - Visits: Requested Total
   - Visits: Authorized Total
   - Referred-By Provider

- Referred-By Department

Customize the Appointment Request Workqueue Toolbar

You can edit workqueue toolbars just like any other activity toolbar to give users easy access to tools and activities. For example, you might want to add the CC Results activity to your toolbar if your schedulers often need to add providers to the Carbon Copy (CC) results list so they are notified of order results.

1. In Hyperspace, follow the path Epic button > Admin > Access Management > Role Editor and select the user role that needs access to additional workqueue toolbar buttons.
2. In the Menu Information table, under the Menu To Extend column, enter the menu record for appointment request workqueues (ES_MT_SCH_ORD_WQ).
3. In the Menu Descriptor column, enter a menu record for the button you want to add to the toolbar. For example, to add the CC Results button to the toolbar, enter IP_TB_ORDER_INQ_CC_RESULTS.
4. Set the Override? column to No.

Enable Managers to Report on Workqueue Productivity

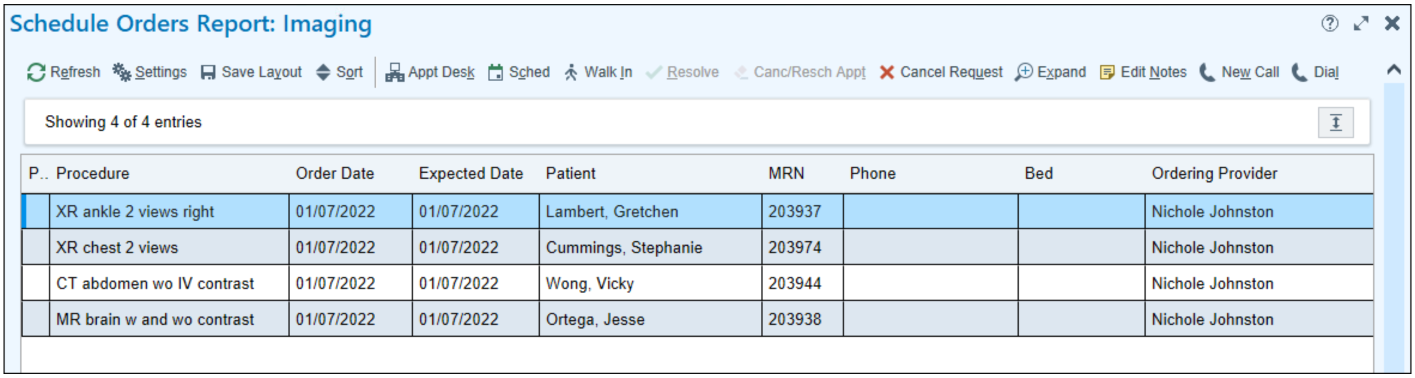
Clinic managers, supervisors, and project team members have several tools to help them monitor workqueue activity. You need to decide which tools you want to use at your organization.

- Workqueue List activity: The Workqueue List activity includes some basic reporting on workqueue activity, so managers can monitor activity at a glance from the workqueues.
- Reporting Workbench report: If you use Reporting Workbench, you can use report template 55052-ES Schedule Orders Workqueues to build management reports for the workqueues.
- Radar dashboard: If you use Radar dashboards, you can use dashboard component 55052-ES Sched Order Workqueue to show results from Reporting Workbench reports.

Create Reports for the Schedule Orders Report

Schedulers use the Schedule Orders work list to find schedulable orders and schedule appointments from the order. Depending on how your organization schedules orders, you might create reports for individual departments or for certain scheduling groupers. To access the report, follow the path Epic > Scheduling > Work Lists > Sched Orders.

Refer to the Report Repository for information on creating reports for the Schedule Orders work list.



Add Scheduling Groupers to Procedures to Filter Reports

Schedule order groupers do just what their name says: they group schedulable orders. Schedule order groupers greatly enhance the performance of a Schedule Orders work list because the report can look up only orders with a certain grouper. This way, the report shows fewer orders and you schedulers can easily see and organize the orders. You create schedule orders groupers in a category list and then assign those groupers to procedures and procedure categories.

Prerequisites

Enable procedures and procedure categories for scheduling. Refer to the Enable Scheduling Procedures and Enable Scheduling of Procedure Categories topics.

To use schedule orders groupers, you first create each schedule orders grouper in a category list and then assign those categories to procedures and procedure categories.

You might find it easier to enter schedule order groupers at the procedure category level because there are less records to edit and groupers usually apply to several procedures.

Build Schedule Orders Grouper Category List

Create a category for each scheduling grouper in the Scheduling Grouper (I ORD 153) category list. Refer to the Modify a Category List's Values topic for more information on editing category lists.

Add a Grouper to a Procedure or Procedure Category

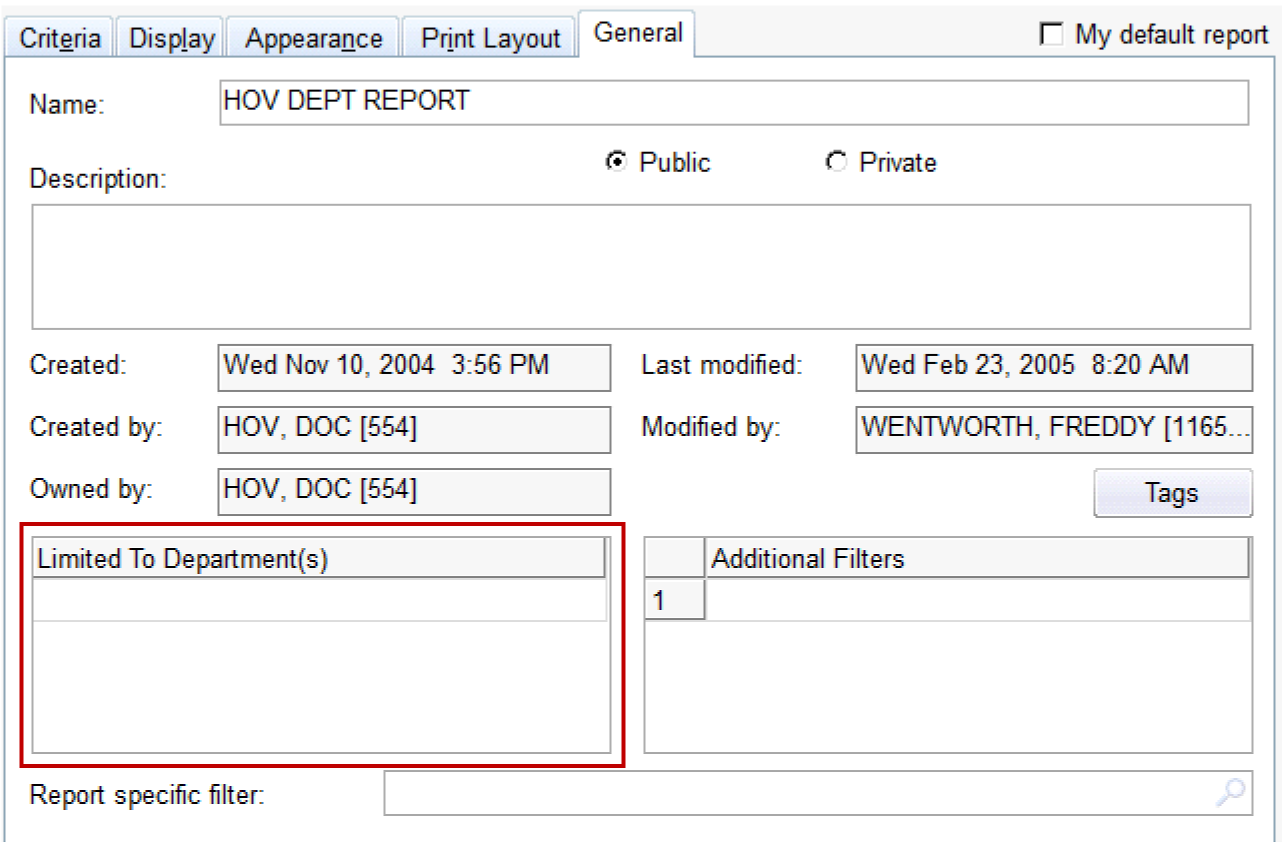
1. In Hyperspace, follow the path Epic button> Admin > Schedule Admin > Master File Edit > Procedures or Procedure Categories and open a procedure or procedure category record.
2. In the Default sched grouper (I EAP 10901 or I EDP 10901) field, select the grouper for the procedure or procedure category.

Limit a Public Report to Specific Users

If you want to limit which schedulers have access to run a specific orders report settings, you can limit the report to specific departments. Schedulers must be logged into one of the listed departments in order to see and run the report settings.

Considerations
For the scheduling Front Desk, this field works the same whether you are using the report settings or an appointment request workqueue.

On the General tab of a public report settings, in the Limited to Departments(s) field, select the departments for which this report is limited to. Schedulers must be logged into one of these departments in order to see the report settings.



Allow Users to Access the Appointment Request Workqueue

Users need Cadence security to access the Appointment Request Workqueue. This includes project team members who build reports and front desk users who schedule orders from the workqueue.

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Workqueues form.
3. Enter Yes in the Appt Request WQ/Order work list (I ECL 5180) field.

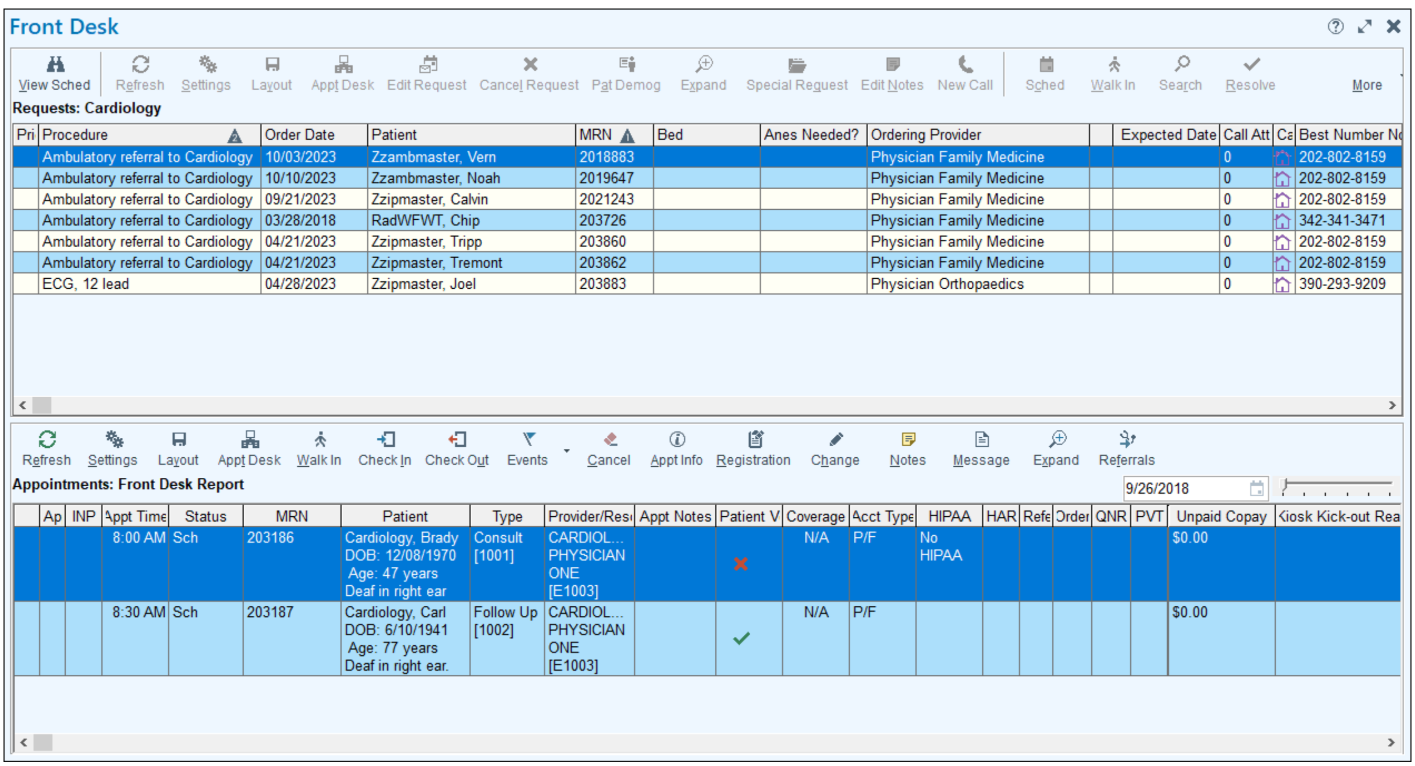
Set Up the Scheduling Front Desk Activity

Front desk users in departments that frequently schedule appointment requests and check in appointments can use the scheduling Front Desk activity. This activity allows users to see unscheduled appointment requests and scheduled appointments on the same screen, so it's helpful for departments like lab departments and hospital outpatient departments (HODs).

This scheduling Front Desk activity is different from the imaging Front Desk activity used in Radiant and Cupid. Refer to the Imaging Front Desk Setup and Support Guide to learn about that activity.

Two reports make up this activity: the Appointments report, where schedulers check in appointments, and the Requests report, where schedulers make appointments from requests. To set up this activity, you need to build these two reports.

- The Appointments report on the scheduling Front Desk identifies upcoming appointments for the department. It looks very similar to the Department Appointments report but uses different report settings.
- The Requests report on the scheduling Front Desk identifies appointment requests that need to be scheduled for a department. If your department uses appointment request workqueues instead of the Schedule Orders work list, the Requests report on the scheduling Front Desk uses a workqueue record instead of a report. Visually, this section of the activity still looks like a report. If your department still uses the Schedule Orders work list instead of workqueues, refer to the Build a Report for the Request Report on the Scheduling Front Desk topic to set up the Requests report for the Front Desk.



Build an Appointments Report for the Front Desk

1. Open the Front Desk (Epic button > Scheduling > Front Desk).
2. Click in the bottom Appointments section and then click Settings.

3. Determine what appointments you need to view on the report.
   - If you need to see appointments from a certain department, center, or subgroup of providers, select those options at the topic and then enter the specific departments, centers, and subgroups. You can only use one option for the report.
   - If you want appointments with certain visit types to appear on the report, enter those visit types in the Visit Type field. You might do this if your department only uses certain visit types. If you want to include all appointments, select the All check box.
   - If you want appointments with certain statuses to appear on the report, enter those statuses in the Appointment Status field. If you want to include all appointments, select the All check box.
4. Determine the date for which you need to include appointments. Epic recommends using relative dates in these fields, such as T for today.
5. Determine the time range for which you need to include appointments.
   - Enter the earliest time in the From time field.
   - Enter the latest time in the To time field.
6. If this is a public report that all schedulers can use, select the General tab. Select the public report option and name your report.
7. Click Save to save the settings.

The Foundation System has one report for this section of the Front Desk. The report looks at all visit types and appointments in the user's login department for today.

Build a Requests Report for the Front Desk

For departments that use appointment request workqueues

Refer to the Build an Appointment Request Workqueue topic to build a workqueue for the scheduling Front Desk, then follow the steps below to add that workqueue to your Front Desk report settings.

1. Open the Front Desk (Epic button > Scheduling > Front Desk).
2. Click in the top Requests section and then click Settings.
3. Enter your workqueue in the Workqueue field.
4. Determine the requests that appear on the report.
   - If you want to show requests from the Active tab of the selected workqueue, select the Show requests from the "Active" tab check box.
   - If you want to show requests from the Deferred tab of the selected workqueue, select the Show requests from the "Deferred" tab check box.
5. If this is a public report that all schedulers can use, select the General tab. Select the public report option and name your report.
6. Click Save to save the settings.

For departments that use the Schedule Orders work list

If a department uses the Schedule Orders work list instead of appointment request workqueue, you need to build report records for the Requests report on the Front Desk. These report settings are very similar to the Schedule Orders work list but they run on different report records.

1. Open the Front Desk (Epic button > Scheduling > Front Desk).

2. Click in the top Requests section and then click Settings.
3. Enter a date range for the orders. This date range applies to the effective dates of the orders, or when the order hasn't expired.
4. Determine what orders you need to view on the report.
    - If you want to see orders from specific ordering departments or providers, enter the departments and providers in the Ordering Department and Ordering Providers fields.
    - If you want to see orders for specific procedures or procedure categories, enter the procedures and procedure categories in the associated fields.
    - If you want to see orders with a specific order class or scheduling grouper, select the order class and scheduling groupers in the associated fields.
    - If you want to see orders with referrals to a certain department, enter the department in the Referred to Department field.
    - Select the specific order types you want to see under the Order Types heading.
5. If you are looking at future orders on the report, enter the number of days into the future to look for future orders. Orders beyond this date range don't appear in the report.
6. If this is a public report that all schedulers can use, select the General tab. Select the public report option and name your report.
7. Click Save to save the settings.

Determine Information Schedulers Collect After Scheduling Appointments from the Front Desk

You can customize the information that order schedulers see and collect after scheduling appointments from the Front Desk activity. Using advantage activities, you can configure the forms that appear after appointment entry. This allows schedulers to collect information specific to appointments scheduled from the Front Desk.

Considerations
When checking in appointments from the Front Desk, the system uses the advantage activity for the appointment department. To learn about designing the check in workflow with advantage activity records, refer to the Set Up Sign In, Check In, and Check Out Advantage Activities topic.

To set up an after scheduling activity for the Front Desk, you need to build the advantage activity record and then enter the record at the system or department level. The department level overrides the system level. The activity appears based on the appointment department.

Create an After Appointment Entry Advantage Activity Record

Refer to the Set Up After Appointment Entry Advantage Activities to create an after appointment entry advantage activity. Make sure to enter 14-After schedule from front desk in the Access Points field.

Enter Your Advantage Activity Record in the System

1. In Hyperspace, choose a path:
    - To activate this at the department level, go to Epic button > Admin > Master File Edit > Department and enter a department.
    - To activate this at the system level, go to Epic button > Admin > Schedule Admin > Cadence

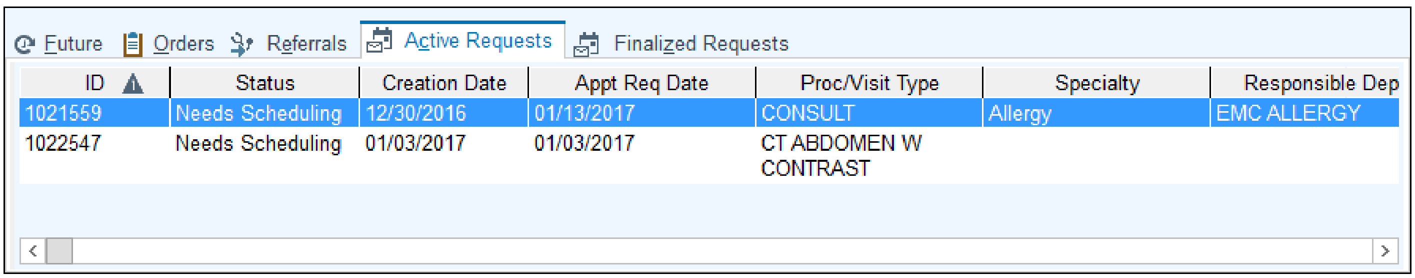
System Definitions.

2. Select the Advantage Activities 2 form.
3. Under the Front Desk heading, enter an advantage activity record name or number in the After appointment entry field. This activity appears when schedulers make appointments from the Front Desk.
4. In the Show appointment review? field, enter No if schedulers don't need to see the Appointment Review window when scheduling appointments from the Front Desk.

Show Appointment Requests on the Appointment Desk

The Appointment Desk is where schedulers can see a patient's past and future appointments, admissions, referrals, wait list entries, and active and finalized appointment requests. For example, when a patient calls to inquire about an outstanding appointment request, a scheduler can open the patient's Appointment Desk and select the Active Requests tab to find the request. The Active Requests and Finalized Requests tabs do not appear by default, and you can configure these tabs to appear at the system or department level. Tabs configured at the department level override your system-level configuration.

- The Active Requests tab includes clinical orders and appointment requests that haven't been scheduled yet. Orders and requests that have a base status (I ORD 67001) of Needs Scheduling, Order Modified, Order Canceled, or Deferred, as well as any custom statuses (I ORD 67000) that are mapped to one of these base statuses, appear on this tab.
- The Finalized Requests tab includes clinical orders and appointment requests that have already been scheduled or marked as not needing to be scheduled. Orders and requests that have a base status (I ORD 67001) of Scheduled, Completed, Canceled, Expired, or Voided, as well as any custom statuses (I ORD 67000) that are mapped to one of these base statuses, appear on this tab.



ID	Status	Creation Date	Appt Req Date	Proc/Visit Type	Specialty	Responsible Dep
1021559	Needs Scheduling	12/30/2016	01/13/2017	CONSULT	Allergy	EMC ALLERGY
1022547	Needs Scheduling	01/03/2017	01/03/2017	CT ABDOMEN W CONTRAST		

For information about setting up these tabs, refer to the Appointment Desk Setup and Support Guide.

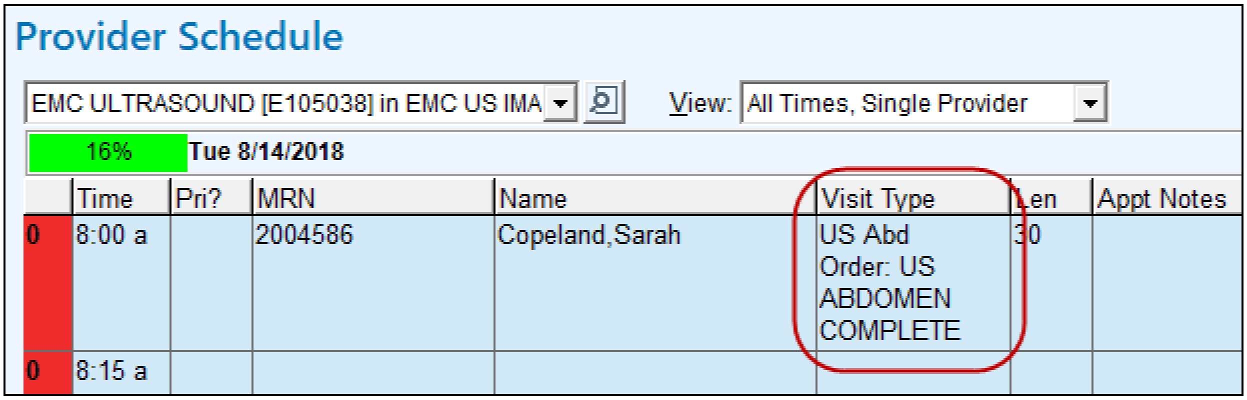
After you have set up the Active Requests and Finalized Requests tabs, you can use the Build Wizard to remove the Orders tab report settings from departments where the tab is specified. It doesn't remove the tab from Cadence System Definitions. To get started, open the Build Wizard (search: Build Wizard) and search for feature 420006-Remove Appointment Desk Orders Tab Reports (application: Cadence). This Build Wizard feature is available starting in August 2020, in May 2020 with special update E9302816, and in February 2020 with special update E9206536.

Manage and Schedule Appointment Requests

In this section, we'll cover how to set up tools that allow schedulers to manage unscheduled appointment requests and get them scheduled appropriately for patients.

Show Procedures for Visits on the Provider Schedule

For departments that schedule a lot of procedures, schedulers might like to see appointment procedures on the Provider Schedule. You can show the name of a procedure for an appointment in the Visit Type column, next to the visit type name. You can set this up for the department or system level.



1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Display form.
3. In the Data override for PP for name and visit type column (I SDF 1176 or I DEP 1176) field, enter SchView^HORDLPP.

Prompt Users to Schedule Related Orders in a Single Workflow

To help schedulers efficiently schedule a patient's related orders, the Related Orders window appears during order scheduling workflows when the system identifies orders that are possibly related to the orders the scheduler selected for the patient. The system also distinguishes which orders are most strongly related to the selected order by showing a signal icon when some orders have a stronger relationship than others. Related orders that the current user cannot schedule due to visit type restrictions but might want to coordinate scheduling for also appear in the window in their own section, but you can choose to hide the window if only orders that the user cannot schedule would appear. The Related Orders window does not appear when schedulers select multiple orders for different patients. The window also does not appear in the Walk In activity, Order Up, or for add-on orders.

By default, orders placed in the scenarios listed below appear in the Related Orders window. The signal icon appears only when there are orders with a mix of strong and weak relationships to show.

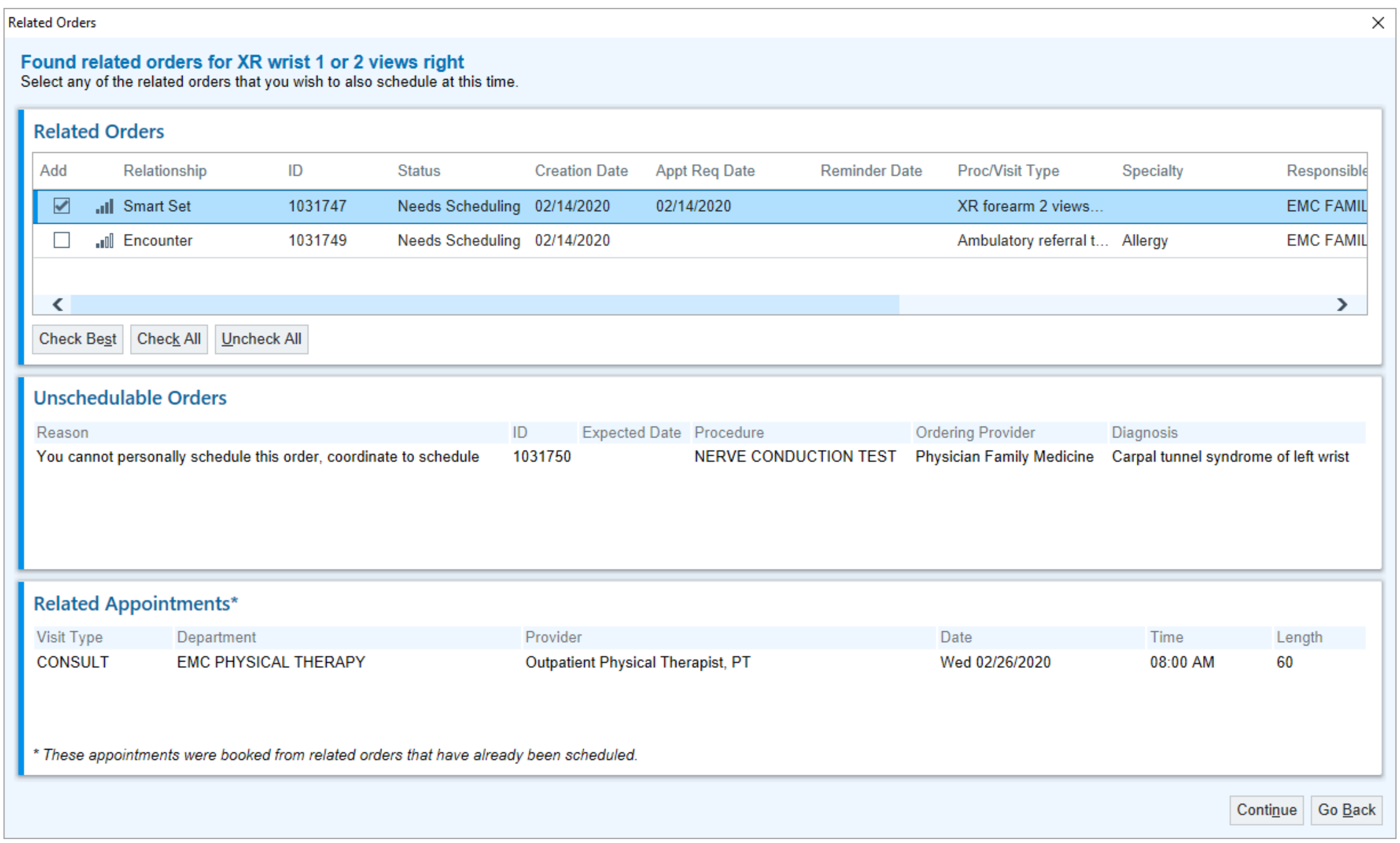
- Orders that were placed on the same encounter. Orders from the same encounter that were placed from the same SmartSet, Order Set, or order panel have a strong signal icon. Separate orders from the same encounter have a weak signal icon.
- Orders that have the same external ID (I ORD 800) from an interfaced system. These orders have a strong signal icon.

- Orders that were placed using the Additional Orders button during triage of a referral order, including the original referral order. These orders have a strong signal icon.
- Orders that were automatically generated as prerequisites for an appointment request. These orders have a strong signal icon.
- Orders that are part of the same request bundle. These orders have a strong signal icon.

You can customize how the system identifies which orders might be related by hiding the window in any of the scenarios listed above, showing the window when the system finds orders that were placed on the same day as one of the selected orders, or by specifying an Appointment Request or Order context rule that excludes any matching orders from the Related Orders window. For example, you might choose to always exclude lab or radiology orders or all orders for a certain location.

When schedulers select multiple orders to schedule from the Related Orders window, the system combines orders into a single visit based on your procedure and procedure category build, just like when they schedule multiple orders at once from a workqueue or the Appointment Desk. The relevant settings in your procedure and procedure category records are:

- Combine procedures? (I EAP 10910) set to Yes or you have set up combinations on the Procedure Combinations form
- Combine categories? (I EDP 10910) set to Yes



Customize How the System or a Department Identifies Related Orders

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 > Scheduling form.
3. In the Filtering rule (I SDF 1211 or I DEP 3311) field, enter an Appointment Request or Order context rule

that identifies orders that should always be excluded from the Related Orders window. By default, no rule is entered here, so no related orders are excluded.

4. In the Searches (I SDF 1220 or I DEP 3320) field, enter the search scenarios you want to use to identify possibly related orders. By default, this field is blank, and the system uses the Placed On Same Encounter, Same External ID, Order Triage, Automatically Generated Orders, and Ticket Bundle searches.
    - Placed On Same Encounter
    - Placed On Same Date
    - Same External ID
    - Order Triage
    - Automatically Generated Orders
    - Ticket Bundle
5. In the Show popup if (I SDF 1230 or I DEP 3330) field, enter the sections of the Related Orders window that must have data in order for the window to appear in a scheduling workflow. If any of the sections you list here has data, the window appears. This setting does not control which sections of the window appear, only whether the window appears. By default, this setting is blank, and the window appears only when related orders are found as defined by the Filtering rule and Searches settings.
    - Related Orders Exist (related orders that the user can schedule)
    - Unschedulable Orders Exist (related orders that the user cannot schedule).
    - Appointments Exist (appointments that have already been scheduled for related orders)

Turn Off the Related Orders Feature

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 Appointment Requests > Scheduling form.
3. In the Related Orders section, enter No in the Show popup? (I SDF 1210 or I DEP 3310) field. When this field is blank or set to Yes, the Related Orders window appears during order scheduling workflows.

Customize the Columns that Appear on the Related Orders Window

The columns that appear on in the Related Orders section of the Related Orders window are determined by the Appointment Desk configuration for the Active Requests tab specified at the system or department level. To customize the appearance of these columns follow the steps in the Design the Look and Use of the Appointment Desk Tabs topic.

Allow Schedulers to Manually Link Appointments to Requests

Occasionally, an appointment gets scheduled separately from the request, such as when an appointment is made before the clinician can place the order. Schedulers need to associate the request with the scheduled appointment by linking the records. Schedulers might also need to unlink a request from an appointment if the appointment shouldn't be associated with the request, like when the request was linked by mistake. Schedulers need Cadence security and access to the Link Appointment to Requests activity or the Link Request activity to complete these workflows.

Give Users Security to Link Appointments to Requests

1. In Hyperspace, open a Cadence security class (search: Cadence Security).

2. Select the Appointment Functions form.
3. Enter Yes in the Link appt to requests (I ECL 5074) field.

Refer to the Foundation Hosted environment and the Users and Security Matrix to see which Cadence users can link appointments to requests.

Give Users Access to the Link Requests Option on the Appointment Desk

The Link Appointment to Requests activity is available from the Future and Past tabs of the Appointment Desk as a right-click option and toolbar button. In the Foundation System, we added the Link Requests option to the right-click menu for the Future and Past tabs.

1. In Hyperspace, open Cadence System Definitions or a department record.
   - To open Cadence System Definitions, search Cadence System Definitions.
   - To open a department record, go to Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Select the Appointment Desk > Configuration form in Cadence System Definitions or the General > Appointment Desk form in your department record.
3. Click the Report Settings icon for the Future Appts Tab or the Past Appts Tab.
4. On the Criteria tab, move the Link Requests option to the Right Click Actions list and/or Toolbar Actions list.

Give Users Access to the Link to Appointment Option on the Appointment Desk

Starting in February 2025

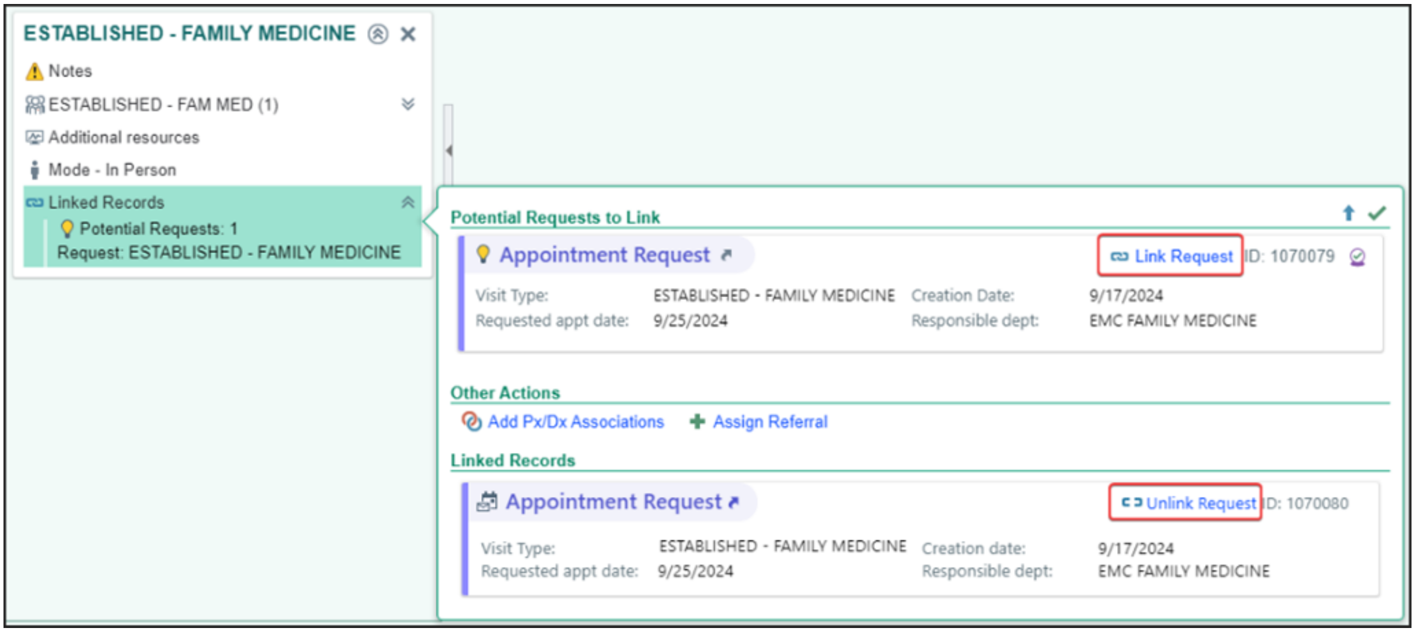
The Link Request activity is available from the Active Requests and Finalized Requests tabs of the Appointment Desk as a right-click option and toolbar button. In the Foundation System, we added the Link to Appointment option to the right-click menu for both the Active Requests and Finalized Requests tabs.

1. In Hyperspace, open Cadence System Definitions or a department record.
   - To open Cadence System Definitions, search Cadence System Definitions.
   - To open a department record, go to Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Select the Appointment Desk > Configuration form in Cadence System Definitions or the General > Appointment Desk form in your department record.
3. Click the Report Settings icon for the Active Requests Tab or the Finalized Requests Tab.
4. On the Criteria tab, move the Link to Appointment option to the Right Click Actions list and/or Toolbar Actions list.

Customize Potential Requests for Request Linking in Book It

Starting in November 2024

Occasionally, an appointment gets scheduled separately from the request, such as when an appointment is made before the clinician can place the order. Schedulers need to associate the request with the scheduled appointment by linking the records. In scenarios like this, it is useful to use the potential requests to link that appear automatically in the visit card in Book It. These recommendations appear if the requested visit type matches the visit type you are scheduling. Additionally, more specific potential requests are shown after you hold time for a visit. By default, the system recommends potential requests after holding time if the appointment you are scheduling matches the exact date of the request, and matches at least one of the following criteria: Provider, Specialty, Visit Type, or Department. However, it might be useful to customize these settings to increase or decrease how restrictive the recommendations are. You can configure these settings at the Cadence System Definitions or Department level.



Link and unlink requests in the Linked Records flyout in Book It

Customize How the System or a Department Recommends Potential Requests to Link

1. In Hyperspace, open Cadence System Definitions or the Department master file.
2. Go to the Appointment Requests section, then to the Auto-Linking tab.
3. Click the Recommend requests when a visit type is selected (I SDF 3566) or (I DEP 3566) button to turn on request linking.
4. Configure The Days Allowed Before/After Requested Date (I SDF 3561 and I SDF 3562) or (I DEP 3561 and I DEP 3562) fields to determine how many days before or after a request's requested date you see recommendations. The default value is 0 for both fields, which means schedulers see recommended requests only if the date they are scheduling on exactly matches the requested date of the request. You can increase these values if you want to see less restrictive recommendations. Starting in May 2025 or in February 2025 with special update E11303413, if the requested date (I ORD 67203) is empty, then the expected date (I ORD 615) which is typically used by clinical orders is evaluated instead and won't be evaluated for auto-linking. If neither the requested date nor expected date is used then the request will show as recommended in Book it. If an order has both a requested and expected date, then the requested date takes priority.
5. Configure the criteria that determines how restrictive the feature is. The criterion table specifies which criteria are used to find matching requests and how that criteria is evaluated.
    a. Add which criteria you want to be used when searching for relevant requests to the Criterion (I SDF 3563 or I DEP 3563) column. Provider, Specialty, Visit Type, and Department are the default criteria.
    b. Next, determine how you want each of the criteria you chose to be evaluated. You can set the Recommend (User) (I SDF 3564 or I DEP 3564) column to 0-Ignore, 1-Require, or 2-Prefer. By

default, these are set to 2-Prefer, but you can change them to 1-Require for more specific recommendations, or 0-Ignore if you don't want to use that criterion when searching. Recommendations appear if they match the date and at least one of the preferred criteria. If any of the criteria are required, the request must match the date and all required criteria. Setting more criteria as required makes the recommendations in Book It more restrictive.

6. See the Item Matching Information for Potential Request Linking in Book It topic for additional information on what specific items are checked when matching criteria.

Automatically Link Requests and Appointments

Starting in November 2024

Instead of requiring schedulers to manually link a request to an appointment during or after scheduling, you can configure the system to automatically link relevant requests when an appointment is scheduled. That way, if a patient has an appointment scheduled while they have a relevant request in the system, but the appointment isn't scheduled from the request, schedulers don't have to track down the request to manually link it. Starting in February 2025, you can also configure the system to automatically link appointments after a request is created to account for situations where an appointment gets scheduled before its relevant request is created.

Considerations

Keep in mind that there are some situations in which appointments and requests don't automatically link, even if they match all of your criteria. Auto-linking doesn't occur if:

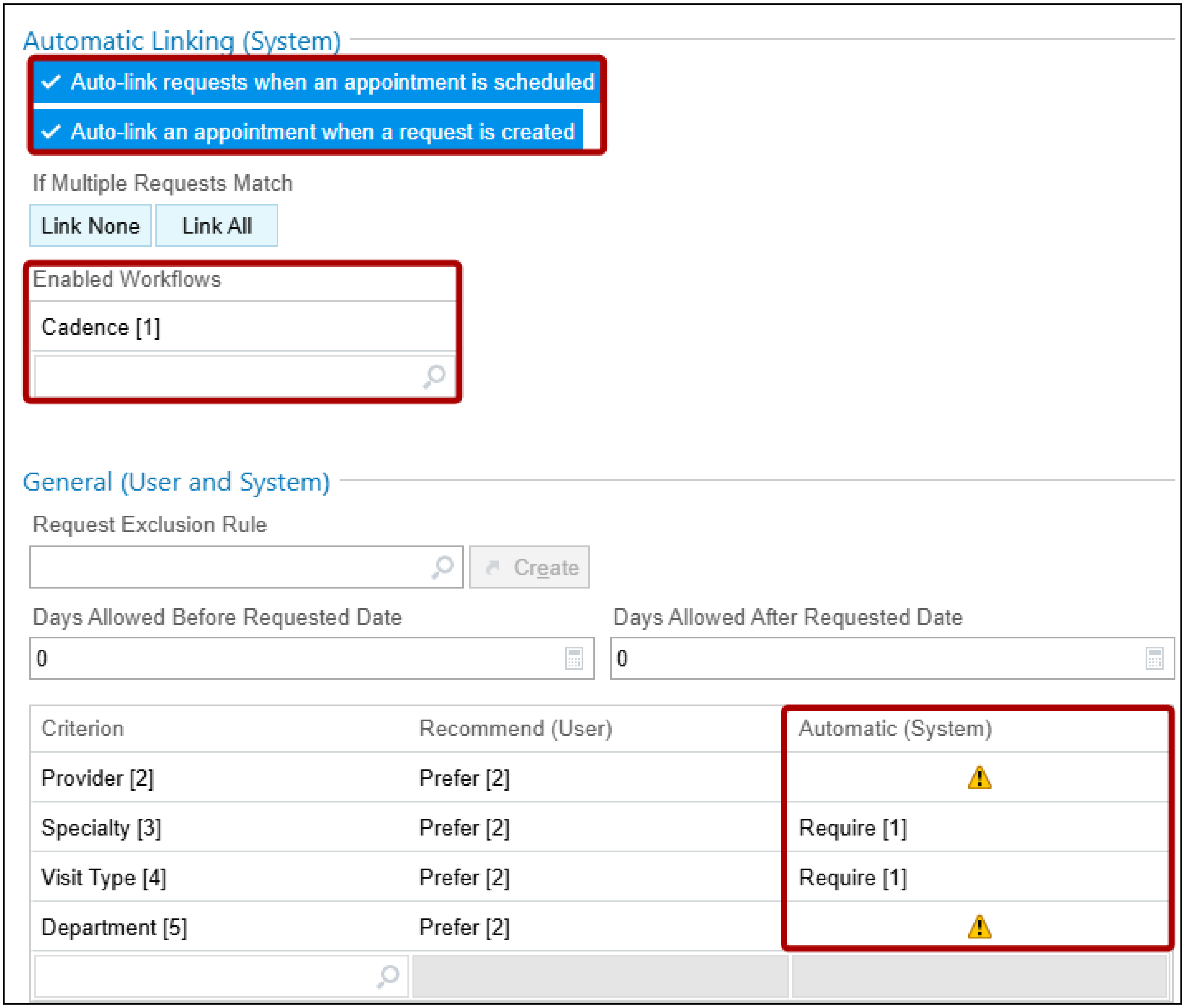
- The request doesn't have an expected date
  - Starting in May 2025 or in February 2025 with special update E11303413, if request does not have a requested date, then if there is one, the expected date (I ORD 615) is used instead.
- Manually linking the same appointment-request pair would result in a hard stop
- The date of the scheduled appointment is after the expiration date of the request's linked referral
- The appointment already has a request linked to it
- The appointment isn't scheduled via a method listed in Enabled Workflows (I SDF or DEP 3571)

You can configure automatic appointment linking for the entire system in Cadence System Definitions or for a specific department. Regardless of which configuration level you choose, first you need to set the Background Linking User (I SDF 3570) in Cadence System Definitions, otherwise the system can't automatically link your requests. Your background user needs to have the security outlined in the Allow Schedulers to Manually Link Appointments to Requests topic. For more information about creating background users, refer to the Create a Single User topic.

To set a background linking user:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > Auto Linking form.
3. In the Background Linking User (I SDF 3570) field, enter your background user.

Then, configure automatic linking. Starting in February 2025, some Cadence System Definitions settings will be configured by default, but if you already configured them with the November 2024 release, your existing settings won't be overridden. The items outlined in red are set by default:



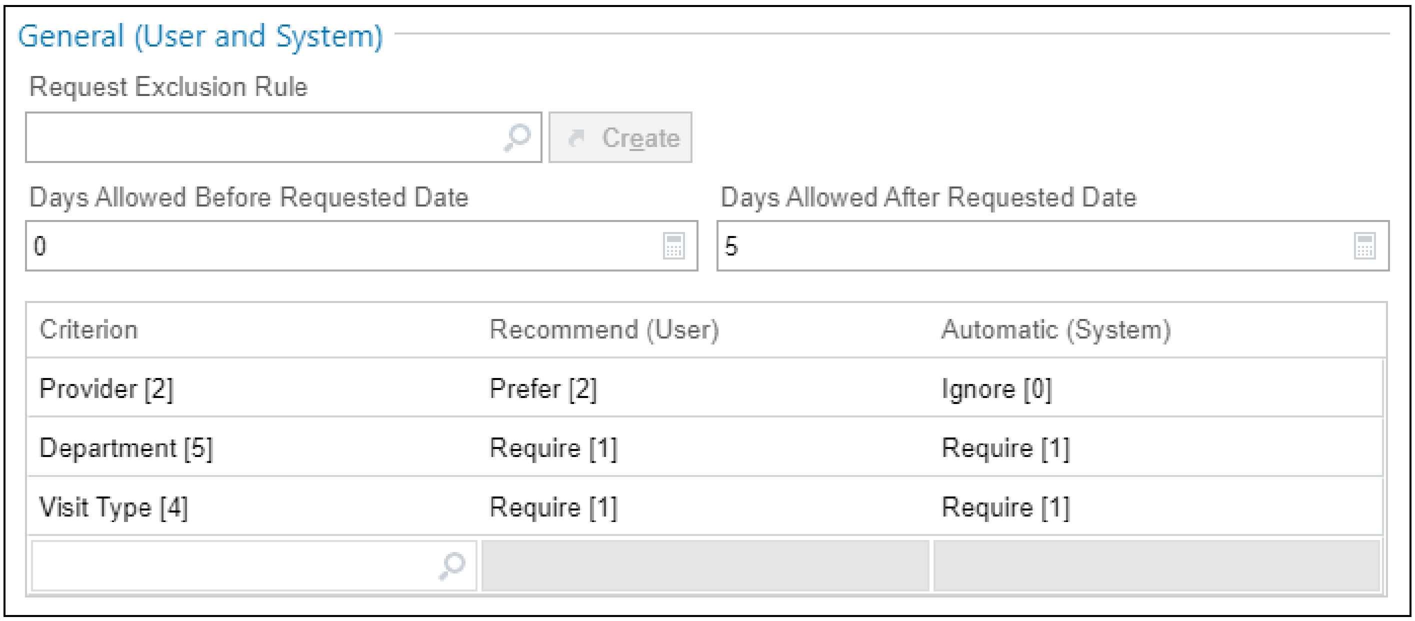
Cadence System Definitions with the items set by default

You can continue configuring settings on the Auto-Linking screen in Cadence System Definitions, or you can configure settings at the department level by accessing the same screen in the Department master file activity.

1. If you're configuring settings for a department, select the Use Department Settings checkbox to enable the other fields on the screen.
2. If you want to automatically link appointments to requests after an appointment is scheduled, select the Auto-link requests when an appointment is scheduled (I SDF 3567 or I DEP 3567) checkbox. This automatic linking occurs immediately after an appointment is scheduled.
3. If you want to automatically link requests to appointments after a request is created, select the Auto-link an appointment when a request is created (I SDF 3568 or I DEP 3568) checkbox. This automatic linking happens overnight with a scheduled nightly task.
4. Under the If Multiple Requests Match prompt, click either the Link All or Link None (I SDF 3569 or I DEP 3569) button to determine how the system should behave if multiple requests are eligible for automatic linking. If you don't make a selection, the default is Link None.
5. Enter the workflows you want to be eligible for automatic linking in the Enabled Workflows (I SDF 3571 or I

DEP 3571) table. If you only want appointments scheduled in Hyperspace to be automatically linked, enter Cadence.

6. If you want to use a rule to exclude certain requests from being evaluated for automatic linking, enter it in the Request Exclusion Rule (I SDF 3560 or I DEP 3560) field, or click the Create button to make a new rule. The rule must use the Auto-link Appt to Appt Request context. When the rule is true, requests are excluded from automatic linking evaluation. If left blank, all requests are evaluated.
7. Customize the automatic linking criteria, including the Days Allowed Before/After Requested Date (I SDF 3561 and I SDF 3562 or I DEP 3561 and I DEP 3562) fields by following the steps in the Customize Potential Requests for Request Linking in Book It topic.
   - Instead of the Recommend (User) column, configure your criteria in the Automatic (System) column. Unlike the Recommended (User) column, the options for Automatic (System) are Ignore or Require. All required criteria have to match for a request to be automatically linked to an appointment. In this screenshot, requests automatically link for appointments scheduled up to 5 days after the requested date, as long as the department and visit type match the request.



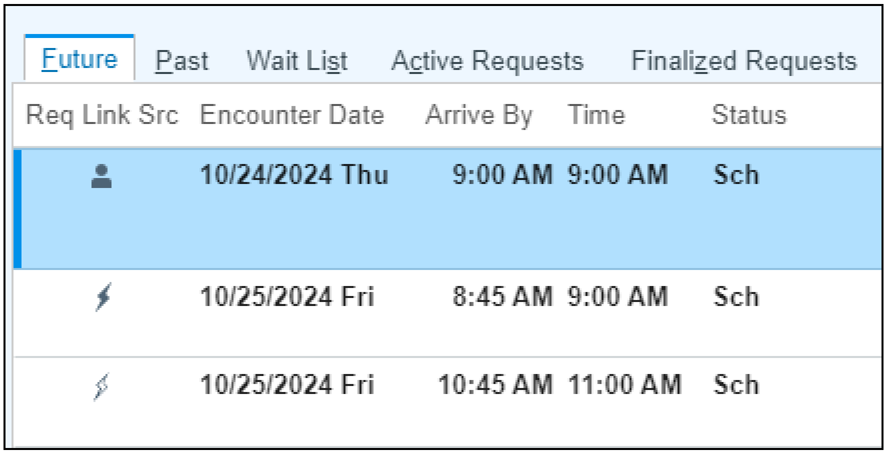
Linking Appointments After Request Creation

Unlike automatically linking after scheduling, which happens instantly, automatic linking after request creation happens overnight with a scheduled nightly task. This way, a clinician has time to modify or cancel an order, if needed, before it gets automatically linked to an appointment. The task automatically runs at 2:00 AM local time, and if it can't make an automatic link because the patient or request is locked, it tries again at 3:00 AM and 4:00 AM. If it can't process all of the requests flagged for evaluation on a given day, it tries again the next night. Each night when the task runs, it evaluates requests created the previous day against appointment starting on the next day. For example, when the task runs at 2:00 AM on December 15th, it looks at requests that were created on December 14th and tries to link them to appointments scheduled on or after the 16th.

Show Schedulers How a Request Was Linked to an Appointment

Starting in November 2024

You can optionally use a column to show how requests were linked to scheduled appointments. This column is available for use on the Future or Past tabs on the Appointment Desk, the Department Appointments Report, or on reports created from Reporting Workbench report template 55050-ES Appt Search. To add this column, open the settings for your report, navigate to the Display tab, and add column 5279-Appt Request Link Source. Refer to the Configure the Appointment Desk Tabs topic and the Design Department Appointments Reports topic for more information.



Icon	Meaning
	The appointment and request(s) were linked completely manually.
	The appointment and request(s) were linked completely automatically.
	The appointment and requests were linked both manually and automatically.

Automatically Enter the Search Start Date from a Clinical Order

To save time and clicks for users who make appointments from clinical orders, you can have the system automatically use the expected date listed in the order record as the start date for the appointment search. This automatic entry can also make sure users schedule the order as expected by the clinician who placed the order. Users can change the start date of the appointment search if they're scheduling one order or multiple orders with the same expected date or no expected dates. Note that the system always uses the expected date when scheduling treatment plan appointment requests, regardless of whether you have set up this feature.

This feature applies only to future or standing orders that are schedulable. If the user schedules multiple appointments from multiple orders, the system uses the earliest expected date of all the orders. The system uses the expected dates on all the orders to find appointment times for each order, not just the order with the earliest expected date. If a user makes an appointment from an order using Walk In, the system continues to use today as the start date for the appointment search rather than the expected date.

Considerations
Some organizations use the order's expected date to indicate when the order should be performed by, instead of using it to indicate the earliest date an order should be performed. It's important to understand how your organization uses the order expected date prior to turning on this feature.

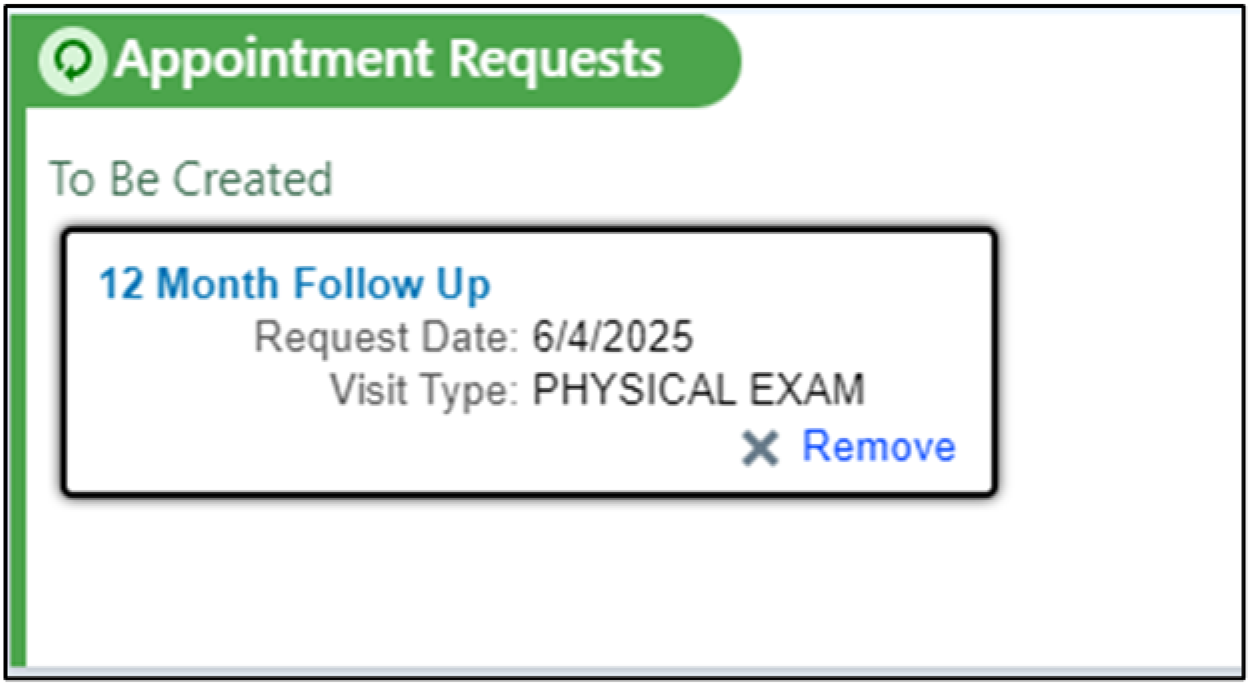
1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > Entry Defaults/Reqs form.
3. In the Default search start date from order expected date? (I SDF 10271) field, enter one of the options listed below. Note that if an order is from an oncology treatment plan, the Restrict by visit option is always used.
   - Do not default. With this option, the Auto Scheduler does not use the expected date for any order and instead uses the current date as the default search start date. This is the default option if you leave this field blank.
   - Restrict by visit. With this option, the Auto Scheduler uses the expected dates on all the orders to find appointment times for each order, not just the order with the earliest expected date. For example, if the scheduler is scheduling three orders with expected dates of 6/1, 6/10, and 6/20, the Auto Scheduler suggests appointment times on or near 6/1, 6/10, and 6/20 for each individual order.
   - Earliest date only. With this option, the Auto Scheduler uses the earliest expected date among the orders as the start date for the appointment search. For example, if the scheduler is scheduling three orders with expected dates of 6/1, 6/10, and 6/20, the Auto Scheduler suggests appointment times on or near 6/1 for all the orders.

Automatically Generate Appointment Requests at Check In and Check Out

Starting in August 2024

Generate appointment requests automatically during the check in or check out workflows to make it easier for follow-up appointments to be scheduled using tickets or appointment request workqueues. You can configure a visit type to generate an appointment request using a template that includes information like visit type, provider, and when the request should be scheduled.

When a user checks in or checks out an appointment for a visit type that is configured to generate requests, those requests appear in the Appointment Requests section of the navigator with details about the request to be generated. Here, users can add or remove additional requests.



To configure a visit type to generate a request, first configure the generation settings at the system level:

1. In Hyperspace, open Cadence System Definitions.
2. Go to the Appointment Request > Recalls form.
3. To generate an appointment request at Check In, set the Generate Recalls At (I SDF 11552) field to 1-Check In. To generate a request at check out, set the field to 2-Check Out. If you leave this field blank, a request is never generated during either workflow.
4. You can additionally set default values for the Recall Letter (I SDF 11550) item, Recall Email (I SDF 11553) item, and Days to Expire All Recalls After (I SDF 11551) item for requests generated via this method.

Then, set a template at the visit type level:

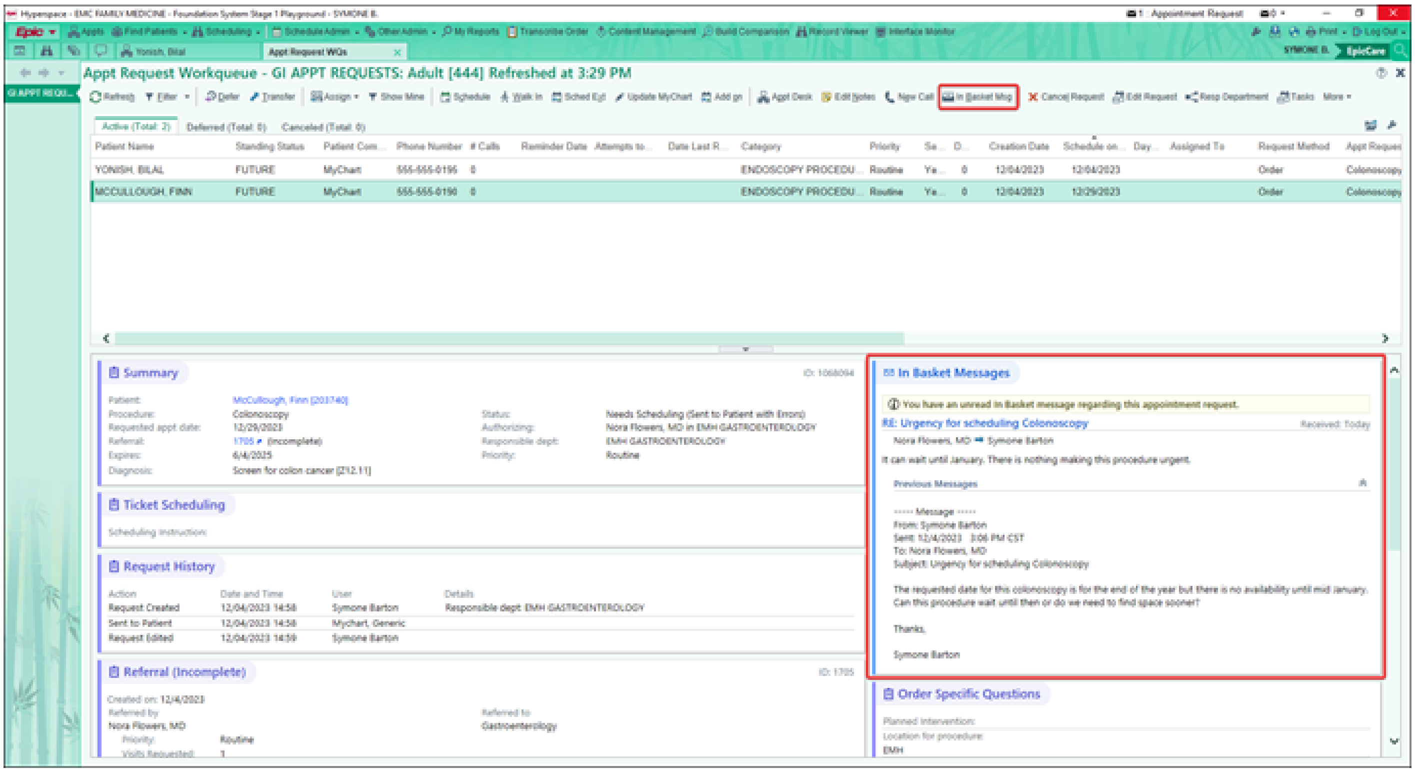
1. In Hyperspace, open the visit type (search: Visit Type).
2. Go to the Appointment Request > Recalls form.
3. In the Default Recall Templates (I PRC 1260) field, enter the template you want to use. For more information on creating a template, refer to the Create Recall Templates for Recalls topic. You can also configure the visit type to use a template from another visit type in the User Recalls From Visit Type (I PRC 1250) field, or apply templates based on a rule by using the Rule Based Recall templates (I PRC 1270 and I PRC 1280) table.

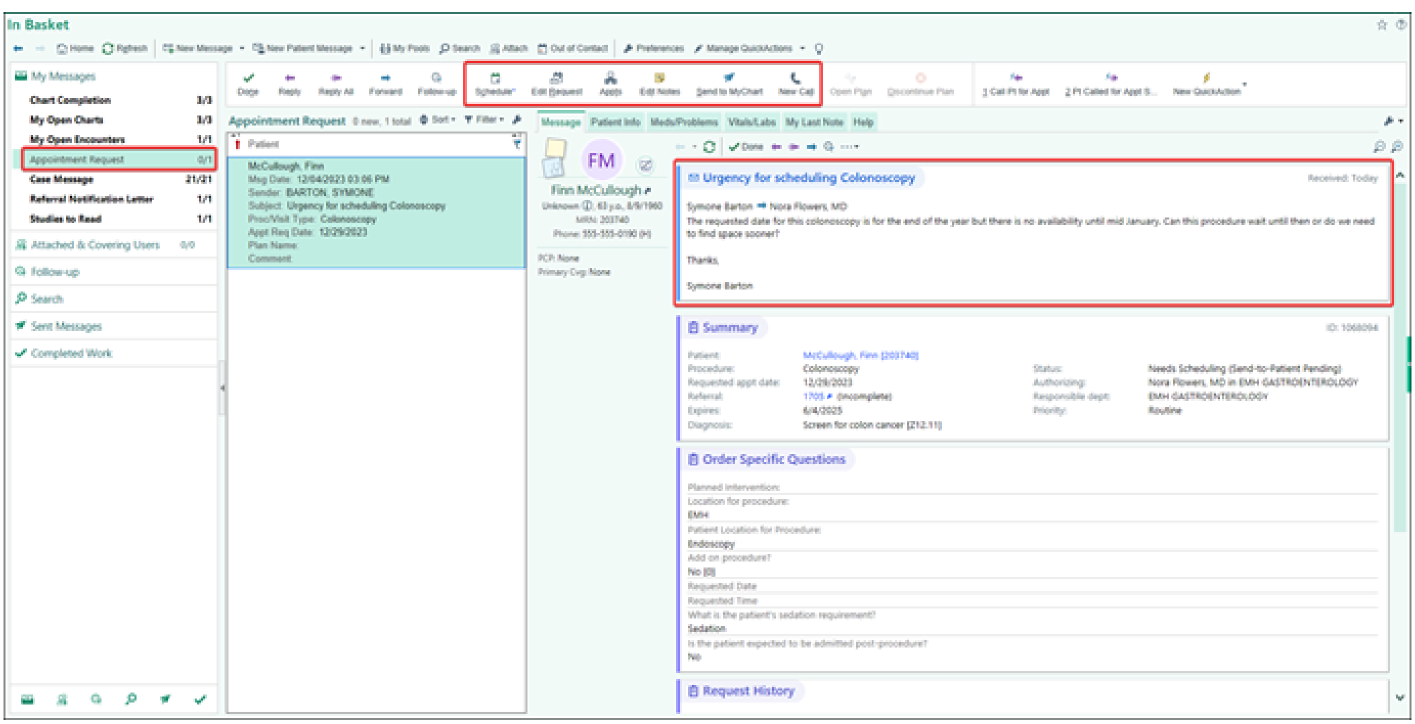
Send In Basket Messages Linked to Appointment Requests

Starting in February 2024

When scheduling appointments from appointment requests, schedulers might have questions that prevent them from scheduling. To streamline getting answers to these questions, schedulers can send In Basket messages linked directly to appointment requests they're working on. Schedulers don't need to include request or patient information in the message since the recipient can see that information directly in In Basket messages linked to appointment requests. The appointment request linkage also allows the recipient to take direct actions on the appointment request, like editing, scheduling, or sending it to a patient as a ticket. Schedulers can send these linked In Basket messages from the Appointment Desk, Appointment Request workqueues, the Snapboard, the Front Desk activity, and the Appointment Request Edit activity using the In Basket Msg button.

All messages linked to an appointment request are visible in print groups and HTML tables, allowing all users to see the entire conversation linked to the appointment request regardless of whether they sent the message themselves. This allows different users to follow up on a request as soon as a response is received, even if the message did not go to their In Basket. Also, when creating a new appointment request In Basket message, schedulers can choose to have responses to their message sent to a pool rather than to themselves. This allows others to also see the response in their In Basket and take action.





To help keep the new In Basket folder for the Appointment Request message type up to date with only actionable messages, messages are automatically marked as done in the following scenarios:

- The linked appointment request is completed and it has no incomplete tasks.
- The final task on a completed appointment request is completed.
- The appointment request is canceled.

Message type 790-Appointment Request is available to all users with the In Basket security points In Basket Listing Access (I ECL 20100), Send - Access Type (I ECL 20120), and Additional Send Type - Access (I ECL 20140) set to All. These users can use the In Basket Msg button on toolbars in Appointment Request workqueues, the Snapboard, the Front Desk activity, and the Appointment Request Edit activity. Complete the setup described below as necessary to make the In Basket Msg button available from the Appointment Desk, give users access to SmartTexts, and to update user security or update overridden menus or HTML displays.

Give Users Access to the In Basket Msg Button on the Appointment Desk

To make the Appointment Request Message activity available from the Active Requests and Finalized Requests tabs of the Appointment Desk, update Appointment Desk configuration reports to include the In Basket Msg button. In the Foundation System, we added the In Basket Msg option to the right-click menu and toolbar for the Active Requests and Finalized Requests tabs. Complete the following steps to update Appointment Desk configuration reports:

1. In Hyperspace, open Cadence System Definitions or a department record.
   - To open Cadence System Definitions, search Cadence System Definitions.
   - To open a department record, go to Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Select the Appointment Desk > Configuration form in Cadence System Definitions or the Appointment Desk Configuration form in your department record.
3. Click Edit report for the Active Requests Tab or the Finalized Requests tab.
4. On the Criteria tab, move the In Basket Msg option to the Right Click Actions list or Toolbar Actions list.

Give Users Access to SmartTexts in Appointment Request Messages

To allow users to select SmartTexts in Appointment Request In Basket messages, associate SmartText functional types with message type 790-Appointment Request:

1. In Hyperspace, open In Basket Epic-Wide settings and navigate to the SmartText Configuration for In Basket form.
2. Add 790-Appointment Request to the Message Type (I HDF 10180) field.
3. Add a SmartText functional type in the Functional Type (I HDF 10190) field. Refer to the Enable SmartTexts to Help Users Write Messages Quicker topic for more information on functional types.
4. Repeat steps 2 and 3 if there are multiple functional types you want to allow to be used in the Appointment Request message type.

Give Users Access to the New Appointment Request Message Type in In Basket Security

If any of the following items are not set to All in a user's In Basket security class, then you need to add 790-Appointment Request to the allowed list of message types to give them access to send and receive the Appointment Request message type.

- In Basket Listing Access (I ECL 20100)
- Send - Access Type (I ECL 20120)
- Additional Send Type - Access (I ECL 20140)

If security changes are needed, complete the following steps:

1. In Hyperspace, open the In Basket security class (search: In Basket Security).
2. Navigate to the Receive Message Type, Send Message Type, and Reply/Forward Message Type forms and add 790-Appointment Request to the allowed message types.

Add In Basket Msg Button to Overridden Menus

The new In Basket Msg button has been added to the below Epic released menus. If any of these menus have been overridden add menu 5520-ES_IT_INBASKET to the Menu Items (I E2U 230) item in the menu record.

- 5204-ES_MT_SCH_ORD_WQ
- 1932-ES_MT_FRONT_DESK_ORDERS
- 5076-ES_MT_APPTREQUEST
- 1853-ES_IT_DEPOT_MENU_ORDERS

To add the In Basket Msg button to an overridden menu:

1. In Chronicles, access the Menu (E2U) master file.
2. Select Enter Data.
3. Select Create/Edit Menu and open your menu that overrides an Epic-released menu.
4. Page down once to the Menu Information screen.
5. Add ES_IT_INBASKET to the list of Items.

Update Overridden HTML Display System Configuration

If you have overridden the default HTML tables in HTML display 7-AS Orders: Expand Popup or 76-AS Orders: Workqueue & Front Desk, add HTML table 62030-ES APPT REQUEST RELATED MESSAGES to your override. Or if you have made a copy of report 63000-ES Order Information, which is used in HTML table 62030, add print group 62148-ES Display Request Messages to the list of print groups in the report.

Add the HTML table

1. In Hyperspace, open the HTML Display Configuration activity (search: HTML Display Configuration)
2. Select 7-AS Orders: Expand Popup or 76-AS Orders: Workqueue & Front Desk.
3. Choose the level your override is set at (System, Location/Service Area, or Department).
4. Add HTML table 62030-ES APPT REQUEST RELATED MESSAGES to the list of HTML Tables.

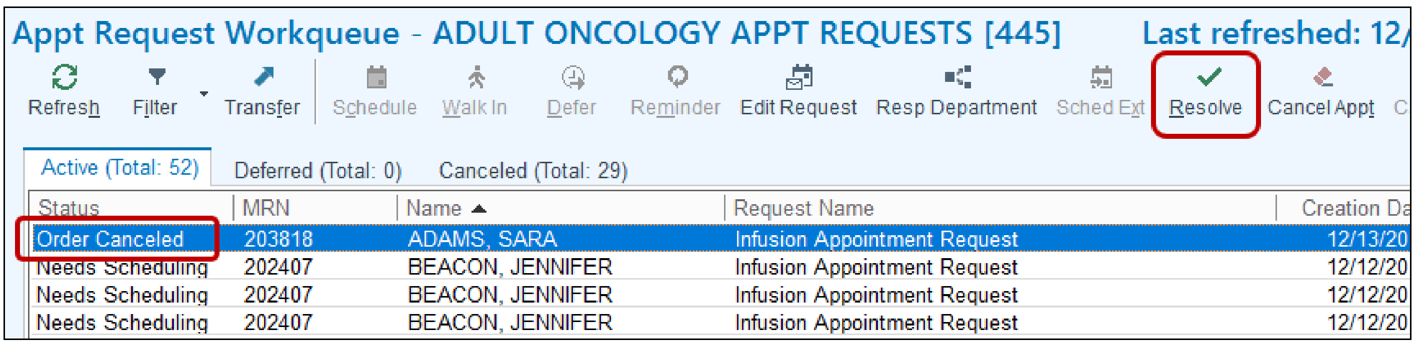
Update the report

1. In Chronicles, access the Reports (LRP) master file.
2. Select Enter Data.
3. Select Create/Edit Report and open the report being used in HTML display 7-AS Orders: Expand Popup or 76-AS Orders: Workqueue & Front Desk HTML Display Definitions.
4. Page down four times to the Report Definition screen.
5. Add print group 62148-ES Display Request Messages to the list of Report Print Groups.

Allow Schedulers to Resolve Appointment Requests

Starting in Epic 2017

When appointment requests that are linked to a scheduled, arrived, or completed appointment are canceled or modified, they return to scheduling for follow-up by a scheduler. If no changes are needed for the appointment, schedulers can click the Resolve button in an appointment request workqueue to remove the request from the workqueue. If you want to report on these resolved requests later, the Request Base Status (I ORD 67001) item is set to Canceled for canceled requests or Scheduled for modified requests.

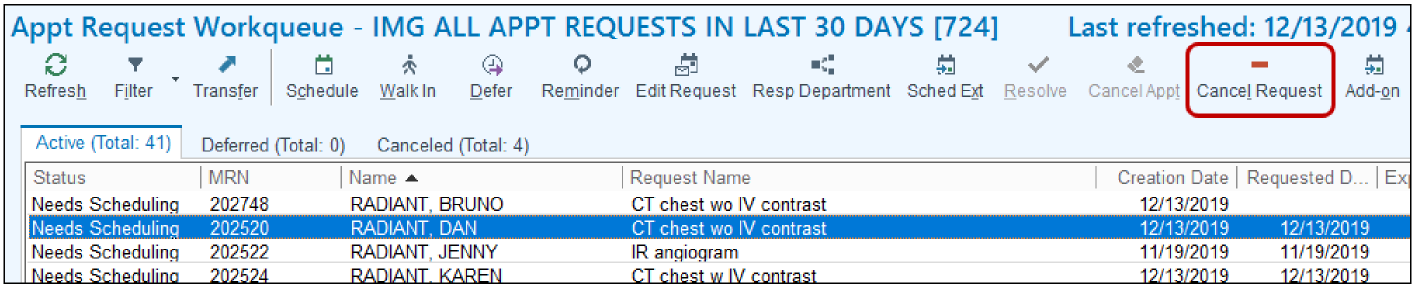


The Resolve button appears automatically on the standard appointment request workqueue toolbar. If you override this toolbar, you might need to add the button for your users. The menu record for the toolbar is 5204-ES_MT_SCH_ORD_WQ and the menu record for the Resolve button is 5065-ES_IT_RESOLVE_ORDERS_DEFAULT. Refer to the Add a Button or Menu to an Existing Menu or Toolbar topic for detailed instructions about extending menus.

You can also add a Resolve button and right-click option to the Appointment Requests tab of the Appointment Desk. For more information, refer to the Configure the Appointment Desk Tabs topic.

Allow Schedulers to Cancel Appointment Requests That Don't Need to Be Scheduled

Sometimes an appointment request doesn't actually need scheduling, like when a clinician accidentally places a duplicate order. To prevent unnecessary appointments, schedulers with the correct security can mark appointment requests as not needing scheduling. Schedulers with this security see the Cancel Request button on the appointment request workqueue toolbar.



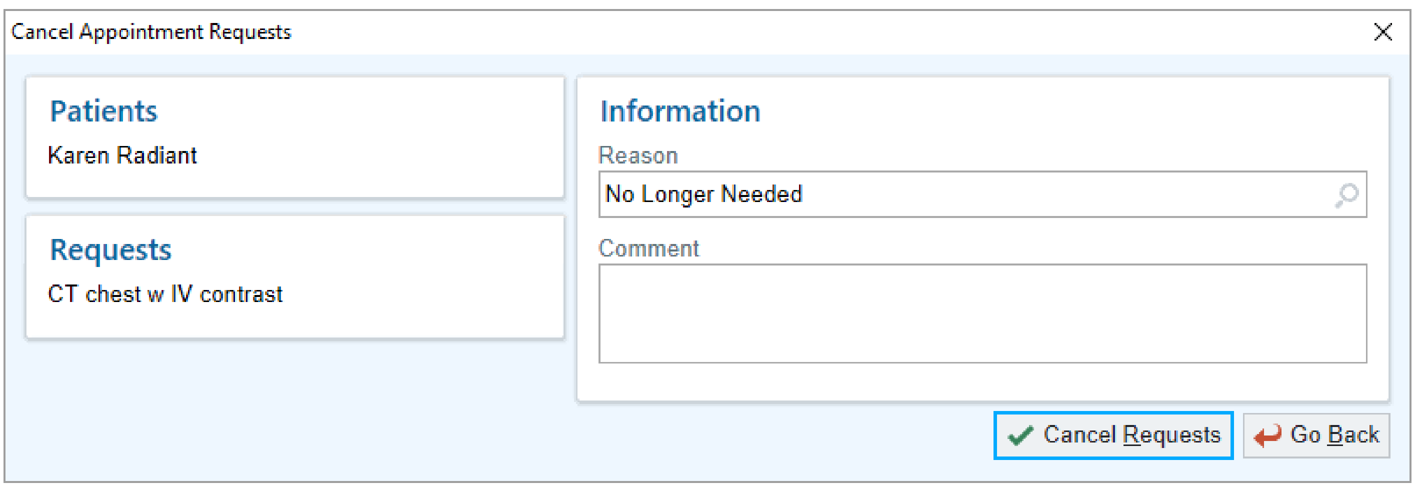
1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Requests, Prerequisites, & Recalls form.
3. In the Requests section, enter Yes in the Cancel order request (I ECL 5181) field.

Refer to the Foundation Hosted environment and the Users and Security Matrix to see which Cadence users can cancel appointment requests.

You can also add a Cancel button and right-click option to the Active Requests tab of the Appointment Desk. For more information, refer to the Configure the Appointment Desk Tabs topic.

Collect Reasons Why Schedulers Cancel Appointment Requests

When schedulers cancel an appointment request, you can prompt them to select a reason why the appointment request doesn't need to be scheduled and enter a comment. These reasons help you make sure schedulers cancel the correct appointment requests or determine if schedulers are canceling a lot of appointment requests for certain reasons. You determine if schedulers are required to enter a reason when canceling an appointment, as well as the list of reasons schedulers can choose.



Collect Reasons When Schedulers Cancel Appointment Requests

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form. In August 2018 and earlier, select the Orders/Requests > Workqueues/Cancel form.
3. In the Collect Removal Reason? (I SDF 10236) field, select Yes, required if schedulers need to enter a reason when they cancel an appointment request. Select Yes, recommended to prompt schedulers with the reason window but not require them to enter a reason. To replicate the Foundation System, select Yes, required.

Collect Comments When Schedulers Cancel Appointment Requests

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form. In August 2018 and earlier, select the Orders/Requests > Workqueues/Cancel form.
3. In the Collect Removal Comments? (I SDF 10238) field, select Yes, required if schedulers need to enter a comment when cancel an appointment request. Select Yes, recommended to prompt schedulers with the comment window but not require them to enter a comment.

Define the List of Reasons for Canceling Appointment Requests

Create a category value for each removal reason you want available to schedulers in the Cancel Reason (I ORD 1510) category list. For additional information about editing category lists, refer to the Modify a Category List's Values topic.

The Foundation System has several appointment request cancellation reasons including Patient and Performed Elsewhere. Refer to the Foundation Hosted environment to see the whole list.

Choose the Cancellation Reasons That Indicate an Appointment Request Was Scheduled Externally

Sometimes schedulers cancel an appointment request because it was scheduled outside of Epic or at another organization. You can keep track of these cancellation reasons by listing them in Cadence System Definitions. If a treatment plan appointment request was canceled for one of these reasons, the request appears with a calendar icon with a green check mark in the treatment plan so clinicians know the request was scheduled.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form. In August 2018 and earlier, select the Orders/Requests > Workqueues/Cancel form.
3. In the Removal Reasons for Scheduled Externally (I SDF 10239) field, enter the cancellation reasons that you want to mean a request was canceled because it was scheduled elsewhere.

Automatically Cancel Linked Appointment Requests When Appointments Are Canceled

You can set up the system so that when an appointment that was scheduled from an appointment request is canceled with a reason that indicates it doesn't need to be rescheduled, the request is automatically canceled from scheduling. This saves your users the time of manually canceling the linked request. To do this, you list the appropriate appointment cancellation reasons in Cadence System Definitions. You can also map your appointment cancellation reasons to your appointment request cancellation reasons if you want to record a specific cancellation reason with the order.

To ensure that requests are appropriately canceled when an appointment is canceled with the cancellation reasons you specify as part of the setup, users in the Technologist Work List are prompted to cancel the linked order when they use one of the specified cancellation reasons while canceling an appointment. Users must manually cancel the linked order because the automatic cancellation process doesn't apply to the Technologist Work List.

When the user chooses to cancel an appointment with one of the specified cancellations reasons, a warning message appears instructing them to also cancel the order. The user must then select the Cancel order check box before completing the appointment cancellation. If the user doesn't have EpicCare security point 40-Cancel Order, they cannot cancel the appointment using the selected reason. They can select a different reason if appropriate or ask a supervisor to cancel the appointment and order for them.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Workqueues/Cancel form.
3. Complete the Cancel Appt Cancel Request Reason Mapping Table:
    - In the Cancel Appt Reason (I SDF 10570) field, enter appointment cancellation reasons from the Reason for Cancellation (I EPT 7300) category list. Requests are not automatically canceled for appointments that are canceled with a reason that is not listed here.
    - In the Cancel Request Reason (I SDF 10571) field, enter the request cancellation reason from the Cancel Reason (I ORD 1510) category list for the system to record when it cancels the request linked to the appointment with the corresponding appointment cancellation reason. If you leave this field blank, the system cancels the request without recording a reason.

Automatically Cancel Orders When the Linked Request Is Canceled

Starting in August 2023

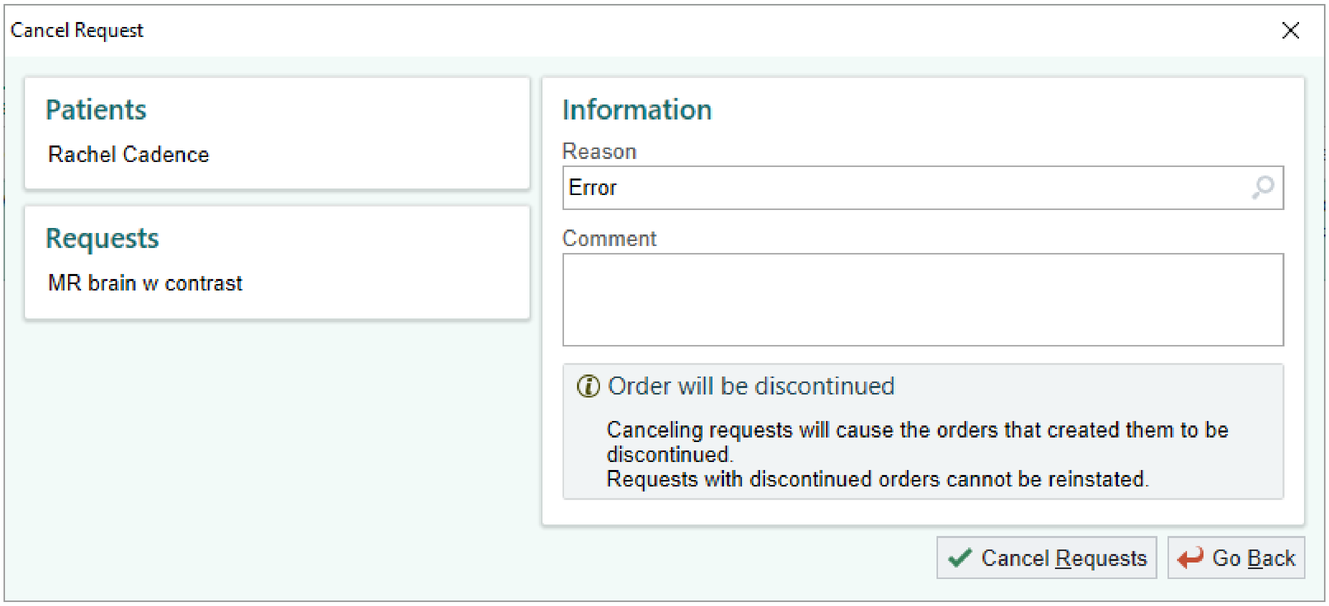
You can set up the system so orders meeting certain criteria are canceled when the linked appointment request is canceled through any workflow. By configuring these settings in Cadence System Definitions, you can prevent orders from being visible in clinical workspaces when they don’t appear on the patient's Appointment Desk. This saves time by combining some cancellations into one step rather than canceling appointment requests and orders separately.

> **!** If your organization schedules treatment plans, exercise caution when configuring these settings. If you use these settings and an order is canceled as a result of a request being canceled, only one order from the plan is canceled, which might affect subsequent orders in the plan.
>
> If canceling an order usually triggers an OurPractice Advisory or other order validation, these might not appear for orders canceled through a canceled appointment request. If you would like to show OurPractice Advisories for certain types of orders, do not allow them to be discontinued via appointment requests. Work with your clinical teams who own OurPractice Advisory content to validate which orders are safe to discontinue.

Considerations
If you use Radiant, keep in mind that the Prior Status activity allows administrators and technologists to revert exams to an earlier status and allows order cancellation. This feature isn't affected by the Cadence System Definitions settings described in this topic. Prior Status takes precedence, and any existing hard stops will remain in place. Refer to the Prior Status Setup topic for more information.

As part of setting up this feature, consider whether you want providers to be notified when these orders are canceled. If so, you can configure After Cancel Extensions to send an In Basket message when the order is canceled, if your organization doesn't already have that configured.

If you set up this feature, when a scheduler cancels a request that you've set up to automatically cancel an order, they see a message warning them that the corresponding order will also be discontinued when they cancel the appointment request.



1. First, consult with your organization's EpicCare Ambulatory and other clinical teams to determine if there are any orders which should not be canceled by appointment request cancellation, and work with them to appropriately configure these settings.
2. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
3. Select the Workqueues/Cancel form. The Cancel Orders When Canceling Requests section contains the settings needed to configure how orders are handled when the linked request is canceled.
    - Set Cancel Procedure Orders? and Cancel Medication Orders? to Yes or No depending on which types of orders should be canceled.
    - In the Cancel Linked Procedure Order Reason (I SDF 10582) field, enter the reason to show when an order is canceled.
    - In the Discontinue Linked Medication Reason (I SDF 10583) field, enter the reason to show when a medication order is canceled.
    - In the Cancel Linked Order User (I SDF 10581) field, enter a background user to list as canceling the order. Depending on which types of orders this user should be able to cancel, they need the following security points:
        - To cancel medication orders: EpicCare security points 242-Discontinue Outpatient Medications and 310-Discontinue Inpatient Medications, and Inpatient security point 36-Discontinue Medication.
        - To cancel procedure orders: EpicCare security points 40-Cancel Order and 313-Discontinue Inpatient Procedures, and Inpatient security point 36-Discontinue Medication.
    - In the Allow Users to Override Order Cancel (I SDF 10586) field, optionally enter Yes if you would like to allow users to keep an order active when a request is canceled despite meeting the conditions of Cancel Linked Order Cancel Request Reasons and Cancel Linked Order Rule. If you enter Yes, schedulers see a “Discontinue Linked Order” checkbox on the cancel request window. If checked, the order is canceled.
    - In the Cancel Linked Order Cancel Request Reasons (I SDF 10584) field, enter the Cancel Request reasons that should result in the linked order being canceled when the request is canceled, provided the order passes the Cancel Linked Order Rule.
        - This field is optional. If left blank, any Cancel Request reason cancels the order if the order

passes the Cancel Linked Order Rule, if set. If both fields are left empty, all procedure and/or medication orders associated with an appointment request are canceled if the request is canceled.

        - Optionally check the Exclude checkbox if you would like the list of Cancel Linked Order Cancel Request Reasons list to be exclusive rather than inclusive.

    - In the Cancel Linked Order Rule (I SDF 10580) field, enter the rule against which orders are evaluated to determine if canceling the request cancels the order.
        - This field is optional. If left blank and the Cancel Request reason is one that was set in the previous step, the order is canceled.
        - To build a rule for this field, open the Rule Editor (search: Rule Editor) and create a new rule with a context of Order.

If your organization hasn't set up In Basket messages to be sent upon order cancellation, providers aren't notified when their orders are canceled. If you need to start sending these messages, first consult with your organization’s EpicCare Ambulatory and other clinical teams to determine which extensions are most appropriate to add. Then, do the following:

1. From the EpicCare Ambulatory menu, go to Management Options > Edit System Definitions (LSD) > Procedure, Scheduling, Task > Reorder, Modify, Discontinue, Administer.
2. In After Cancel Extensions (I LSD 3050), set an extension (LPP) that sends a message to a provider or scheduling pool when one of their orders is discontinued. You can use the following existing extensions to send messages upon order cancellation and can also configure them to suppress messages for orders canceled with certain reasons: 5114-Message to Ordering User Upon Order Cancellation, 5115-Message to Authorizing Provider Upon Order Cancellation, or 5118-Message to Department Scheduling Pool Upon Order Cancellation.
    - If you would like to suppress messaging for orders that are canceled with specific reasons, you can add cancellation reasons to the Exclude Cancel Reasons parameter of the extension. To add excluded cancellation reasons, open the extension in text, page down to the Parameters screen, and enter values in Exclude Cancel Reasons. For example, adding 4-Duplicate and 6-No Show suppresses messages for orders that are canceled with either of those reasons.

Assign a Default Cancel Reason for Rescheduled Appointments That Are Linked to Requests

Cadence prompts schedulers to select an appointment cancellation reason when they reschedule appointments that are linked to appointment requests. If schedulers often use the same cancellation reason for rescheduled appointments that are linked to requests, you can configure the system to use a default cancellation reason.

In the Foundation System, we entered a reason of Provider.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form. In August 2018 and earlier, select the Orders/Requests > General form.
3. In the Default cancellation reason (I SDF 10259) field, enter the default reason why appointments are rescheduled for requests. The system selects this reason automatically when schedulers reschedule appointments that are linked to requests.

Stop Canceled Orders with Linked Appointments from

Reappearing in Scheduling Activities

Starting in Epic 2017

By default, canceled orders reappear in Cadence, Cupid, and Radiant activities when the order is linked to a scheduled, arrived, or completed appointment because a scheduler might need to modify that appointment. You can turn off this behavior in Cadence System Definitions if there's no reason for schedulers at your organization to follow up on these orders. Starting in August 2019, you can choose to turn off this behavior for procedures only, for medications only, or for both.

This setting does not affect Beacon treatment plan scheduling integration with Cadence for future orders that have been released for scheduling from a Beacon treatment plan. Those orders are always returned to scheduling when an oncologist cancels an order for which an appointment has already been scheduled, arrived, or completed.

This setting also does not apply to the Schedule Orders Work List on the Technologist Work List, the Orders report and High Priority Orders report on the imaging Front Desk, and the Verify Orders activity. Canceled orders that are linked to a scheduled, arrived, or completed appointment never appear in these activities.

To turn off this behavior:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form. In August 2018 and earlier, select the Orders/Requests > General form.
3. In the Return orders canceled after scheduling? (I SDF 10261) field, enter one of the following values:
   - Never. Turns this behavior off for all orders. In May 2019 and earlier, this option is labeled No.
   - Procedures only. Turns this behavior off for medication orders only. Available starting in August 2019.
   - Medications only. Turns this behavior off for procedure orders only. Available starting in August 2019.

Allow Schedulers to Record When an Appointment Request Was Scheduled Externally

Starting in Epic 2017

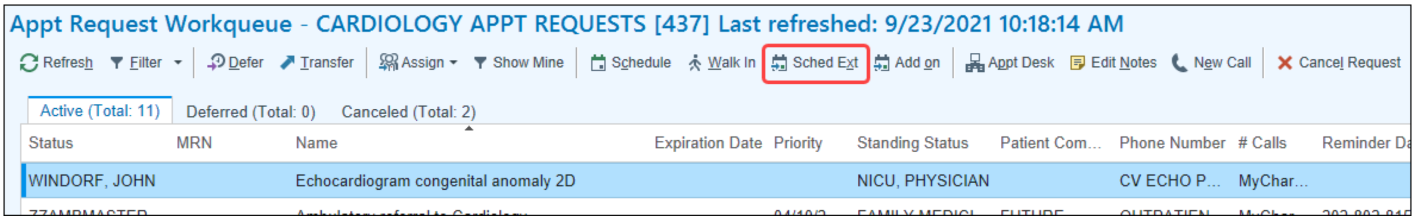
When a patient has scheduled an appointment at another organization for an appointment request in your system, your schedulers can record information about that external appointment in Epic. They can enter external appointment information by selecting a request in an appointment request workqueue and clicking the Sched Ext button on the toolbar or in the Appointment Request activity by clicking Schedule Externally. You can also add the Sched Ext button and Scheduled Externally right-click option to the Active Requests tab of the Appointment Desk.

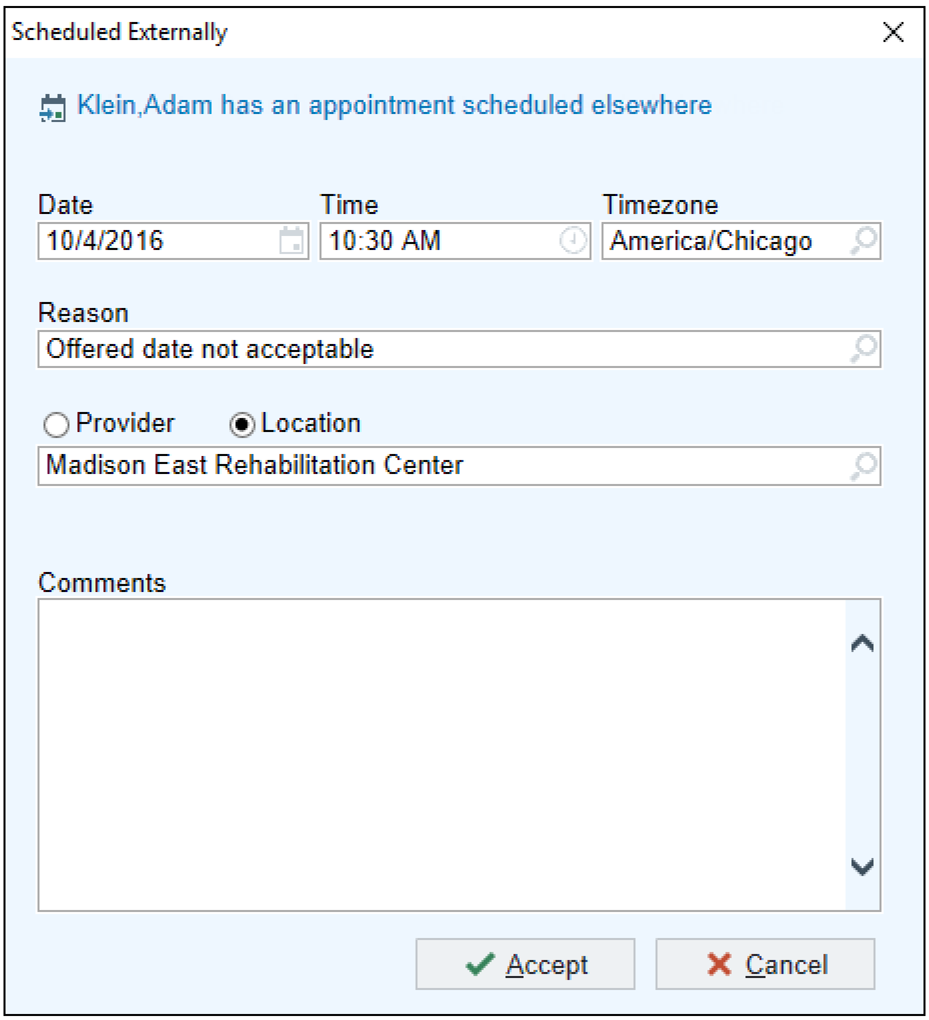
Schedulers select a reason why the appointment was scheduled elsewhere. You define these reasons in the External Appointment Reason (I ORD 67801) category list. The following released values are available, but you can deactivate these or add your own:

- Services not available
- Offered date not acceptable
- Travel concerns

A patient's external appointments appear in the Patient Itinerary report and in many After Visit Summary (AVS) print groups.

Note for organizations that are licensed for PAS: The Scheduled Externally feature cannot update the status of Waiting Lists that are linked to requests. To prevent reporting issues with Waiting Lists, schedulers cannot use the Scheduled Externally feature for requests that are linked to Waiting Lists.





Create Reasons Why Appointment Requests Are Scheduled Externally

Modify the External Appointment Reason (I ORD 67801) category list if you want to deactivate the Epic-released options or created your own reasons why an appointment request was scheduled externally. Refer to the Modify a Category List's Values topic for detailed instructions.

In the Foundation System, we added a value of Patient Preference to this category list.

Add the Sched Ext Button to the Appointment Desk

If you want to allow schedulers to record external appointments for requests from the Appointment Desk, you can add the Sched Ext button and right-click option to the Active Requests tab of the Appointment Desk. For more information, refer to the Configure the Appointment Desk Tabs topic.

The Foundation System uses this option. Your Epic representative can help you incorporate this build into your own environment. To get started, contact your Epic representative and mention parent SLG 1416567.

Allow Schedulers to Select Scheduling Delays for Orders

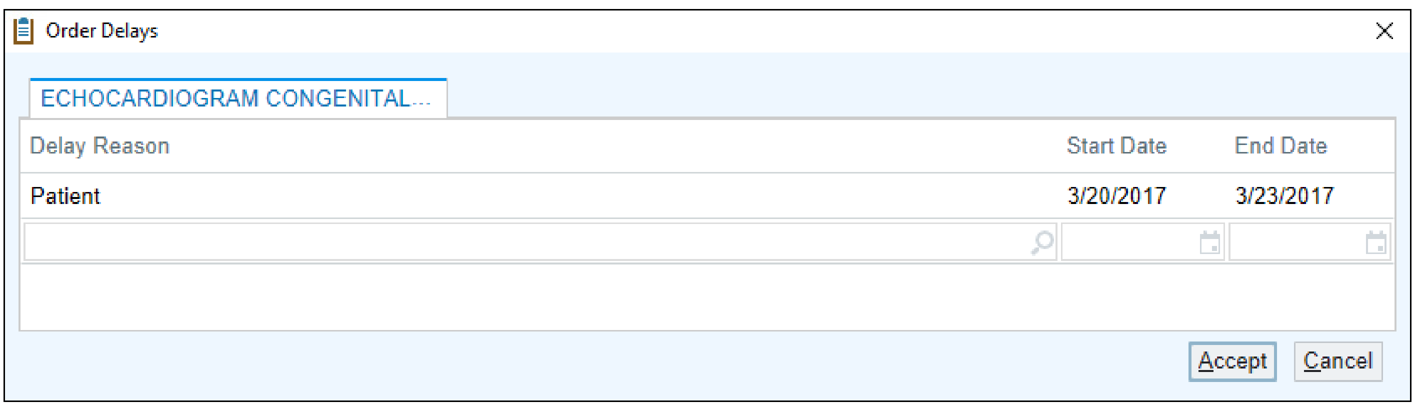
Starting in Epic 2018

Epic 2017 by SU E8305384, C8305384-Hyperspace, E8305386, C8305386-Hyperspace, C8305386-HSWeb, E8309551

Organizations in Ontario can collect reasons why scheduling an order has been delayed and report those reasons to Cancer Care Ontario's Wait Time Information System (WTIS). When you enable this feature, schedulers can specify reasons why they've delayed an appointment for an order. The Order Scheduling Delays activity appears in the following places to allow schedulers to document the reason for a delay when scheduling an appointment from an order:

- Appointment Review window (November 2021 and earlier)
- Schedule orders/appointment request workqueues
- Department Appointments report
- Future, Orders, and Active Requests tabs of the Appointment Desk
- Technologist Work List and Technologist Work List Schedule Orders report
- Snapboard

When you turn this feature on, schedulers can collect reasons for scheduling delays for all orders by default, but you can configure a rule that specifies types of orders that delays can be collected for.



Create Order Scheduling Delay Reasons

1. In Hyperspace, go to the Category List Maintenance activity (search: Category List Maintenance).
2. Add category values to the Order Schedule Delay Reason (I ORD 67402) item.
    - Optionally enter Yes in the Patient initiated delay? field to indicate whether the delay is a patient initiated delay. The default is No.
    - Optionally enter Yes in the Require dates? field to require schedulers to set dates for the delay. The default is No.

Enable Order Scheduling Delay Collection

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form. In August 2018 and earlier, select the Orders/Requests > General form.
3. Set Enable order scheduling delay collection? (I SDF 19000) field to Yes.
4. Specify a rule in the Order scheduling delay filter rule (I SDF 19001) field. If an order meets the criteria of this rule, it can be associated with an order scheduling delay, and schedulers can select it when making an appointment. If the field is left blank, schedulers can assign a delay to any order.

Show the Order Delay Audit Trail to Schedulers

To show the audit trail in the Expand Order window:

1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and open your override of HTML display 7-AS Orders: Expand Popup.
2. Add HTML table 67400-AS Order Delays Audit Changes to the list of HTML tables that appear in the HTML display.

To show the audit trail in the Expand Appointment window:

1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and open your override of HTML display 4-AS Appointment.
2. Add HTML table 67401-AS Order Delays Audit Appointment to the list of HTML tables that appear in the HTML display.

Give Users Access to the Order Delays Window

In November 2021 and earlier, the Order Scheduling Delays section appears automatically in the Appointment Review window when you enable order scheduling delay collection. Starting in February 2022, it does not appear in Appointment Review. To make the Order Delays window available in other activities, complete the following steps:

- Schedule orders/appointment request workqueues: We added the Order Delays button (menu record 102-ES_IT_ORDER_DELAYS_APPT) to the standard toolbar (menu record 5204-ES_MT_SCH_ORD_WQ). If you override this menu at your organization, you need to manually add the Order Delays button to your overrides. Refer to the Add a Button or Menu to an Existing Menu or Toolbar topic for detailed instructions.
- Department Appointments report: We added the Order Delays button (menu record 102-ES_IT_ORDER_DELAYS_APPT) to the standard toolbar (menu record 1046-ES_MT_DEP_APPTS_REP). If you override this menu at your organization, you need to manually add the Order Delays button to your overrides. Refer to the Add a Button or Menu to an Existing Menu or Toolbar topic for detailed instructions.
- Future, Orders, Wait List, and Active Requests tabs of the Appointment Desk: Modify your report settings for these tabs to add the Order Scheduling Delays option to the toolbar and right-click menu. Refer to the Configure the Appointment Desk Tabs topic for detailed instructions.
- Technologist Work List and Technologist Work List Schedule Orders report: We added the Order Delays button (menu record 102-ES_IT_ORDER_DELAYS_APPT) to the standard toolbars (menu records 52007-RIS_MNU_TB_TECHWKLIST2 and 52013-RIS_MNU_TB_TWL_SCHED_ORD). If you override these menus at your organization, you need to manually add the Order Delays button to your overrides. Refer to the Add a Button or Menu to an Existing Menu or Toolbar topic for detailed instructions.
- Snapboard: Modify the report settings for your Snapboard right-click menu to add the Order Scheduling Delays option. Refer to the Design the Right-Click Menu on the Snapboard topic for detailed instructions.

Allow Schedulers to Defer Orders at the Order Level

Starting in Epic 2017

Before Epic 2017, the only way to defer a request is in appointment request workqueues, and the deferral applies only to the workqueue item (WQI) record for the request and not the request itself. The deferral information also doesn't appear in other places in Cadence, such as the patient's Appointment Desk. Users can't defer requests in other scheduling activities like the Snapboard.

Starting in Epic 2017, you can allow schedulers to defer requests at the request level instead of the workqueue level. This makes it possible for schedulers to defer requests from appointment request workqueues, the Snapboard, and the Active Requests tab of the Appointment Desk. Columns for the Active Requests tab of the Appointment Desk also allow schedulers to see deferral information for a request.

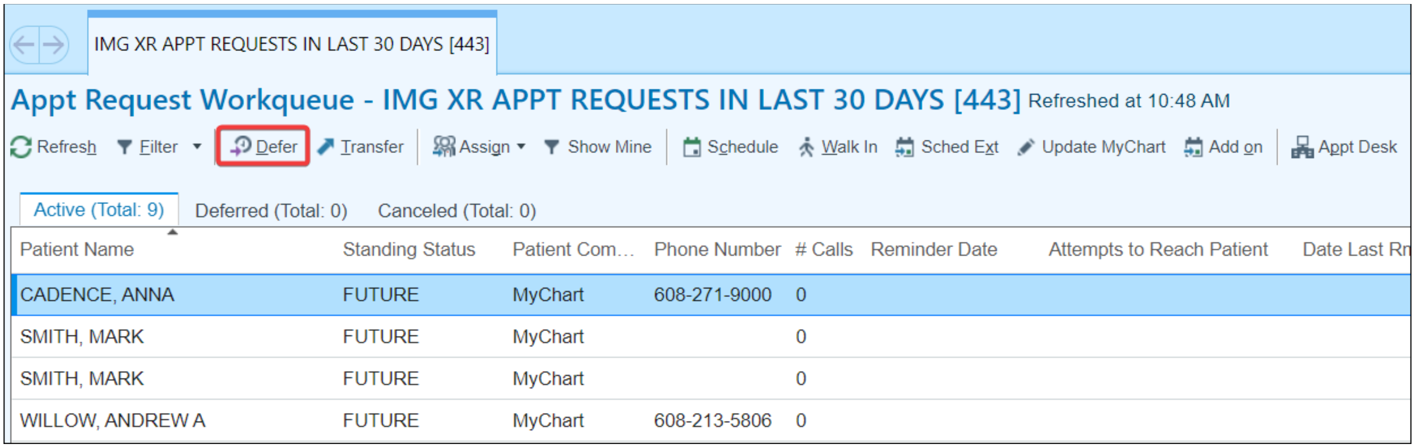
The workflow for schedulers isn't very different from deferring requests at the workqueue level. They select an order and click Defer. In the Defer Request window, they can enter the following information:

- A reason why the request cannot be scheduled right now. Starting in August 2018, in Epic 2018 with special updates E8410244 and C8410244-Hyperspace, and in Epic 2017 with special updates E8331707 and C8331707-Hyperspace, this reason is not required by default, but you can make it required. For more information, refer to the Allow Users to Specify a Reason When Deferring or Transferring Records in Workqueues topic. In Epic 2018 and Epic 2017 without the special updates, this reason is required and cannot be configured to be optional.
- A date and time for when the request should no longer be deferred. Note that these fields are not required like they are for workqueue-level deferrals, which allows schedulers to defer requests indefinitely unless you've configured the maximum deferral days for appointment request workqueues. For more information, refer to the Limit the Time a User Can Defer an Order topic.
- Any comments about the deferral.

Schedulers can undo the deferral by clicking Undo Deferral.

To start using request-level deferral you must turn it on in Cadence System Definitions. When you turn on the feature, the Defer button is available automatically on the standard appointment request workqueue toolbar and orders depots in the Snapboard. You can also choose to:

- Add the Defer button to a custom appointment request workqueue toolbar
- Create custom deferral reasons
- Add deferral columns to your appointment request workqueue views
- Add the Defer button and deferral columns to the Orders or Active Requests tab of the Appointment Desk


IMG XR APPT REQUESTS IN LAST 30 DAYS [443]
Appt Request Workqueue - IMG XR APPT REQUESTS IN LAST 30 DAYS [443] Refreshed at 10:48 AM
Refresh
Filter
Defer
Transfer
Assign
Show Mine
Schedule
Walk In
Sched Ext
Update MyChart
Add on
Appt Desk
Active (Total: 9)
Deferred (Total: 0)
Canceled (Total: 0)
Patient Name
Standing Status
Patient Com…
Phone Number
Calls
Reminder Date
Attempts to Reach Patient
Date Last Rr
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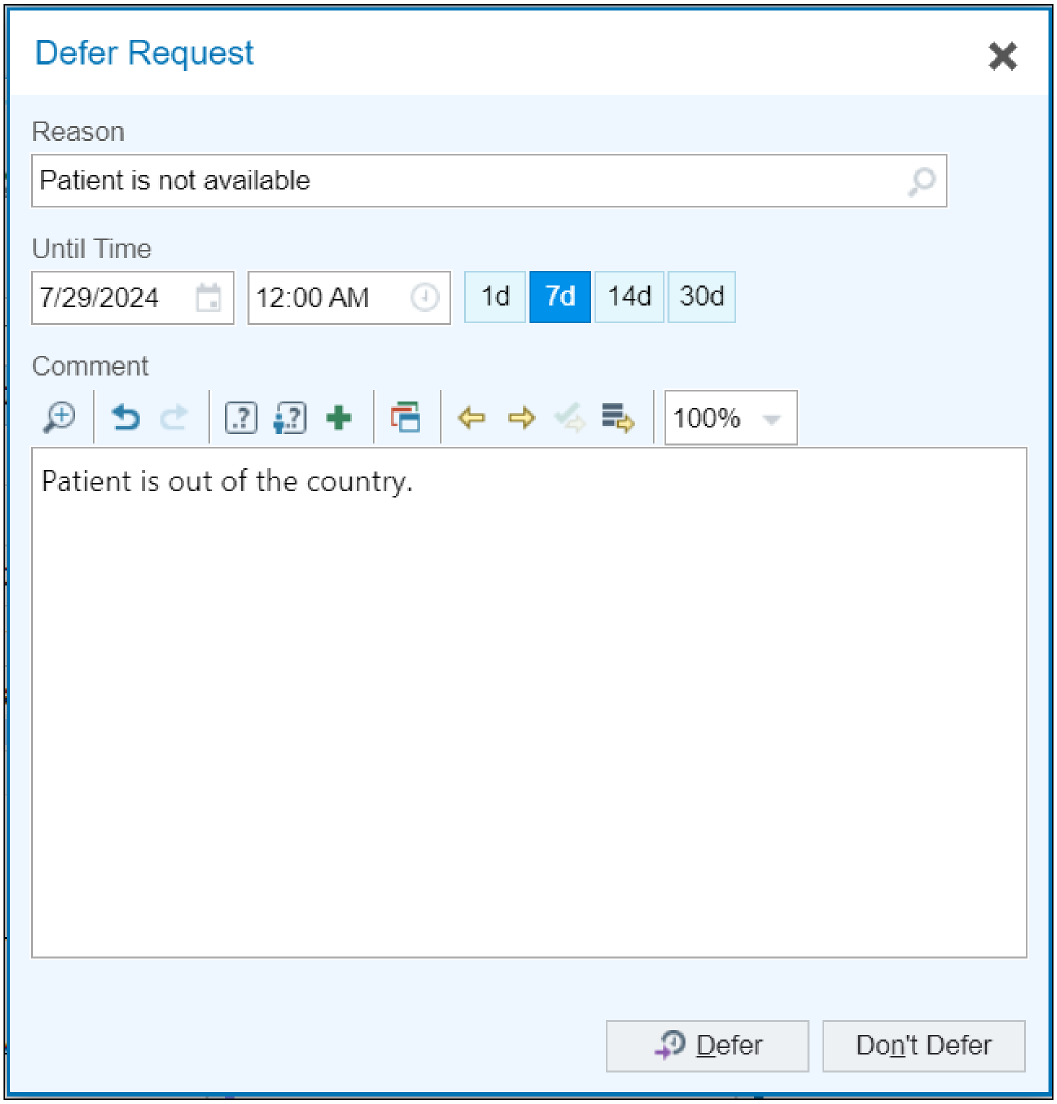
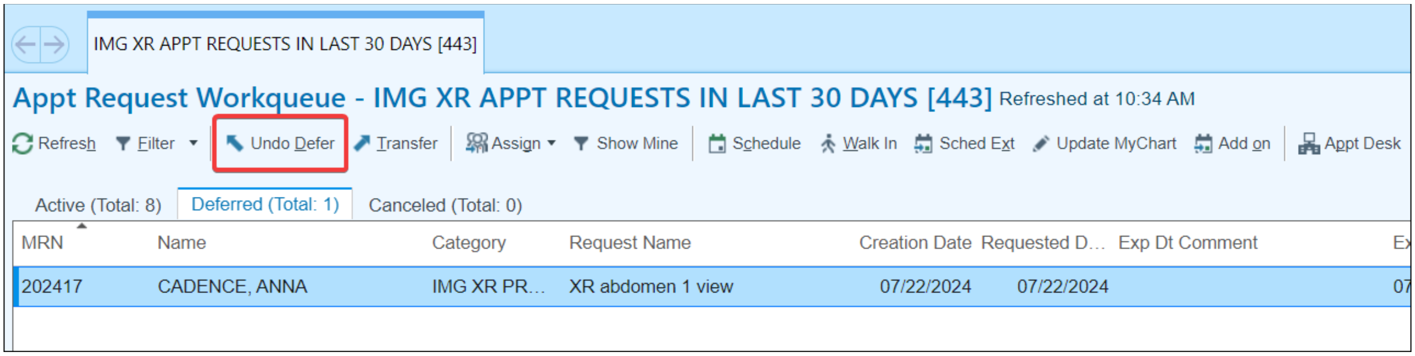

Defer Request
Reason
Patient is not available
Until Time
7/29/2024
12:00 AM
1d
7d
14d
30d
Comment
100%
Patient is out of the country.
Defer
Don't Defer



Turn On Order-Level Deferral

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form. In August 2018 and earlier, select the Orders/Requests > Workqueues/Cancel form.
3. Enter Yes in the Use Request-Level Defer Function? (I SDF 10186) field.

Add the Defer Button to a Custom Appointment Request Workqueue Toolbar

If you don't use the standard appointment request workqueue toolbar (menu record 5204-ES_MT_SCH_ORD_WQ), you must add the Defer button (menu record 5135-ES_IT_APPT_REQUEST_DEFER_WQ) to your custom toolbar. Refer to the Add a Button or Menu to an Existing Menu or Toolbar topic for detailed instructions.

Create Reasons Why Orders Are Deferred

Modify the Appointment Request Current Deferral Reason (I ORD 67360) category list if you want to deactivate the Epic-released options or create your own reasons why an order can be deferred. Refer to the Modify a Category List's Values topic for detailed instructions.

Add Deferral Columns to Your Appointment Request Workqueue Views

Refer to the Customize the Columns in Appointment Request Workqueues topic for details about adding the following properties to appointment request workqueue views to show order-level deferral information:

- 98620-Appt Request - Is Deferred?
- 98621-Appt Request - Defer Reason
- 98622-Appt Request - Defer Until Time
- 98623-Appt Request - Deferral Comments
- 98636-Appt Request - Deferred by User

Add the Defer Button and Deferral Columns to the Appointment Desk

If you want to add the Defer button to the Orders or Active Requests tabs of the Appointment Desk, refer to the Configure the Appointment Desk Tabs topic for detailed instructions. You can also add the following columns to the Orders or Active Requests tab to help schedulers identify deferred orders:

- 1846-Appt Request Is Deferred
- 1847-Appt Request Defer Until Time
- 1848-Appt Request Deferral Comments
- 1849-Appt Request Deferral Reason
- 1852-Appt Request Deferred By User

Change the Length of Time for When Canceled Requests Can No Longer Be Scheduled

When an appointment requests has been canceled for 30 days it is unlikely that it will be scheduled. These requests are likely no longer clinically relevant, and a patient would need to have a new order signed by a physician. For these reasons, requests that have been canceled fall off your appointment requests workqueues after 30 days unless a scheduler reinstates them from the appointment desk before their expiration date. The number of days is configurable in Cadence System Definitions.

> Starting in May 2023, appointment requests for dental visits also expire based on the Days to Keep Canceled Requests (I SDF 10185) setting described below. In February 2023 and earlier versions, appointment requests for dental visits never expire, regardless of how this setting is configured.

Complete these steps if 30 days is not an appropriate length of time for canceled requests to fall off your workqueues:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form. In August 2018 and earlier, select the Orders/Requests > Workqueues/Cancel form.
3. Change the value in the new Days to Keep Canceled Requests (I SDF 10185) field. The default value is 30.

Hide the Cancel Appts Form for Appointments That Are Linked to Appointment Requests

By default, Cadence prompts schedulers to select a reason when they cancel appointments that are linked to appointment requests. Follow the steps below if you don't want the system to prompt schedulers to enter a cancel reason for these appointments.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form. In August 2018 and earlier, select the Orders/Requests > General form.
3. In the Always prompt for cancel reason? (I SDF 10242) field, enter No. When this field is set to No and Cadence is configured to require a cancel reason for appointments, the Cancel Appts form still appears if you haven't specified a default cancellation reason for appointment requests.

Restrict Scheduler Access to Orders and Appointment Requests by Department

If schedulers should be allowed to see schedulable orders or appointment requests for patients in some departments but not others, you can use the order-level security feature to restrict access to those orders. This access is dependent on your configuration of the Security check method (I SDF 10193) setting (labeled Use order level security check? in versions prior to May 2020) in Cadence System Definitions and the user's Cadence security configuration on the Requests, Prerequisites, and Recalls form of the Cadence Security activity (search: Cadence Security). The setting and security points interact differently depending on your version of Epic.

To restrict access to orders by department, 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.

Restrict Scheduler Access by Login Department or the Order or Appointment Request's Relevant Departments

Starting in May 2020

February 2020 by SU E9200742, E9200576, C9200576-Hyperspace

Depending on your configuration of the Security check method (I SDF 10193) setting in Cadence System Definitions, the system checks a user's login department security or the user's security in the order or appointment request's relevant departments (I ORD 67005) when the user attempts to perform an action on the order or request in the following activities:

- Appointment request workqueues
- Active Requests tab of the Appointment Desk
- Requests depot in the Snapboard
- Requests report in the Front Desk

By default, the system checks the user's login department security. This feature applies to the following Cadence security points on the Requests, Prerequisites, and Recalls form in the Cadence Security activity (search: Cadence Security). The security points are checked when a user attempts to perform the corresponding action on an order or request.

- View request (I ECL 5720)
- Edit request (I ECL 5723)
- Cancel/reinstate order request (I ECL 5181). Applies only to schedulable orders.
- Cancel non-order request (I ECL 5722). Applies only to appointment requests.
- Reinstate request (I ECL 5724). Applies only to appointment requests.
- Edit order requested date (I ECL 5725). Applies only to schedulable orders.

If the Security check method field is set to Relevant Department, when a user attempts to edit an appointment request, the system checks the value in the Edit request security point for the user in the request's relevant departments. If the Edit request security point is set to Yes in at least one of the relevant departments, the user can edit the appointment request. A request can have multiple relevant departments that reflect the following:

- The department the request was created or ordered in.
- The current responsible department.
- A previous responsible department.
- A search department or the departments of search providers. If a visit or provider is removed from the request, the associated search department is removed as a relevant department.

If the Security check method field is set to Login Department or left blank, the system checks the value in the Edit request security point in the user's login department.

To configure the system to check the user's security in the order or request's relevant departments when a user performs an action on the order or request:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. On the Appointment Requests > General form, enter Relevant Department in the Security check method (I

SDF 10193) field. By default, the system checks the user's login department security.

If you need to modify a user's Cadence security while implementing this feature, do the following:

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Go to the Requests, Prerequisites & Recalls form.
3. Enter Yes or No in the fields in the Requests section depending on whether a user should be able to perform the corresponding action on an order or request in a given department.

Restrict Schedulers' Ability to View Schedulable Orders

November 2019 and Earlier

The Use order level security check? (I SDF 10193) setting applies only to the View request (I ECL 5720) Cadence security point in November 2019 and earlier versions. When you set the field to Yes in Cadence System Definitions, the user can see a schedulable order or appointment request in the activities listed below only if they have the View request security point set to Yes for any of the order's relevant departments (I ORD 67005).

- Appointment request workqueues
- Active Requests tab of the Appointment Desk
- Requests depot in the Snapboard
- Requests report in the Front Desk

By default, in November 2019 and earlier versions, a user can view schedulable orders and appointment requests with no security check.

You can override a user's default Cadence security class at the center and department levels. For example, if a user should be able to view all orders except for those in a certain department, you can give them a default Cadence security class that has View request set to Yes and then override it for the department with a Cadence security class that has View request set to No.

The default value of the View request security point is No, so if you turn on order-level security without modifying your users' security classes first, your users won't be able to see any orders.

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Requests, Prerequisites & Recalls form.
3. Enter Yes in the View request field.
4. If needed, assign your Cadence security classes to your users on the Cadence form of the User Security activity (search: User Security).

After you've configured the security for your users so that they can see orders only in the departments you want them to, you can turn on the order-level security feature in Cadence System Definitions:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form. In August 2018 and earlier, select the Orders/Requests > General form.
3. Enter Yes in the Use order level security check? (I SDF 10193) field.

Restrict Access to Appointment Requests for Sensitive Referrals

Starting in Epic 2018

Epic 2017 by SU E8304319, E8305162, and C8305162-Hyperspace

You can restrict access to appointment requests based on the sensitivities of linked referrals to ensure that scheduling staff do not have inappropriate access view a patient's requests. If a user doesn't have Referrals security to view referrals with a certain sensitivity type, any requests that are linked to the sensitive referral do not appear in workqueues or the Appointment Desk. For example, you might have a sensitivity type for the Psychiatry department specialty. If you turn on a setting in Cadence System Definitions to restrict requests linked to sensitive referrals, scheduling staff without the proper Referrals security cannot see any appointment requests created with a department specialty of Psychiatry. Note that scheduling users can still transcribe orders or create appointment requests that result in a sensitive referral, but they won't be able to see the request after they save and close it.

Work with your Referrals team to determine whether you're using referral sensitivities as described in the Limit Users' Access to Certain Referrals Using Sensitivities topic. Before turning on this feature, determine which referrals are sensitive and review your scheduling users' Referrals security to ensure that the users who should be allowed to see certain referral sensitivities can. Schedulers who are responsible for scheduling requests that are linked to sensitive referrals won't be able to do so if they don't have security to see the sensitive referrals, which could result in requests not being scheduled.

To restrict access to requests for sensitive referrals:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form. In August 2018 and earlier, select the Orders/Requests > General form.
3. Enter Yes in the Requests use linked referral sensitivity? (I SDF 10197) field.

Record the Original Referring Provider

If a large number of patients are referred to your organization from outside organizations, you might need to keep track of the original referring provider, as detailed further in the Send Automatically Generated Communications to the Original Referring Provider topic. You can record the original referring provider for an appointment with the Original referring (I EPT 7945) field, which is available in the Appointment Information navigator section and the following standard Cadence advantage activity forms:

- Sign in, check in, and check out forms:
  - AR Copay form (1610-ES_SN_CHKIN_ARCOPAY)
  - Reg Copay form (1612-ES_SN_CHKIN_REGCOPAY)
  - Patient Demographics form (1625-ES_SN_CHKIN_DEMOG)
  - Referring Provider Alternate Info form (1215-ES_ND_REF_PROV_ALT_INFO)
- After scheduling or Appointment Information form:
  - Patient Demographics form w/Overtime Ref Source (1271-ES_ND_PATDEMOG_OT_REFER)

Starting in February 2021, if you've enabled the Original Referring Provider feature, the system fills in a provider automatically when one is available. The system traces back through the path of orders, referrals, cases, and episodes to determine the original referring provider. Schedulers can still edit the original referring provider manually if any information needs to be changed.

To use this feature, you must enable it in your compiled configuration record. You can choose to allow all providers or only external providers to be entered as original referring providers.

You can audit this workflow using new event logging record 1000-ES_SC_ORIG_REF_PROV, which logs when the Prelude Original Referring Provider item is accessed.

The relevant patient items are available in the EPT,1010-Template - AS, Future Appointment Import and EPT,1015-Template - AS, Appointment Import with Checks import specifications.

First, enable this feature in your compiled configuration record.

1. In Chronicles, access the Shared Configuration (HDF) master file.
2. Open your compiled configuration record and access the Facility-Wide Extensions & Flags 5 screen.
3. In the Original referring provider for appts (I HDF 7755) field, enter 1-Yes or 2-Only for external providers. If you choose this setting, only providers from outside organizations will be added as an original referring provider. You can designate a provider as external based on two items in provider records: Internal/External (I SER 190) and the Access to EHR check box (I SER 21185) that appears when editing an address for a provider.

Next, either:

- Show the original referring provider in registration workflows by adding the Appointment Information navigator section to your registration workflow. Refer to the Access Navigators and Workflows Setup and Support Guide for general instructions on adding navigator sections to workflows.
- Make sure you're using one of the Cadence forms listed above in your Cadence advantage activities. To customize your Cadence advantage activities, refer to the Create Your Before Appointment Entry, After Appointment Entry, and Appointment Demographics Workflows and Create Your Sign In, Check In, and Check Out Workflows topics.

Starting in February 2021, if you've enabled the Original Referring Provider feature with the above steps, the system fills in a provider automatically. Schedulers can still edit the original referring provider manually if any information needs to be changed.

Customize the HTML Displays for Appointment Requests

Refer to the topics in this section for information about how to customize what appears in the HTML displays for appointment requests in workqueues, the Front Desk activity, Book It (starting in February 2022) or the Make Appointment activity (November 2021 and earlier), the Expand Requests window, and the Check Out activity.

Design the HTML Display for Appointment Request Workqueues and the Front Desk

HTML display record 76-AS Orders: Workqueue & Front Desk appears when a scheduler selects an order on an appointment request workqueue or in the Cadence Front Desk activity. The default display can also use print group-based report 63000-ES Order Information. This report shows the same information as the HTML tables but uses print groups instead. It includes information about treatment plans and therapy plans, so can be valuable when scheduling orders for Beacon.

Considerations
You can design this HTML display using report records or HTML tables. The default action is to use HTML tables. There are pros and cons about print group-based reports over HTML tables: • Print groups let you add, remove, and reorder related information within a report, rather than building each cell of the table individually in the HTML Table Editor. Because other Epic applications use print groups and reports, this change also means a consistent look for users and simplified system maintenance for project team members. • However, because print groups contain a number of related items, they are less flexible than HTML tables. You can't add items individually with print groups, and you can't override hyperlinks within print groups at the various levels of your facility structure. Think carefully about your organization's needs and workflows to determine whether easy maintenance and a consistent look or precisely customized information is best for your users.

Design Using HTML Tables

1. In Hyperspace, follow the path Epic button > Admin > General Admin > HTML Display Configuration.
2. Select record 76 and choose whether you want to configure the display for your whole system, a certain service area or location, or a certain department.
3. Customize the display by adding HTML table records.
    - Refer to the Customize an HTML Table topic for additional information about creating and editing HTML tables.

Design Using Reports

1. In Hyperspace, follow the path Epic button > Admin > General Admin > HTML Display Configuration.
2. Select record 76 and choose whether you want to configure the display for your whole system, a certain service area or location, or a certain department.
3. In the Report Options field, select Print Group Reports.
4. Customize the display by adding print group reports.
    - Refer to the HTML Displays Report Setup topic for additional information about creating and editing print groups for HTML Displays.

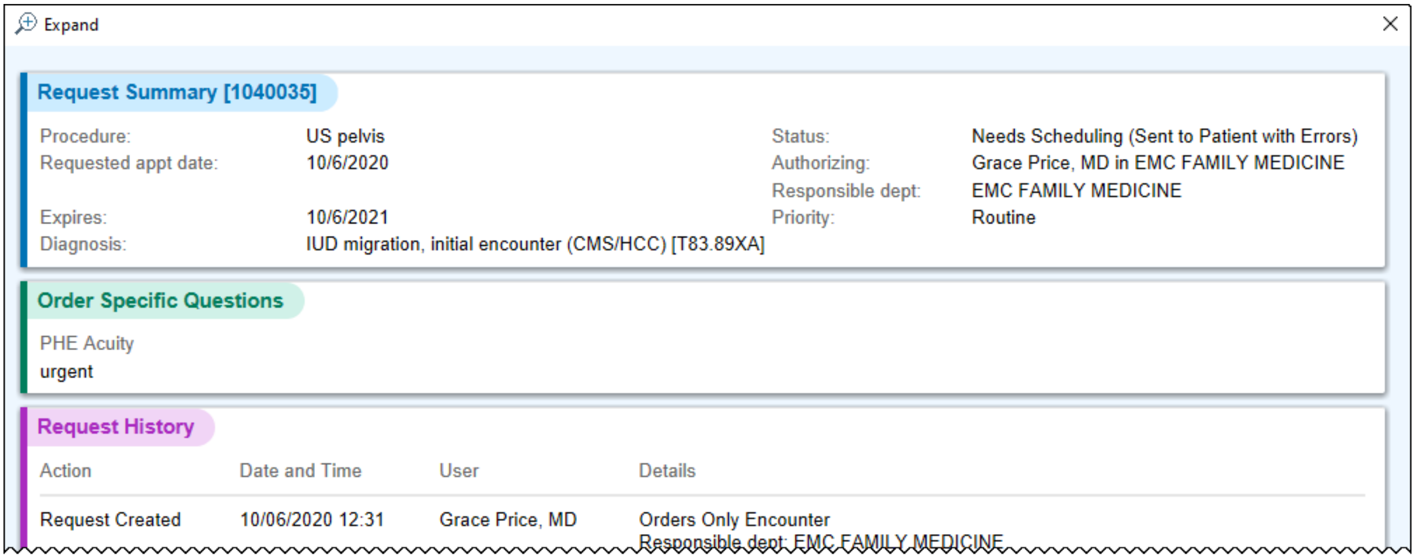
Customize the HTML Display for Appointment Requests in Appointment Entry

HTML display record 77-AS Orders: Appointment Entry appears when schedulers expand a request in Book It (available starting in February 2022). In earlier versions, the HTML display appears in the Make Appointment activity when a scheduler makes an appointment for an order.

If needed, you can customize which HTML tables appear in the HTML display or show a print group-based report instead of HTML tables. When you change the HTML display to show a report, report 63014-ES Appointment Entry Orders is used by default. You can create a custom copy of report 63000 to use instead. Refer to the HTML in Hyperspace Setup and Support Guide for information about customizing HTML displays.

Customize the HTML Display for the Expand Request Window

HTML display 7-AS Orders: Expand Popup appears when a scheduler expands an appointment request from the Active Requests tab or Finalized Requests tab on the Appointment Desk. If needed, you can customize which HTML tables appear in the HTML display or, starting in November 2020, show a print group-based report instead of HTML tables. When you change the HTML display to show a report, report 63000-ES Order Information is used by default. You can create a custom copy of report 63000 to use instead. Refer to the HTML in Hyperspace Setup and Support Guide for information about customizing HTML displays.



Design the HTML Display for the Check Out Activity

HTML display record 104-AS CheckIn Orders Display appears in the Orders and Follow-up (90027-ES_CHECKIN_ORDERS) navigator section and on the Orders form in the Check Out activity. This HTML display shows information entered in the encounter by the clinician, including the disposition, diagnostic follow-up, instructions, and check out comments. This information can alert the check out staff of any appointments or follow-up needed for the appointment.

If needed, you can customize which HTML tables appear in the HTML display. Refer to the HTML in Hyperspace Setup and Support Guide for information about customizing HTML displays.

Communicate With Patients About Scheduling Their Appointment Requests

In this section we'll cover tools for schedulers to help make sure that patients get their appointment requests scheduled.

Allow Schedulers to Record Calls to Patients About Appointment Requests from the Appointment Desk

You can add the New Call option as a toolbar button or right-click option on the Active Requests tab of the Appointment Desk. If schedulers are using this tab when they are contacting patients to schedule appointments, this button allows them to record call details from the Appointment Desk instead of switching to the appointment request workqueue, selecting the request, and clicking New Call there.

1. In Hyperspace, open Cadence System Definitions or your department record.
2. Select the Appointment Desk > Configuration form in Cadence System Definitions or the Appointment Desk Configuration form in your department record.
3. Click Edit report for the Active Requests Tab.
4. In the Available Actions list, select New Call and add it to the Right Click Actions list or the Toolbar Actions list.

When schedulers call a patient, they can indicate in the Contacts navigator section what the outcome of their call was. For example, they might indicate that they left a message or spoke with the patient. If you want clinicians to document successful outcomes such as Spoke with Patient, you need to complete some setup to ensure the calls appear with the appropriate formatting in areas like Call Information sections. Refer to the Allow Users to Document Successful Patient Contact Outcomes topic for more information.

Remind Patients to Schedule Appointment Requests

To help your patients schedule appointment requests at a future date, such as a follow-up consult or physical that can't be scheduled until six months before the appointment date, you can set up the system to automatically send reminders to patients. The system can automatically create reminders for clinical orders when a clinician signs an order, but schedulers need to manually create reminders for appointment requests for non-clinical orders.

The system uses your existing configuration for patient communication preferences, as described in the Patient Communication Preferences Setup and Support Guide, when sending appointment request reminders to patients. Depending on your organization's supported communication methods and the preferred communication methods of your patients, appointment request reminders can be sent by Hello World text message (starting in August 2023), mail, email, MyChart, or automated phone call or text message.

- For Hello World text messages, you need to be using Hello World's SMS gateway, which is license key C for Hello World.
- For mail, email, and MyChart, you need to create SmartText letter templates and a batch job for the system to send letters to patients.
- For automated phone calls or to send text messages without the Hello World SMS gateway, you need to partner with a third-party vendor.

Schedulers can set up reminders from the following locations:

- The Appointment Request Reminder window that can be accessed from appointment request workqueues or the Appointment Desk. A Reminder button appears automatically in workqueues if you're using the standard toolbar. You can add a Reminder right-click option and toolbar button to the Active Requests tab of the Appointment Desk.
- The Reminder section of the Appointment Request activity. The Reminder section appears automatically in the Appointment Request activity if you're using the default Manage topic (90014-TOPIC_ES_REQUEST_MANAGE) in your navigator template, or if you're using one of the standard navigator templates (90002-T_ES_APPT_REQUEST or 90015-T_ES_APPT_REQUEST_NO_FINANCIAL_SCREENING).

When you set up this feature, be aware of other features in Epic that also send scheduling reminders to patients so you're not sending duplicate reminders. These features include:

- Recalls in Cadence
- Health Maintenance reminders in EpicCare Ambulatory
- Breast imaging reminders in Radiant

Build Overview

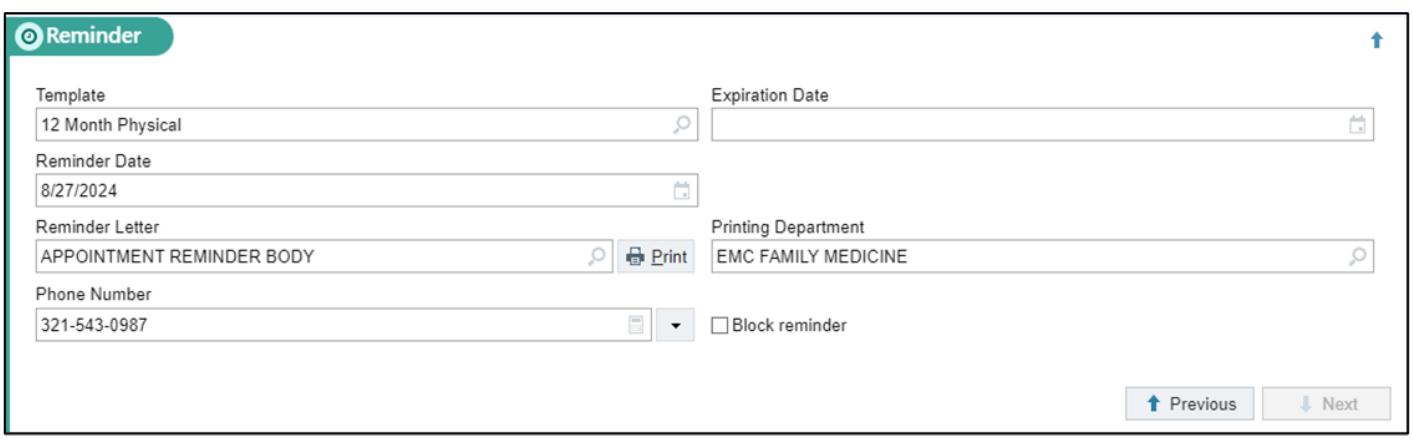
Here's an overview of the setup needed to start using appointment request reminders:

- Allow schedulers to create reminders for appointment requests and see when reminders have been automatically created.
- Allow the system to automatically create reminders for clinical orders based on the expected date of the order.
- Allow the system to send reminder text messages to patients.
- Allow the system and your schedulers to print or send reminder letters by mail, email, or MyChart.
- Work with your third-party automated calling vendor to contact patients about appointment request reminders by automated phone call or text message.
- Report on reminders that have been created for appointment requests.

Allow Schedulers to Create Reminders for Patients

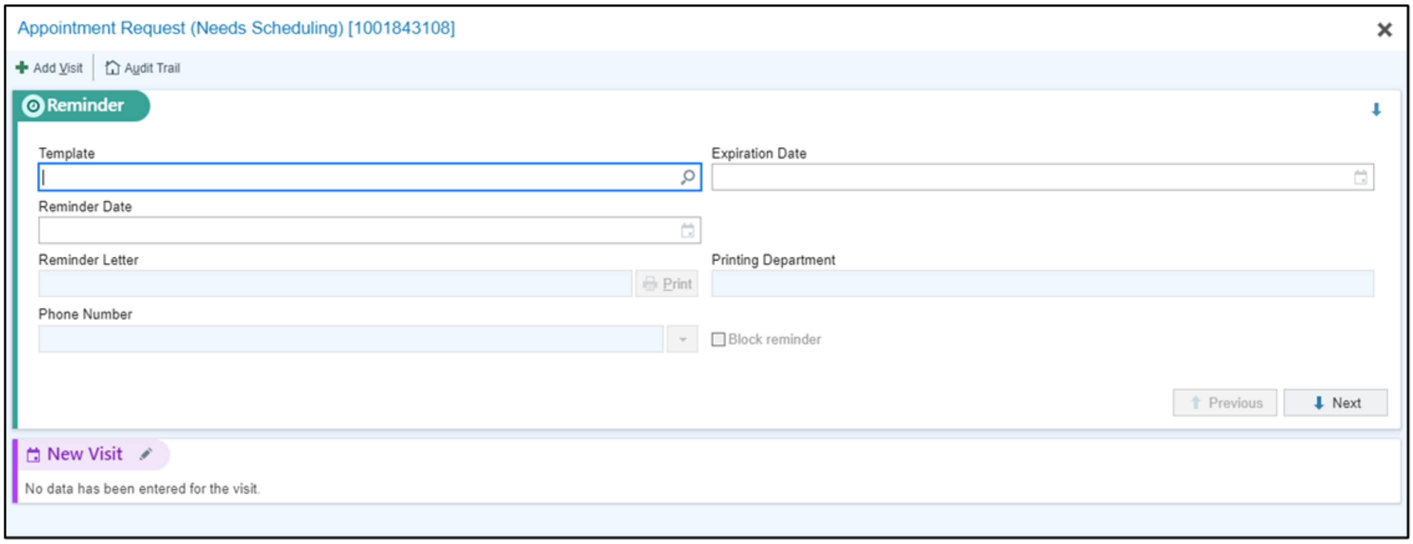
Schedulers can create reminders for requests from the Appointment Request activity, the Active Requests tab of the Appointment Desk, and appointment request workqueues.

The Reminder section in the Appointment Request activity:



The Appointment Request Reminder window that appears in appointment request workqueues and the

Appointment Desk:



To allow schedulers to create reminders and view reminder details, you need to:

- Configure which options are available to schedulers in the Reminder section and the Appointment Request Reminder window.
- Make the Reminder section available in the Appointment Request activity.
- Make the Reminder option available in the Appointment Desk.
- Make the Reminder button available in appointment request workqueues.
- Add reminder-related columns to the Appointment Desk and appointment request workqueues.

Configure the Appearance of the Reminder Section and Appointment Request Reminder Window

By default, only the Reminder Date field appears in the Reminder section and the Appointment Request Reminder window so that schedulers can set the date for when the reminder should be sent. You can configure Cadence System Definitions to also show a Reminder Letter field, Phone Number field, and a Block reminder check box.

- The Reminder Letter field allows users to select a different reminder letter template from the default you specify in Cadence System Definitions and also print the letter on demand. Show this field to users if you're sending reminder letters to patients and you have more than one letter template that you want users to choose from or if you want to allow schedulers to print reminders on demand. A Print button appears next to the Reminder Letter field.
- The Phone Number field allows users to specify a request-specific phone number at which the patient wants to be contacted. Show this field to users if you're using a third-party automated calling vendor to call patients about appointment request reminders and you want to allow users to specify a phone number that the vendor should call for a specific appointment request. If this field is blank, the system uses the phone numbers listed in the patient's demographics in the following order: confidential phone number, temporary phone number, preferred phone number.
- The Block reminder check box allows users to prevent reminders from being sent for a specific appointment request.

For schedulers who are creating reminders from workqueues or the Appointment Desk, you can allow them to add visits to the request that need to be scheduled in the Appointment Request Reminder window, similar to how they would add visits to a request in the Appointment Request activity. Schedulers can add more visits or override the default visit. Then, when the patient receives the reminder and calls to schedule the appointment, the visit types associated with the request appear automatically in Book It (starting in February 2022) or Make Appointment (November 2021 and earlier) for the scheduler.

To determine which options are available in the Reminder section and the Appointment Request Reminder window:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > Reminders form.
3. Complete the following fields:
    - Show Letter Field? (I SDF 10209). Determines whether the Reminder Letter field appears so users can select the reminder letter to use for a particular appointment request. By default, the Reminder Letter field does not appear. If you do not show the field to users, the system sends the letter specified in the Default Reminder Letter (I SDF 10216) field for mail and MyChart or the letter specified in the Reminder E-mail (I SDF 10217) field for email.
    - Show Phone Field? (I SDF 10218). Determines whether the Phone Number field appears. Show this field to users if you're using a third-party automated calling vendor to call patients about appointment request reminders and you want to allow users to specify a phone number that the vendor should call for a specific appointment request. If users leave the Phone Number field blank, the system uses the phone numbers listed in the patient's demographics in the following order: confidential phone number, temporary phone number, preferred phone number.
    - Allow Blocking Reminder? (I SDF 10219). Determines whether the Block reminder check box appears. Schedulers can select the Block reminder check box to prevent the system from sending reminders for a specific appointment request.
    - Show Visit Section in Reminder Popup? (I SDF 10212). Determines whether schedulers can add visits to an order or request from the Appointment Request Reminder window that's available from the Appointment Desk and schedule orders/appointment request workqueues. This setting does not control whether the Visits topic is available in the Appointment Request activity.

Add the Reminder Section to the Appointment Request Activity

The Reminder section is included in the default Manage topic (90014-TOPIC_ES_REQUEST_MANAGE), which is included in default templates 90002-T_ES_APPT_REQUEST and 90015-T_ES_APPT_REQUEST_NO_FINANCIAL_SCREENING. If you've customized the navigator template for the Appointment Request activity, refer to the Customize the Appointment Request Navigator topic for instructions about adding the Reminder section (90024-SEC_ES_REQUEST_REMINDER) to your custom template.

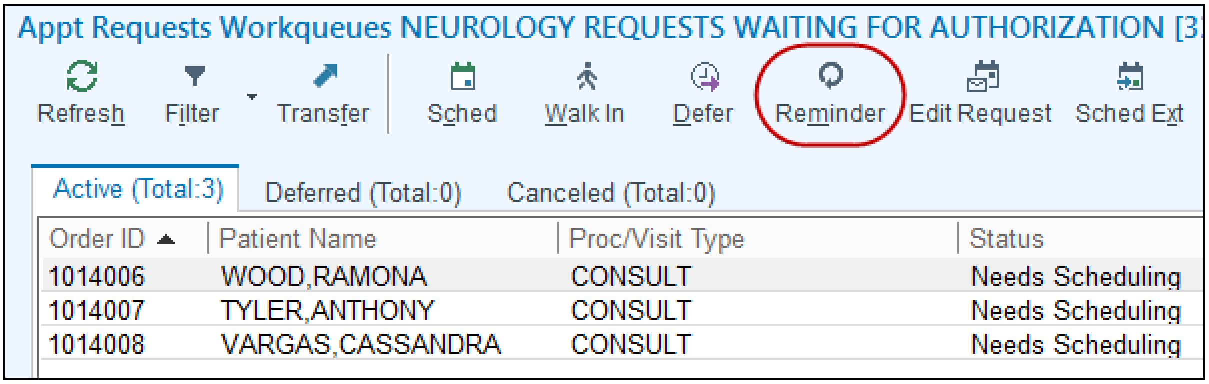
Add the Reminder Option to the Appointment Desk

Schedulers can quickly create or edit reminders for appointment requests from the Active Requests tab of a patient's Appointment Desk. You can add the Reminder option to the right-click menu, toolbar, or both so schedulers can open the Appointment Request Reminder window.

1. In Hyperspace, open Cadence System Definitions or a department record.
    - In Cadence System Definitions, select the Appointment Desk > Configuration form.
    - In a department record, select the General > Appointment Des form.
2. Click the Edit report button for the Active Requests Tab.
3. On the Criteria tab, select the Reminder action in the Available Actions list and add it to the Right Click Actions list, Toolbar Actions list, or both.

Add the Reminder Button to Appointment Request Workqueues

The Reminder button appears on the default toolbar for appointment request workqueues, 5204-ES_MT_SCH_ORD_WQ. If you've customized this toolbar, you can add the Reminder button to it using menu record 5105-ES_IT_APPT_REQUEST_REMINDER_WQ. For more information about customizing toolbars, refer to the Add a Button or Menu to an Existing Menu or Toolbar topic.



Show Schedulers Information About Reminders

You can show information about the reminders that have been sent for an order or request in columns for the Orders, Active Requests, and Finalized Requests tabs on the Appointment Desk and in your appointment request workqueues. This helps schedulers determine whether they should contact the patient to schedule the order or request.

Show Reminder Details on the Appointment Desk

1. In Hyperspace, open Cadence System Definitions or a department record.
   - In Cadence System Definitions, select the Appointment Desk > Configuration form.
   - In a department record, select the Appt Desk Config form.
2. Click the Edit report button for the Schedule Orders Tab, the Active Requests Tab, or the Finalized Requests Tab.
3. On the Display tab, add the following reminder-related columns to the Selected Columns list:
   - 1831-Appt Request Needs Reminder
   - 1833-Appt Request Reminder Date
   - 1834-Appt Request Reminder Phone Number
   - 1837-Appt Request Block Reminder
   - 1839-Appt Request Reminder Attempts
   - 1840-Appt Request Date of Last Reminder
   - 1841-Appt Request Scheduled Before

Show Reminder Details in Appointment Request Workqueues

1. In Hyperspace, open an appointment request workqueue from the Workqueue List activity (search: Workqueue List).
2. Click Column Actions and select Customize.
3. Select the view you want to edit and click Edit View. If you want to create a new view to use for the workqueue, click Create View.
4. Select the following reminder-related properties in the Properties tree and drag them to the Columns table

to add them to your view:

- 98179-Appt Request - Reminder Date
- 98601-Appt Request - Reminder Attempts
- 98602-Appt Request - Date of Last Reminder
- 98603-Appt Request - Reminder Phone Number
- 98605-Appt Request - Is Reminder Blocked?
- 98606-Appt Request - Scheduled Before?

Automatically Create Appointment Request Reminders for Clinical Orders

For appointment requests that originate as clinical orders, such as a follow-up visit, an imaging exam, or (starting in August 2024) a dental visit, you can set up the system to automatically create an appointment request reminder based on the expected date of the order set by the clinician. For example, you might set up the system to remind patients one month before the expected date of an order that they need to schedule an appointment. You define rules that identify orders for which the system should create a reminder. How many rules you need to create depends on whether you want to have different offset dates and letters for different sets of orders. When a clinician signs an order that meets the rule criteria you've set up, the system automatically populates the Reminder Date and Reminder Letter fields for the order.

Specify a Default Reminder Date Offset and Reminder Letter

When you set up your rules for automatically creating appointment request reminders for clinical orders, you can specify a how far in advanced of the expected date the reminder is sent and the letter to use for each rule. If many of your rules use the same date offset and letter, you can specify those at the system level instead of defining them for each rule.

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > Reminders form.
3. In the Default Reminder Date Offset (I SDF 10214) field, enter the default number of days before the expected date of the order that the system should set the reminder for. This value cannot be greater than 365.
4. In the Default Reminder Letter (I SDF 10216) field, enter a default SmartText record to use for reminder letters. Refer to the Send Appointment Request Reminders by Mail, Email, or MyChart topic for details about creating your reminder letter templates.

Specify Rules for When Reminders Are Created

When clinicians sign orders with an expected date, the system evaluates rules to identify orders that need reminders created. You can specify rules at the system or department level.

1. In Hyperspace, open the Rule Editor and create rules in the Appointment Request or Order context to identify the orders that need reminders. For more information about creating rules, refer to the Create or Edit a Rule topic.
2. Open Cadence System Definitions or a department record.
3. Select the Appointment Requests > Reminders form.
4. Complete the fields in the Trigger Table section. The system evaluates this table from the top down and stops when a rule returns true for an order.
   - Rule (I SDF 10221 or I DEP 3900). Enter an Appointment Request or Order context rule to identify orders that the system should create reminders for.

- Reminder Date Offset (I SDF 10222 or I DEP 3901). Enter the number of days before the expected date of the order that the system should set the reminder for. This value cannot be greater than 365. For example, to create a reminder for one month before the expected date of the order, enter 30. If this field is blank, the system uses the value in the Default Reminder Date Offset (I SDF 10214) field on the Reminder form.
- Reminder Letter (I SDF 10223 or I DEP 3902). Enter the SmartText record to use as the reminder letter for orders that match the rule. If this field is blank, the system uses the value from the Default Reminder Letter (I SDF 10216) field on the Reminder form.

5. If you're setting up the Trigger Table at the department level, you can choose to not fall back to the Trigger Table settings at the system level by entering Yes in the Skip Evaluating the Trigger Table at the System Level? (I DEP 3905) field. By default, the system evaluates the system level Trigger table when it doesn't find a rule at the department level that matches the order.

Send Text Messages to Patients When It's Time to Schedule an Appointment Request

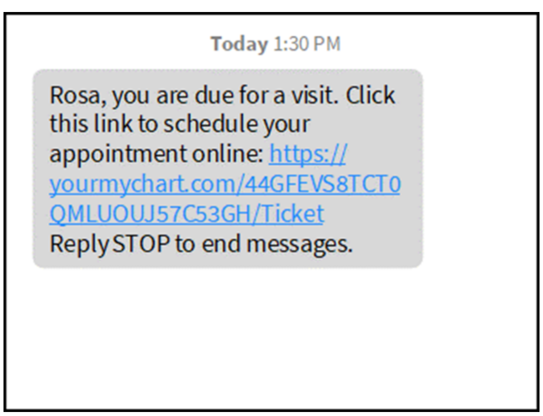
Starting in August 2023

Prerequisites

To send text messages using Hello World content, you need to use either the Hello World SMS gateway or work with a third-party SMS vendor. Refer to the Hello World Setup and Support Guide for information about the Hello World SMS gateway. Refer to the Text Messaging Setup and Support Guide for information about working with third-party SMS vendors.

Hello World includes sample content that you can use to send appointment request reminders to patients by text message. To do so, you create a report to identify the appointment requests that you want to remind patients about, set up the report to automatically run each day, and approve the standard Epic-released communication template for reminders to use for the messages. After the communication template is approved, the system sends text messages when the report is run by using either the Hello World SMS gateway or a third-party SMS vendor, depending on your organization.

The system sends text messages to patients who have a mobile phone number on file, have opted in to receiving text messages from your organization, and have selected the text message option for the Scheduling Ticket communication concept, 28517-New Scheduling Ticket, in the Communication Preferences activity.



A sample appointment request reminder text message using the standard communication template

Identify the Appointment Requests to Remind Patients About with Text Messages

To define the criteria for which appointment requests you want to remind patients about, you need to create a report based on Reporting Workbench template 55072-ES Request Search. Set up the report criteria to identify the appointment requests that your organization wants to remind patients about by text messages. The Foundation System uses report 781416-ES Appointment Request Text Reminders.

To make it easier for you to get this content, we've created a Turbocharger package for Foundation System report 781416. This package is available for download starting in August 2023. For information about importing this package, refer to the 278205-Appointment Request Reminder Extracts topic.

Starting in November 2023, you can add the following criteria to exclude appointment requests that reminders have already been sent for:

- 32881-Ticket Notification Count
- 32882-Last Ticket Notification Sent (Date)

In August 2023, use the following properties to exclude appointment requests that reminder have already been sent for:

- 98396-Hello World: Message Count
- 98403-Hello World: Last Message Sent (Date)

Refer to the Create a Report from a Report Template topic for detailed instructions. In the next section, you create a batch job that automatically runs this report every day and sends messages to the patients on the report.

Automatically Search for Appointment Requests and Send Text Messages to Patients

Complete the following steps to set up the system to automatically run your report daily:

1. In Cadence Text, go to Utility Menu > Batch Jobs > Job Enter/Edit.
2. Create a batch job based on template 1000-RW Batch Template. In the Report mnemonic, enter the report you created from template 55072.
3. Create a batch and schedule a run for your batch job. Refer to the Batch Scheduler Setup and Support Guide for detailed instructions.

After the batch job runs your report, a Reporting Workbench report action sends text messages to patients. Complete the following steps to add the report action to Analytics System Settings:

1. In Hyperspace, open Analytics System Settings (search: Analytics System Settings).
2. Select the RW Actions tab.
3. Add a new row to the Actions on Reports table:
    - In the Report column, enter the report you created from template 55072.
    - In the Report Action column, enter 29003-ES Send Appt Request SMS.

Approve Hello World Content for Appointment Request Reminder Text Messages

The standard communication templates for appointment request reminders are:

Version	Communication Template
• May 2025 • February 2025 with SU E11304474 • November 2024 with SU E11209545 • August 2024 with SU E11112641	• 60335-Appointment Request Reminder - SMS - Prompt (November 2024 and later) • 60316-Appointment Request Reminder - SMS - Prompt (August 2024)
February 2025	32081-Appointment Request Reminder - SMS - Broadcast
May 2024	32037-Appointment Request Reminder - Availability Information
November 2023	35365-Appointment Request Reminder (MyChart Link)
August 2023	60038-Appointment Request Reminder

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 the communication template 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 60142-Appointment Request Reminder.
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.

Identify the Appointment Requests to Remind Patients About by Automated Phone Call from a Third-Party Vendor

Some of your patients might not be able to or might not want to receive text messages about their appointment requests. If you currently work with a third-party automated calling vendor to call or text patients about appointment requests, you need to update your build to exclude patients who are being contacted by text message from Hello World. This ensures that patients who aren't receiving text messages from Hello World still receive a phone call to remind them of their appointment request, and it ensures that patients who are receiving text messages from Hello World don't also receive a call or text from your third-party vendor.

Update any Reporting Workbench reports that are based on extract template 55071-ES Request Phone Reminders to exclude patients who were sent a text message from Hello World. We also recommend that you update your batch job for automated calling to run after your batch job for Hello World.

1. Open the settings for a report based on extract template 55071-ES Request Phone Reminders. The steps for doing this differ based on whether you're using the Classic client or the Hyperdrive client:
   - In the Classic client:
     i. In Hyperspace, open the Library tab of the Analytics Catalog (search: Analytics Catalog).
     ii. Search for extract template 55071.
     iii. Expand the list of reports and click Edit to open the settings for a report.
   - In the Hyperdrive client:
     i. In Hyperspace, open the Analytics Catalog (search: Analytics Catalog).
     ii. Search for extract template 55071.
     iii. Click the hammer icon to open the Report Settings window.
     iv. Expand the left pane and select a report.
2. In the Find Criteria field, scroll to the bottom of the list and choose Add new criterion.
3. In the Add Criterion window, select Property.
4. In the Property field, enter 98396-Hello World: Message Count.
5. Click Accept.
6. Enter the following values for the Hello World: Message Count criterion:
   - Base Template: 60038-Appointment Request Reminder
   - Relationship: 1-Equal to
   - Hello World: Message Count: 0
7. Update your batch job for third-party automated calling to run after your batch job for Hello World. Refer to the Use Third-Party Automated Calling to Remind Patients to Schedule Appointment Requests topic for information about the third-party automated calling batch job.

Send Appointment Request Reminders by Mail, Email, or MyChart

If you're sending appointment request reminders to patients by mail, email, or MyChart, you need to:

- Enable rich text formatting of reminder letters.
- Define the content of the reminder letter in one or more SmartText records.
- In Cadence System Definitions, you can specify one default template for email reminders and one default template for letters sent by mail or in MyChart.
- Optionally customize the subject for letters sent by email or in MyChart.
- Create a sending user for emails and specify that user in Cadence System Definitions.
- Allow appointment request reminders to be printed to certain devices.
- Create a batch job to automatically print reminders or send reminders to patients.

Enable Rich Text Formatting of Reminder Letters

In order to add rich text formatting to your reminder letters, the functional type for appointment request reminder SmartTexts must be enabled for rich text.

1. In Chronicles, access the Shared Configuration (HDF) master file.
2. Open your compiled configuration.
3. Go to the SmartTool Field Settings screen.

4. In the RTF Enabled Functional Types (I HDF 2460) field, enter functional type 3013-Cadence Appt Request Reminder.

Create Appointment Request Reminder Letter Templates

1. In Hyperspace, open the ES Request Reminder Letter Template Editor (search: Appt Request Reminder Letter). Starting in May 2023, you need Shared security point 11-Edit SmartText to access this activity.
2. Create a SmartText record. The activity automatically assigns functional type 3013-Cadence Appt Request Reminder to the record.
3. Add text, SmartLinks, and other content as needed for your reminder letter.
    a. To see the SmartTexts and other content we've configured for Appointment Request Reminder letters, log in to the Foundation Hosted environment as your organization's Cadence administrator (ESADM). In the Request Reminder Letter Template Editor, search for template 16718-Appt Request Reminder Letter.
    b. For more information about creating SmartText records, refer to the SmartTexts topic. For more information about the SmartLinks available in your system, refer to the Search for Information About SmartLinks in Your System topic.
4. Make sure the Released check box is selected. This allows you to select this SmartText in Cadence System Definitions and makes the SmartText available for users to select in the Reminder Letter field in the Reminder section of the Appointment Request activity.

In the Foundation System, we created a default SmartText letter for appointment requests that you can use or model your letters after. You can see the letter in the Foundation Hosted environment. Log in as your Cadence administrator (ESADM) and search for 16718-Appt Request Reminder Letter in the ES Request Reminder Letter Template Editor. This letter template is also available in Spanish and can be found by searching for 16719-Spanish Appt Request Reminder Letter.

Specify Default Letter Templates in Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions.
2. Select the Appointment Requests > Reminders form.
3. Complete the following fields:
    - Reminder E-mail (I SDF 10217). If you're sending appointment request reminders by email, enter the default SmartText record to use for the email. The SmartText must have the functional type 3013-Cadence Appt Request Reminder. If a scheduler selects a different SmartText record in the Reminder Letter field, the system uses that SmartText record instead of the default SmartText record you specify here.
    - Default Reminder Letter (I SDF 10216). If you're sending appointment request reminders by mail or in MyChart, enter the default SmartText record to use for your reminder letter. The SmartText must have the functional type 3013-Cadence Appt Request Reminder. If you're not showing the Reminder Letter field to users, this is the letter that the system always sends to patients. If you're showing the Reminder Letter field to users, the system uses this letter if schedulers leave the Reminder Letter field blank.

Customize the Subject for Email and MyChart Messages

The default subject for appointment request reminder letters that are sent to patients by email or in MyChart is "It's time to schedule your appointment." Your organization can choose to customize this subject by creating a SmartText record that includes your subject text and adding it to Cadence System Definitions.

1. In Hyperspace, open the ES Request Reminder Letter Template Editor (search: Appt Request Reminder Letter). Starting in May 2023, you need Shared security point 11-Edit SmartText to access this activity.
2. Create a SmartText record. The activity automatically assigns functional type 3013-Cadence Appt Request Reminder to the record.
3. Add the text you want to use for your reminder letter subject. The system uses only the first line of text that you enter.
4. Make sure the Released check box is selected. This allows you to select this SmartText in Cadence System Definitions.
5. Open Cadence System Definitions.
6. Select the Appointment Requests > Reminders form.
7. In the Subject of Reminder E-mail or MyChart Message (I SDF 10208) field, enter the SmartText you created.

Send Appointment Request Reminders by Email

If you're sending appointment request reminders to patients by email, you need to set up a sending user that is listed as the "From:" person on the email. You might already have this user configured if you're sending appointment notifications to staff or to patients, as described in the Notify Staff About Appointments with Appointment Notifications topic.

1. In Hyperspace, go to User Security (search: User Security).
2. Choose Edit single user to make an existing user the sending user. Alternately, you can choose Create single user to create a new user record for the sending user.
3. Go to the In Basket > Mail Settings/Access form. In the Mail System field, enter External Mail.
4. In the Mail sending setup table, enter extension 4400-Staff Message SMTP in the System (I EMP 20340) field to format a message routed to an external email address.
5. In the Email Address (I EMP 20330) field, enter a valid email address.
6. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
7. Select the Communications > Appt Notification form.
8. In the Appointment notification sending user (I SDF 8185) field, enter the user who will serve as the sending user.

Enable Printing of Appointment Request Reminder Letters

Users can print reminder letters on demand from the Appointment Request activity, and you can set up the system to automatically print reminder letters on a set schedule. Follow the steps in the Use Printer Class Mapping to Send Print Jobs to Printers topic to map printer class 6009-ES Request Reminder Letter to default devices.

Print Appointment Request Reminder Letters in Batch

You can use the Batch Scheduler to automatically print appointment request reminder letters or send the letters by email or to MyChart. You determine the date range for letters to print, such as printing all reminders with a due date in the next two weeks. You can also specify a department to route print jobs to as well as an Order or Appointment Request context rule for excluding certain appointment requests from having a letter printed.

The system does not print or send letters for patients who are deceased or who have elected to block reminders, either in Patient Preferences or for a specific appointment request.

1. In Cadence Text, go to Utility Menu > Batch Jobs > Job Enter/Edit.
2. Create a new batch job using batch template 850-ES Appointment Request Reminder.
3. Complete the following mnemonics:
   - Start Date. Optional. Enter the relative start date for which to print reminders for appointment requests.
   - Stop Date. Required. Enter the relative end date for which to print reminders for appointment requests. For example, you might enter W+2 to print reminders for appointment requests that are due in the next two weeks.
   - Dept for Printing. Optional. Enter the department to route the print jobs to. The system uses the printer in the specified department that has printer class 6009-ES Request Reminder Letter defined.
   - Rule. Optional. Enter an Order or Appointment Request context rule for which appointment requests must meet the criteria of the rule in order for the system print a reminder letter. If the rule returns false for an appointment request, the system does not print a reminder letter for it.
4. Add your job to a batch and schedule a run to print request reminder letters on a set schedule. For information about creating Batch Scheduler jobs, batches, and runs, refer to the Batch Scheduler Setup and Support Guide.

Use Third-Party Automated Calling to Remind Patients to Schedule Appointment Requests

Defines the communication reason added to the Communication Tracking (CAL) record when the extract runs with column 1919-ES Appt Request CAL ID added. Available starting in August 2025, in May 2025 with special update E11404132, and in February 2025 with special update E11309091.You can work with your third-party automated calling vendor to contact patients to remind them to schedule appointment requests. Automatically calling patients about appointment requests saves your schedulers time and can increase the chance of patients scheduling an appointment for the request.

You can use Reporting Workbench extract template 55071-ES Request Phone Reminders to generate a file for your third-party calling vendor. Your vendor uses this file to contact patients about appointment requests. Starting in November 2020, you can use the Batch Scheduler to import call results from your vendor to store in Epic.

To see an example of a completed extract report that sends reminders to patients with appointments in the next week, log in to the Foundation Hosted environment as your Cadence administrator (ESADM) and search the report library for 471110-ES Appointment Request Reminders - Next Week.

Define the Information You Send with a Reporting Workbench Extract

The first step to notifying patients about appointment requests they need to schedule is to define the information you send to your third-party vendor with a Reporting Workbench extract. If standard extract 55071-ES Request Phone Reminders includes the columns your organization needs, you do not need to create a custom copy and you can skip to the next task, Define the Patients and Requests You Include with Reporting Workbench Report Criteria.

The standard extract includes the following columns to send information about appointment requests to your vendor:

- 1748-Appt Request ID
- 1832-Appt Request Requested Appt Date
- 1003-Patient MRN

- 1004-Patient Name
- 1834-Appt Request Reminder Phone Number
- 1842-Appt Request Visit Department IDs
- 1843-Appt Request Provider IDs
- 1844-Appt Request Visit Type IDs
- 1845-Appt Request Center IDs
- 1767-Appt Request Specialty ID
- 1867-Appt Request Subspecialty ID
- 5011-Patient Appointment Confirmation Preference for Appt Request
- 1919-ES Appt Request CAL ID (starting in November 2020)

To customize an extract for your organization:

1. In Hyperspace, open the Extract Format Editor (search: Extract Format Editor).
2. Select Create new extract format.
3. Enter a name and ID for your extract.
4. In the Copy from field, enter 55071-ES Request Phone Reminders.
5. Click Accept.
6. On the Format tab, add or remove columns to determine what information to include in the extract.
7. Click Save and Exit.

For additional information about creating extract records, refer to the Create an Extract Format topic.

Define the Patients and Requests You Include with Reporting Workbench Report Criteria

The next step towards automatically calling patients to remind them to schedule their appointment requests is to define the patients and appointment requests you include with Reporting Workbench report criteria.

1. In Hyperspace, go to Epic button > Reports > Analytics Catalog.
2. Locate template 55071-ES Request Phone Reminder and click New report to begin creating a report from this template.
3. On the Criteria tab, select all criteria you need to determine which records appear in your extract.
    - Reminder date. Restricts the report results to appointment requests with a reminder date in the specified date range.
    - Reminder attempts. Restricts the report results to appointment requests for which a patient has or has not already received a reminder.
    - Last reminder date. Restricts the report results to appointment requests for which a patient has or has not been reminded since a certain date.
    - Destination specialty. Restricts the report results to appointment requests for the specified specialties.
    - Destination subspecialty. Restricts the report results to appointment requests for the specified subspecialties.
    - Requested centers. Restricts the report results to appointment requests that have been requested in the specified centers.

    - Visit type/panel. Restricts the report results to appointment requests that have the specified visit type or panel. If a request originated from a clinical order and does not have a visit type, the system looks to the visit type of the procedure or procedure category.
    - Visit department. Restricts the report results to appointment requests that have a visit for the specified departments.
    - Responsible department. Restricts the report results to appointment requests for the specified responsible departments.
    - Patient age. Restricts the report results to appointment requests for patients of the specified age.
    - Patient communication preferences. Restricts the report results to appointment requests for patients who have the specified communication preferences for the specified communication concepts. Select concept 28504-Cadence Automated Calling System Preference for automated calling. If a patient does not have a preferred method of communication for a given concept, their requests are included so long as they have the necessary information for one of the communication preferences you list. For example, if you select Phone, requests for patients who do not have a communication preference but do have a phone number appear in the report results.
        - When you select a method of Text Message, the Respect "Send Text Messages?" Flag setting determines whether the system respects the Send Text Messages? setting in the Communication Preferences activity. The default behavior is to not respect this setting. The Respect "Send Text Messages?" Flag setting does not apply to methods other than Text Message.
    - Communication Reason. Defines the communication reason added to the Communication Tracking (CAL) record when the extract runs with column 1919-ES Appt Request CAL ID added. Available starting in August 2025, in May 2025 with special update E11404132, and in February 2025 with special update E11309091.
4. On the Extract tab, enter standard extract 55071-ES Request Phone Reminders or the custom extract you created in the previous task and enter the file path where the system should save the file.
5. On the General tab, configure the report's name, description, and other settings as needed.
6. Click Save.

For additional information about creating extract reports, refer to the Create an Extract Report topic.

Create Call Records for the Requests You Extract

To help keep track of when you extract orders and requests to your vendor, the system can create call (CAL) records that are linked to each order and request that you extract. The setup you need to do to create these records depends on the version that you use.

Starting in November 2023, you need to add action pack 29012-ES Create CAL Record for Request to your report in Analytics System Settings. Starting in August 2024 and in May 2024 with SU E10901359, February 2024 with SU E10806931, and November 2023 with SU 10710771, you don't need to complete these steps because communication records are automatically generated by extracts.

1. In Hyperspace, access Analytics System Settings (search: Analytics System Settings).
2. Select the RW Actions tab.
3. Add a row to the Actions on Reports table:
    a. In the Report (I EAF 49540) column, enter the Reporting Workbench extract report you created from template 55071 in the Report column.

   b. In the Report Action (I EAF 49550) column, enter action pack 29012-ES Create CAL Record for Request.

Also make sure that column 1919-ES Appt Request CAL ID is in your extract report.

1. In Hyperspace, open the Extract Format Editor (search: Extract Format Editor).
2. Open template 55071-ES Request Phone Reminders.
3. In Format grid, make sure there is a row for column 1919-ES Appt Request CAL ID.

In August 2023 and earlier, the call records are created automatically by setup extension 42271-ES Request Phone Reminder Extract Setup in extract template 55071-ES Request Phone Reminder.

Send Data to a Third-Party Vendor

Batch jobs using template 71000-RW Extract Batch Template format extracts for your third-party vendor according to system, department, or report settings, and create a flat file that can be used by third-party vendors.

You need to create and schedule a batch process that uses this template to format these extracts. Refer to the Batch Scheduler Setup: Essentials topic for information about creating batch jobs.

Process Data from a Third-Party Vendor

Starting in November 2020

Batch jobs using template 860-ES Appointment Request Auto Notices Incoming take information from your third-party vendor, store it, and automatically update call records as appropriate.

You need to create and schedule a batch process that uses this template to format these extracts. Refer to the Batch Scheduler Setup: Essentials topic for information about creating batch jobs.

Report on Appointment Request Reminders

You can report on your attempts to remind patients to schedule their orders and appointment requests using criteria in reports built from Reporting Workbench template 55072-ES Request Search:

- Reminder attempts. Restricts the report results to appointment requests for which a patient has already received a certain number of reminders.
- Last reminder date. Restricts the report results to appointment requests for which a patient has or has not been reminded since a certain date.
- Patient communication preference. Restricts the report results to appointment requests for patients who have the specified communication preferences. If a patient does not have a preferred method of communication, their requests are included so long as they have the necessary information for one of the communication preferences you list. For example, if you select Phone, requests for patients who do not have a communication preference but do have a phone number appear in the report results.
- Patient age. Restricts the report results to appointment requests for patients of the specified age.
- Reminder is blocked. Restricts the report results to appointment requests that do or do not have the Block reminder check box selected.

Automatically Send Scheduling Ticket Notifications for New Availability

Starting in May 2024

Similar to Fast Pass for wait list entries, Ticket Pass notifies patients with unscheduled tickets that a new slot is available for scheduling. This helps reduce time spent by patients repeatedly checking MyChart to see if a slot that fits into their schedule has opened up, which can be frustrating. 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 when a time slot opens up that meets their needs. Behind the scenes, the slot is reserved for the patient for 120 minutes by default so that another scheduler doesn't schedule in it. You can further ensure that patients receive the benefits of Ticket Pass in areas that historically have low availability by configuring the system to automatically opt in patients to Ticket Pass at the time scheduling tickets are released in these areas. With this configuration, the patient is automatically notified when a time slot opens up for their ticket, so the patient doesn't even need to attempt to schedule their ticket. Additionally, you can use a batch job to opt in existing scheduling tickets so that Ticket Pass can get to work right away.

Patients can receive Ticket Pass notifications for new slot openings through email ticklers, MyChart push notifications, one-way text messages, or two-way text messages. To send two-way text messages to patients, your organization needs to be using the Hello World SMS gateway, as described in the Set Up the SMS Gateway topic. With two-way text messages, patients can accept or decline Ticket Pass offers by responding to a text message. If you don't use the Hello World SMS gateway, you can use the one-way tickler framework to notify patients of new slot openings through text messages. With both one-way and two-way text messages, you need to enable the Hello World content for the notification type you plan to use. Refer to the Message Content section below for more information.

To receive notifications of a given type, patients need to be opted in to the text message, push notification, or email options for the Scheduling Ticket communication concept found in the Communication Preferences activity.

Message Content

Hello World includes sample content for both one-way and two-way text messages.

Starting in November 2024, ticket pass offers are sent in SMS notifications in communication workflow 60137-Ticket Pass Offer. The base communication template for these two-way text messages is 60276-Ticket Pass Offer - SMS - Prompt, which uses conditional content so you can send the right information for a patient’s situation without needing to set up multiple communication templates. For more information about how conditional content works, refer to the Send Conditional Content with SmartMarkup topic.

In August 2024 and earlier, for the one-way tickler message, the primary communication template is 60134-Ticket Pass Offer - One-Way. For the two-way text message, which is available if you use the Hello World SMS gateway, the primary communication template is 60083-Ticket Pass Offer Two-Way, which includes an initial message that contains the patient's appointment details and asks them to schedule, decline, or see more options. Behind the scenes, there are additional communication templates that are used to send messages back to the patient based on how they reply to the initial message. The possible response communication templates are:

- 60086-Ticket Pass Offer Declined
- 60088-Ticket Pass Offer Accept Success
- 60089-Ticket Pass Offer Failure
- 60091-Ticket Pass Offer Already Accepted
- 60092-Ticket Pass Offer Not Available
- 60103-Ticket Pass More Options
- 60104-Ticket Pass Opted Out

We also created default content for the email and push notifications. English-language SmartTexts and Spanish-language SmartText overrides for the email and push notifications have been added in the Foundation System. The following table lists the Foundation System SmartTexts:

Notification Type	Notification Subject	Patient Notification Text	Proxy Notification Text
Push Notification	New appointment opening	Log in to view appointment offer.	Log in to View appointment offer for @pushpatnam@
Email	New appointment opening in @MYCHARTNAME@	Hello @FPREFNAME@, There is a new opening for your scheduled appointment. Log into @MYCHARTNAME@ to view your appointment offer. @MYCHARTURL@	Hello @PROXYPREFNAME@, There is a new opening for the unscheduled appointment for @FPREFNAME@. Log into @MYCHARTNAME@ to view the appointment offer. @MYCHARTURL@

For more information about setting up communication templates refer to the Manage Message Content topic.

Considerations

- Automatically opting patients in to Ticket Pass is most beneficial when used for scheduling tickets for areas that typically have low to no schedule availability. It is not recommended to opt all tickets into Ticket Pass.
- Ticket Pass does not send notifications for tickets associated with panels, standing orders, combined procedures, or ticket bundles.
- Ticket Pass sends notifications only for tickets with a visit mode of in person.
- Ticket Pass offers patients slots from the same pool of slots that Fast Pass uses. By default, the Ticket Pass process is scheduled to run after the recommended Foundation System Fast Pass batch jobs, but refer to your Fast Pass batch job schedule to make sure slot offers are being sent in the order you prefer. Refer to the Create a Batch Job to Search for Openings and Send Offers to Patients topic for more information.
- If you update the time the Ticket Pass process runs, be mindful of your organization's messaging quiet hours. Since messages are not sent during quiet hours, you do not want a patient receiving a message with an offer that has already expired because it was sent after quiet hours ended. Refer to the Configure Sender Information topic for more information.
- Starting in February 2025, in November 2024 with special update E11202256, in August 2024 with special update E11105515, and in May 2024 with special update E10910741, use the Run Ticket Pass Now utility to run the Ticket Pass process ad-hoc to help with testing. To run the utility, in Cadence Text, go to Utility Menu > Run Ticket Pass Now.

Build Considerations

Ticket Pass settings are in Cadence System Definitions and the default values for the items allow Ticket Pass to work out of the box in MyChart. If you don't change any of the values, when a patient attempts to schedule a ticket for an appointment request and there's no availability in the relevant department, the patient is prompted to choose preferred appointment dates and times and be notified when an open slot within those dates and times is available. After a patient has opted in, the Ticket Pass scheduled task runs at 6:00 PM local time and, if an open time slot within the patient's specified date and time ranges is found, a new appointment offer is created for the patient. By default, the system doesn't send a Ticket Pass notification to the patient related to the new offer. The patient can go to the MyChart home page to view and accept the new appointment offer.

You can use Ticket Pass settings to adjust the time the Ticket Pass process starts, the maximum number of slot offers, how long before a Ticket Pass offer times out, and whether schedulers can overrule scheduling into reserved slots. You can also configure MyChart ticklers and push notifications with content specific to Ticket Pass. Further, you can enable Ticket Pass content for one-way or two-way text messages.

Enable Content for Ticket Pass Text Messages

To send two-way text messages to patients your organization needs to be using the Hello World SMS gateway. If you don't use the Hello World SMS gateway, you can use the one-way tickler framework to notify patients through text messages. In both cases you need to enable the Hello World content for the notification type you plan to use.

As well, 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.

Ticket Pass Offer Two-Way Content

Complete these steps to customize text message content if you use two-way text messages:

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 communication template 60083-Ticket Pass Offer Two-Way with stakeholders at your organization to determine whether you can use the sample content. In Hyperspace, open the base template (search: Communication Template). On the SMS Content form, you can see the initial message that is sent to patients, and you can click buttons to simulate a response from a patient.
3. Click Create New Override and create an override of communication template 60083 at the facility, service area, location, or department level. We recommend creating overrides only at the facility level if possible. You need to complete this step even if you're not planning to edit the released content. Refer to the Create Override Communication Templates for Two-Way Messages topic for additional information about working with communication templates.
4. If you want to edit the released content, select the SMS Content form and click Edit to make your changes. To edit the released content for the replies to the patient, click the response buttons and then click Edit.
5. 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 Content Management.

Ticket Pass Offer One-Way Content

Complete these steps to customize text message content if you use one-way text messages:

1. Review the communication template 60134-Ticket Pass Offer - One-Way with stakeholders at your organization to determine whether you can use the sample content. In Hyperspace, open the base

template (search: Communication Template). On the SMS Content form, you can see the message that is sent to patients.

2. Click Create New Override and create an override of communication template 60134 at the facility, service area, location, or department level. We recommend creating overrides only at the facility level if possible. You need to complete this step even if you're not planning to edit the released content. Refer to the Create Override Communication Templates topic for additional information about working with communication templates.
3. If you want to edit the released content, select the SMS Content form and click Edit to make your changes.
4. 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 Content Management.

Create Custom Content for Tickler and Push Notification Messages

By default, patients receive generic MyChart notifications that do not include any Ticket Pass related information. If you want patients to receive email tickler and MyChart push notifications specific to Ticket Pass, you need to create subject and body SmartTexts for email and push notification content.

The Foundation System has examples of content for both notification types. If you would prefer to not create your own SmartTexts from scratch, you can use the below records as is or make changes to suit your needs:

- 26587-MYC TICKLER - TICKET PASS OFFER SUBJECT
- 265871-MYC TICKLER - TICKET PASS OFFER SUBJECT -- SPANISH
- 26593-MYC TICKLER - TICKET PASS OFFER (PATIENT,PLAIN)
- 265931-MYC TICKLER - TICKET PASS OFFER (PATIENT,PLAIN) -- SPANISH
- 26594-MYC TICKLER - TICKET PASS OFFER (PROXY,PLAIN)
- 265941-MYC TICKLER - TICKET PASS OFFER (PROXY,PLAIN) -- SPANISH
- 26598-MYC TICKLER - TICKET PASS OFFER (PATIENT,HTML)
- 265981-MYC TICKLER - TICKET PASS OFFER (PATIENT,HTML) -- SPANISH
- 26599-MYC TICKLER - TICKET PASS OFFER (PROXY,HTML)
- 265991-MYC TICKLER - TICKET PASS OFFER (PROXY,HTML) -- SPANISH
- 26628-MYC HTML TICKET PASS FORMATTING
- 26595-MYC TICKLER - TICKET PASS OFFER SUBJECT (PN)
- 265951-MYC TICKLER - TICKET PASS OFFER SUBJECT (PN) -- SPANISH
- 26596-MYC TICKLER - TICKET PASS OFFER (PATIENT,PN)
- 265961-MYC TICKLER - TICKET PASS OFFER (PATIENT,PN) -- SPANISH
- 26597-MYC TICKLER - TICKET PASS OFFER (PROXY, PN)
- 265971-MYC TICKLER - TICKET PASS OFFER (PROXY, PN) -- SPANISH

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 starting in May 2024. For information about importing this package, refer to the 289577-Ticklers for Ticket Fast Pass topic.

If you would prefer to create your own content, follow the steps in the Create and Edit a SmartText topic to create new SmartTexts. Depending on the type of SmartTexts you are creating you need to give them the following contexts:

- Email content should have a context of 8000-WP Patient Internet Email Tickler Template.
- HTML email content should have a context of 8001-WP HTML Email Ticklers.
- Push notification content should have a context of 8004-WP Push Notification.

Update Patient Access System Definitions with Tickler and Push Notification Content

After you have your SmartText content finalized you need to associate it with the new 60133-Ticket Pass Offer communication concept. Follow the below steps to start sending your custom ticklers and push notifications to patients:

1. From the MyChart System Manager Menu, select Message Configuration and go to the Tickler Settings screen.
2. Enter the 60133-Ticket Pass Offer concept in the Tickler Concept (I WDF 573) list. Place your cursor in the row for your new concept and press F6 to access a screen on which you can specify settings specific to that concept.
3. In the From field, enter the SmartText for the tickler message sender.
4. In the Subject field, enter the SmartText for the tickler message subject.
5. Define the SmartTexts that will become the text of the tickler message for email ticklers. You can use both plain text and HTML SmartTexts. If no HTML SmartText is specified or the patient's email is not HTML-enabled, the plain text SmartText is used. We recommend using both plain text and HTML ticklers. You'll use a different SmartText for each one, but the SmartTexts should contain similar text and information to ensure a consistent experience for patients.
6. Define the SmartTexts that will become the text of the Push Notification.

Identify the Scheduling Tickets That Should Have Patients Automatically Opted In to Ticket Pass

By default, patients must manually opt in to notifications for open time slots through Ticket Pass. If there are specific specialties or locations that consistently have limited scheduling options, you can create a rule to find appointment requests for those areas and automatically opt the patient in to Ticket Pass when the scheduling ticket is sent to the patient. To see an example of this type of rule you can review rule 734115-ES Ticket Pass Auto Opt In Rule in the Foundation System. It opts in any appointment request with the specialty set to Dermatology.

Complete the following steps to create a rule and add it to Cadence System Definitions**:**

1. In Hyperspace, open the Rule Editor activity (search: Rule Editor).
2. Create or open an existing Appointment Request context rule.
3. Add criteria to find appointment requests that should be automatically opted in to Ticket Pass. For more information about creating rules see the Create or Edit a Rule topic.
4. Open Cadence System Definitions (search: Cadence System Definitions).
5. Select the Appointment Requests > Ticket Pass form.
6. Add your rule to the Auto Opt in Rule (I SDF 42006) field.

Customize Ticket Pass Configuration

The Ticket Pass configuration is used to specify how and when notifications are sent for scheduling tickets that have been opted in to Ticket Pass. The below items all have a default value, so no changes are necessary in order to use Ticket Pass. However, if you want to customize the Ticket Pass configuration to fit your organization's specific needs, then complete the following steps:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Ticket Pass form.
3. Add values to any of the below items to fit your needs.
    - Ticket Pass Scheduled Run Time (I SDF 42000). Determines when Ticket Pass notifications are generated. The default value is 6:00 PM.
    - Max Slot Offers Per Run (I SDF 42002). Determines the maximum number of offers that can be sent out for a slot with each run of the task. The default value is 5.
    - Max Slot Offers Total (I SDF 42003). Determines the maximum number of offers that can be made for a slot overall (across all task runs as well as all Fast Pass for Wait List batch runs) in a single day. The default value is 5.
    - Ticket Pass Offer Timeout Length (I SDF 42004). Determines how long (in minutes) offers are valid before they expire. The default value is 120 minutes.
    - Allow Overrule of Reserved Slots (I SDF 42005). Determines whether Cadence users with Cadence security point Overrule reserved time (I ECL 5084) can schedule into slots that have been offered to a patient. The default value is 2-Yes, no Security, meaning schedulers can overrule reserved slots without the Overrule reserved time security point.

Create a Batch Job to Opt In Existing Scheduling Tickets

Any existing scheduling tickets already released to patients are not retroactively opted in to Ticket Pass. If you would like to opt in existing requests, you can create a batch job using the instructions below to find them and opt them in.

Identify the Existing Appointment Requests That Should Be Opted In

Create a report based on Reporting Workbench template 55072-ES Request Search and set up the report criteria to identify existing appointment requests that your organization wants to automatically opt in to Ticket Pass. We recommend that you use the same criteria you used in the auto opt in rule you created for the Identify the Scheduling Tickets for Which Patients Should Be Automatically Opted in to Ticket Pass build task. In the next section, you create a batch job that automatically runs this report to opt in requests to Ticket Pass.

Automatically Opt in Existing Appointment Request to Ticket Pass

Add a Reporting Workbench action pack so that appointment requests returned in the report can be opted in to Ticket Pass:

1. In Hyperspace, open Analytics System Settings (search: Analytics System Settings).
2. Select the RW Actions tab.
3. Add a new row to the Actions on Reports table:
    - In the Report column, enter the report you created from report template 55072.
    - In the Report Action column, enter 29013-ES Ticket Pass Opt In.

Create and run a batch job to opt in appointment requests returned in the report:

1. In Cadence Text, go to Utility Menu > Batch Jobs > Job Enter/Edit.
2. Create a batch job based on template 1000-RW Batch Template. In the Report mnemonic, enter the report you created from report template 55072.

3. Create a batch and schedule a run for your batch job. Refer to the Batch Scheduler Setup and Support Guide for detailed instructions.

Follow Up on Appointment Requests Where Scheduling Was Denied

Starting in February 2021

November 2020 by SU E9503643, E9503644, E9503671, C9503643-HSWeb

August 2020 by SU E9407541, E9407542, E9403643, C9407541-HSWeb

May 2020 by SU E9309136, E9309137, E9309145, C9309136-HSWeb

February 2020 by SU E9210209, E9210210, E9210213, C9210209-HSWeb

If you've configured a decision tree that contains the Deny Scheduling node, when a user or patient is prevented from scheduling an appointment request based on that decision tree, that denial is stored on the appointment request in the Request Appt Entry Denial Decision Tree (I ORD 67060) item. With this information, users can identify appointment requests that couldn't be scheduled in an appointment request workqueue or report and follow up with patients to determine why that denial occurred and how to ensure that scheduling can proceed.

For example, say that you allow patients to schedule COVID vaccination appointments in MyChart, as described in the Let Patients Schedule COVID-19 Vaccination Appointments topic, and a decision tree with the Deny Scheduling node is linked to the COVID vaccination visit type. Because the scheduling denial is stored on the appointment request, you can create an appointment request workqueue to identify appointment requests for the COVID vaccination where the patient was denied scheduling. Using the workqueue, staff can follow up with patients to identify why scheduling was denied and ensure that an appointment can be created for the COVID vaccination.

To create an appointment request workqueue:

1. In Hyperspace, create an Appointment Request-context rule in the Rule Editor (search: Rule Editor).
2. Add either of the following properties to the rule:
   - Property 98645-Appt Request - Appt Entry Denial DT. Set this property not equal to blank to identify appointment requests that have a value in the Request Appt Entry Denial Decision Tree item.
   - Property 98646-Appt Request - Appt Entry Denial DT Answer. Enter a question (LQL) record ID in the Question ID parameter. This question should correspond to the question associated with the singular Deny Scheduling node in a decision tree. Set the property equal to the response to the question for which you want your rule to check. For example, if you want to identify appointment requests that were denied because a user or patient responded to the specified question with "Yes," then set the property equal to Yes.
3. Create an appointment request workqueue, as described in the Build an Appointment Request Workqueue topic.
4. Add your rule to the workqueue.

Optionally, you can modify a workqueue view to show the user or patient's response to the question associated with the Deny Scheduling node in the decision tree. This information can help the workqueue user determine why scheduling was denied, for example, if the question has multiple responses and only certain ones deny scheduling.

1. In Hyperspace, open the Workqueue Detail activity (search: Requests WQ Maintenance).
2. Open the workqueue to which you want to add the column.
3. Click Configure View > Edit View and edit the view to which you want to add the column.
4. Click and drag the Appt Request - Appt Entry Denial DT Answer property from the Properties section into the Columns section.

To create a report that identifies appointment requests with denied scheduling, use one of the following methods. Note that the report doesn't identify the decision tree question associated with the Deny Scheduling node.

- Method 1:
  a. In Hyperspace, create a copy of Reporting Workbench template 55072-ES Request Search or open an existing copy in the Template Editor (search: Template Editor).
  b. Add property 98645-Appt Request - Appt Entry Denial DT as a parameter on the Query Template and User Interface forms in the Template Editor. Refer to the Add Parameters to a Template topic for more information.
  c. Create a report based on your copy of template 55072.
- Method 2:
  a. In Hyperspace, create a report based on Reporting Workbench template 55072-ES Request Search.
  b. Add a criterion to the report based on property 98645-Appt Request - Appt Entry Denial DT. Refer to the Add Criteria to a Report topic for more information.

Automatically Create an Appointment Request When Scheduling Is Denied by a Decision Tree

Starting in May 2021

February 2021 by SU E9600957, E9600958, E9600959

November 2020 by SU E9504802, E9504803, E9504804

August 2020 by SU E9408425, E9408426, E9408427

May 2020 by SU E9309614, E9309615, E9309616

February 2020 by SU E9210420, E9210421, E9210422

The system can automatically generate an appointment request after a user or the patient is denied scheduling by a decision tree. With this feature enabled, schedulers can easily identify when scheduling was denied and then follow up on that denied scheduling attempt, such as by contacting the patient, modifying the appointment, and attempting scheduling again.

Note that this feature is specifically designed for scheduling attempts that don't use appointment requests, such as a user scheduling an appointment in Book It or a patient scheduling an appointment in MyChart. Refer to the Follow Up on Appointment Requests Where Scheduling Was Denied topic for information about following up on denied scheduling of appointment requests. Additionally, this feature applies only when the visit type being scheduled is linked to a decision tree with a Deny Scheduling node.

For example, say that a patient is scheduling a COVID vaccine appointment from a scheduling ticket in MyChart. If the patient's response to a decision tree question triggers a Deny Scheduling node that's configured to create an appointment request, the system automatically creates one based on the patient's scheduling attempt. The new appointment request is marked as Canceled, has a requested date of today, and contains the patient and visit type that was entered on the appointment. Note that the responsible department is blank for an appointment request generated from MyChart and contains the user's login department for an appointment request generated from Hyperspace.

A scheduler can then find the appointment request on a workqueue, in a report, or on the Finalized Requests tab of the Appointment Desk and follow up with the patient to successfully schedule the appointment. If the patient attempts to schedule with the same visit type multiple times in a day and the same decision tree denies scheduling, only the one appointment request is created.

> **!** If you've enabled the abandoned scheduling workflow, this feature applies only to MyChart scheduling. For schedulers working in Hyperspace, the feature would potentially create duplicate appointment requests because the abandoned scheduling workflow gives schedulers the option to save a scheduling attempt as an appointment request, such as when a decision tree denies scheduling.

To enable this feature, configure the Deny Scheduling node in a decision tree to trigger appointment request creation:

1. In Hyperspace, open an appointment entry decision tree (search: Appointment Entry Decision Tree). For example, if you're implementing this feature for COVID vaccine appointments, open the decision tree linked to the COVID vaccine visit type.
2. Add a Deny Scheduling node or select an existing one where the system should generate an appointment request for follow-up when the user or patient reaches that point in the scheduling workflow.
3. Select the Create Canceled Request for Tracking Denials? check box.
4. Optionally, enter a value in the Cancel/Denial Reason field. The selected reason is applied to the automatically generated appointment request.

After you enable the feature, create an appointment request workqueue or report to identify new appointment requests. To create a workqueue:

1. In Hyperspace, create an Appointment Request-context rule in the Rule Editor (search: Rule Editor).
2. Add either of the following properties to the rule:
   - Property 98645-Appt Request - Appt Entry Denial DT. Set this property not equal to blank to identify appointment requests that have a value in the Request Appt Entry Denial Decision Tree item.
   - Property 98646-Appt Request - Appt Entry Denial DT Answer. Enter a question (LQL) record ID in the Question ID parameter. This question should correspond to the question associated with the Deny Scheduling node in the decision tree. Set the property equal to Deny to identify appointment requests that were denied based on the user or patient's response to the specified question.
3. Create an appointment request workqueue, as described in the Build an Appointment Request Workqueue topic.
4. Add your rule to the workqueue.

Optionally, you can modify a workqueue view to show the user or patient's response to the question associated with the Deny Scheduling node in the decision tree. This information can help the workqueue user determine why scheduling was denied, for example, if the question has multiple responses and only certain ones deny scheduling.

1. In Hyperspace, create a new property in the Property Editor (search: Property Editor).
2. On the Properties Selection window, choose Select properties from a context to edit: and select Appointment Request.
3. Click the Appointment Request property and click Add Property.
4. In February 2024 and earlier, in the Lookup section enter the following in the Lookup function field: $$GetApptEntryDenialDTreeAnswer^S2PROPSR(question id). Starting in May 2024, using Free Text Cache Function as your Lookup Type enter the following in the Lookup Function field: $$GetApptEntryDenialDTreeAnswer^S2PROPSR(question id).
5. In the Data type field, enter String.
6. Open the Workqueue Detail activity (search: Requests WQ Maintenance).
7. Open the workqueue to which you want to add the column.
8. Click Configure View > Edit View and edit the view to which you want to add the column.
9. Click and drag the property you created from the Properties section into the Columns section.

To create a report that identifies appointment requests, use one of the following methods. Note that the report doesn't identify the decision tree question associated with the Deny Scheduling node.

Method 1:

1. In Hyperspace, create a copy of Reporting Workbench template 55072-ES Request Search or open an existing copy in the Template Editor (search: Template Editor).
2. Add property 98645-Appt Request - Appt Entry Denial DT as a parameter on the Query Template and User Interface forms in the Template Editor. Refer to the Add Parameters to a Template topic for more information.
3. Create a report based on your copy of template 55072.

Method 2:

1. In Hyperspace, create a report based on Reporting Workbench template 55072-ES Request Search.
2. Add a criterion to the report based on property 98645-Appt Request - Appt Entry Denial DT. Refer to the Add Criteria to a Report topic for more information.

Use Appointment Requests for Intake

Starting in Epic 2018

Epic 2017 by SU E8308315 and C8308315-Hyperspace

You can use appointment requests to create a centralized intake workflow for complex patients who are requesting to be seen by providers at your organization before you schedule any appointments for them. We recommend that organizations that have a large number of specialties or that draw patients from a large geographic area, such as academic organizations and destination medical centers, implement appointment requests for intake.

We don't recommend the appointment request intake navigator for organizations that schedule appointments for all patients who request one without pausing for physician triage, getting medical records, or completing other tasks before scheduling. Creating requests is unnecessary when you're scheduling appointments right away.

We developed appointment requests to help organizations create an intake workflow for call centers, patient access centers, and other areas that handle a high volume of requests for appointments but don't schedule the appointments right away. Creating appointment requests allows your schedulers to ensure that it's appropriate to schedule the patient and that all prerequisite tasks are completed before scheduling or before the patient arrives for their appointment.

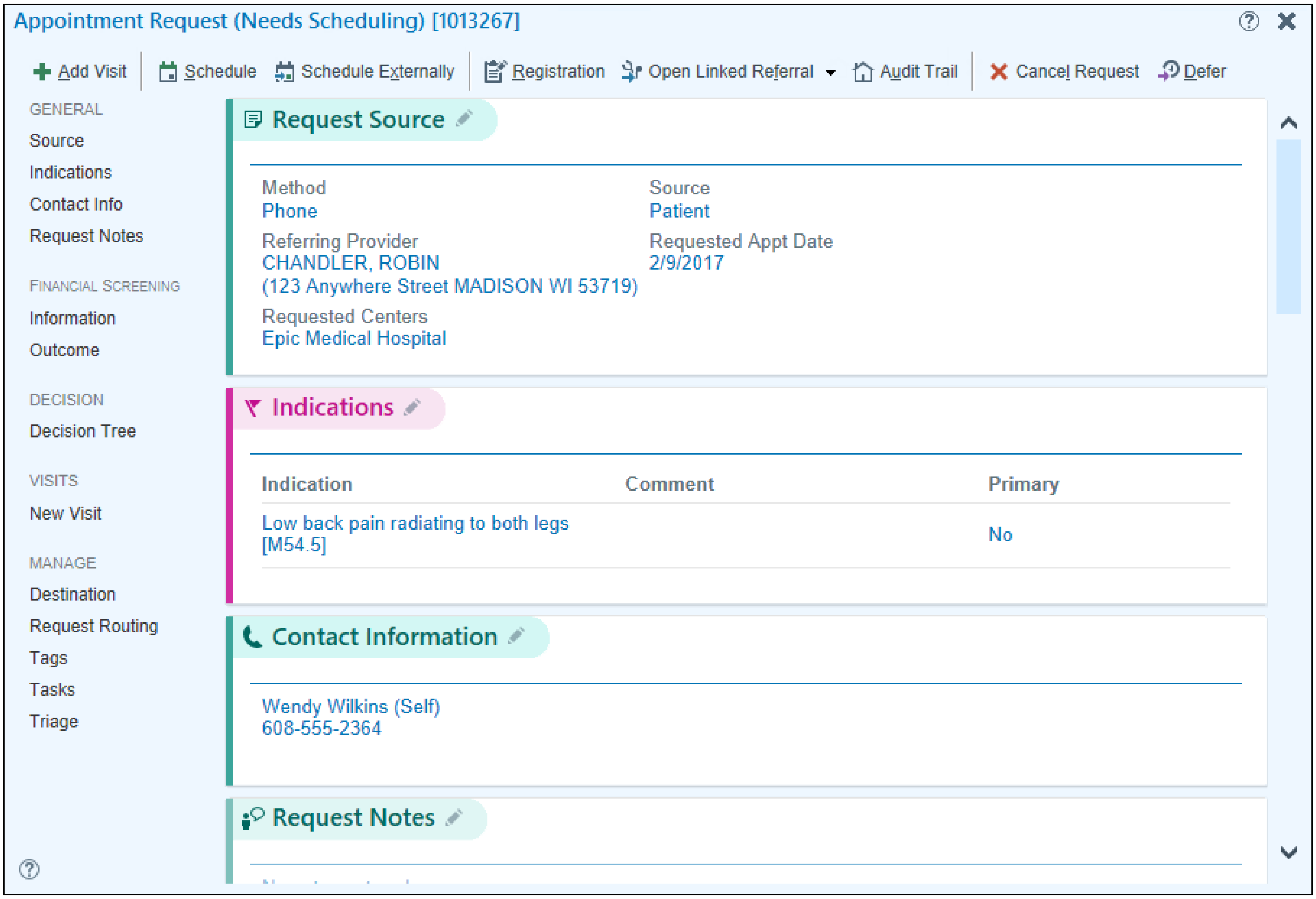
For example, a patient named Wendy is suffering from a neurological condition that requires specialized expertise or care. She, or a provider on her behalf, calls your central call center to share her care needs. A scheduler creates an appointment request to capture information about Wendy, completes basic financial screening to find the best location to schedule her based on her insurance coverage, and follows a decision tree to determine which visits to schedule with which providers. If it's not appropriate to schedule an appointment for Wendy, the scheduler communicates that to Wendy and cancels the appointment request. If it is appropriate to schedule an appointment for Wendy, the scheduler can return to the appointment request when all prerequisite tasks are complete and schedule the visits that the decision tree added to the request.

When you set up appointment requests for intake, schedulers can create a request for a patient by clicking the Appt Request button on the Appointment Desk toolbar. From the Appointment Request activity, schedulers can take the following actions:

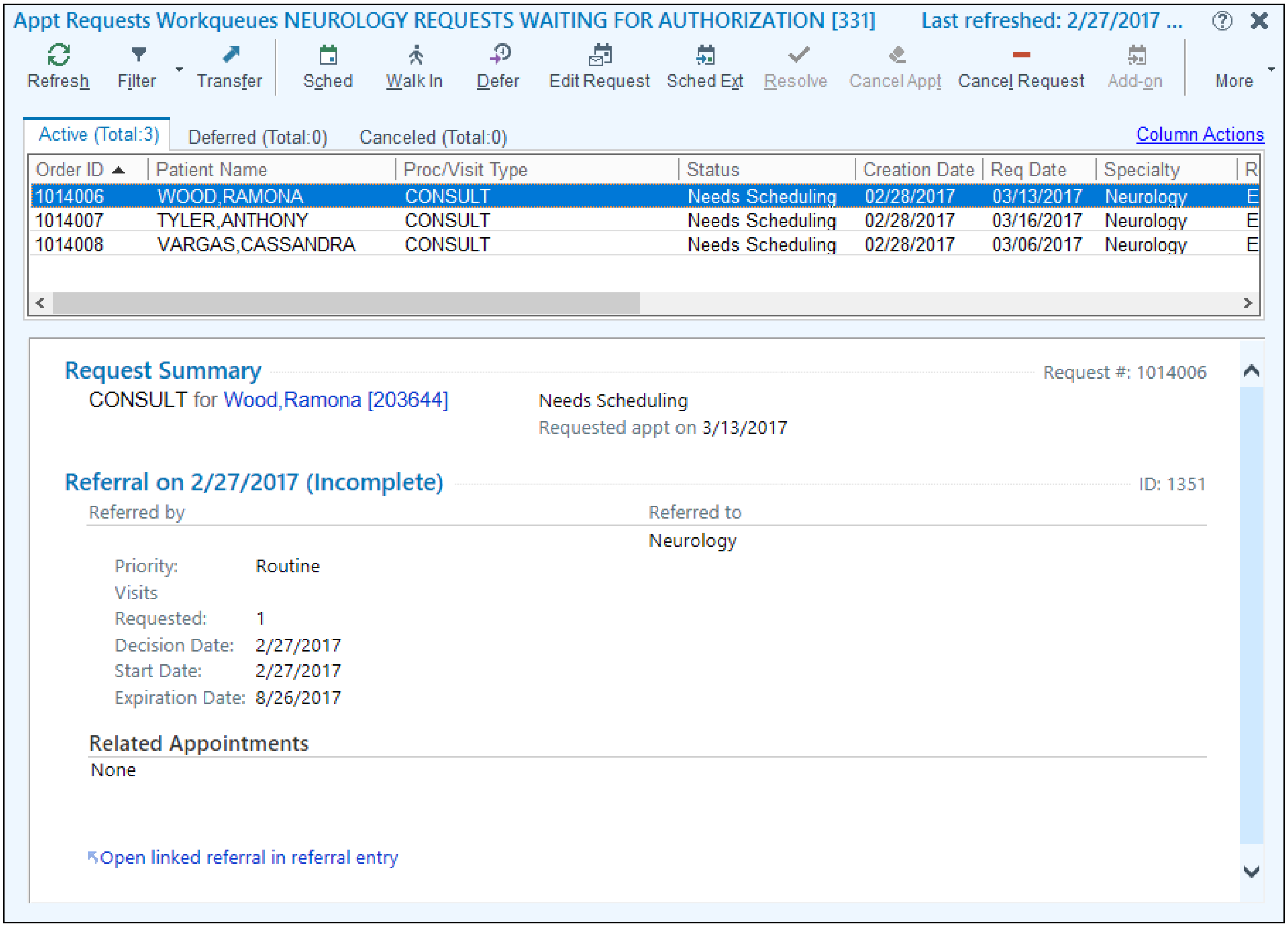
- Add visits that need to be scheduled
- Schedule the visits on the request
- Indicate that the request was scheduled outside your organization
- Open the Registration activity
- Open Referral Entry for the referral linked to the request
- View an audit trail of changes that have been made to the request
- Cancel a request or reinstate a canceled request
- Defer scheduling of a request

Schedulers can manage a patient's appointment requests in appointment request workqueues and on the Active Requests and Finalized Requests tabs on the Appointment Desk.

The Appointment Request activity is based on a navigator template, which are commonly used in Epic's clinical applications. The left side of the activity organizes each section in the template and allows users to quickly open a particular section.



Schedulers can manage requests that have incomplete tasks or are ready to be scheduled in appointment request workqueues.



To use appointment requests for intake, 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.

In the Foundation System

Appointment requests for intake are enabled in the Foundation System and set up according to Epic recommendations. Our recommended enhancements include:

- Changing the names of all schedule orders workqueues to reference appointment requests instead of schedulable orders.
- Adding print group 51956-Order: Questions (Rich Text) to workqueue report 117630001-FS ES Order Information to display order questions and answers in the appointment request workqueue details pane. Refer to the HTML Displays Report Setup topic for more information.
- Replacing the Orders tab with Active Requests and Finalized Requests tabs for every department that uses the Appointment Desk, as described in the Show Appointment Requests on the Appointment Desk topic.
- Collecting cancel reasons from schedulers who cancel appointment requests, as described in the Collect Reasons Why Requests Are Canceled or Denied topic.
- Adding values to the Cancel Reason (I ORD 1510) and Request Contact Relationship (I ORD 67221) category lists.

To see this build, log in to the Foundation Hosted environment as your organization's Cadence administrator

(ESADM) and access the Appointment Desk for a patient with a schedulable order, view the workqueues in the Requests tab of the Workqueue List, or open the category lists in Category List Maintenance.

Your Epic representative can help you move this build into your environment. To get started, contact your Epic representative and mention parent SLG 1416567.

Additionally, you can use the Foundation System's example intake workflow to try out the appointment requests from start to finish. To try out the workflow in the Foundation Hosted environment:

1. Log in as your organization's front desk user (ESDESK) and transcribe a referral to neurology for a patient. For the order question, "Is this referral for headaches?" answer Yes and associate a headache-related diagnosis.
2. Go to the Appt Requests tab of the Workqueue List and open workqueue 2001-Neurology Appt Requests - Incomplete Tasks. Open your patient's request and click Edit Request in the workqueue toolbar.
3. The task section of the request shows that you need to complete a decision tree. Navigate to the Decision Tree section and open the tree listed there.
4. Answer the questions in the decision tree however you want. Depending on these answers, you might see that you need to:
   - Request Triage
   - Request Authorization
   - Collect Outside Records
5. Click Apply to indicate that you've finished answering the questions. The tasks that appear in your decision tree results now also appear in the Tasks section.
6. Mark the Complete Decision Tree task as complete.
7. Complete any other tasks:
   - If you need to collect outside records, mark this task Complete manually.
   - If you need to complete authorization, open the linked referral and change the referral's status to Authorized.
   - If you need to request triage, log in as your organization's neurology nurse (NEURORN), find the triage message in the Referral Triage In Basket folder, and click Accept in the message.
8. After all the tasks have a status of Complete, your patient's request falls off of the incomplete tasks workqueue and appears on workqueue 451-Neurology Appt Requests - Ready to Schedule. Highlight the appointment to see the request and order details, including the Order Questions section. From this workqueue, you can schedule the appointment.

Import Appointment Requests

If you want to import information about appointment request records from your previous system all at once before go-live or create appointment requests for patients in bulk, you can use import specification ORD,1010-Template - Appointment Request Import to bring in this data.

- Starting in November 2024 and in August 2024 with special update E11103414, May 2024 with special update E10908991, and February 2024 with special update E10812636, you can use this import specification to import items that let both schedulers and patients schedule appointment requests.
- In August 2024 and earlier versions, you can import only items that let end users schedule appointment requests in Hyperspace.

For more information about importing records, refer to the Standard Import Guide.

To set the status of a task assigned to an appointment request, enter one of the following statuses in the Tasks Status column exactly as it appears below:

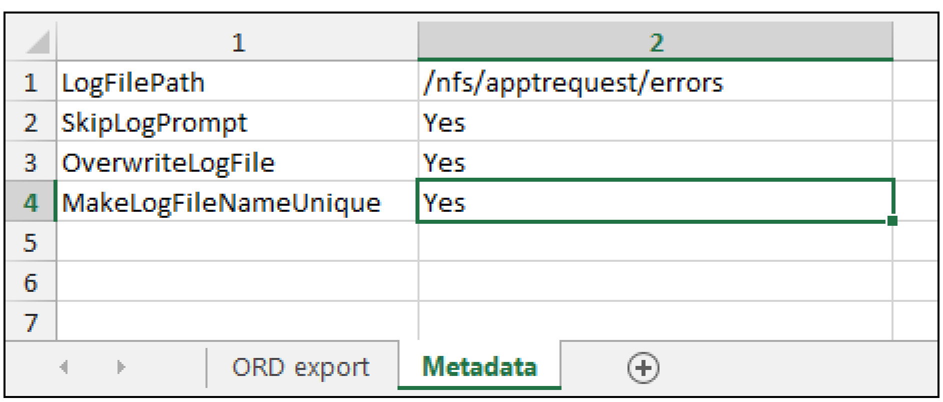
- Not Started
- Started
- Complete
- Not Needed

Note that a referral is automatically generated for appointment requests that are imported with import specification ORD,1010. If you're importing a large number of appointment requests, consider preventing referral generation if referrals aren't necessary for the imported requests. Refer to the Prevent Referrals from Being Automatically Generated for Appointment Requests topic for more information.

In addition to the import log, you can set up your import to create a spreadsheet (CSV file) of errors to help you troubleshoot any appointment requests that the system could not import. If you're using Chronicles to import your appointment requests, the system prompts you for a file path and file name where it should save the error log file.

To automate the creation of the error log spreadsheet you can add metadata to your import spreadsheet that tells the system to create the error log spreadsheet. This step is required if you want to run the import from Hyperspace, which does not have the prompt to create the spreadsheet. To do this:

1. Add a tab to your import spreadsheet called "Metadata."
2. On the Metadata tab, add rows and values for the following metadata items:
   - LogFilePath. Enter the file path or the file path and file name for saving the file. If you enter only a file path, the system generates a name for the file.
   - SkipLogPrompt. Enter Yes to skip the Chronicles prompt where you specify the file path and file name for saving the file because you've already specified that in the LogFilePath metadata item.
   - OverwriteLogFile. Enter Yes if, on subsequent imports, you want the system to overwrite the last error log file it created.
   - MakeLogFileNameUnique. Enter Yes if you want to system to create a unique file for each import by appending the date and time to the file name.



Grant Schedulers Access to Appointment Requests

Only schedulers with the proper Cadence security points can view, create, and edit appointment requests. Review the security points in the steps below and update your scheduler's Cadence security classes as needed.

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Requests, Prerequisites & Recalls form and enter Yes in the following fields to grant schedulers access to these appointment request features:
   - View request (I ECL 5720). Allows users to view appointment requests.
   - Create request (I ECL 5721). Allows users to create appointment requests.
   - Edit request (I ECL 5723). Allows users to edit appointment requests.
   - Reinstate request (I ECL 5724). Allows users to reinstate canceled appointment requests.
   - Cancel non-order request (I ECL 5722). Allows users to cancel appointment requests that are not also a schedulable order.

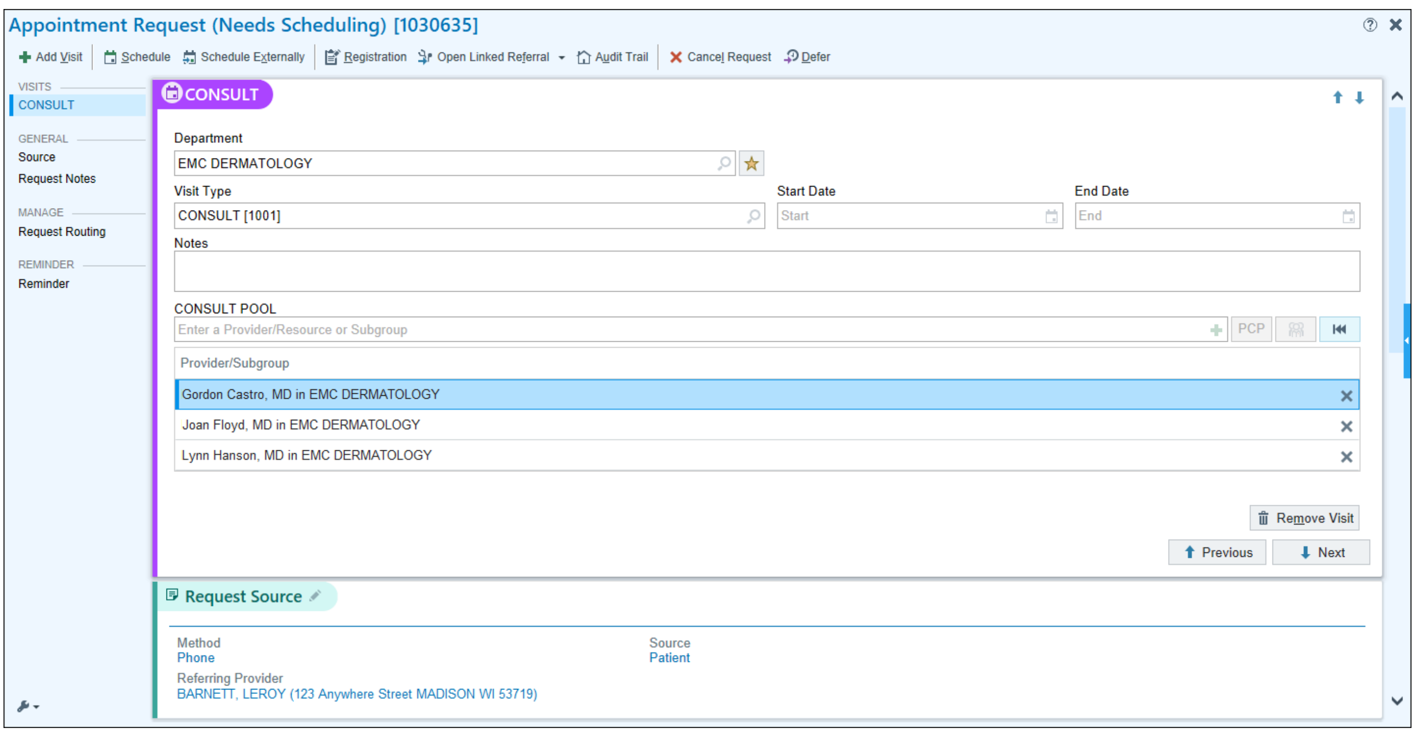
Set Up the Appointment Request Activity

In this section, we cover the tasks needed to set up the Appointment Request activity for the way you want to use it. The Appointment Request activity is based on a navigator template, which are commonly used in Epic's clinical applications. You can add, remove, and rearrange the sections in the navigator template to fit your workflow. Many sections also have some build associated with them, such as creating a list of request sources for the Request Source section or creating a financial decision tree for the Financial Screening Outcome section.

Customize the Appointment Request Navigator

The Appointment Request activity is based on a navigator template. The activity uses a default navigator template, but you can customize a navigator template to use instead.

A navigator template contains topics, and those topics contain sections. In the example below, the topics are Visits, General, Manage, and Reminder.



When customizing a navigator template, you must include the TOPIC_ES_REQUEST_VISITS topic. In November 2019 and earlier, you must also include the TOPIC_ES_REQUEST_DECISION topic.

To begin customizing the Appointment Request navigator, you can copy one of the following Epic-released templates and then modify the topics and sections that appear in it:

- 90002-T_ES_APPT_REQUEST. This is the default template in November 2019 and earlier.
- 90015-T_ES_APPT_REQUEST_NO_FINANCIAL_SCREENING. This is similar to template 90002 but does not have the financial screening topic and sections.
- 90033-T_ES_APPT_REQUEST_SIMPLE. This is the default template starting in February 2020.

The table below lists the sections you can add to your copied template. The only section that is not included in the released templates is the Referral Information section.

> **!** The topics for the Decision and Visits topics must be used as released. Do not duplicate these topics or the sections in these topics. If you do, schedulers won't be able to answer decision trees or add visits to a request.

Name	Descriptor	Purpose
Contact Information	90007-SEC_ES_REQUEST_CONTACT_INFO	Collect information about the person to follow up with if any questions arise for the request.
Destination	90011-SEC_ES_REQUEST_DESTINATION	Enter the specialty and subspecialty in which the appointment request should be scheduled.
Financial Screening Information	83000-SEC_REG_REQUEST_FINANCIALINFO	Collect financial information about the patient before running financial screening.
Financial Screening Outcome	83001-SEC_REG_REQUEST_FINANCIALDECISION	Run your organization's financial decision tree for the patient and view the results.
Indications	90009-SEC_ES_REQUEST_INDICATIONS	Enter the patient's indications to automatically suggest the linked decision trees in the Decision Tree Search section. By default, users can search only for indications that are linked to a request entry decision tree.
Referral Information	90010-SEC_ES_REQUEST_REFERRAL_INFO	Enter the referral type, priority, and free text diagnoses and procedures for the referral linked to the request. Click Open Referral to edit the full referral in Referral Entry.
Reminder	90024-SEC_ES_REQUEST_REMINDER	Enter the date to start reminding the patient to schedule their appointment. For

Name	Descriptor	Purpose
		more information about appointment request reminders, refer to the Remind Patients to Schedule Appointment Requests topic.
Request Notes	90008-SEC_ES_REQUEST_NOTES	Enter free text notes about the request.
Request Routing	90018-SEC_ES_REQUEST_ROUTE	Enter the responsible department for the request.
Request Source	90005-SEC_ES_REQUEST_REQ_SOURCE	Enter information about the person who is requesting the appointment, when the appointment is requested for, and the centers at which it is requested.
Search Terms (available starting in May 2025)	90054-SEC_ES_REQUEST_SEARCH_TERMS	Enter provider search terms (specialty, subspecialty, condition, treatment, or keyword) for the request.
Tags	90017-SEC_ES_REQUEST_TAGS	Enter tags for the patient. Tags can be used in the following ways: • Tags can allow a patient to be scheduled into any visit type block that is mapped to the tag. For more information about tags and blocks, refer to the Restrict Time in Schedules for Specific Visit Types Using Blocks topic. For example, the Foundation System includes a tag for Priority patients that allows office visits for these patients to be scheduled into New Patient and Physical blocks so they can be seen sooner.

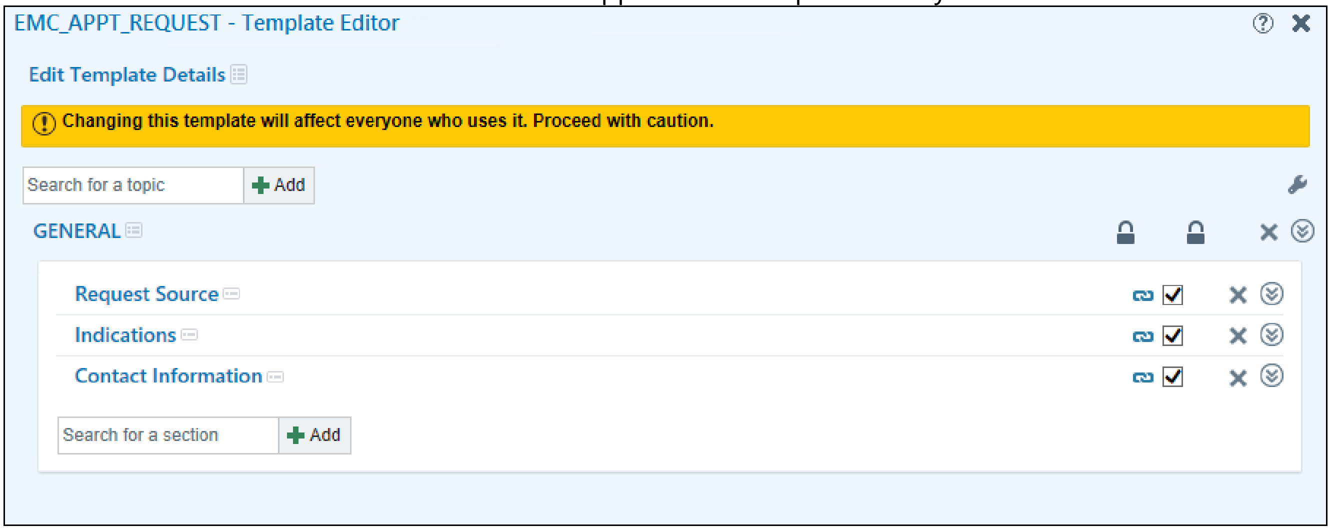
Name	Descriptor	Purpose
		• Tags can tell the system to automatically request a resource for an appointment. For more information about tags and resource requests, refer to the Automatically Request Additional Resources for Departments and Visit Types topic.
Tasks	90022-SEC_ES_REQUEST_TASKS	Keep track of individual action items that need to be completed before a request can be scheduled or before the patient arrives for their appointment.
Triage	90016-SEC_ES_REQUEST_TRIAGE	Monitor the status of the triage decision for the request and route it to a triage pool in In Basket. For more information about referral triage, refer to the Involve Clinicians in Deciding Whether to Accept a Referral topic.

Complete these steps to create a custom navigator template for the Appointment Request activity:

1. In Hyperspace, open the Template Editor (search: Navigator Template).
2. Create a navigator template.
3. Create custom topics or use some of the standard topics if they meet your needs.
    - To create a topic, click Add and select the Create tab. Give your topic a descriptive name that includes the word "topic" and select a record type of Topic. In the Caption field, enter the title that you want schedulers to see for your topic in the Appointment Request activity.
    - The standard topics are:
        - General: 90004-TOPIC_ES_REQUEST_GENERAL
        - General (Simple): 90034-TOPIC_ES_REQUEST_GENERAL_SIMPLE. Available starting in February 2020.
        - Financial Screening: 83002-TOPIC_REG_REQUEST_FINANCIALTREE
        - Decision: 90012-TOPIC_ES_REQUEST_DECISION
        - Visits: 90013-TOPIC_ES_REQUEST_VISITS
        - Manage: 90014-TOPIC_ES_REQUEST_MANAGE

- Manage (Simple): 90035-TOPIC_ES_REQUEST_MANAGE_SIMPLE. Available starting in February 2020.

4. For your custom topics, add the sections you want to appear under each topic. Refer to the previous table for a list of the sections available for use in the Appointment Request activity.



5. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
6. Select the Appointment Requests > Creation form. In August 2018 and earlier, select the Orders/Requests > Entry/Creation form.
7. Enter the descriptor for your custom navigator template in the Request Navigator Template Descriptor (I SDF 10190) field.

Keep Track of Appointment Requests with Custom Statuses

You can use the status of an appointment request to route requests to certain workqueues. Schedulers can also see the status of a request and use it to help them identify the next step they need to take. The system tracks the status of an appointment request in two ways:

- The base status is what the system uses to determine which actions can be taken on a request. Base statuses for requests cannot be customized. An appointment request can have one of the following base statuses:
  - Draft (starting in February 2023)
  - Needs Scheduling
  - Scheduled
  - Order Modified
  - Order Canceled
  - Deferred
  - Completed
  - Canceled
  - Expired
  - Voided
- The custom status is a list of statuses that you define and map to a base status. The system determines the custom status for a request based on rules you define. For example, if your policy is to obtain authorization

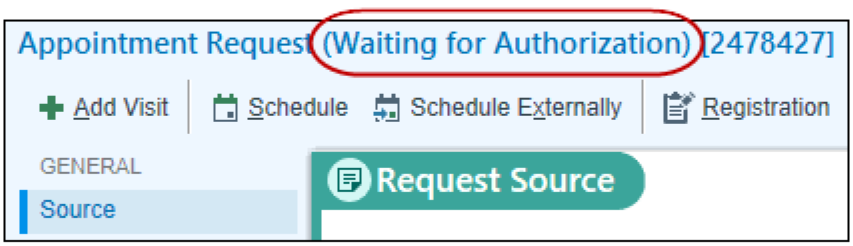
for requests before scheduling them, you could define a custom status of Needs Authorization for requests that have a base status of Needs Scheduling and also have an outstanding authorization task. You could then route these requests to an appointment request workqueue for authorization based on the custom status.

Starting in February 2023, appointment requests coming from patient self-triage are initially created in Draft status. This status can't be used to route requests to workqueues.

Allow schedulers and managers to tell at-a-glance where an appointment request is in the scheduling lifecycle at your organization by creating custom statuses that map to the Needs Scheduling, Deferred, Completed, and Canceled base statuses. You can create custom statuses that represent the following pieces of an appointment request:

- Whether there are incomplete tasks
- The next active task
- Triage status
- The reason the request is deferred
- The reason the request is canceled
- Whether the request was scheduled outside your organization

Schedulers can see the status of a request in a column on the Active Requests and Finalized Requests tabs of the Appointment Desk, in a column in appointment request workqueues, and in the Appointment Request activity:



Create Custom Appointment Request Statuses

Create your custom appointment request statuses as values in the Request Status (I ORD 67000) category list. For more information about working with category lists, refer to the Modify a Category List's Values topic.

Map Your Custom Statuses to Base Statuses

Behind the scenes, an appointment request still has a base status from the Request Base Status (I ORD 67001) category list. To start using your custom statuses, you need to map them to the Needs Scheduling, Deferred, Completed, and Canceled base statuses in Cadence System Definitions. You can map a custom status to only one base status.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Status Overrides form. In August 2018 and earlier, select the Orders/Requests > Status Overrides form.
3. Complete the Status Overrides table. The system evaluates this table from the top down and uses the first matching override it finds for a request. If a match isn't found, the base status of the request is used.
   - Request Status (I SDF 10560). Enter a custom status from the Request Status (I ORD 67000) category list.
   - Base Status (I SDF 10561). Enter a base status to map to the custom status. Choose from Needs

Scheduling, Deferred, Completed, and Canceled.

  - Incomplete Task? (I SDF 10562). Applies only to the Needs Scheduling and Deferred base statuses. Enter Yes if this status override applies only to requests that have incomplete tasks.
  - Next Incomplete Task (I SDF 10563). Applies only to the Needs Scheduling and Deferred base statuses. If you entered Yes in the Incomplete Task? column, you can optionally define what the next incomplete task for the request must be for this status override to apply to a request.
  - Triage Status (I SDF 10564). Applies only to the Needs Scheduling and Deferred base statuses. Enter the triage status (I ORD 67310) that a request must have for this status override to apply.
  - Deferred Reason (I SDF 10566). Applies only to the Deferred base status. Enter the defer reason (I ORD 67360) that a request must have for this status override to apply.
  - Cancel Reason (I SDF 10567). Applied only to the Canceled base status. Enter the cancel reason (I ORD 1510) that a request must have for this status override to apply.
  - Sched Externally? (I SDF 10568). Applies only to the Completed base status. Enter Yes if this status override applies only to requests that were completed by being scheduled outside of your organization.

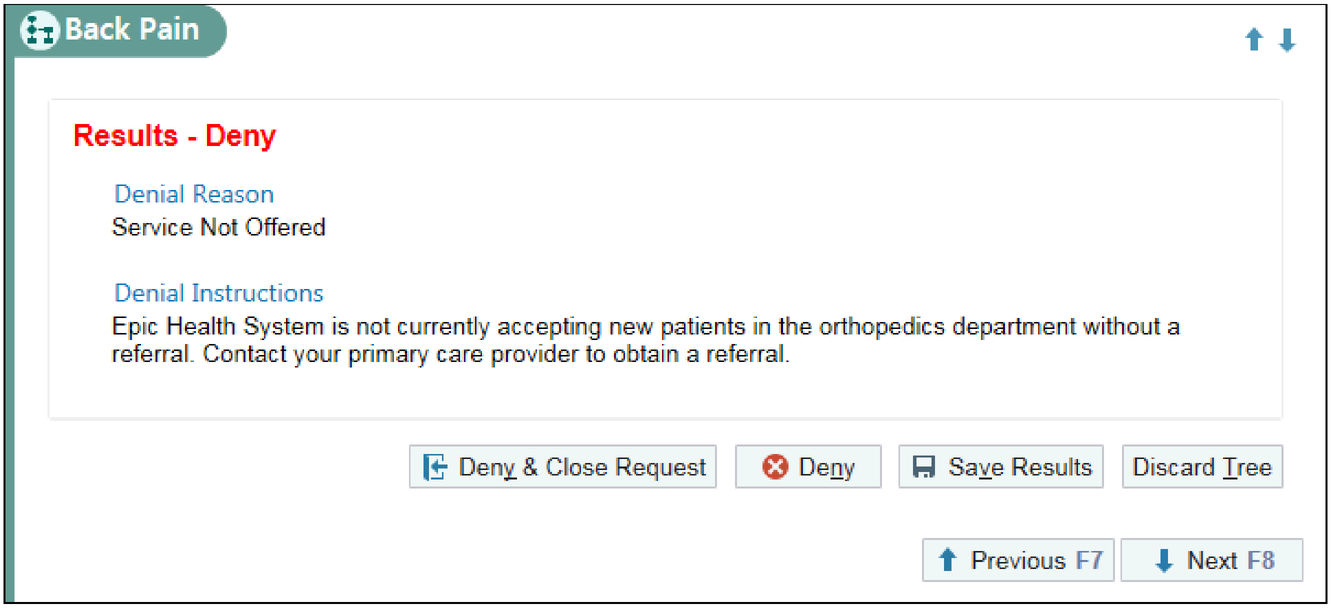
Status Overrides

Request Status	Base Status	Incomplete Task?	Next Incomplete Task	Triage Status	Deferred Reason	Cancel Reason	Sched Externally?
In Triage	Needs Scheduling			In Triage			
Scheduled Externally	Completed						Yes
Waiting for Tasks	Needs Scheduling	Yes					

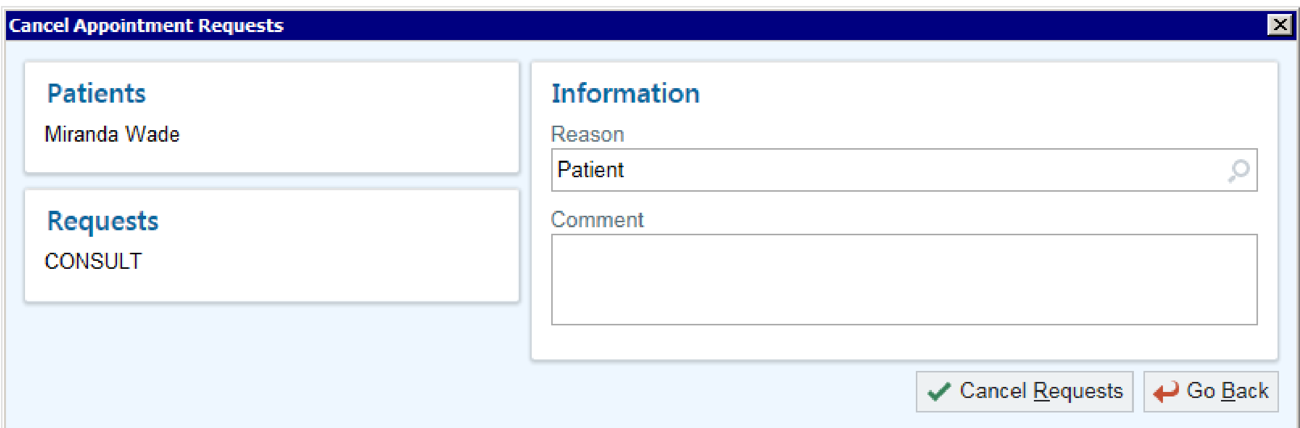
Collect Reasons Why Requests Are Canceled or Denied

Your organization likely cannot accommodate every request for an appointment. Perhaps you don't have a specialist who can treat the patient's condition. Or maybe the patient changes their mind and doesn't want to seek treatment at your organization. In these scenarios, schedulers can deny or cancel a request.

- Denying requests. You can set up a request entry decision tree to instruct a scheduler to deny an appointment request. When you add the Deny Request node to the decision tree, you must specify a reason why the request is being denied. This reason is stored with the canceled request record that the system saves when the scheduler clicks Deny & Close Request or Deny.



- Canceling requests. Schedulers can cancel a request from the Appointment Request activity by clicking Cancel Request. You can prompt them for a reason and comment for why they are canceling the request.



For both workflows, you define the reasons schedulers can choose from in the Cancel Reason (I ORD 1510) category list. This is the same category list you edit when you're setting up the abandoned scheduling workflow, which is described in the Keep Track of Abandoned Scheduling Attempts topic. You might also already have cancel reasons defined if you collect reasons why schedulers remove orders from scheduling as described in the Collect Reasons Why Schedulers Remove Orders from Scheduling topic. For the purposes of reporting on leaked demand for appointments, you can flag cancel reasons as representing leaked demand.

Create Reasons Why Requests Are Canceled or Denied

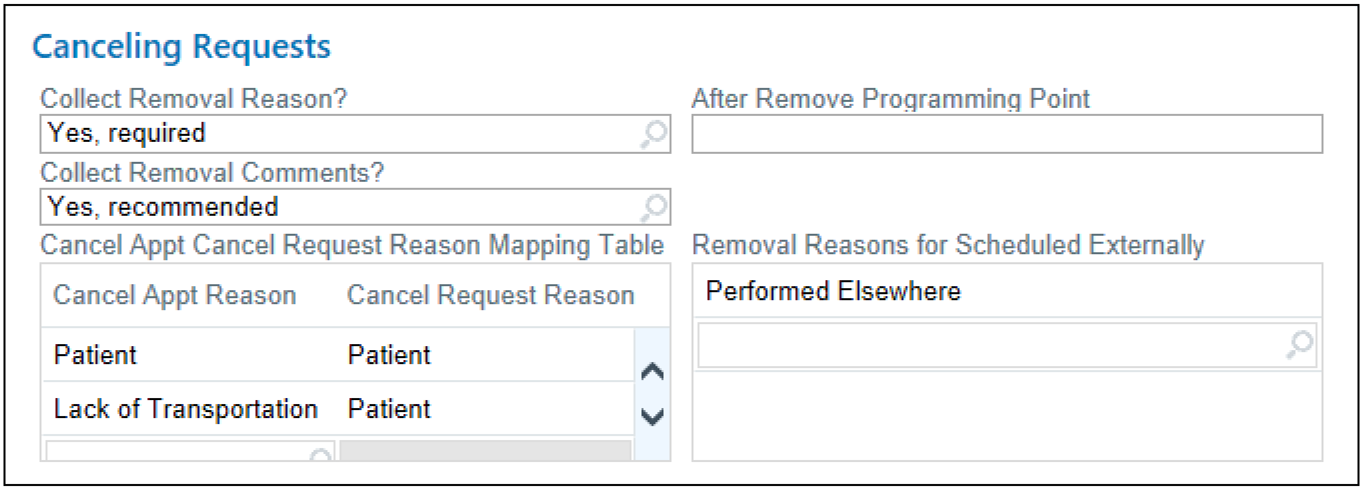
Define your cancel reasons in the Cancel Reason (I ORD 1510) category list and enter Yes in the "Is leaked demand?" field if they should count as leaked demand, or missed opportunities to care for a patient at your organization. For more information about editing category lists, refer to the Modify a Category List's Values topic.

Collect Reasons Why Requests Are Canceled

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Workqueues/Cancel form. In August 2018 and earlier, select the Orders/Requests > Workqueues/Cancel form.
3. In the Collect Removal Reason? (I SDF 10236) field, enter "Yes" to prompt users for a reason when they cancel a request. Enter "Yes, recommended" to make the Cancel Reason field recommended. Enter "Yes,

required" to make the Cancel Reason field required. The default is No.

4. In the After Remove Programming Point (I SDF 10237) field, enter an optional programming point to execute after a request is canceled. Work with your Epic representative if you have a need to run special code here.
5. In the Collect Removal Comments? (I SDF 10238) field, enter "Yes" to prompt users to enter a comment when they cancel a request. Enter "Yes, recommended" to make the Cancel Comment field recommended. Enter "Yes, required" to make the Cancel Comment field required. The default is No.

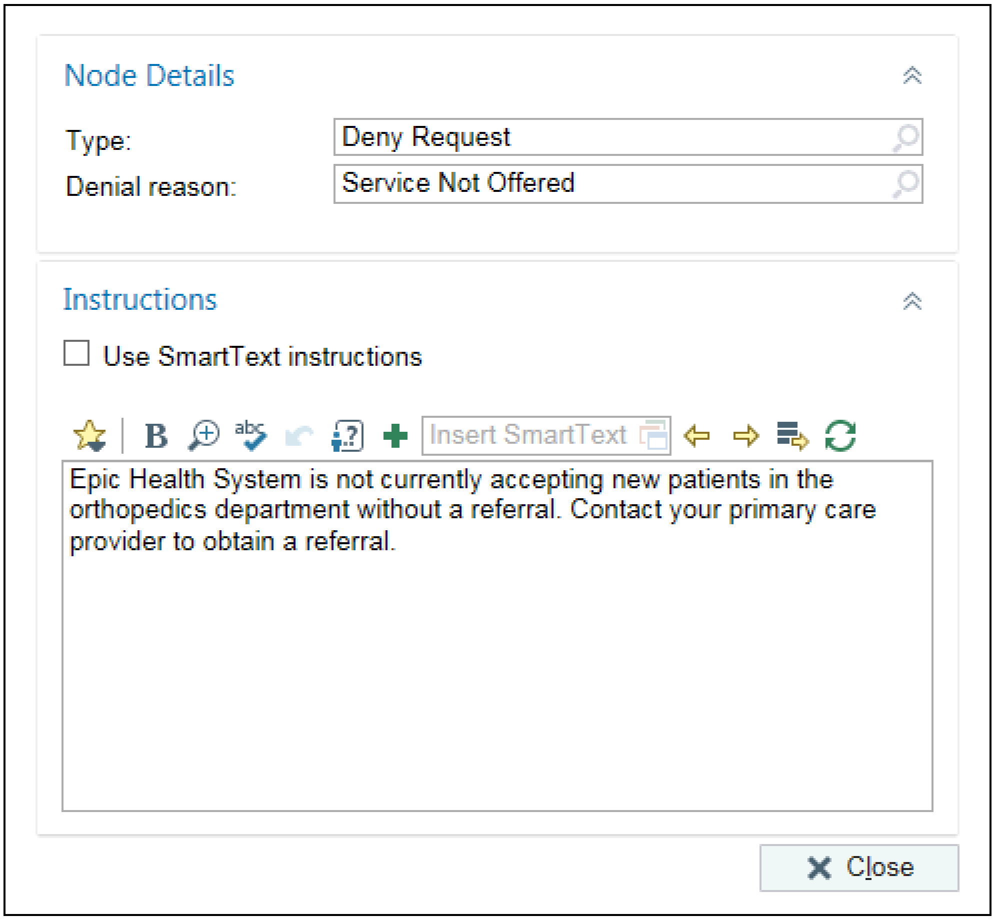


Mark Requests Canceled When Appointments Are Canceled

When an appointment that was scheduled from a request is canceled, you can set up the system to mark the request as canceled so that it doesn't appear on workqueues to be scheduled again. To do this, you list the appointment cancellation reasons that should cause linked requests to be marked as canceled in Cadence System Definitions. You can also map your appointment cancellation reasons to your request cancellation reasons if you want to record a specific reason with the canceled request. Refer to the Automatically Cancel Linked Appointment Requests When Appointments Are Canceled topic for additional information.

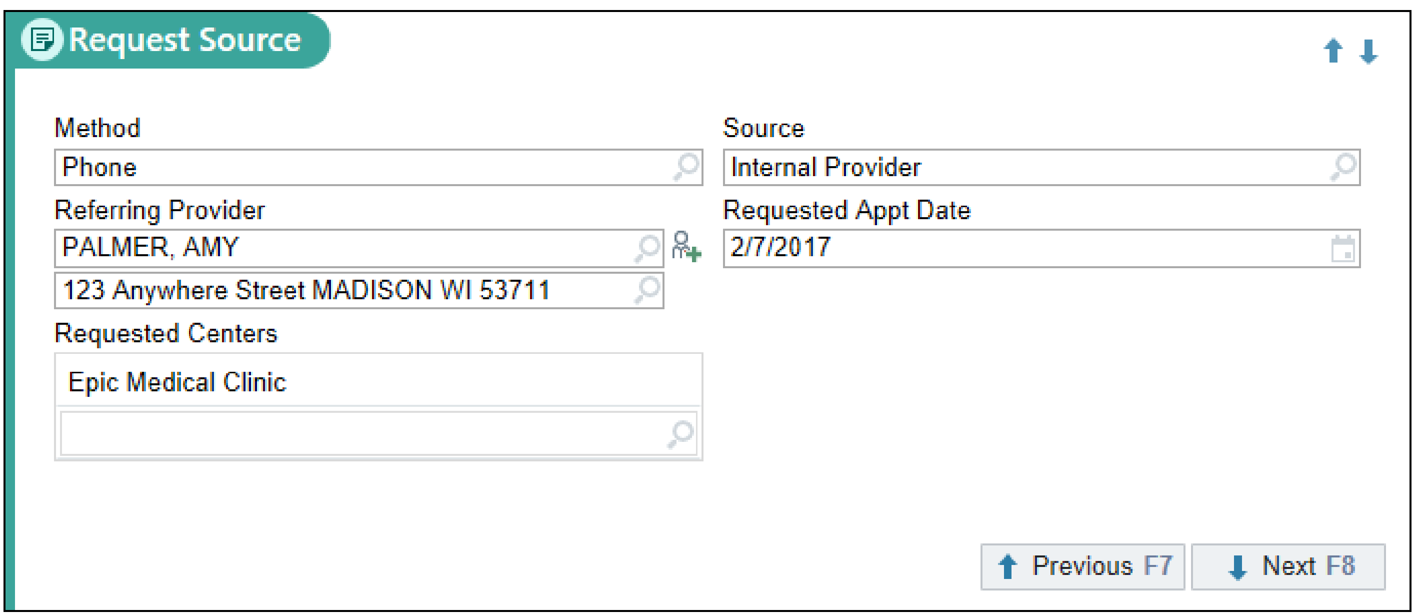
Use Request Entry Decision Trees to Deny Requests

You can use the Deny Request node in a request entry decision tree to instruct schedulers to deny a patient's request for an appointment. In the Denial reason field, enter a reason from the Cancel Reason (I ORD 1510) category list to store as the reason why the request was denied. For more information, refer to the Create a Decision Tree topic.



Customize the List of Request Sources

Schedulers can enter the source of a request in the Request Source section of the Appointment Request activity. For example, a patient might call to request an appointment, or a provider or family member might call on the patient's behalf.



By default, the following options are available in the Source field, but you can deactivate these options or add your own options to the list:

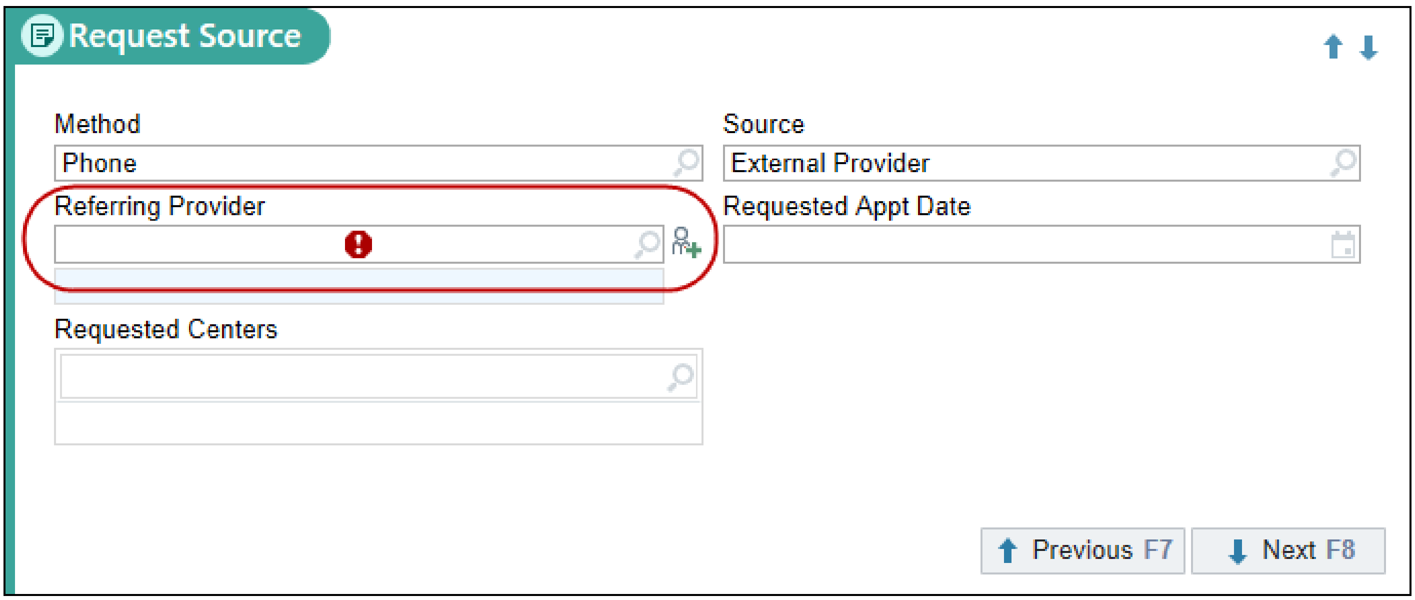
- Patient

- Internal Provider
- External Provider
- Spouse
- Parent
- Child
- Other

Define your request sources in the Appointment Request Source (I ORD 67201) category list. For more information about working with category lists, refer to the Modify a Category List's Values topic.

Require Schedulers to Enter a Referring Provider for Certain Request Sources

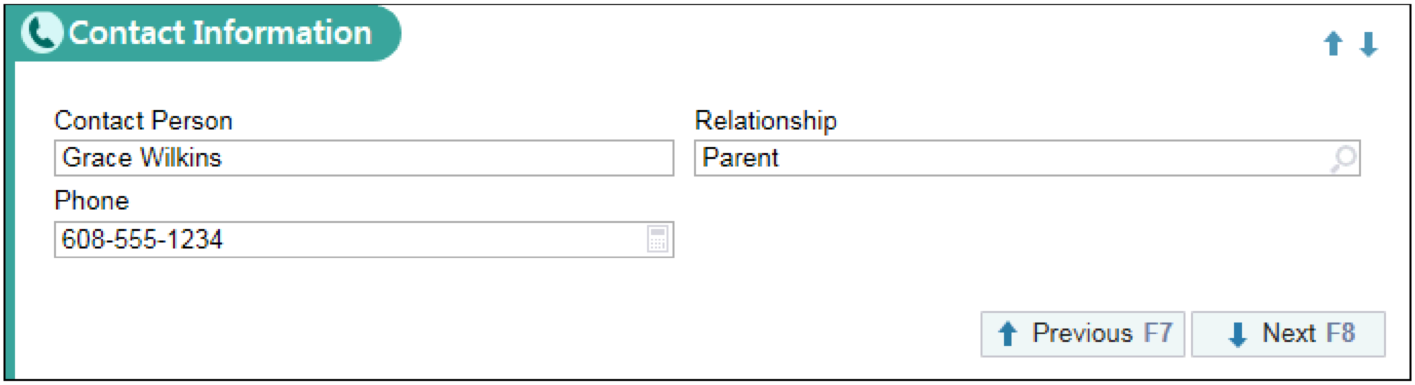
You can require schedulers to enter a referring provider for certain request sources that you specify in Cadence System Definitions. For example, you might require that schedulers enter a referring provider when the request source is Internal Provider or External Provider.



1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form. In August 2018 and earlier, select the Orders/Requests > Entry/Creation form.
3. In the Referring Provider Required Sources (I SDF 10196) field, enter the request sources for which schedulers are required to enter a referring provider.

Record the Relationship of the Person to Contact About a Request

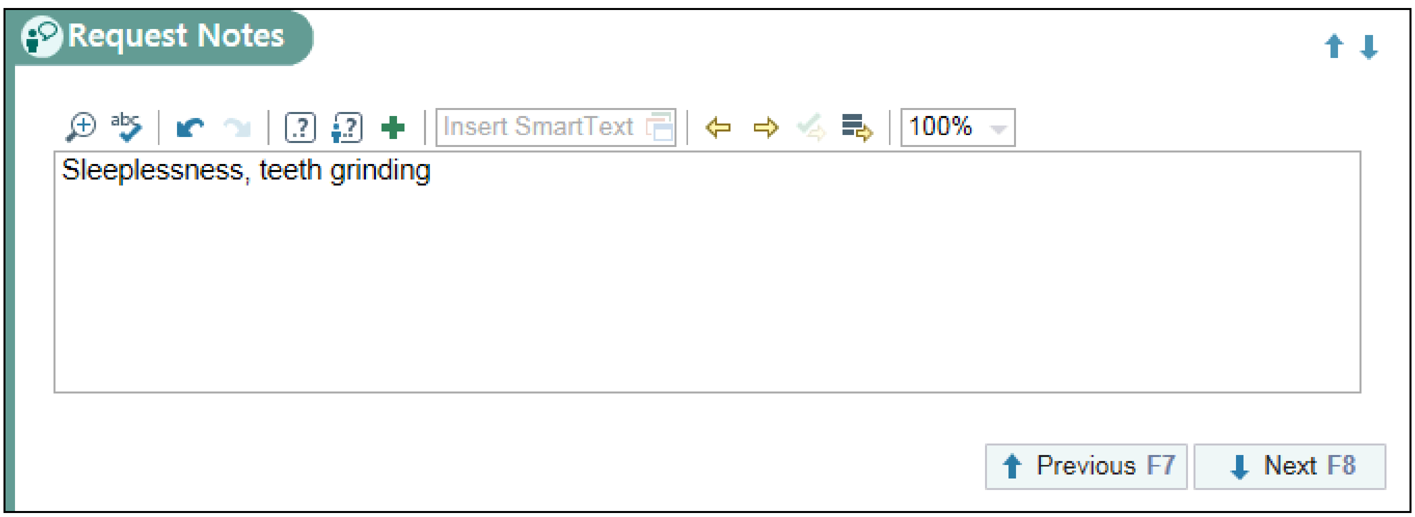
The Contact Information section of the Appointment Request activity can be used to record information about the person to contact with questions about a request. For example, a parent might call to schedule an appointment for their child. A scheduler can record the parent's name and phone number in case they need to follow up later and also select the relationship to the patient.



Define these relationships in the Request Contact Relationship (I ORD 67221) category list. For more information about working with category lists, refer to the Modify a Category List's Values topic.

Create SmartText Templates for Appointment Request Notes and Tasks

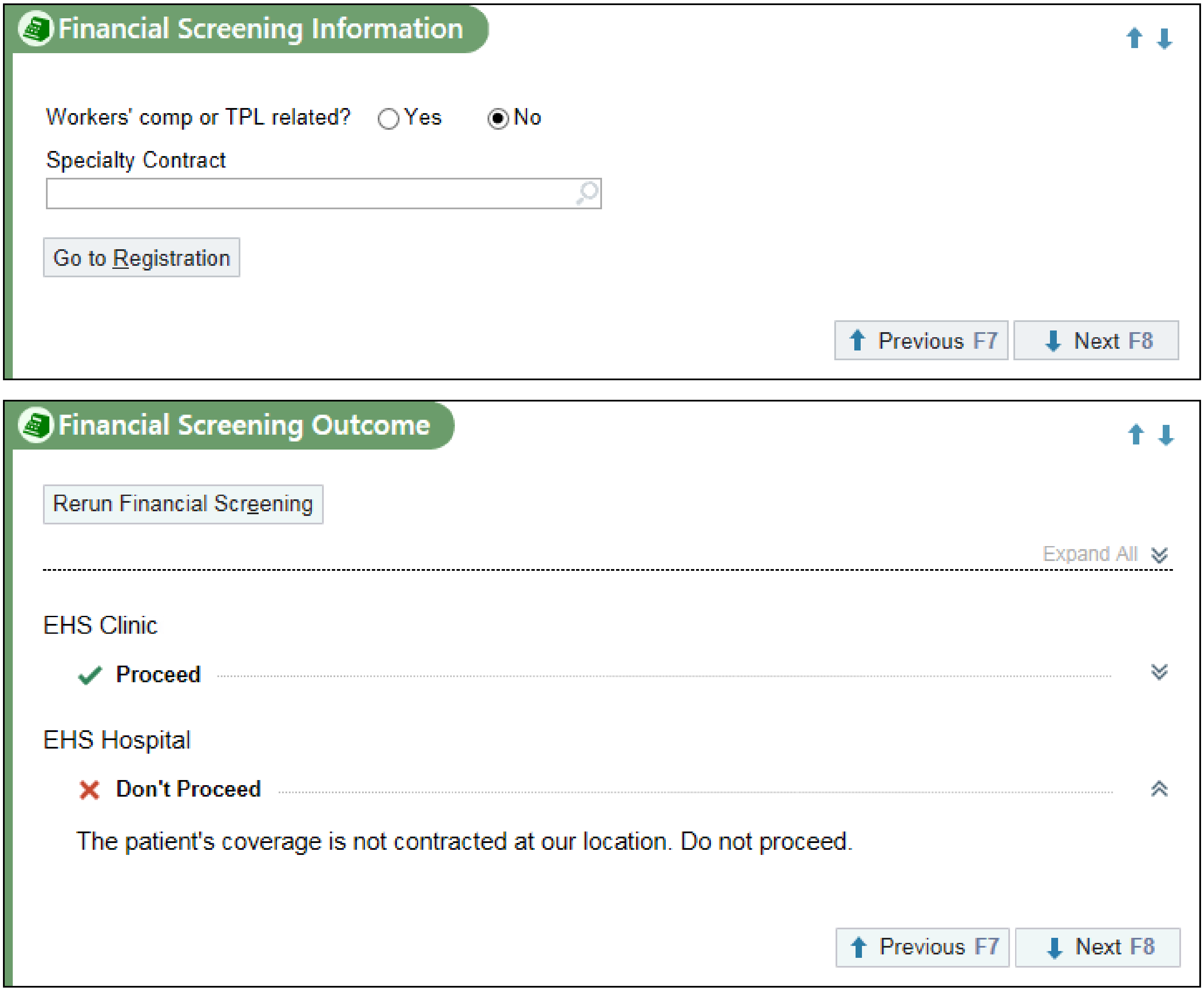
Schedulers can record free text notes about an appointment request in the Request Notes section or, starting in May 2022, the Tasks section of the Appointment Request activity. Notes added to the Request Notes section appear in the Request Notes column of the Active Requests and Finalized Requests tabs on the Appointment Desk as well as the Expand window for a request, while notes added to the Tasks section will only appear in the Quick Tasks window or when the request is expanded for editing. If you want to offer templates for how these notes should be structured, you can create SmartText records for users to choose from in the Request Notes section. Users are able to use EPT (patient) and ORD (orders) contexts for SmartText for request notes.



1. In Hyperspace, create a SmartText record (search: SmartText).
2. On the Restrictions tab, enter 3012-Cadence Appt Request Notes in the Functional Type field.
3. On the General tab, enter the text that appears in the Request Notes or Tasks comment section when users select this SmartText record.
4. Select the Released check box and click Accept.

Perform Financial Screening in Appointment Requests

Financial screening is the process of using a patient's registration and coverage information to guide whether a requested appointment should or should not be scheduled at your organization. In the Appointment Request activity, schedulers use the Financial Screening Information section to specify whether the request is related to an accident and should be billed to a third party instead of the patient. The system copies this information to the appointment when the request is scheduled. Next, they can jump to Registration to complete the patient's registration information, including demographics and coverages. After all financial details have been entered for the patient, the scheduler can run your financial decision tree from the Financial Screening Outcome section. The financial screening outcome is only informational; it does not allow or prevent a scheduler from completing the rest of the request and scheduling appointments for a patient.



Your financial decision tree can use rules, questions, and questionnaires to determine whether a patient is financially compatible with your organization. For example, the following factors might affect whether a patient can be seen at your organization:

- Whether your organization has a contract with the patient's insurance company
- The financial class of the patient's payer or plan
- The product type of the patient's payer or plan
- The patient's employer, particularly if the patient is an employee of your organization
- Any patient FYIs
- The patient's type
- The status of the patient's guarantor account or coverage
- Where the patient lives

- Whether the requested appointment is related to an accident
- Whether the patient or a third party will be billed for the visit
- Whether the patient is able to pay a deposit for the visit

To use financial decision trees, you must have the Cadence Financial Decision Trees 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.

Create Financial Decision Outcomes

By default, there are four possible outcomes you can choose from for a path in a financial decision tree:

- Proceed. It's appropriate to continue with the request but more tasks need to be completed before scheduling the visit.
- Don't Proceed. It's not appropriate to continue with the request.
- Schedule. It's appropriate to continue with the request and schedule the visit.
- Don't Schedule. It's not appropriate to schedule the patient.

If needed, you can create other outcomes to show to schedulers in the Financial Screening Outcome section.

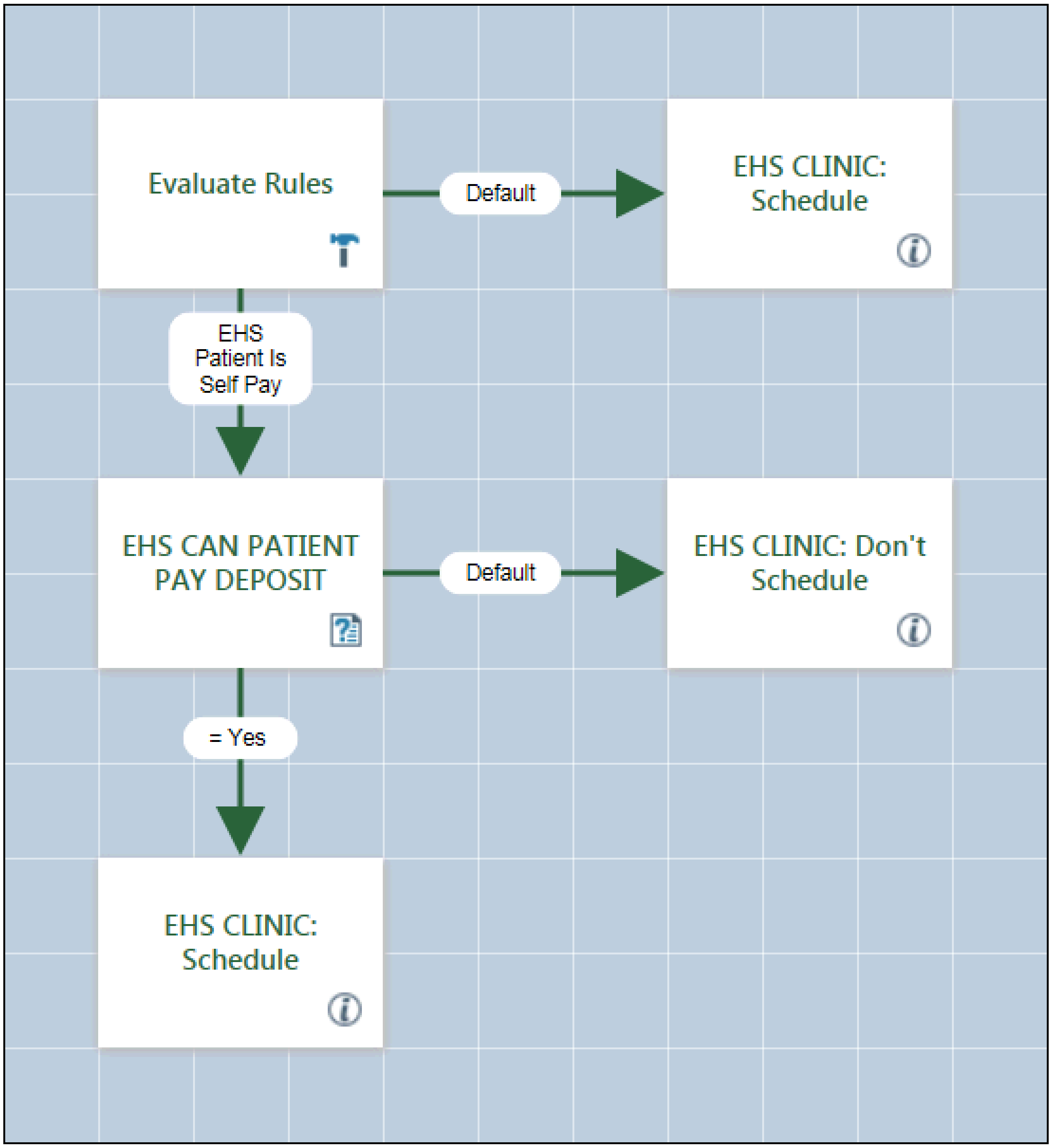
Define your custom outcomes in the Node - Financial Decision (I LQL 1321) category list. For more information about editing category lists, refer to the Modify a Category List's Values topic.

Create a Financial Decision Tree

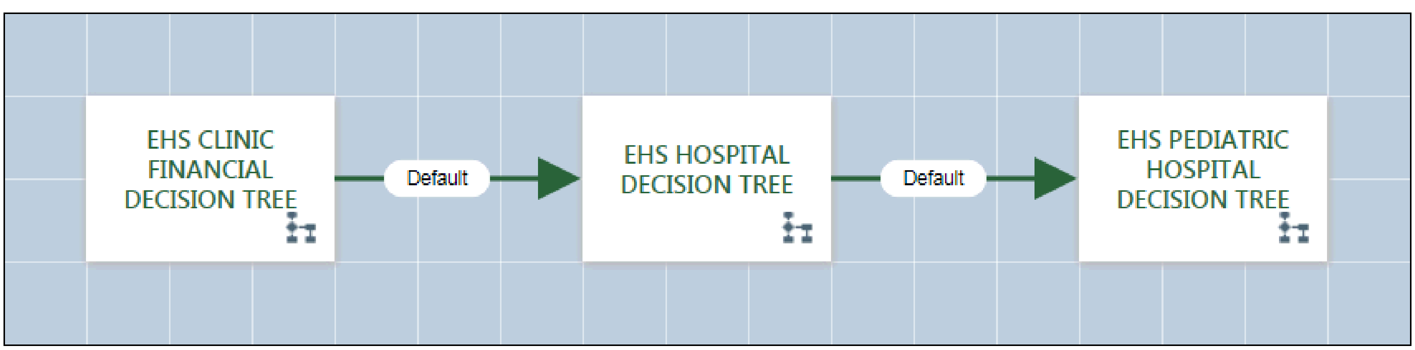
If you're familiar with appointment entry or request entry decision trees, you're already familiar with how to build a financial decision tree. As you're planning your decision tree, keep in mind that you can specify only one financial decision tree for schedulers at your organization to run during financial screening. You can create one decision tree that covers all scenarios, or create separate decision trees for each scenario and bring those trees together in one decision tree for your organization.

For more information about creating decision trees, refer to the Create a Decision Tree topic.

In the following example, the financial decision tree uses a rule to determine whether the patient has a financial class of Self-Pay. If no, the scheduler is instructed to schedule the patient in the EHS Clinic location. If yes, the scheduler is prompted to ask the patient whether they can pay a deposit for the visit. If yes, the scheduler is instructed to schedule the patient. If no, the scheduler is instructed not to schedule the patient.



Below is an example of a financial decision tree that could be used at the facility level if you decide to build separate financial decision trees for different locations or scenarios at your organization. This decision tree brings together those individual trees.



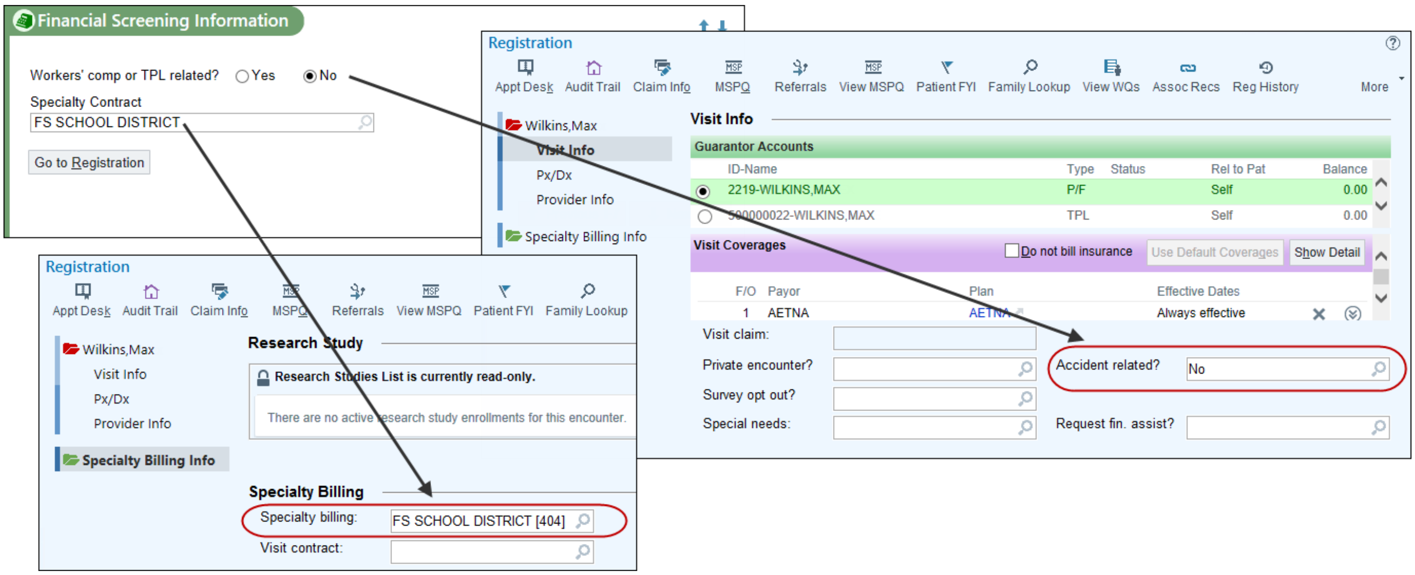
Define the Financial Decision Tree for Your Organization

1. In Hyperspace, go to Epic button > Admin > Registration/ADT Admin > System Definitions and open record 1.

2. Select the Financial Tree form.
3. Enter your financial decision tree in the Financial Tree to use in Appt. Request (I EAF 60010) field.

Copy Financial Screening Information to Related Appointments

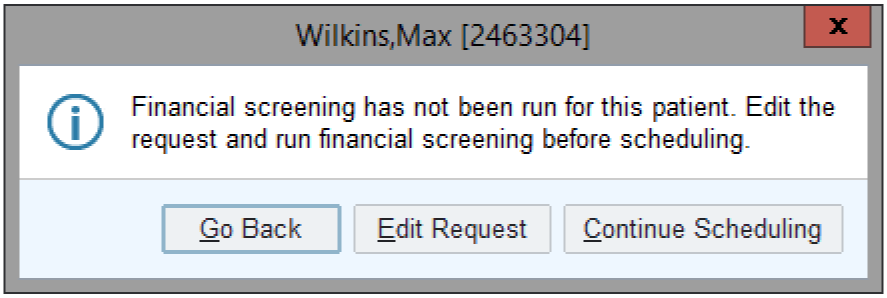
When a user schedules an appointment for a request, the system automatically copies the accident related and specialty billing information from the Financial Screening Information section to the appointment so users don't need to enter that information again. You can also set up the system to copy the information to future related appointments. For example, if a provider places orders for the first appointment that result in additional appointments being scheduled, those appointments can copy the accident related and specialty billing information from the first appointment.



1. Create a rule in the 2001-Patient context to identify when the system should copy information from the appointment from which an order was placed. For more information about working with rules, refer to the Create or Edit a Rule topic.
2. In Chronicles, access the Action Lists (HAL) master file and create an action list.
   a. In the Type of action (I HAL 60) field, enter Auto Eligibility Actions.
   b. In the Released? (I HAL 30) field, enter Yes.
   c. In the Used by Products (I HAL 50) field, enter Registration.
   d. In the Actions (I HAL 40) field, enter extension 58400-Reg Copy Forward Data to Encounter.
3. In Prelude Text, open your facility record.
4. Go to the RTE Auto-Trigger upon Reg Open Rules screen.
5. In the Auto-Verification Rule (I EAF 60598) field, enter the rule you created in step 1.
6. In the corresponding Actions to Perform (I EAF 60599) field, enter the action list you created in step 2.

Prompt Users to Perform Financial Screening Before Scheduling

To ensure that users are completing financial screening for patients before scheduling requests, you can prompt them to edit the request and run financial screening when they try to schedule a request and the conditions of a rule you specify are met.



1. Create a rule in the 5008-Appointment Request context to identify requests for which users should be prompted to run financial screening before scheduling. The error message you enter for the rule appears to users when they try to schedule a request that does not meet the criteria of your rule. For more information about working with rules, refer to the Create or Edit a Rule topic. Property 80092-Appt Request - Financial Screening Was Run? is useful for checking whether financial screening has already been run for a request or for other requests for the patient.
2. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
3. Select the Appointment Requests > Scheduling form. In August 2018 and earlier, select the Orders/Requests > Schedule form.
4. Enter your rule in the Rule to run (I SDF 10192) field.

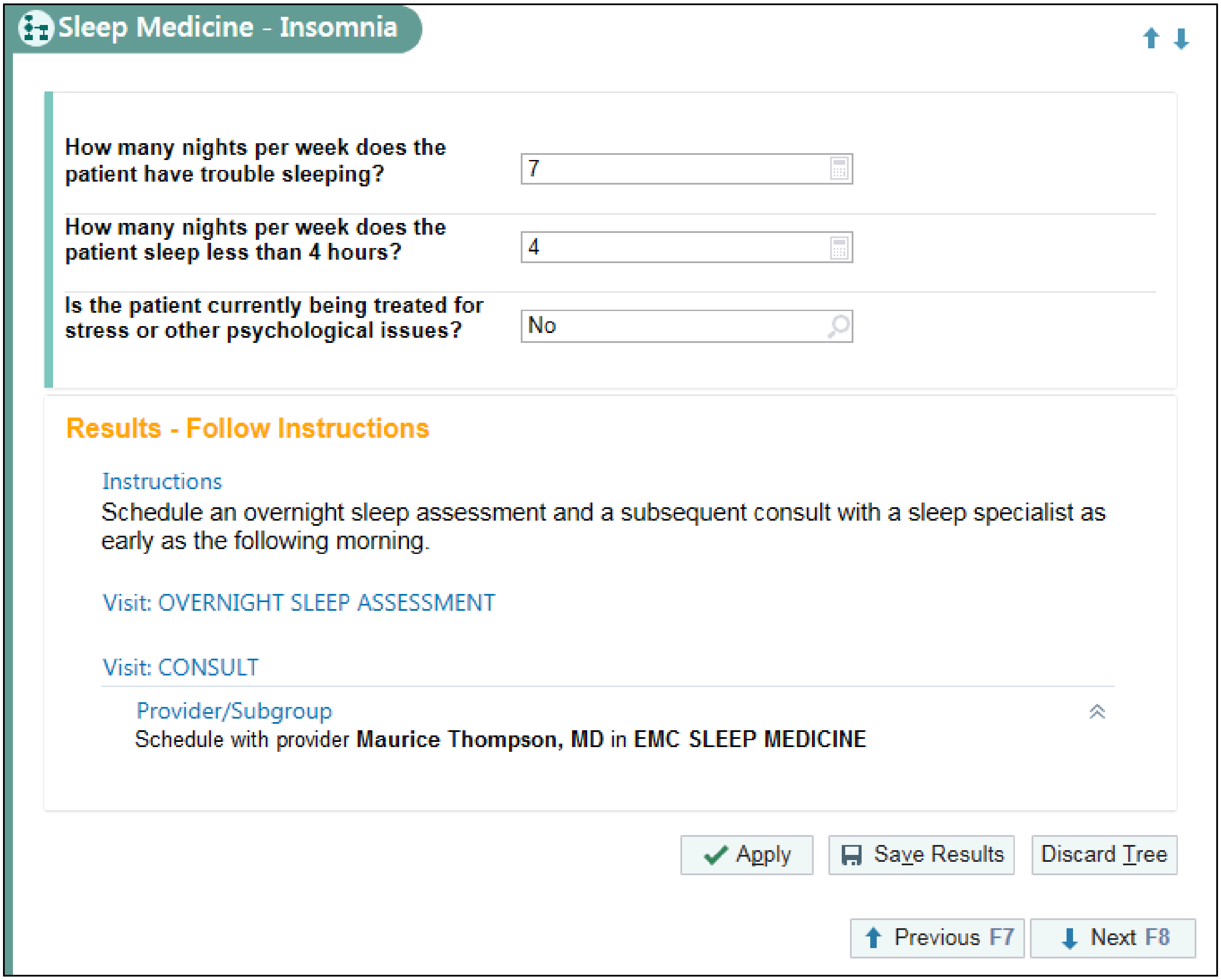
Use Decision Trees to Guide Schedulers During Request Entry

You can use request entry decision trees to guide schedulers through the process of completing an appointment request for a patient. Request entry decision trees can:

- Add panels and visits to be scheduled for the patient.
- Add tags that allow the patient to be scheduled into certain scheduling blocks.
- Add tasks that need to be completed before the request can be scheduled.
- Instruct schedulers to call someone to discuss how the patient should be scheduled.
- Instruct schedulers to deny the request.
- Prompt schedulers to ask the patient questions.
- Use rules to automatically determine how to proceed in the decision tree.
- Set the responsible department for the request.
- Set the specialty and subspecialty for the request.
- Show instructions to schedulers about how to proceed with the request.

When you map your request entry decision trees to indications as described in the Map Indications to Request Entry Decision Trees topic, the system can suggest decision trees to schedulers based on the indications for which the patient wants to be seen. For more information about how to plan and build your request entry decision trees, refer to the Decision Trees Setup and Support Guide.

In the example below, a scheduler has completed a request entry decision tree for a patient seeking treatment for insomnia.

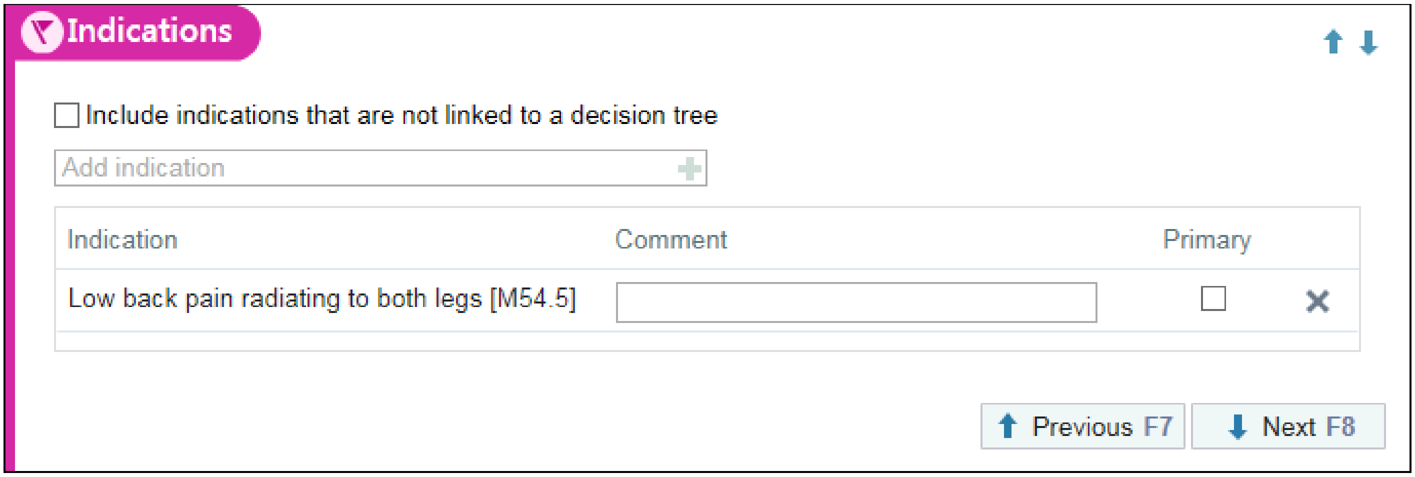


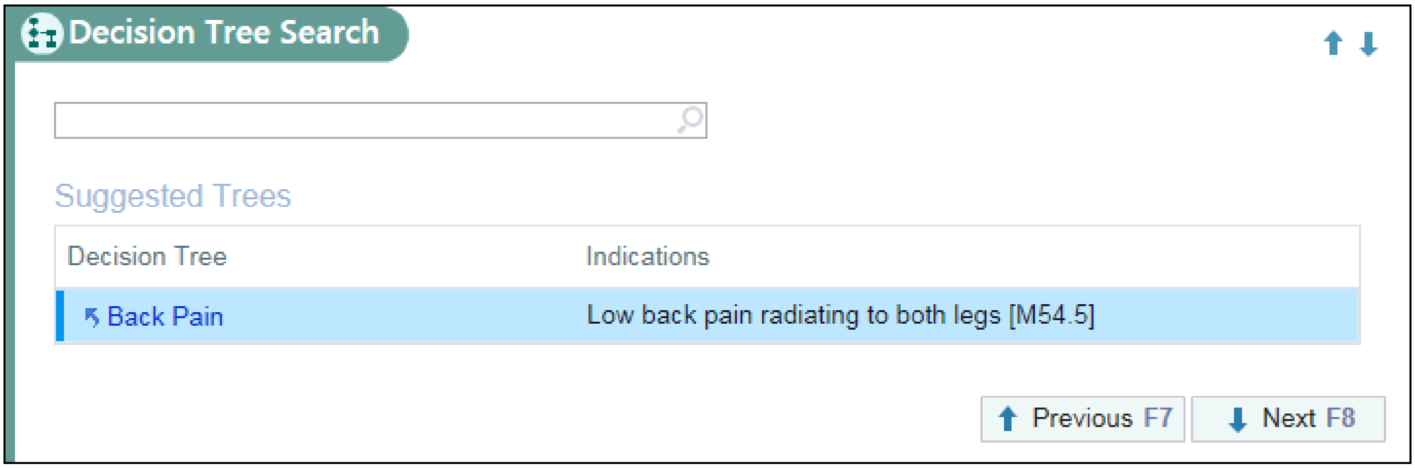
To use request entry decision trees, you must have the Cadence Appt Request Decision Trees license, which is included in the standard Cadence license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Map Indications to Request Entry Decision Trees

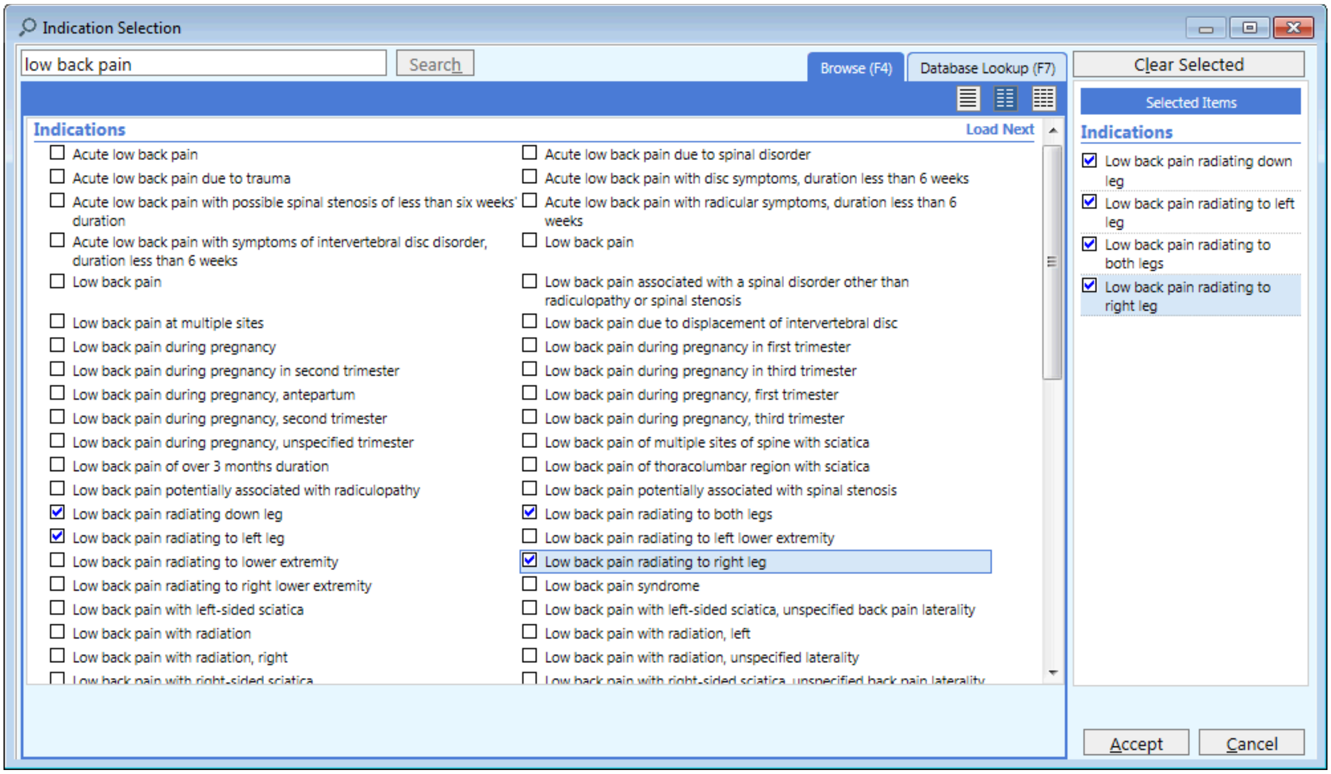
The Indications section of the Appointment Request activity allows schedulers to enter indications for which a patient wants to be seen. When you map your indications to request entry decision trees, the system suggests those decision trees in the Decision Tree Search section of the activity. This allows you to create targeted decision trees for indications that offer schedulers specific guidance when patients request to be seen for a particular diagnosis.

To use request entry decision trees, you must have the Cadence Appt Request Decision Trees 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.

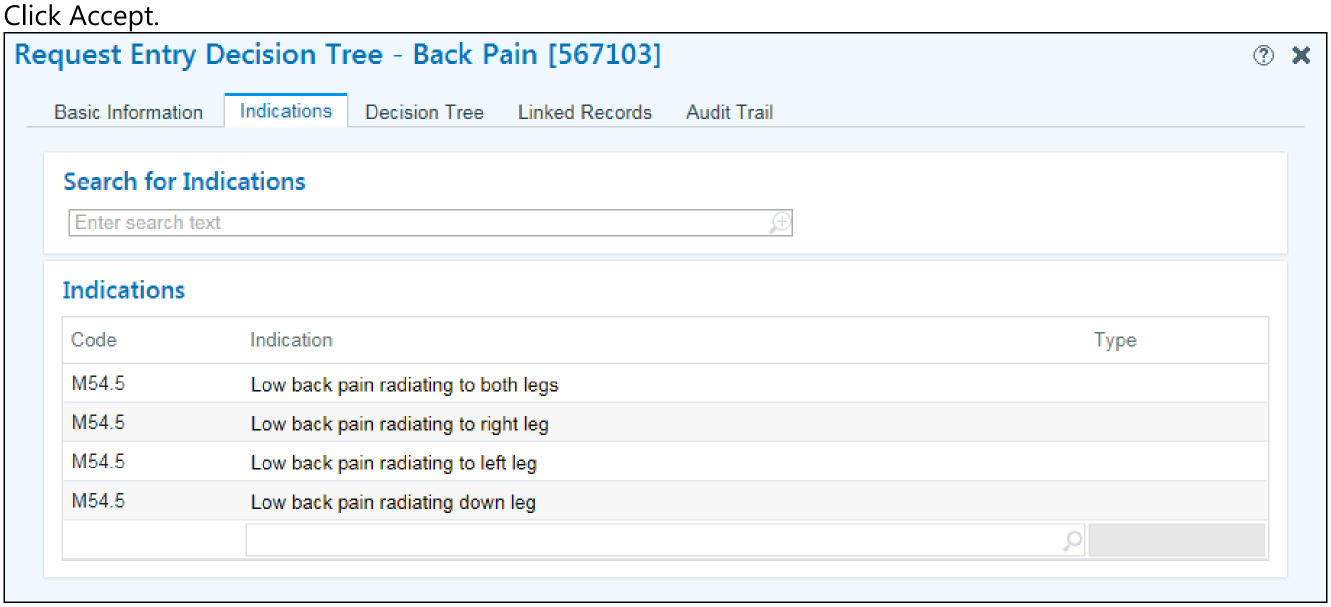




1. In Hyperspace, open a request entry decision tree (search: Request Entry Decision Tree).
2. Select the Indications tab.
3. Enter text in the Search for Indications box to search for diagnoses.
4. In the Indication Selection window, select the check boxes for the diagnoses you want to map to this decision tree.



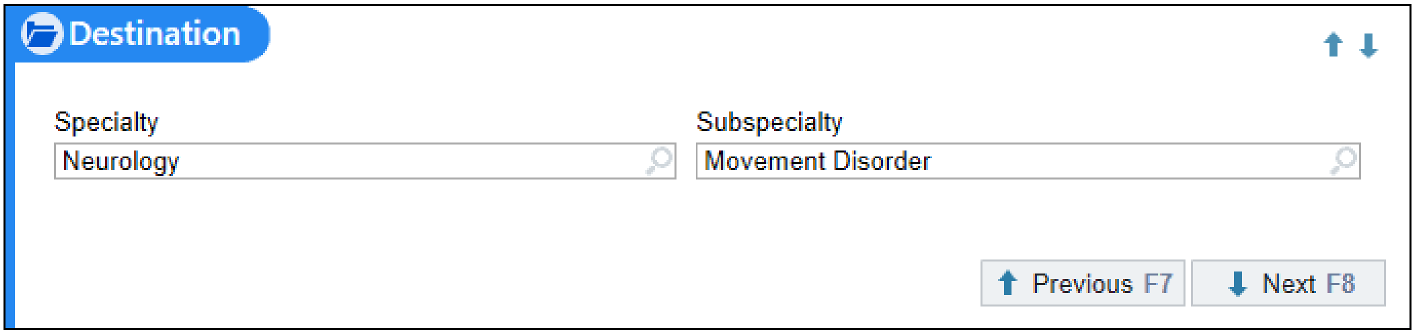
5. Click Accept.



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

Define Specialties and Subspecialties Where Requests Should Be Scheduled

The Destination section of the Appointment Request activity can be used to specify a specialty and subspecialty where the request should be scheduled. You can create appointment request workqueues to allow schedulers to manage requests that need to be scheduled for a certain specialty or subspecialty. For example, you might create a workqueue for dermatology requests. For more information about creating appointment request workqueues, refer to the Build Appointment Request Workqueues topic.



Create Specialties and Subspecialties

Specialties are defined in the Specialty (I DEP 110) category list. You likely already have this category list populated as part of your facility structure build.

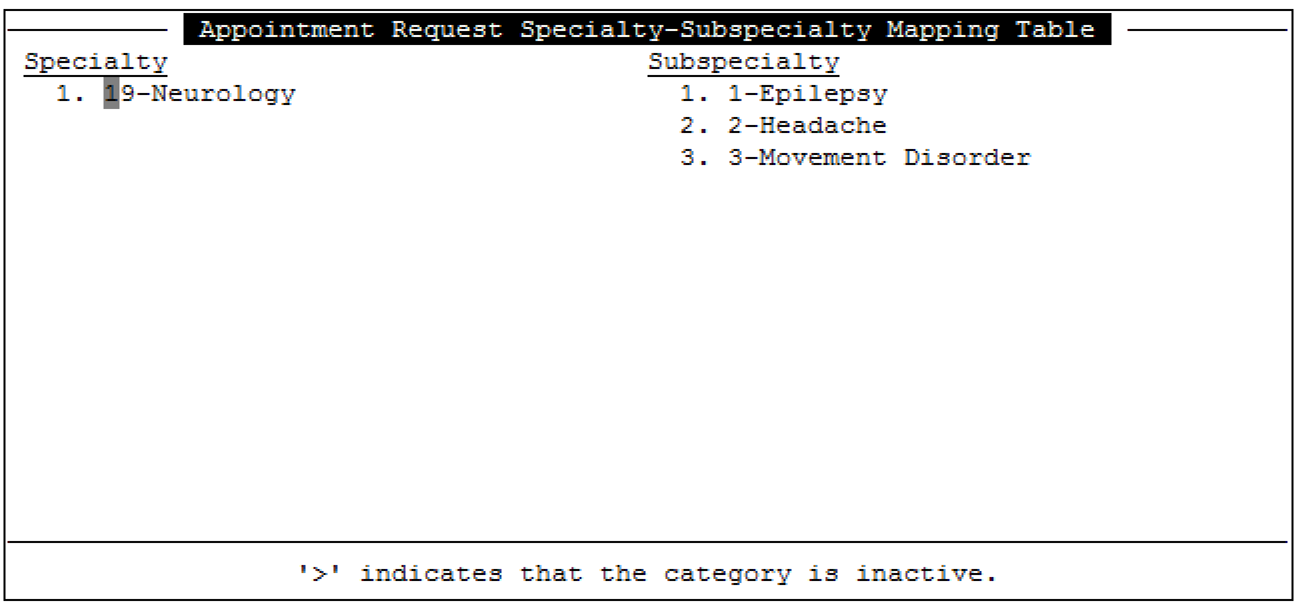
Define your subspecialties in the Provider Subspecialty (I SER 1052) category list.

For more information about working with category lists, refer to the Modify a Category List's Values topic.

Map Specialties and Subspecialties

You can map your specialties and subspecialties to limit the number of subspecialties a user can choose from to only those that make sense for the specialty they selected or vice versa.

1. In Chronicles, access the Shared Configuration (HDF) master file and edit your compiled configuration.
2. Go to the Appointment Request Specialty-Subspecialty Mapping Table screen.
3. In the Specialty (I HDF 880) column, enter a specialty from the Specialty (I DEP 110) category list.
4. In the corresponding Subspecialty (I HDF 886) column, enter the applicable subspecialties from the Provider Subspecialty (I SER 1052) category list.
5. Repeat steps 3 and 4 for each specialty that has subspecialties.



Automatically Set the Responsible Department for Requests Created from Clinical Orders

When you use appointment requests, any schedulable order placed by a clinician is also an appointment request. You can configure the system to automatically use the ordering department (I ORD 225) from an order as the default responsible department (I ORD 67002) for the request. If there isn't an ordering department, the system uses the encounter department in which the order was placed. When you set up your appointment request workqueues, you can use the responsible department to filter the requests that appear on a particular workqueue. If you want to use the responsible department to route requests and clinical orders to appointment request workqueues, you need to configure this setting so that your clinical orders have a responsible department defined.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form. In August 2018 and earlier, select the Orders/Requests > Entry/Creation form.
3. Enter Yes in the Default Responsible Dept for Clinical Orders? (I SDF 10191) field.

Restrict Which Departments Can Be Selected As Responsible Departments

You can restrict the departments that schedulers can choose from in the Responsible Department field of an appointment request. You might not want a department to be a responsible department option, for example, if it's a virtual department in which a patient would never be seen.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Appointment Requests > Scheduling form.
3. Enter Yes in the Request responsibility allowed? (I DEP 3030) field.

Allow Schedulers to Quickly Update the Responsible Department for Appointment Requests

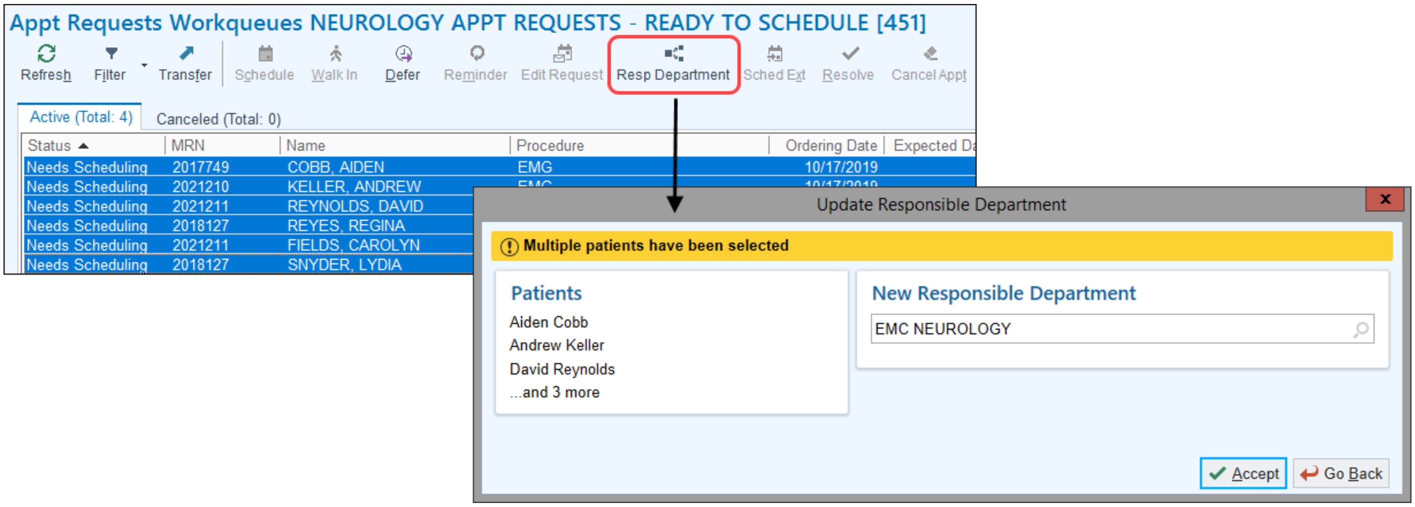
Starting in November 2019

When schedulers need to route one or more appointment requests to a different department for scheduling, they can select all of the requests and use the Update Responsible Department option. In order for this option to be available, you must have at least one department that can be selected as a responsible department, as described in the Restrict Which Departments Can Be Selected As Responsible Departments topic.

Schedulers can update the responsible department in the following places:

- Appointment request workqueues. The Resp Department button appears automatically on the standard appointment request workqueue toolbar and the Update Responsible Dept option appears automatically in the right-click menu.
- The Snapboard Order Depot. The Update Responsible Dept option also appears automatically in the right-click menu for Snapboard Order Depots.
- The Active Requests tab of the Appointment Desk. You can add the Update Responsible Department option as a toolbar or right-click action for the Active Requests tab.

Schedulers must have Cadence security point Edit request (I ECL 5723) set to Yes to update the responsible department for an appointment request.



If you don't use the standard appointment request workqueue toolbar (ES_MT_SCH_ORD_WQ), add menu record ES_IT_APPT_REQUEST_UPDATE_RESPONSIBLE_DEPT to your custom toolbar so schedulers can access the new Resp Department button. Refer to the Add a Button or Menu to an Existing Menu or Toolbar topic for additional information.

If you want to add the Update Responsible Department 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 Update Responsible Department option to the list of right-click actions or toolbar actions.

If you don't already have appointment request workqueues that are restricted by responsible department, refer to the Build an Appointment Request Workqueue topic for information about using the Responsible Department criterion.

Use Tasks to Identify When a Request Is Ready to Be Scheduled

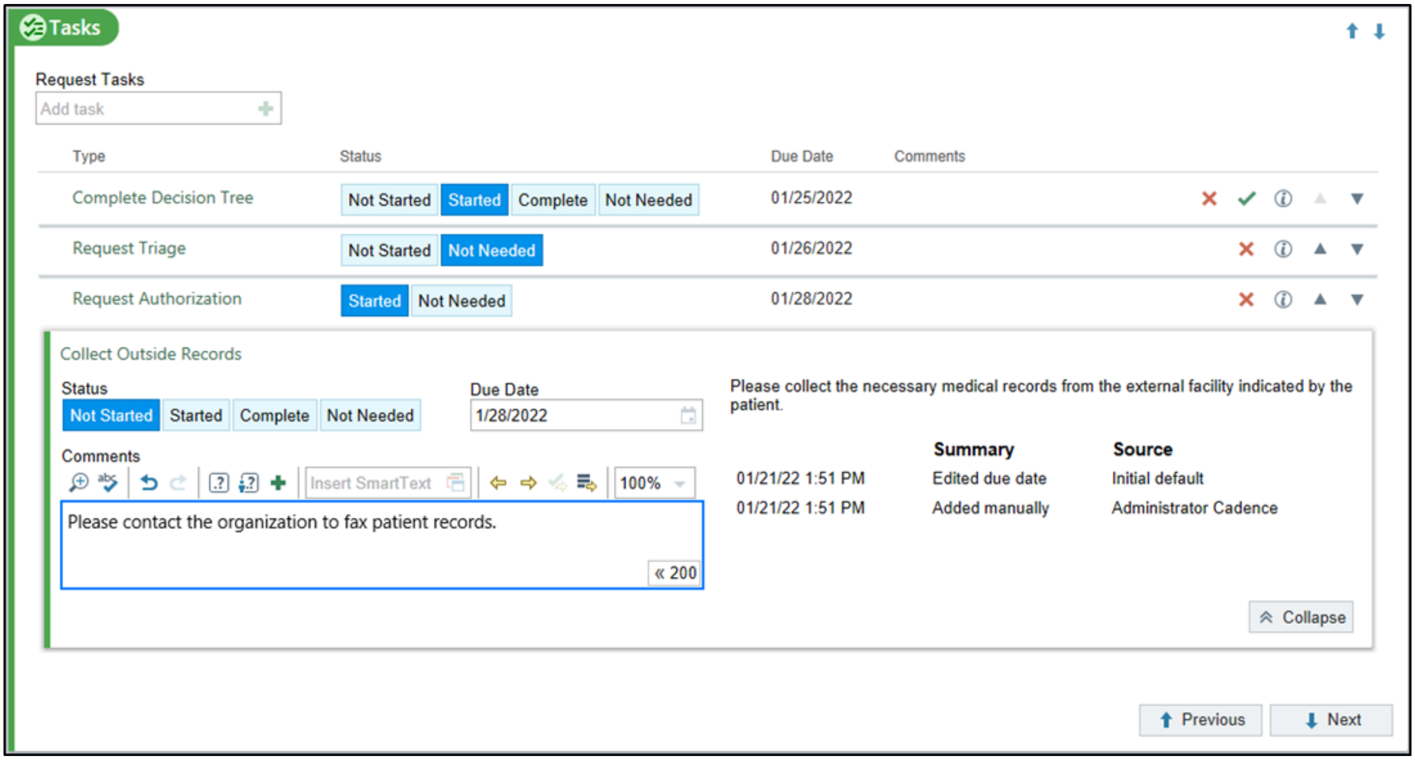
Schedulers can use tasks with appointment requests to keep track of the action items that need to be completed before a request can be scheduled or before the patient arrives for their appointment. For example, the request might need to be authorized by another department or you might need to obtain the patient's medical records from another organization.

Appointment request tasks use the Procedure Pass framework from OpTime, Radiant, and Cupid. When a scheduler or the system adds tasks to a request, the system creates a Procedure Pass for the request to store the tasks. If a scheduler edits the request for a clinical order and that order has a Procedure Pass, any tasks that are added to the request are stored in the existing Procedure Pass.

Schedulers can add tasks and change the order of tasks in the Tasks section of the Appointment Request activity or, starting in May 2022, the Tasks window. Schedulers access this window by clicking Tasks in appointment requests workqueues, Snapboard, or the Appointment Desk. The Tasks button appears automatically in standard toolbar and request drop-down menus in workqueues and Snapboard. You can also add it as a right-click action and toolbar button in the Active Requests tab of the Appointment Desk.

Also starting in May 2022, schedulers can rearrange tasks by dragging them to a new position or by using the arrow buttons found on each task . They can remove tasks in the same request editing session in which they add them, but they cannot remove them after closing the Appointment Request activity and editing the request later. If a task isn't needed and can't be removed, schedulers can set the task status to Not Needed. Schedulers can see an audit trail of how a task has been edited, update the due date, or add comments by clicking on a task's row to open an expanded edit area for that task.

Beginning in May 2022, users can use a SmartText in the Comments field, which must be created in advance for schedulers to use. Refer to the Create SmartText Templates for Appointment Request Notes and Tasks topic for additional information to build out these records. You can also set up request entry decision trees to automatically add tasks to a request.



You can also create appointment request workqueues to allow schedulers to manage requests that have incomplete tasks. For example, you might create a workqueue for requests that are waiting for authorization. For more information about creating appointment request workqueues, refer to Build Appointment Request Workqueues topic.

Appointment request tasks use the Procedure Pass framework from OpTime, Radiant, and Cupid. By default, there is already a Request Authorization and Request Triage task created for you in your system. If these tasks are added to the request for a clinical order, they do not appear in a clinician's view of the Procedure Pass for the order. You can also create custom generic tasks.

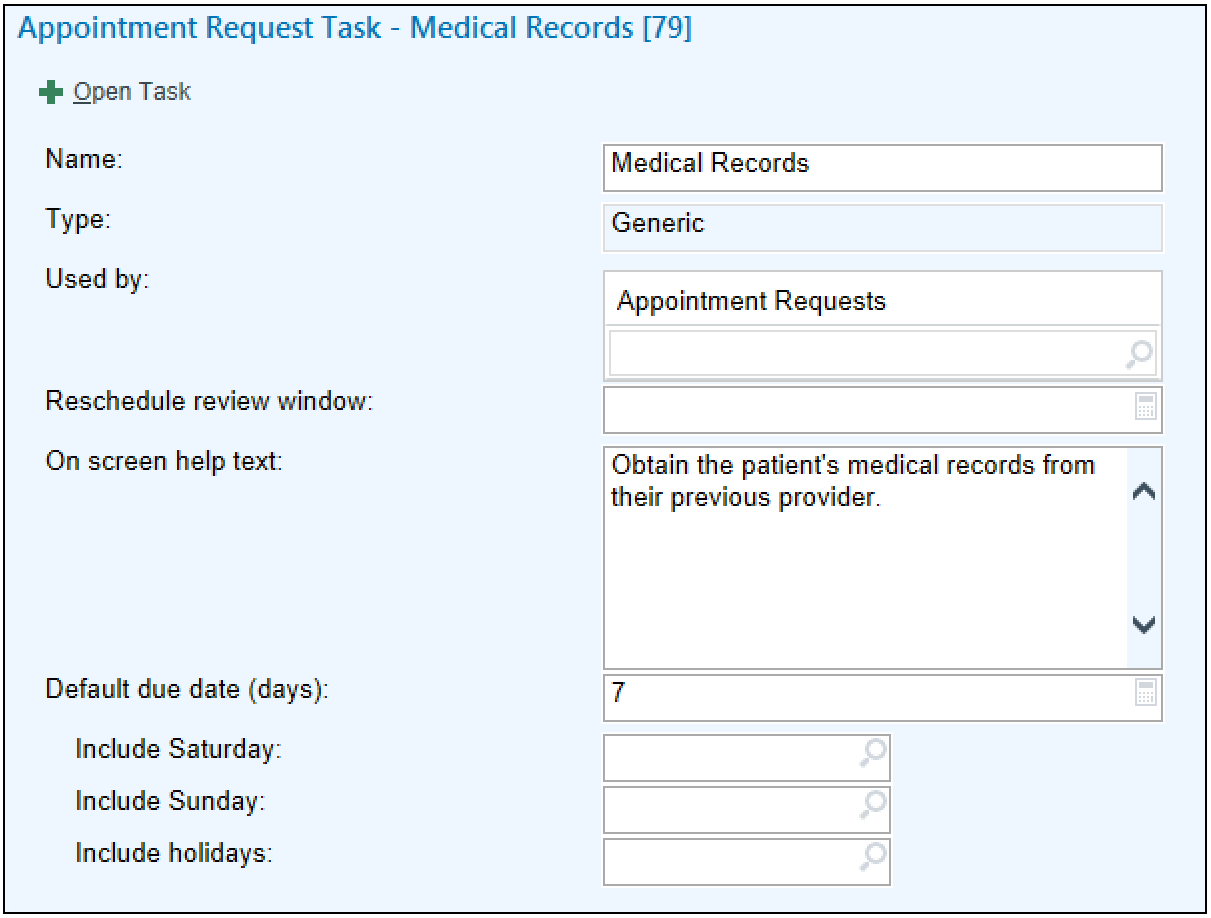
- The Request Authorization task can be used to indicate that payer authorization is needed before the request can be scheduled. When the referral that is linked to the request is authorized, the Request Authorization task is automatically marked as Complete. If a scheduler determines that authorization is not needed, they can change the status to Not Needed.
- The Request Triage task can be used to indicate that the referral linked to the request needs to be triaged and accepted by a clinician before the request can be scheduled. When the Request Triage task moves to the top of the list, the system automatically changes the status to Started and sends the referral In Basket message to the selected pool. Schedulers can also monitor the triage process in the Triage section of the Appointment Request activity. When a clinician accepts a referral, the Request Triage task is automatically

marked as Complete. If a clinician rejects a referral, a scheduler can restart triage for the request and send it to another pool for review. If a scheduler determines that triage is not needed, they can change the status to Not Needed. For more information about referral triage, including setup instructions if you haven't yet enabled it at your organization, refer to the Involve Clinicians in Deciding Whether to Accept a Referral topic.

- Use generic tasks to track other tasks that need to be done before scheduling. Schedulers must manually change the status of these tasks. They can choose from Not Started, Started, Complete, and Not Needed. A setting for generic Procedure Pass tasks allows you to specify whether a generic task appears only for clinicians, only for schedulers, or appears to both types of users. Work with your OpTime, Radiant, and Cupid teams to determine whether your organization has any generic Procedure Pass tasks that could be shared with appointment requests, or if any generic tasks you're going to create for appointment requests should be shared with clinical users.

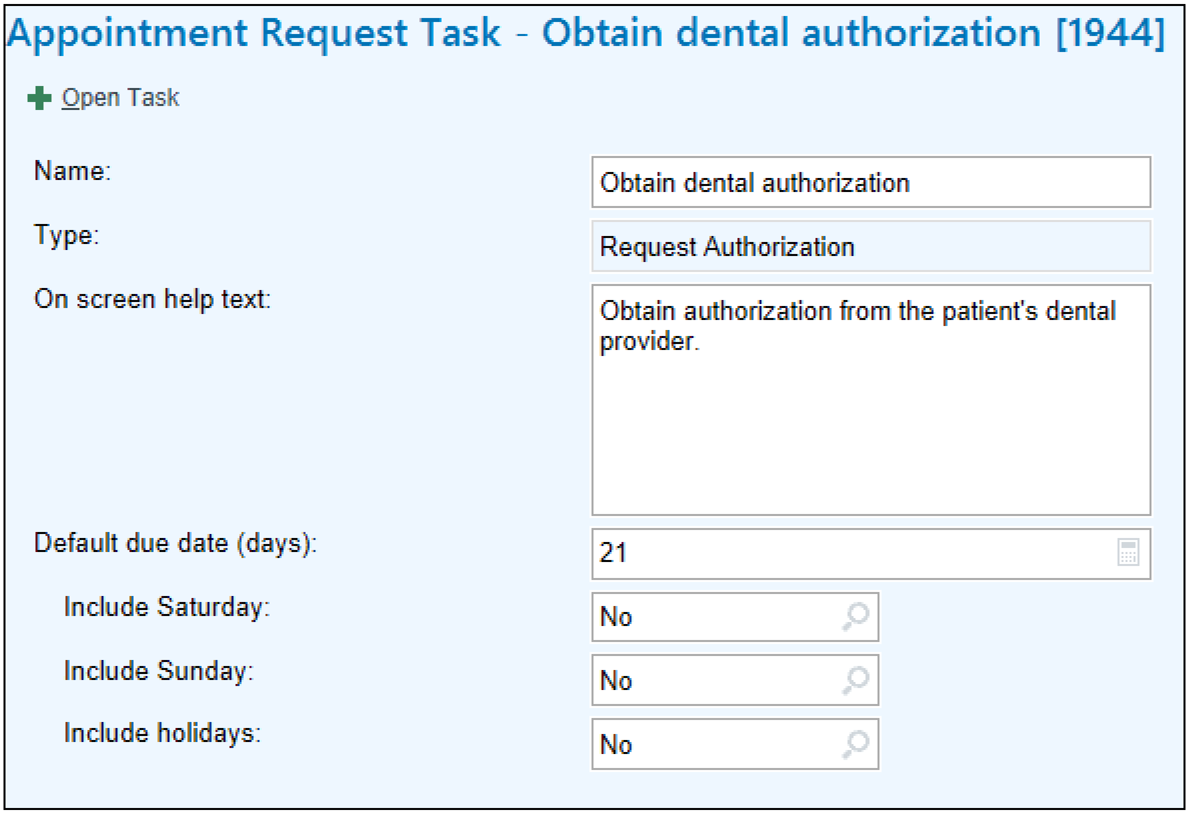
Create Generic Tasks for Appointment Requests

1. In Hyperspace, open the Appointment Request Task Editor (search: Appt Request Task).
2. Create a task and enter Generic in the Type (I DEF 350) field.
3. In the Used by (I DEF 388) field, enter Appointment Requests, or leave the field blank if the task can be used by appointment requests and procedure passes.
4. Leave the Reschedule review window (I DEF 386) field blank. This setting does not apply to generic tasks for appointment requests.
5. In the On screen help text (I DEF 385) field, enter the description of the generic task and the steps required to complete it. This information guides schedulers' understanding of this task, who see this when they click View task information in the Tasks section of the Appointment Request activity.
6. In the Default due date (I DEF 381) field, enter the default number of days in the future to automatically set the due date for a task. If this field is blank, tasks do not have an automatic due date. This field is available only in the Appointment Request Task Editor.
7. If you entered a value in the Default due date field, Saturdays, Sundays, and holidays count towards the due date by default. If you don't want these days to count, enter No in the Include Saturday (I DEF 382), Include Sunday (I DEF 383), and Include holidays (I DEF 384) fields. These fields are available only in the Appointment Request Task Editor.



Create Request Authorization or Request Triage Tasks for Appointment Requests

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Appointment Request Task and create a new task.
2. Enter Request Authorization or Request Triage in the Type (I DEF 350) field.
3. In the On screen help text (I DEF 385) field, enter the description of the task and the steps required to complete it. This information guides schedulers' understanding of this task, who see the help text when they click View task information in the Tasks section of the Appointment Request activity.
4. In the Default due date (days) (I DEF 381) field, enter the number of days after the task is created that it should be completed.
5. In the Include Saturday (I DEF 382), Include Sunday (I DEF 383), and Include holidays (I DEF 384) fields, enter Yes if those days should be considered when the system assigns a due date to the task. The default value is No.



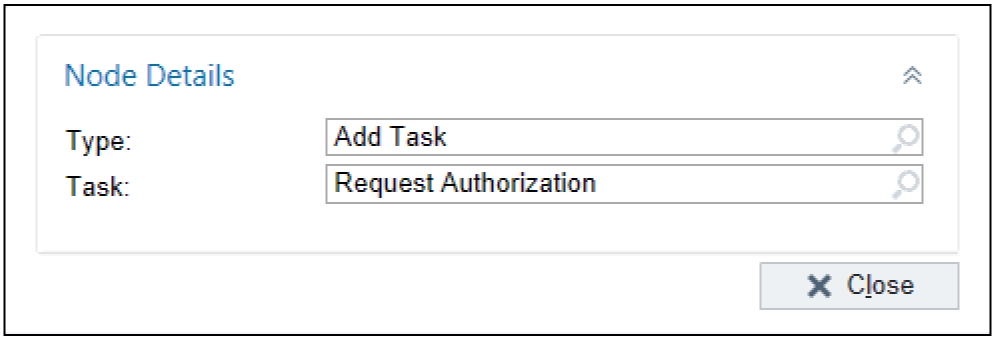
Use Orders to Add Tasks to Appointment Requests

You can specify tasks in your procedures and procedure categories to allow the system to automatically add those tasks to the appointment request for a clinical order.

1. In Clinical Administration, go to Procedures, Scheduling > Procedures (EAP) or Categories (EDP) and open a procedure or procedure category.
2. Go to the Appointment Request Tasks screen.
3. Enter your tasks in the Task (I EAP 33300 or I EDP 33300) field. These can be the Request Authorization, Request Triage, or generic tasks you created for use with appointment requests.
4. In the Rule (I EAP 33301 or I EDP 33301) field, you can specify under which criteria each task should be added by linking each task with an Order or Appointment Request context rule that defines those criteria. If you don't specify a rule for a task, the task is always automatically added to appointment requests for this procedure or procedure category.
5. For Request Triage tasks, you can specify default triage In Basket pool to use. This saves schedulers the step of having to edit the request for the order and select triage pool manually in the Triage section of the Appointment Request activity. It also allows the system to automatically send the referral triage In Basket message when the order is signed if the Request Triage task is the first task listed on the request.
6. Enter your tasks, rules, and triage pools on the Appointment Request Tasks screen in the Task (I EAP 33300 or I EDP 33300), Rule (I EAP 33301 or I EDP 33301), and Triage Pool (I EAP 33302 or I EDP 33302) grid.

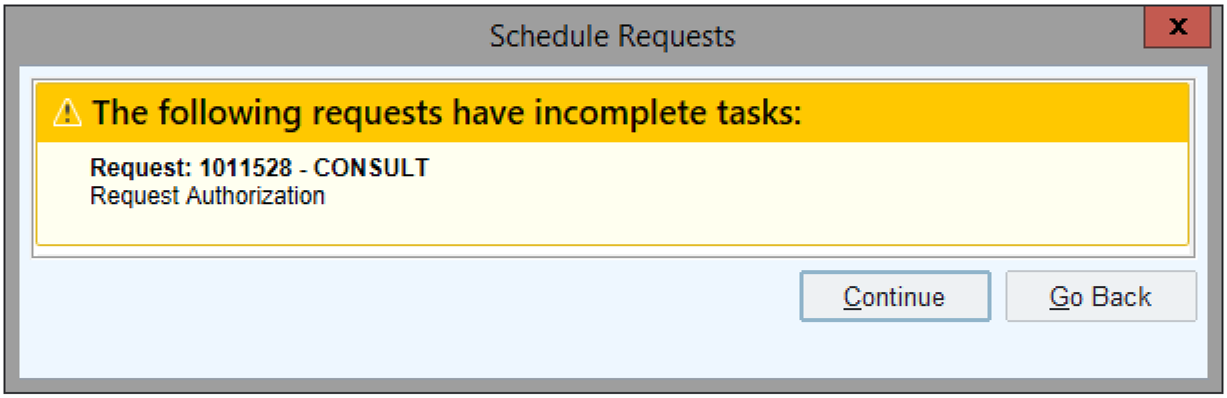
Use Decision Trees to Add Tasks to Appointment Requests

You can use the Add Task node in a request entry decision tree to automatically add a task to an appointment request. For more information, refer to the Create a Decision Tree topic.



Warn Schedulers When They Schedule a Request with Incomplete Tasks

You can warn schedulers when they schedule a request that has incomplete tasks. The following message appears in the Appointment Desk or the Appointment Request activity, and schedulers can either continue with scheduling or go back to complete the tasks.



1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form.
3. In the Show Incomplete Tasks Warning? (I SDF 10194) field, enter Yes.
4. In the Only Show Warnings for Tasks of Type (I SDF 10195) field, enter the tasks for which warnings should appear. If you leave this field blank, warnings for all task types appear.

Collect Basic Referral Information in the Appointment Request Activity

When schedulers create appointment requests in the Appointment Request activity, the system automatically creates a referral record that is linked to the request. Referral records are not created when requests are created using other methods, such as requests created for abandoned scheduling workflows, and requests cannot be linked to a referral after the fact. When you implement appointment requests, there is no change to how your system generates referrals for clinical orders. However, the system will create a referral for a clinical order after it has been placed if a scheduler edits the order in the Appointment Request activity and does one of the following actions:

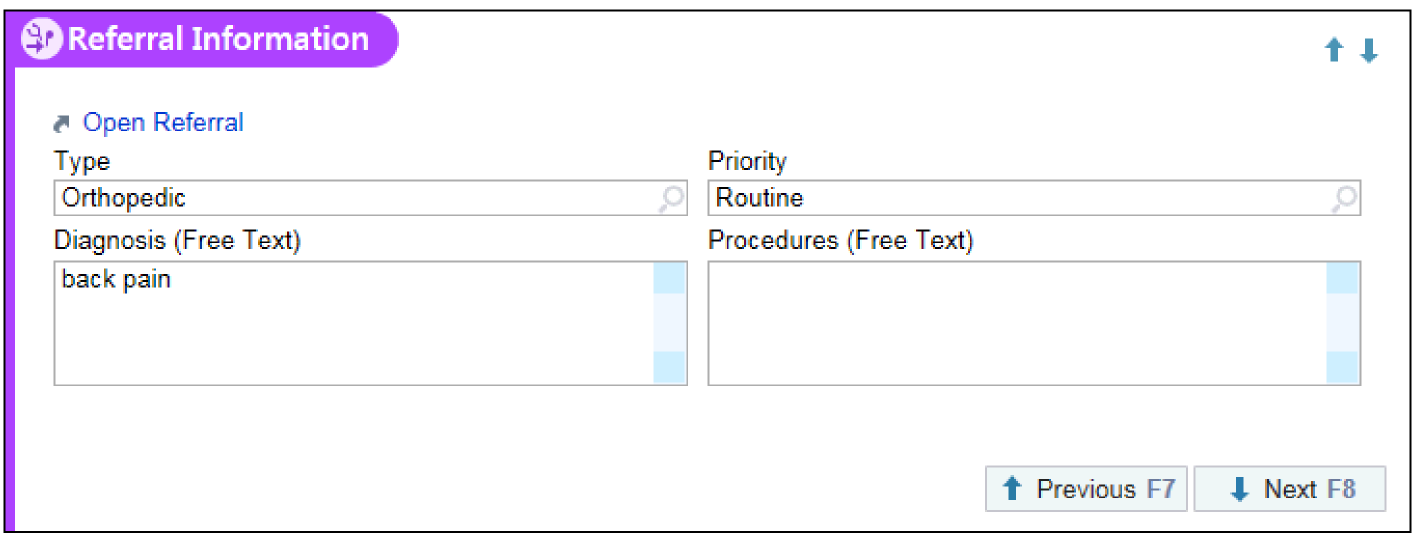
- Enters data in the Referral Information section
- Adds Request Triage or Request Authorization tasks in the Tasks section
- Clicks Open Linked Referral on the Appointment Request toolbar

Starting in August 2019, the system copies an appointment request's indications to the diagnoses for the linked referral to help keep appointment requests and referrals in sync. For appointment requests that originate from clinical orders, the diagnosis associated with the order is used as the indication for the appointment request. An indication is copied to the referral as the coded diagnosis, with the following exceptions:

- The system does not copy indications to the referral for a clinical order if a referral was automatically generated for the order when it was placed, as described in the Automatically Generate a Referral for Appointment Requests topic, because the diagnosis from the order appears automatically on the referral.
- If an indication is not allowed as a coded diagnosis on a referral per your settings in Referrals System Definitions, it is copied to the free-text diagnosis. The following topics describe the ways in which a diagnosis is not allowed to be entered for a referral:
    - Show Only Billing-Specific Diagnosis Codes
    - Prevent Users from Selecting Term Diagnoses
    - Show Only Clinically Active or Inactive Diagnoses Codes
- If there is already a free-text diagnosis on the referral, the system does not copy indications to it, but it can still copy indications as coded diagnoses if there are none already on the referral and they are allowed for referrals.
- If a user changes the indications for an appointment request or the diagnoses for a referral after the indications have already been copied to the referral as free-text diagnoses, any further changes to the indications on the appointment request are not copied to the referral.

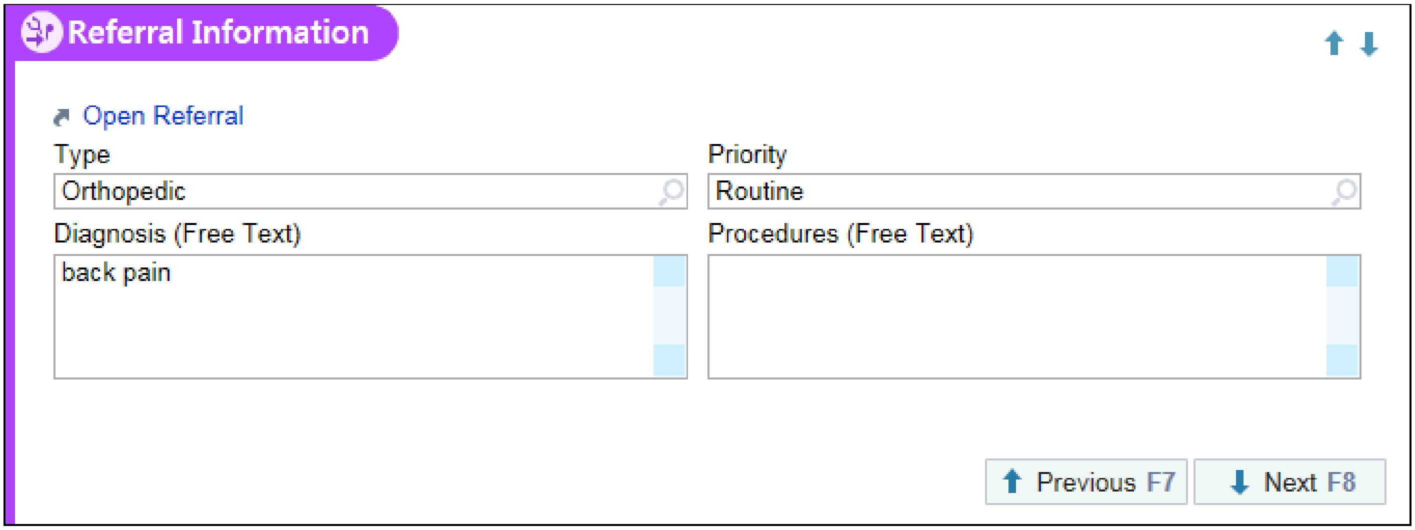
Schedulers can use the Referral Information section in the Appointment Request activity to enter basic information for the referral that is linked to a request. This section is not included in the default Appointment Request navigator template. You can customize the navigator template to include this section and allow schedulers to enter basic referral information in the Appointment Request activity. Without this section, schedulers can still click Open Linked Referral on the Appointment Request toolbar to open Referral Entry.

To add this information, add section 90010-SEC_ES_REQUEST_REFERRAL_INFO to a custom navigator template for the Appointment Request activity. Refer to the Customize the Appointment Request Navigator topic for more information.



Define a Default Referral Type for Appointment Requests

When schedulers create appointment requests in the Appointment Request activity, the system automatically creates a referral record for the request. Schedulers can enter the referral type in the Referral Information navigator section. If they are often entering the same referral type, you can specify that referral type at the system level so they don't need to enter it every time they create an appointment request. That also allows you to easily find, act on, or hide these referrals as necessary in workqueues, reports, and other referral workflows.



1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form. In August 2018 and earlier, select the Orders/Requests > Entry/Creation form.
3. Enter the default referral type for appointment requests in the Default Referral Type (I SDF 41557) field.

Prevent Referrals from Being Automatically Generated for Appointment Requests

Starting in May 2021

February 2021 by SU E9600594, E9600595, C9600594-HSWeb

November 2020 by SUs E9504137, E9504144, C9504137-HSWeb

August 2020 by SUs E9407970, E9407973, C9407970-HSWeb

The system automatically generates a referral when a user manually creates a new appointment request, as noted in the Collect Basic Referral Information in the Appointment Request Activity and Define a Default Referral Type for Appointment Requests topics. You can disable this automatic referral generation by configuring a setting in Cadence System Definitions. You might choose to disable automatic referral generation, for example, if you're concerned that unnecessary referrals are being generated and relying on auto status assignment rules to close the referrals doesn't meet your needs.

Note that this setting applies only to non-clinical appointment requests, appointment requests generated for abandoned scheduling workflows, appointment requests generated by the CreateAppointmentRequest web service, and appointment requests imported using import specification ORD,1010-Template - Appointment Request Import. Referrals for clinical schedulable orders are generated through a separate function, as described in the Automatically Generate a Referral for Appointment Requests topic. Additionally, referrals are still automatically generated for appointment requests in the following situations even after you configure the setting:

- A user adds a Triage or Authorization task to the appointment request.
- A user enters data in the Triage or Referral Info section of the Appointment Request activity.
- A user clicks Create Referral on the Appointment Request activity toolbar.

Keep in mind that this setting isn't designed for situations in which referral generation should be automatic for some appointment requests but not others. If referrals are still needed for some appointment requests after you configure the setting, users need to manually create them.

To configure the setting:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form.
3. Enter Yes in the Suppress referral creation for non-order request? (I SDF 10207) field.

Customize the Registration Workflow for Appointment Requests

Starting in Epic 2018

Epic 2017 by SU E8322769

If users need to fill out specific registration information for appointment requests, you can choose which registration workflow appears when a user jumps to Registration from an appointment request. By default, the system opens the registration workflow that appears during scheduling before appointment entry. You might want to specify a different workflow, for example, if the registration workflow associated with scheduling before appointment entry contains encounter-specific information like the Accident related? field. Because appointment requests aren't associated with an encounter yet, users shouldn't apply encounter-specific information to registration for an appointment request.

You can check whether the registration workflow associated with scheduling before appointment entry meets your requirements by doing the following:

1. In Hyperspace, go to Epic button > Admin > Registration/ADT Admin > System Definitions.
2. On the Workflow Definitions form, go to the Jump to Registration Settings table.
3. Find the line where the From column contains Scheduling Before Appointment Entry and note the workflow in the Override Workflow column.
4. Open that workflow in the Workflow Editor (search: Workflow Editor) and review the contents of the workflow.

1. In Hyperspace, open the workflow settings for your facility, service area, department, or Prelude security class:
   - Facility or service area: Epic button > Admin > Registration/ADT Admin > System Definitions
   - Department: Epic button > Admin > Master File Edit > Department
   - Prelude security class: Epic button > Admin > Registration/ADT Admin > Registration Security
2. Select the Workflow Definitions form.
3. Add a row to the Jump to Registration Settings table:
   - From: 77-Appointment Request Registration
   - Enable New Patient Wizard? Enter Yes to open the New Patient Wizard when users access Registration from an appointment request. The default value is No.
   - Override Workflow: Enter the registration workflow to open when users access Registration from an appointment request.
   - Show Confirmation at Open: Indicates whether the system launches confirmation records linked to the workflow at the beginning of the workflow.
     - If you enter Finish, the system runs the finish confirmation record and displays the Confirmation Messages window when users open the workflow.

- If you enter Action, the system runs the action confirmation record and displays the Confirmation Messages window when users open the workflow.
- If you enter None or leave this field blank, the Confirmation Messages window doesn't appear when users open the workflow.

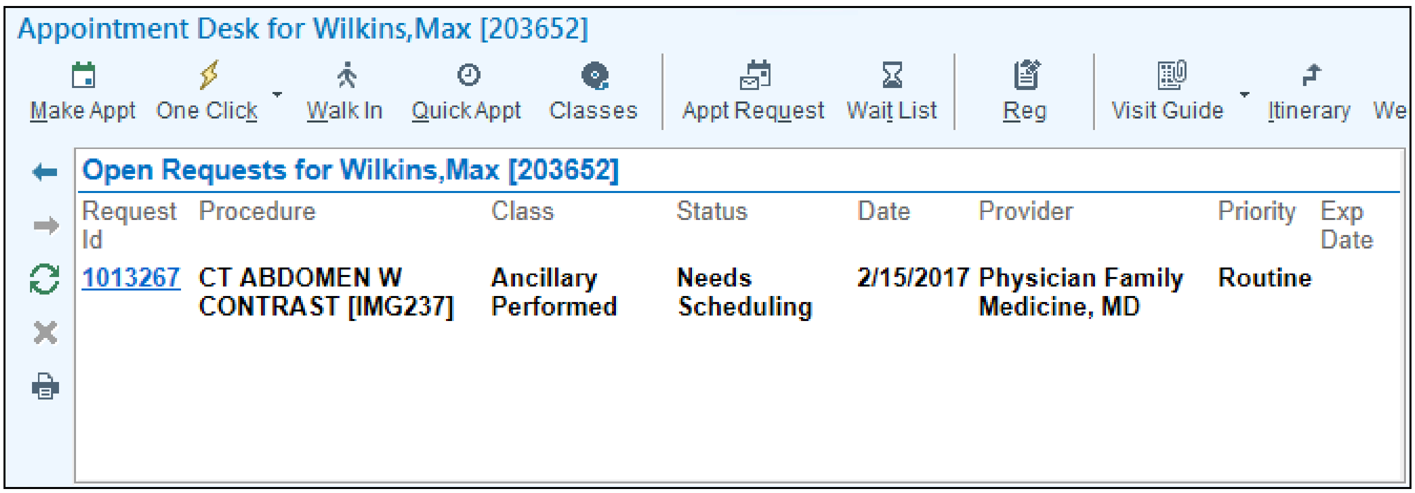
Set Up Scheduling of Appointment Requests

In this section, we cover the tasks you need to complete to allow schedulers to see appointment requests on a patient's Appointment Desk, see appointment request details in scheduling workflows, and manually link appointments to requests.

Show Appointment Request Details on the Appointment Desk

You can show a link to a patient's open requests on the Appointment Desk. If you use standard HTML display 52-AS Open Orders or a customized display with standard HTML table 11040-AS Open Orders, appointment request details appear automatically in your system.

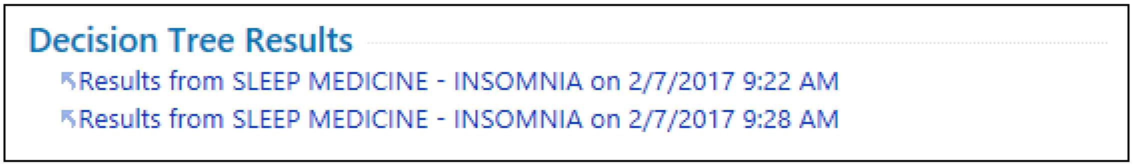
If you have customized HTML table 11040, complete the steps below to add appointment request details to your custom HTML table.



1. In Hyperspace, access the HTML Table Editor (search: HTML Table Editor) and open your copy of HTML table 11040.
2. Select the Repeating tab and add the following extensions to the list:
   - 42226-ES Open Order ID Col
   - 42227-ES Open Order Class
   - 42228-ES Open Order Status
   - 42229-ES Open Order Ordering Date
   - 42230-ES Open Order Auth Provider
   - 42241-ES Open Order Expiration Date

Show the Results of Request Entry Decision Trees During Scheduling

When schedulers make an appointment from a request, you can show the results of the request entry decision tree used by the request in Book It (starting in February 2022) or Make Appointment (November 2021 and earlier), appointment request workqueues, and the scheduling Front Desk activity. This helps schedulers follow any free text instructions from the decision tree.



If you use any of the following standard reports or HTML displays, decision tree results appear automatically in your system:

- Expand Request window: HTML display 7-AS Orders: Expand Popup
- Make Appointment: HTML display 77-AS Orders: Appointment Entry, in which you can choose to show report 63014-ES Appointment Entry Orders instead of HTML tables
- Appointment request workqueues and the scheduling Front Desk activity: HTML display 76-AS Orders: Workqueue & Front Desk, in which you can choose to show report 63000-ES Order Information instead of HTML tables

If you have created custom overrides for the HTML tables that appear in these HTML displays or you customized copies of the standard reports, complete the tasks below to add decision tree information to your custom records. If you're not sure whether you have overrides for these displays, refer to the Use Record Viewer to Find HTML Display Overrides topic for instructions about how to search for overrides. To use reports instead of HTML tables in displays 76 and 77, you would have had to create an override of the displays, but if you're using standard reports 63000 and 63014, no setup is necessary to add decision tree information.

To determine whether you are using a report instead of HTML tables in HTML displays 76 and 77:

1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and open your override of HTML display 76.
2. If Print Group Reports is entered in the Report option field, you are using reports instead of HTML tables for the display.
3. Repeat these steps for HTML display 77.

Add Decision Tree Information to Reports

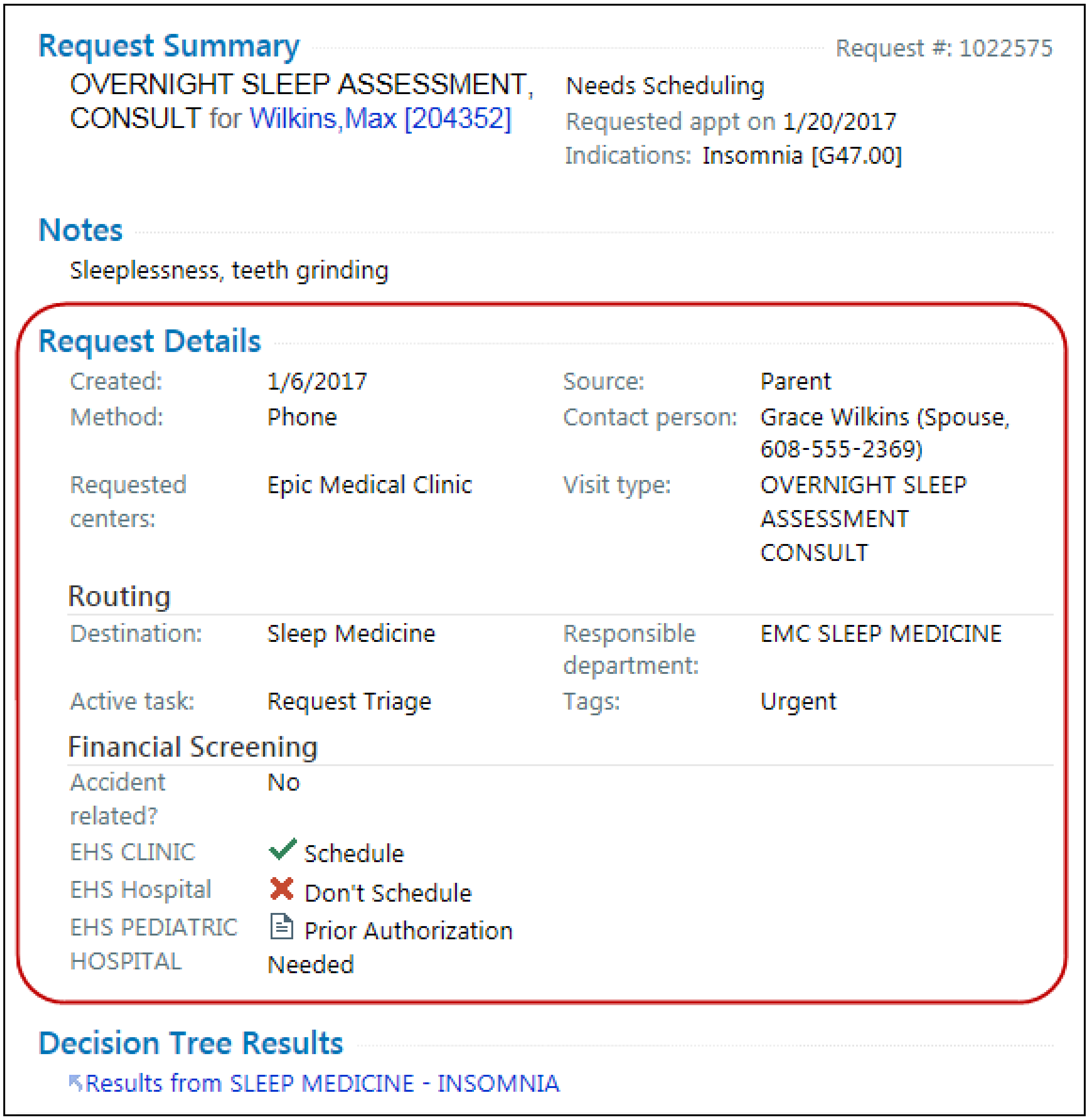
1. In Cadence Text, go to Cadence Management > Reports, Print Groups > Reports (LRP) and open your copy of report 63000.
2. On the Report Definition screen where you list the print groups for rich text reports, add print group 62055-ES Decision Tree Results to the list.
3. Repeat these steps for your copy of report 63014.

Add Decision Tree Information to HTML Displays

1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and open your override of HTML display 7.
2. Add HTML table 62011-AS Decision Tree Results to the list of HTML tables that appear in the HTML display.
3. Repeat these steps for your override of HTML displays 76 and 77.

Show Appointment Request Details During Scheduling

When schedulers make an appointment from a request, you can show the details of the request in Make Appointment, appointment request workqueues, and the scheduling Front Desk activity. This helps schedulers make sure they are scheduling the right request.



If you use any of the following standard reports or HTML displays, appointment request details appear automatically in your system:

- Book It: HTML display 77-AS Orders: Appointment Entry, in which you can choose to show report 63014-ES Appointment Entry Orders instead of HTML tables
- Appointment request workqueues and the scheduling Front Desk activity: HTML display 76-AS Orders: Workqueue & Front Desk, in which you can choose to show report 63000-ES Order Information instead of HTML tables

If you have created custom overrides for the HTML tables that appear in these HTML displays or you customized copies of the standard reports, complete the tasks below to add decision tree information to your custom records. If you're not sure whether you have overrides for these displays, refer to the Use Record Viewer to Find HTML Display Overrides topic for instructions about how to search for overrides. To use reports instead of HTML tables in displays 76 and 77, you would have had to create an override of the displays, but if you're using standard reports 63000 and 63014, no setup is necessary to add appointment request details.

To determine whether you are you using a report instead of HTML tables in HTML displays 76 and 77:

1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and

open your override of HTML display 76.

2. If Print Group Reports is entered in the Report option field, you are using reports instead of HTML tables for the display.
3. Repeat these steps for HTML display 77.

Add Appointment Request Detail to Reports

1. In Cadence Text, go to Cadence Management > Reports, Print Groups > Reports (LRP) and open your copy of report 63000.
2. On the Report Definition screen where you list the print groups for rich text reports, add print group 62039-ES Appointment Request Details to the list.
3. Repeat these steps for your copy of report 63014.

Add Appointment Request Details to HTML Displays

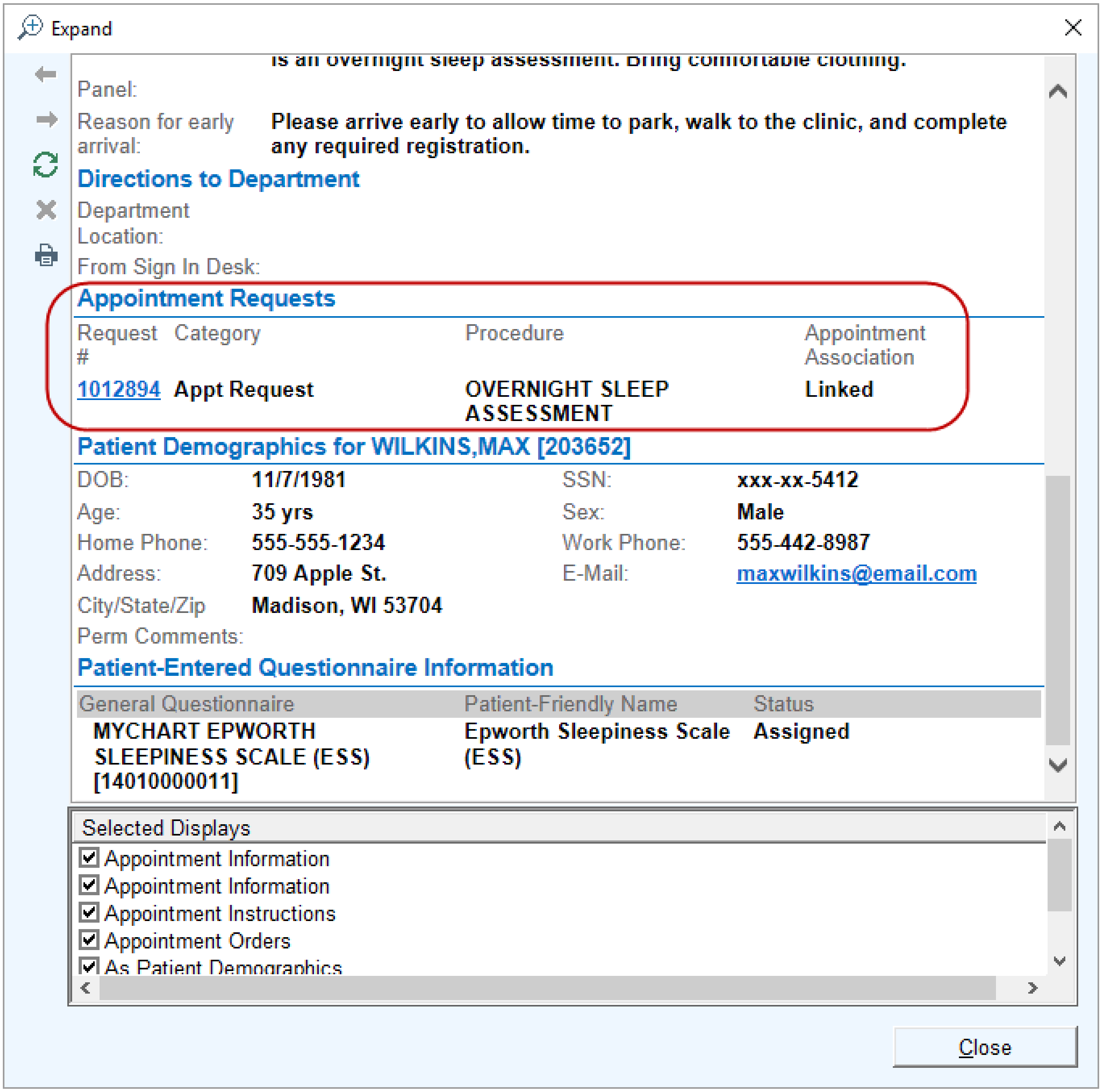
1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and open your override of HTML display 76.
2. Add HTML table 63050-AS Request Details to the list of HTML tables that appear in the HTML display.
3. Repeat these steps for your override of HTML display 77.

Show Appointment Request Details in the Expand Window

You can show appointment request details to schedulers when they open the Expand window for an appointment that was scheduled from a request or when they open the Expand window for a request from the Appointment Desk. Appointment request information appears in the standard HTML displays for these windows, but if you've customized these displays in the past, you need to add the appointment request HTML tables and extensions to your custom displays.

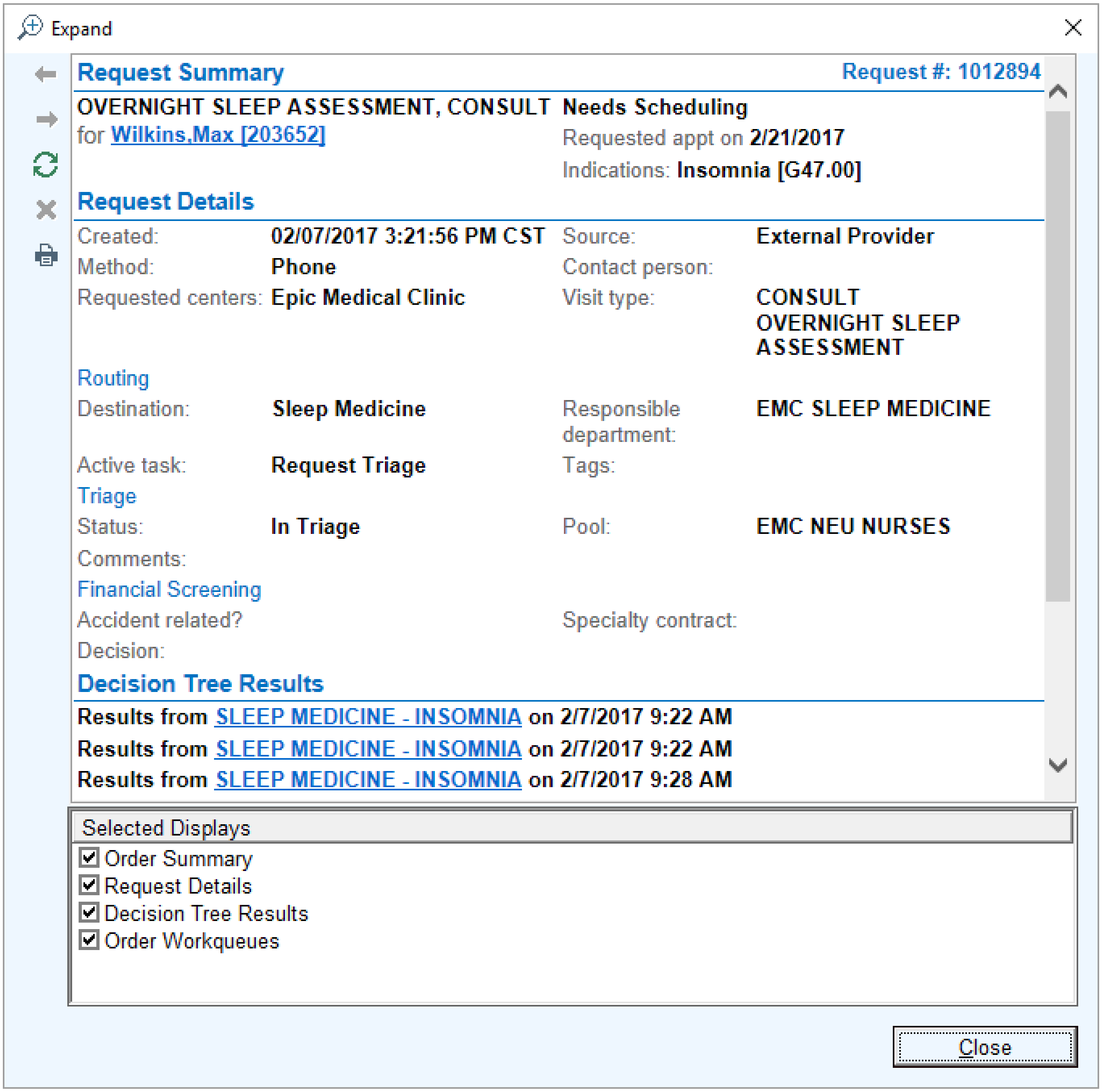
HTML display 4-AS Appointments is used by the Expand window for appointments. Appointment request information appears in HTML table 10070-AS Appointment Orders with the following extensions:

- 42225-ES Appt Orders Header
- 42224-ES Appointment Orders ID Col



HTML display 7-AS Orders: Expand Popup is used by the Expand window for orders and requests. Appointment request information appears in the following HTML tables for this display:

- 63040-AS Order Summary (specifically extension 42204-ES Order Summary Status)
- 63050-AS Request Details
- 62011-AS Decision Tree Results



For more information about working with HTML displays and tables, refer to the HTML in Hyperspace Setup and Support Guide.

Show Appointment Request Details in the Today's Patients Report

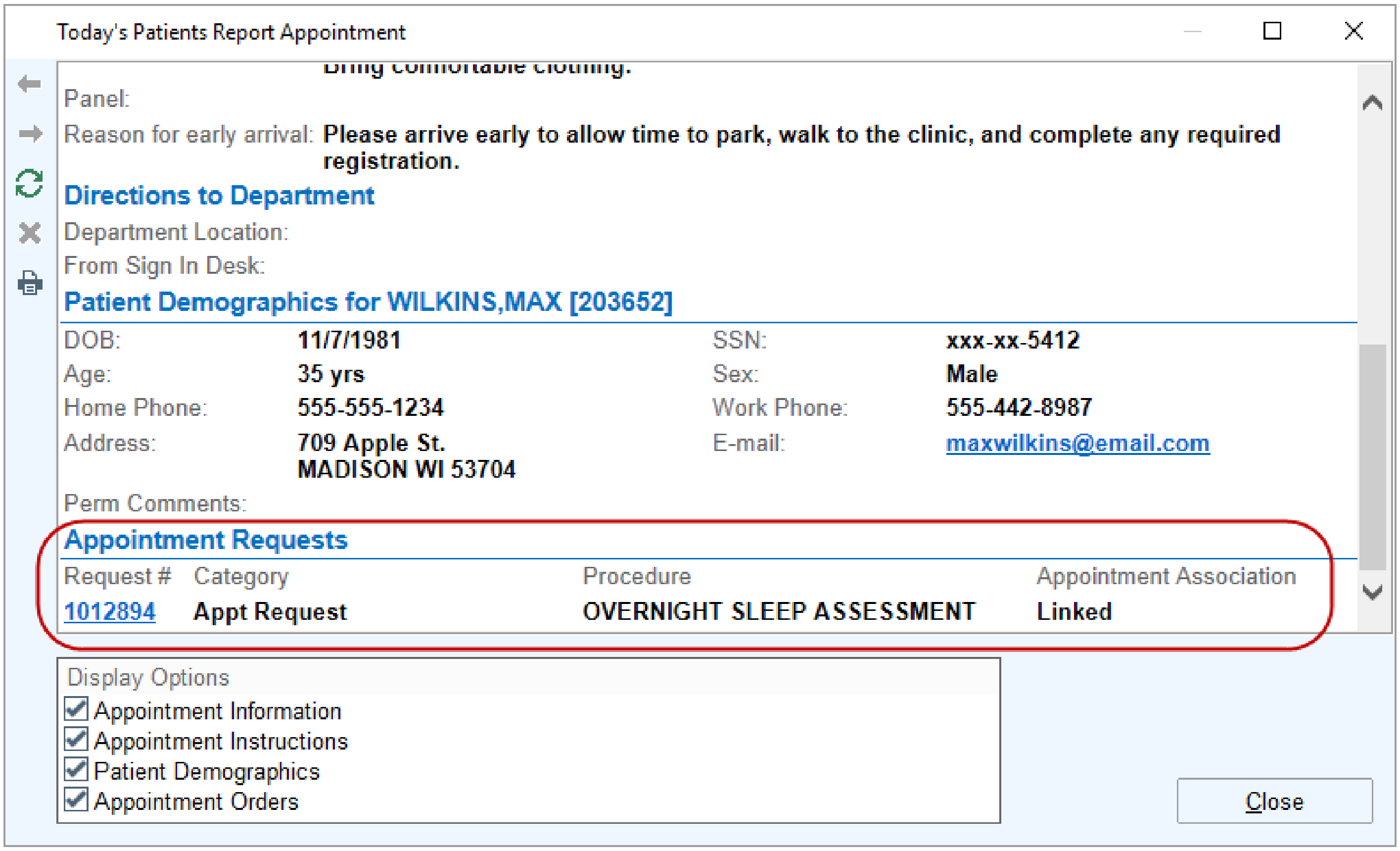
You can show appointment request details to registrars when they view encounter information for an appointment in the Today's Patients report in Grand Central. Appointment request information appears in the standard HTML display, but if you've customized this display in the past, you need to add the appointment request extensions to your custom displays.

HTML display 35201-Today's Patients Report Appointment is used by the Today's Patients report to show detailed information about an appointment. Appointment request information appears in HTML table 10070-AS Appointment Orders with the following extensions:

- 42225-ES Appt Orders Header

- 42224-ES Appointment Orders ID Col

For more information about working with HTML displays and tables, refer to the HTML in Hyperspace Setup and Support Guide.



Require Certain Fields When Users Enter Appointment Requests

You can use Appointment Request-context rules in the Rule field of the Item Profile Editor and Item Default Editor. This option makes it possible, for example, to make the Appt Request - Requested Date (I ORD 67203) item required when a rule determines that a canceled appointment has a specific cancel reason. That way, when a user edits an appointment request related to an appointment that was canceled for a specific reason, the user is required to enter a requested date value on the appointment request.

In the Foundation System, we configured a rule and item defaults to require source and destination specialty fields in manually created requests but not in clinical orders, which already contain relevant information. To check out this configuration, log in to the Foundation Hosted environment and look up rule 717584-ES Appointment Request is Clinical Order. To see how the item defaults are configured, compare item profiles 310-Appointment Request Source and 359-Request Destination Specialty, which cause the fields to be required, with item profiles 355-Appointment Request Source and 394-Request Destination Specialty, which use rule 717584-ES Appointment Request is Clinical Order to set the items to not be required for clinical orders.

For more information, refer to the Create or Edit a Rule topic. Refer to the following topics for more information about creating item defaults and item profiles that use rules:

- Create a New Item Default for a Selected Organizational Context
- Create a New Item Profile for a Selected Organizational Context

Use Request Entry Decision Trees to Place Protocol

Orders for Appointment Requests

Starting in August 2020

Certain visits might require prerequisites be completed before the patient comes in for their appointment. For example, a provider might want patients with certain indications to have diagnostic tests and labs done before their consult. Instead of requiring providers or their delegates to place orders in advance, you can set up request entry decision trees to automatically place protocol orders for procedures that need to be resulted before the patient's first face-to-face appointment. After schedulers create an appointment request and complete the decision tree, they can make appointments for the visits in the appointment request and also schedule the prerequisite orders.

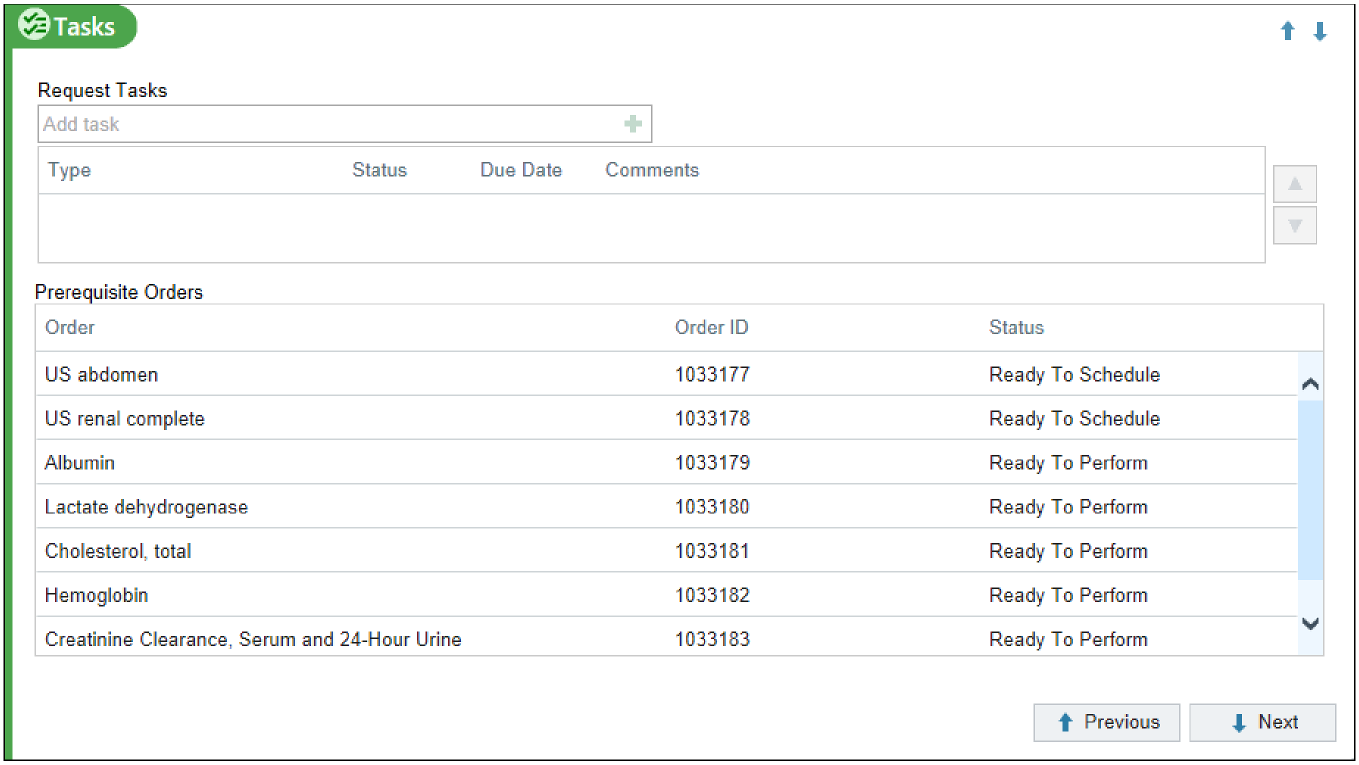
Considerations

- This feature is not meant to replace clinician order entry. Cosign support is available starting in February 2021. In November 2020 and earlier, this feature is most useful for organizations outside of the United States that don't require some types of providers to have their orders cosigned.
- Before implementing this feature, work with your organization's compliance team to ensure that it complies with regulations in your area.
- Work with your EpicCare Ambulatory team to test your build carefully before rolling it out. Ensure that orders are generated as you expect and that results are routed to the correct providers.

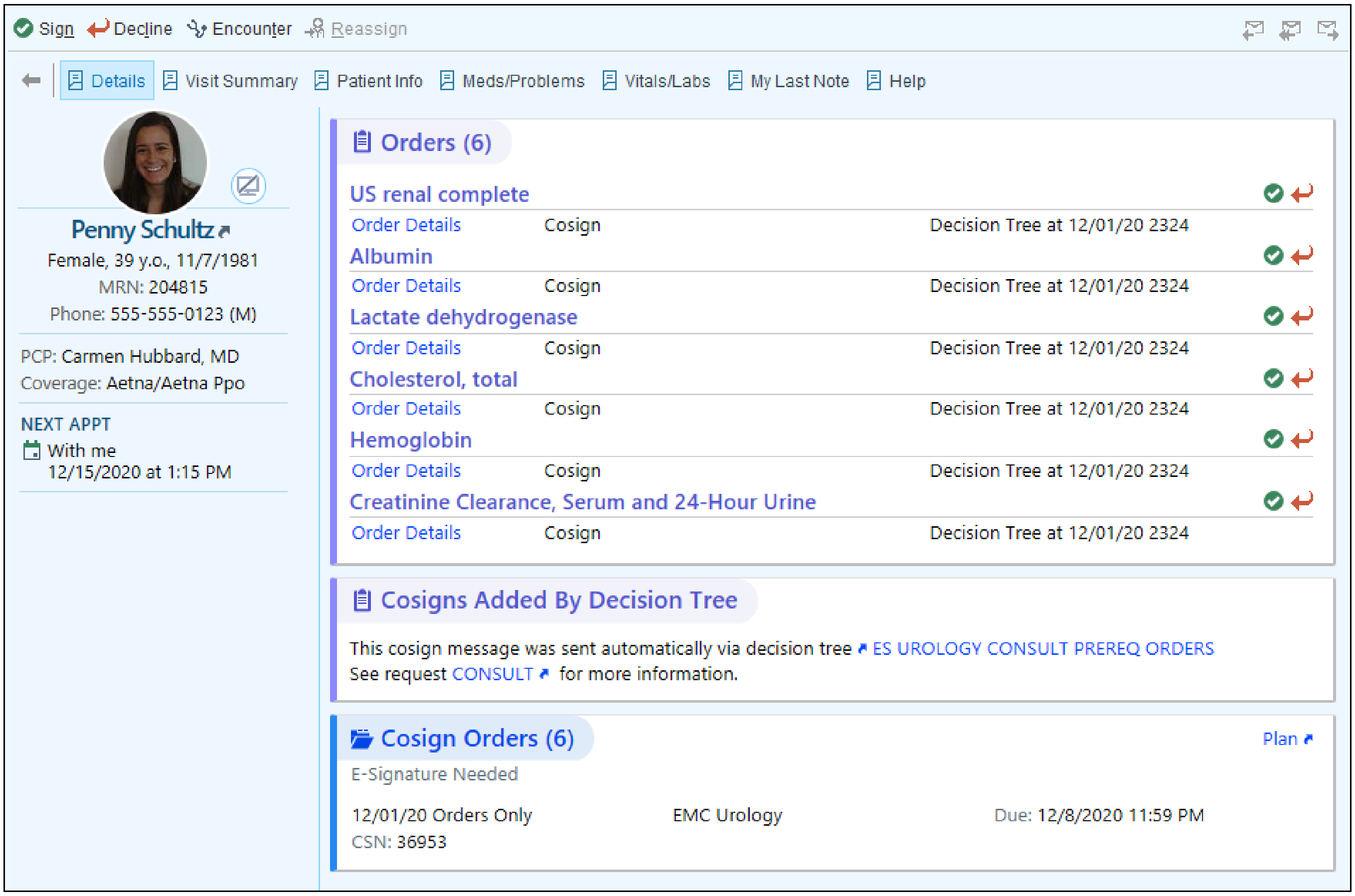
How Automatic Order Generation Works for Appointment Requests

The steps below outline how this feature works using a urology consult as an example.

1. A patient calls to request a consult appointment with a urologist. Your urologists have decided that all patients coming in for a consult must have the following procedures and labs performed within 14 days before their visit: US abdomen; US renal complete; Albumin; Cholesterol, total; Lactate dehydrogenase; Hemoglobin; Creatinine Clearance, Serum and 24-Hour Urine
2. A scheduler creates an appointment request and begins gathering intake information from the patient.
3. In the Decision Tree Search section, the scheduler adds your organization's request entry decision tree for urology consults, completes it, and applies the results to the request.
4. The patient hasn't had any of the necessary procedures or labs done recently, so in the Tasks section, the scheduler sees that prerequisite orders have been created for the request. The orders have either been signed or pended, depending on your configuration. For now, the authorizing provider for the orders is a placeholder provider that you've specified in Cadence System Definitions.



5. From here, the scheduling workflow for the prerequisite orders differs depending on whether the orders were signed or pended and whether the system can determine the real authorizing provider for an order without the appointment request being scheduled.
   - If the orders were signed, they can be scheduled before the appointment request only if the system can identify a real authorizing provider to use for the orders. For example, if the appointment provider should be the authorizing provider for the orders, the appointment needs to be scheduled first so that the system can determine who the appointment provider is.
   - If the orders were pended, a user needs to schedule the appointment request first. After the request is scheduled, the system sets the real authorizing provider for the orders. Then, the system sends a My Unsigned Orders message to the authorizing provider's In Basket so the provider can sign the orders. After the orders have been signed, they appear in appointment request workqueues for scheduling.
6. For orders that were automatically signed, your compliance team might require that the authorizing provider cosign the order. Starting in February 2021, you can set up the system to send a Cosign - Clinic Orders message to the authorizing provider’s In Basket so that they can cosign the order. If you do this, you can also choose to set up rules to warn front desk staff or stop them from checking in an appointment for an order that was generated by a decision tree and requires a cosign but hasn’t been cosigned yet.



MyChart scheduling tickets are not automatically generated for automatically generated orders because the authorizing provider might not be known until the appointment request is scheduled. If needed, schedulers can use the Send to MyChart button in the Appointment Request activity to manually send scheduling tickets to patients in MyChart.

Specify System- and Department-Level Settings for Automatically Generated Orders

There are some settings in Cadence System Definitions and at the department level that you need to define for automatically generated orders:

- A temporary authorizing provider for the system
- A default cancellation reason for the system
- Optionally, whether to re-run Order Transmittal when the authorizing provider is updated
- A default authorizing provider for a department

Specify a Temporary Authorizing Provider for Automatically Generated Orders

When a request entry decision tree generates orders, the system sets a temporary authorizing provider for the orders. This provider is replaced by a real authorizing provider when the appointment request or the order is scheduled, depending on your configuration. You need to specify the provider record the system uses as the temporary authorizing provider in Cadence System Definitions. The provider record you specify must have the Orders Authorizing Provider? (I SER 8220) item set to Yes and must be linked to an active user (EMP) record.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).

2. Select the Appointment Requests > General form.
3. Enter a provider record in the Temporary authorizing provider for auto generated orders (I SDF 10182) field.

Specify a Default Cancellation Reason for Automatically Generated Orders

The system cancels automatically generated orders when users take either of the following actions:

- They overwrite the decision tree that had automatically generated orders for an appointment request.
- They cancel an appointment request that had automatically generated orders.

Orders are not canceled if they were not generated by a decision tree, have already been resulted, or have already been completed.

You need to specify a default order cancellation reason from the Reason for Cancellation (I ORD 280) category list for the system to use when it cancels automatically generated orders.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form.
3. Enter a reason in the Default cancel reason for auto generated orders (I SDF 10183) field.

Specify Whether Order Transmittal Should Re-Run After the Authorizing Provider Is Updated

Starting in May 2022

When the authorizing provider is updated from the temporary one to the actual authorizing provider, it is possible that the order should be sent through order transmittal again. For example, if order transmittal is used to trigger an order to be sent out through an interface to other systems, it could be important to send the order again once the authorizing provider has been determined to ensure that billing is done correctly. To learn more about order transmittal, see the Introduction to Order Transmittal topic, then work with your EpicCare Ambulatory team to determine if you should turn this setting on. In order to turn it on, follow these steps:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > General form.
3. Enter Yes in the Run Order Transmittal on authorizing provider update? (I SDF 10206) field.

Specify a Default Authorizing Provider for a Department

When you set up an Add Task node in a request entry decision tree, you specify the logic for the system to use when determining who the real authorizing provider should be for an automatically generated order. One of the options is to use the default authorizing provider for the department where the appointment gets scheduled for the appointment request. Follow these steps to specify the default authorizing provider for a department:

1. In Hyperspace, open the department record (Epic button > Admin > Schedule Admin > Master File Edit > Department).
2. Select the Scheduling > Decision Support form. In February 2024 and earlier versions, select the After VT Entry form.
3. Enter a provider record in the Default authorizing provider for decision tree orders (I DEP 3850) field.

> You can see a list of a departments where a provider is listed as a default authorizing provider in the Departments (Default Auth Provider) section of the Scheduling > Linked Records form in the provider editor (search: Provider).

Create a Request Entry Decision Tree That Generates Orders

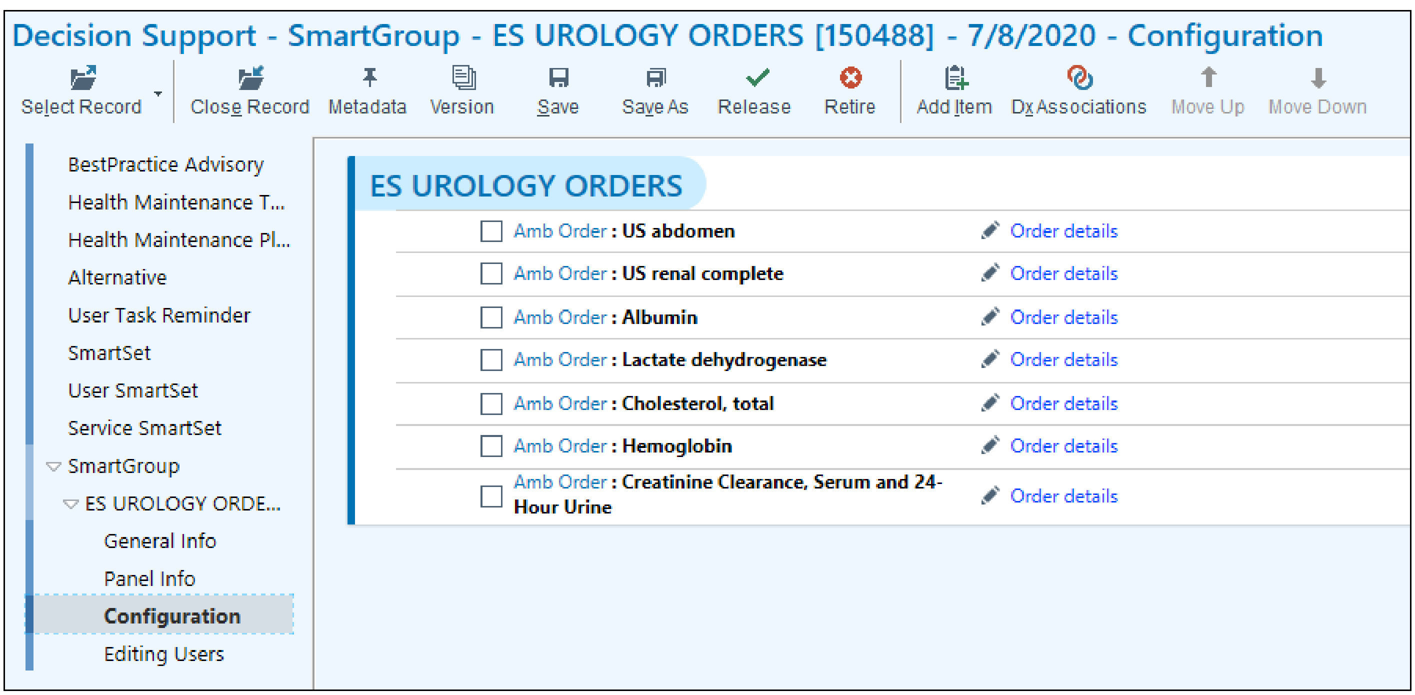
You need to do three things to set up a request entry decision tree to generate prerequisite orders:

- Work with your EpicCare Ambulatory team to create a SmartGroup that contains the order details for the orders that get generated.
- Create an appointment request task that contains the procedures to check whether the patient has already met the prerequisite and the procedure and SmartGroup to use to generate an order if needed.
- Set up Add Task nodes in your decision tree to generate orders for appointment requests, determine whether the orders are pended or signed, and determine the how the real authorizing provider gets set for the orders.

Create a SmartGroup for Orders That Need to Be Automatically Generated

Work with your EpicCare Ambulatory team to create a SmartGroup record that contains the orders that you need to be automatically generated by a request entry decision tree if the patient needs to have an order done. The SmartGroup record contains the details for how each order should be placed, such as the priority and status. The example shown below contains all of the orders that providers want to be done in advance of a patient's urology visit.

1. In Hyperspace, create a SmartGroup (search: SmartGroup).
2. Select the Configuration form.
3. Click Add Item.
4. Select Ambulatory Order for the item type and enter the order to add to the SmartGroup.
5. Repeat steps 3 and 4 for each order that needs to be in the SmartGroup.
6. Select details for each order as needed. The default values for the order appear below the order composer.
7. Click Release to allow the SmartGroup to be used, or click Test Release to make it available only for testing.



Create an Appointment Request Task to Check for Existing Orders and Generate an Order If Needed

The system uses tasks to determine the orders that need to be generated for an appointment request. When you create a task, you're defining two things:

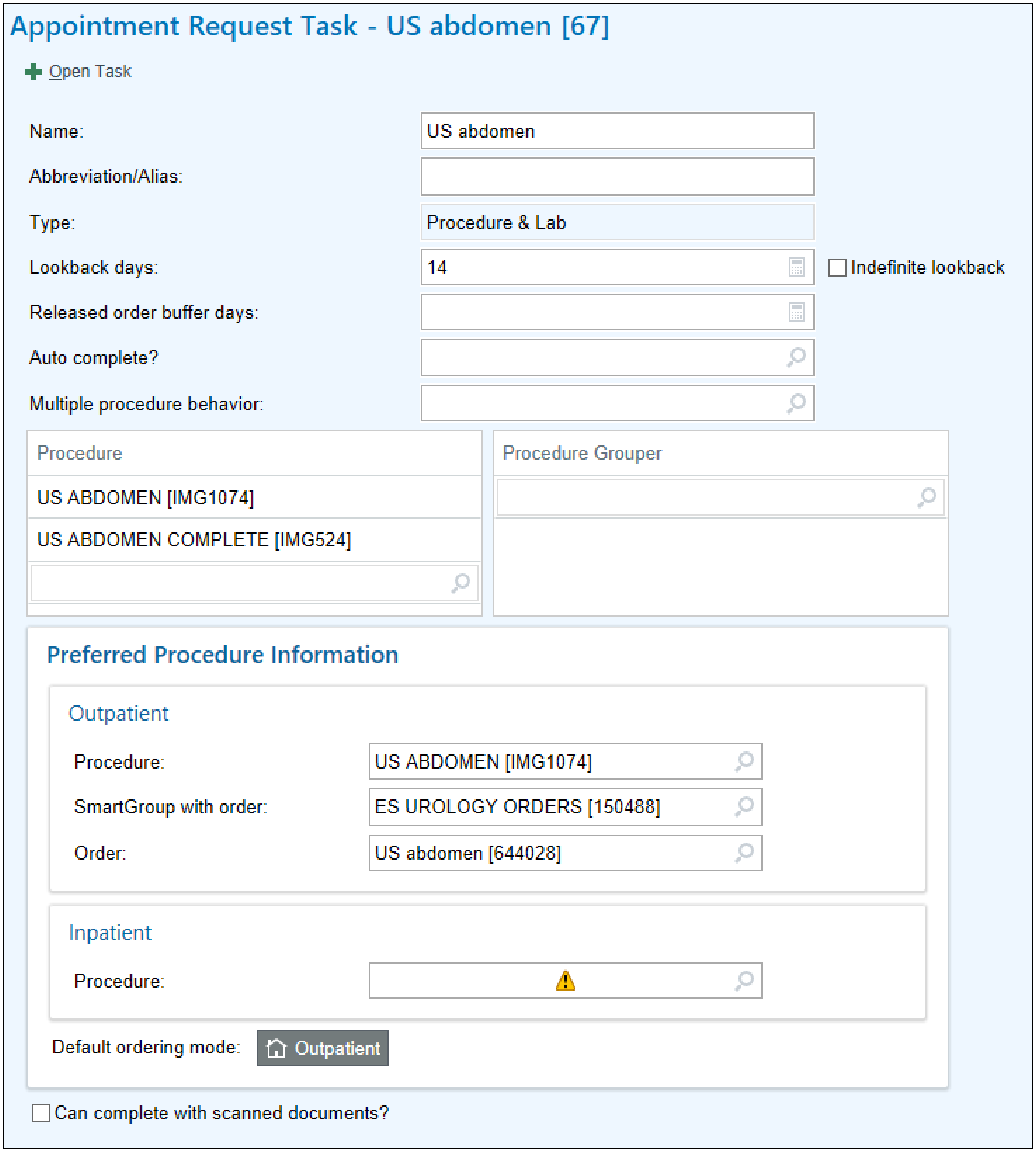
- Which procedures that a patient might already have had done that would satisfy the need for their upcoming appointment
- Which procedure to generate an order for if the patient doesn't already have one that satisfies the need

In the example shown below, the system checks to see if the patient has had a US Abdomen or US Abdomen Complete procedure done in the last 14 days. If they haven't, it generates a US Abdomen order.

1. In Hyperspace, create a task (search: Appt Request Task).
2. In the Type (I DEF 350) field, enter 4-Procedure & Lab.
3. In the Abbreviation/Alias (I DEF 5) field, enter an alternate name for the task that you can use to search for it if EnROL is enabled.
4. In the Lookback days (I DEF 351) field, enter the number of days the system should search backward from the date that the decision tree is run for the order that satisfies the requirements for this task. Alternately, select the Indefinite lookback (I DEF 351) check box to check all orders for the patient. Select this check box only if the patient will have very few orders relevant to this task during their lifetime. For example, you might select this check box for a task that checks for order results on a patient's blood type.
5. In the Released order buffer days (I DEF 368) field, enter the number of additional days that the task should look back for released orders that can complete the task, after the number of days specified in the Lookback days field. This feature is helpful if you release orders well before the procedure occurs. You cannot enter an amount less than one. If this field is left blank, the task looks back an extra 14 days for released orders. The Released order buffer days field isn’t available if you selected the Indefinite lookback check box.
6. In the Auto complete? (I DEF 390) field, enter Yes if you want the system to automatically mark this task as complete when a matching procedure or procedure grouper is found. The system continues updating the task as new orders are placed and resulted. Enter No if you want to require users to manually select the appropriate order from a list of suggested orders. The task status does not advance until the user makes a selection.
7. In the Multiple procedure behavior (I DEF 367) field, enter the criteria you want the system to use to choose a lab or procedure to complete this task if there are multiple labs or procedures that could complete the task. The options are:
    - 1-Use Most Recent. Select this option if you want the system to complete the task with the most recently ordered procedure.
    - 2-Prioritize Resulted. Select this option if you want the system to complete the task with the most recent lab or procedure with results.
    - 3-Use Most Critical. Select this option if you want the system to complete the task with the procedure or lab with the most critical results. If you select this option, the system prioritizes results in this order: critical > abnormal > normal.
    - 4-Require Clinical Review. Select this option if you want a clinician to have to manually review a list of matching procedures and labs and select which one to use to complete the task.
8. In the Procedure (I DEF 365) field, list the procedures or labs that satisfy the requirements for this task. These are records in the Procedures (EAP) master file.
9. In the Procedure Groupers (I DEF 366) field, list the procedure groupers that satisfy the requirements for this task. These are records in the Groupers (VCG) master file. Refer to the Groupers Setup and Support

Guide for information about building grouper records.

10. In the Preferred Procedure Information section, complete the Outpatient section:
    - Procedure. Enter the procedure to automatically generate an order for if the patient doesn't already have an order that satisfies the task.
    - SmartGroup with order. Enter the SmartGroup that contains the order details for the procedure.
    - Order. Enter the order from the SmartGroup to use for the order details.
11. Select the Can complete with scanned documents? check box. Note that scanned documents won't automatically mark a task as complete even if the task is configured to be automatically completed, which makes sure that clinicians select the appropriate scanned document for the task.
    - In the Document types (I DEF 355) field, specify the allowed document types.
    - Select the Always show documents in suggestions? (I DEF 356) check box if you want to show documents listed in the Document types field in the task's list of suggested results. Otherwise, a link appears that opens a window containing all the documents that can satisfy the task.



Configure Add Task Nodes to Generate Orders in Request Entry Decision Trees

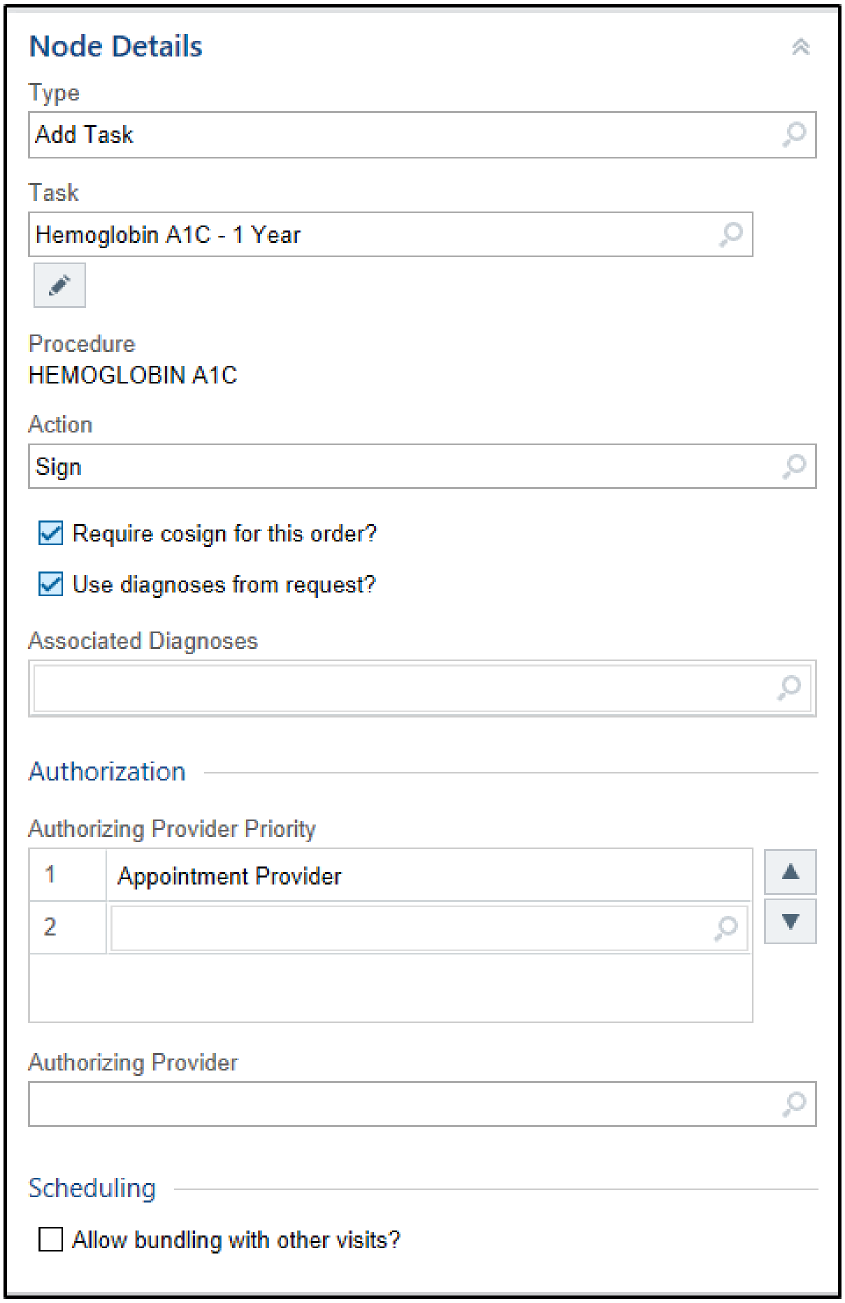
This section contains instructions only for setting up the Add Task node in a request entry decision. For complete instructions about setting up request entry decision trees, refer to the Use Decision Trees to Guide Schedulers During Request Entry topic and the Decision Trees Setup and Support Guide.

Set up Add Task nodes in your request entry decision tree to add tasks to appointment requests that generate orders for patients as needed. In the example shown below, the system generates a US abdomen order for a patient if needed, signs it, and uses the appointment provider as the authorizing provider for the order.

1. In the decision tree editor, select the Decision Tree tab and click Add Node.
2. Fill out the node details:
    - In the Type field, enter Add Task.
    - In the Task field, enter a Procedure & Lab task.
    - In the Action field, choose whether the system should sign or pend the orders. Pended orders get sent to the authorizing provider's My Unsigned Orders folder in In Basket. Pended orders do not appear on workqueues or the Appointment Desk because they are not schedulable until they are signed by a provider.
    - If you selected Sign in the Action field, the Require cosign for this order? checkbox is available starting in February 2021. Select this checkbox if your compliance team requires that authorizing providers cosign orders that are automatically generated by the system.
    - Determine which diagnoses to associate with the order when it gets generated:
        - Select the Use diagnoses from request? checkbox if you want to use the indications from the decision tree that match those on the request as the diagnoses for the order. Indications can be added in the Indications tab of the decision tree editor. This option is available starting in February 2022.
        - In the Associated Diagnoses field, enter the diagnoses to associate with the order when it gets generated. This field is available starting in February 2021.
    - In the Authorizing Provider Priority field, specify the logic that the system uses to determine who the authorizing provider for the orders should be. The system searches for an authorizing provider starting at the top of this list and stops when it finds one.
        - Appointment Provider. Use the appointment provider for the appointment that was scheduled from the appointment request that automatically generated the order. This option does not apply if the appointment request hasn't been scheduled yet.
        - Department Provider. Use the default authorizing provider for the department (I DEP 3850) where the appointment was scheduled for the appointment request that automatically generated the orders. This option does not apply if the appointment request hasn't been scheduled yet.
        - Patient General PCP. Use the patient’s general PCP if they are an authorizing provider for the department where the order is being scheduled.
        - Referring Provider. Use the order referring provider (I ORD 3000) from the appointment request that automatically generated the order or the referral referring provider (I RFL 300) linked to the appointment request that automatically generated the order. This option is available starting in August 2024.
        - Specified Provider On Node. Use the provider specified in the Authorizing Provider field on the Add Task node if they are an authorizing provider for the department where the order is being scheduled.
    - If you entered Specified Provider On Node in the Authorizing Provider Priority field, enter a provider in the Authorizing Provider field.
    - If you selected Sign in the Action field, the Allow bundling with other visits? checkbox is available starting in May 2022. Select this checkbox to bundle the order with an Add Visit node in the same

decision tree. The order will then appear and be schedulable alongside the anchor appointment.

3. Make sure to set up a connection to the node from other nodes in the tree.

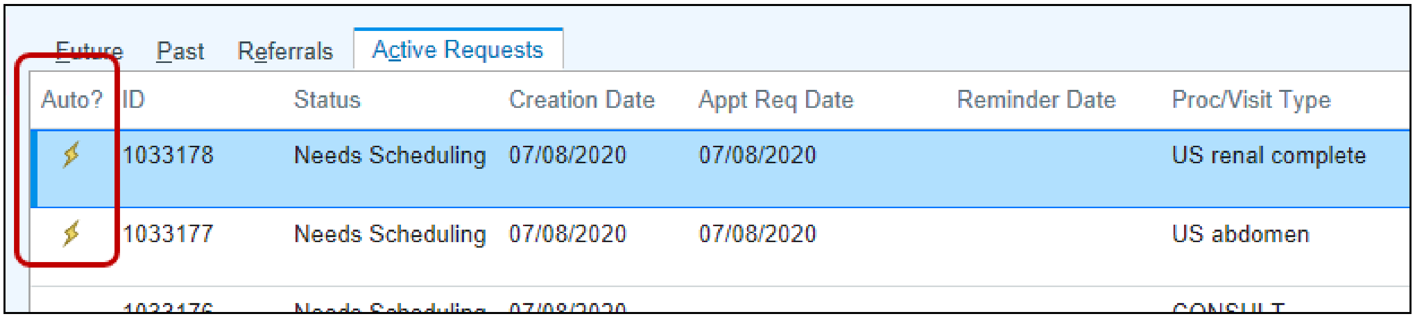


Show Users That Orders Were Automatically Generated by a Request Entry Decision Tree

It can be helpful for schedulers and providers to know that an order was automatically generated by a request entry decision tree rather than placed manually by a provider. You can show this information to schedulers in a column on the Appointment Desk and in reports and HTML displays. You can show this information to providers in In Basket.

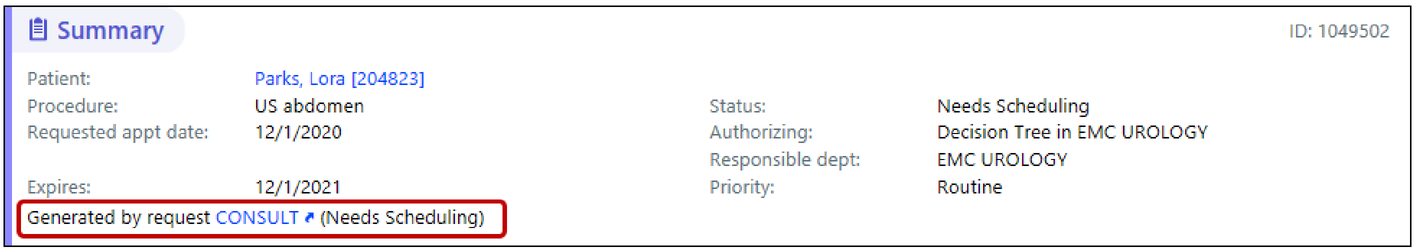
Appointment Desk

You can add report column 1971-Order Was Auto Generated to the Active Requests and Finalized Requests tabs of the Appointment Desk. This column shows a lightning bolt icon when an order was automatically generated. Refer to the Design the Look and Use of the Appointment Desk Tabs topic for additional information.



Expand Request Window, Appointment Request Workqueues, Scheduling Front Desk, and Book It

For prerequisite orders, print group 63040-ES Request Summary and HTML table 63040-AS Order Summary show when an order was automatically generated by an appointment request. If you're using a copy of HTML table 63040, it must include extension 40434-ES Order Summary Auto Generated Text.



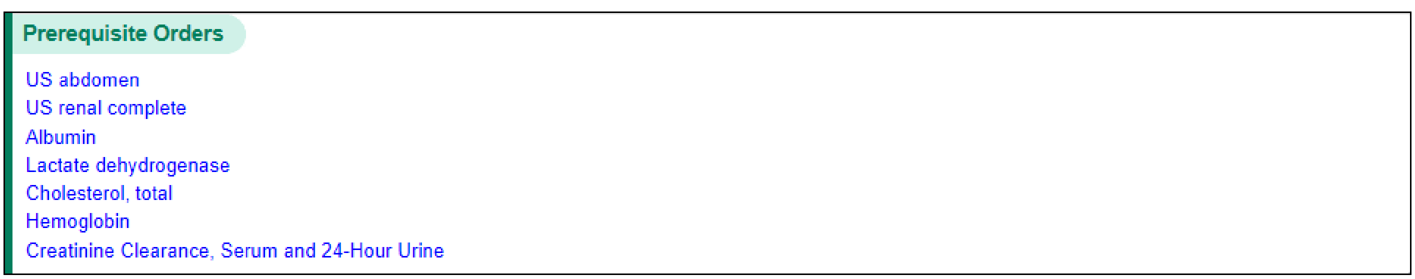
For appointment requests, print group 62075-ES Request Prerequisite Orders and HTML table 62021-AS Request Generated Prereq Orders show a list of prerequisite orders.

Print group 62075 appears in the reports listed below as released. If you use a copy of these reports, you need to add print group 62075 to your copied report.

- 63000-ES Order Information
- 63014-ES Appointment Entry Orders

HTML table 62021 appears in the HTML displays listed below as released. If you have overrides for any of these HTML displays, you need to add HTML table 62021 to your overrides.

- 7-AS Orders: Expand Popup
- 76-AS Orders: Workqueue & Front Desk
- 77-AS Orders: Appointment Entry



Patient Sidebar

Print group 63204-ES Sidebar Order Summary shows when an order was automatically generated by an appointment request.

Selected Request

US renal complete

Scheduled

Expires:	12/1/2021
Ordered:	12/1/2020
Req Appt:	12/1/2020
Provider:	Decision Tree
Dept:	EMC URO [EMC]

Automatically created as a prerequisite for request CONSULT (Scheduled)

In Basket

Print group 51975-Order: Unsigned Orders shows when an order was automatically generated by a decision tree as a prerequisite order. It appears in report 106-IB Unsigned Orders Report, which appears by default in Unsigned Orders messages. If you're using a copy of print group 51975, the Show Generated Orders? parameter must be set to 1 for the Prerequisite Orders section to appear.

Unsigned Orders

ID	Description	Pended By	When	Reason
1049473	US ABDOMEN	Decision Tree	12/01/20 2310	
1049474	US RENAL COMPLETE	Decision Tree	12/01/20 2310	
1049475	ALBUMIN	Decision Tree	12/01/20 2310	
1049476	LACTATE DEHYDROGENASE	Decision Tree	12/01/20 2310	
1049478	CHOLESTEROL, TOTAL	Decision Tree	12/01/20 2310	
1049479	HEMOGLOBIN	Decision Tree	12/01/20 2310	
1049480	CREATININE CLEARANCE, SERUM AND 24-HOUR URINE	Decision Tree	12/01/20 2310	

Prerequisite Orders

Order US abdomen placed automatically by decision tree ES UROLOGY CONSULT PREREQ ORDERS on request CONSULT
Order US renal complete placed automatically by decision tree ES UROLOGY CONSULT PREREQ ORDERS on request CONSULT
Order Albumin placed automatically by decision tree ES UROLOGY CONSULT PREREQ ORDERS on request CONSULT
Order Lactate dehydrogenase placed automatically by decision tree ES UROLOGY CONSULT PREREQ ORDERS on request CONSULT
Order Cholesterol, total placed automatically by decision tree ES UROLOGY CONSULT PREREQ ORDERS on request CONSULT
Order Hemoglobin placed automatically by decision tree ES UROLOGY CONSULT PREREQ ORDERS on request CONSULT
Order Creatinine Clearance, Serum and 24-Hour Urine placed automatically by decision tree ES UROLOGY CONSULT PREREQ ORDERS on request CONSULT

Print group 62098-ES Decision Tree Cosign IB Section informs providers that the order they received a Cosign - Clinic Orders message for was automatically generated by a decision tree. It appears in report 38400-HIM DT Prov ChtComp Deficiency Info Rpt, which appears by default in Cosign - Clinic Orders messages.

Cosigns Added By Decision Tree

This cosign message was sent automatically via decision tree ES UROLOGY CONSULT PREREQ ORDERS
See request CONSULT for more information.

Warn Schedulers When They Check In an Appointment for an Order That Hasn't Been Cosigned

Starting in February 2021

If you require that orders generated by a decision tree be cosigned by a provider, your compliance team might want to warn schedulers when they check in an appointment for an order that hasn't been cosigned so the scheduler can follow up with the provider or prevent check in altogether. To do this, you need to create a Patient context rule as described in the Prevent Check In Based on a Rule topic that uses one of the following properties:

- 98378-Appointment Has Incomplete Decision Tree Cosigns. Returns true if there are orders that were generated by a decision tree, require a cosign, and haven't been cosigned.
- 98379-Appointment Incomplete Tree Cosign Orders. Returns orders that were generated by a decision tree, require a cosign, and haven't been cosigned. This property can be helpful in constructing the error message for your rule.

Show Risk Score Information in Appointment Request Decision Trees

Starting in Epic 2018

If you're using both Cadence and Healthy Planet, you can add risk score information such as a patient's risk of hospital admission or ED visit to appointment request decision trees to help schedulers offer appointments to high-risk patients first. For information about showing risk score information in decision trees and other scheduling tools, refer to the Use Risk Scores to Guide Appointment Scheduling topic.

Allow Schedulers to Use Quick CRMs in the Appointment Request Activity

Starting in February 2020

November 2019 by SU C9100032 and E9100032

August 2019 by SU C8908176 and E8908176

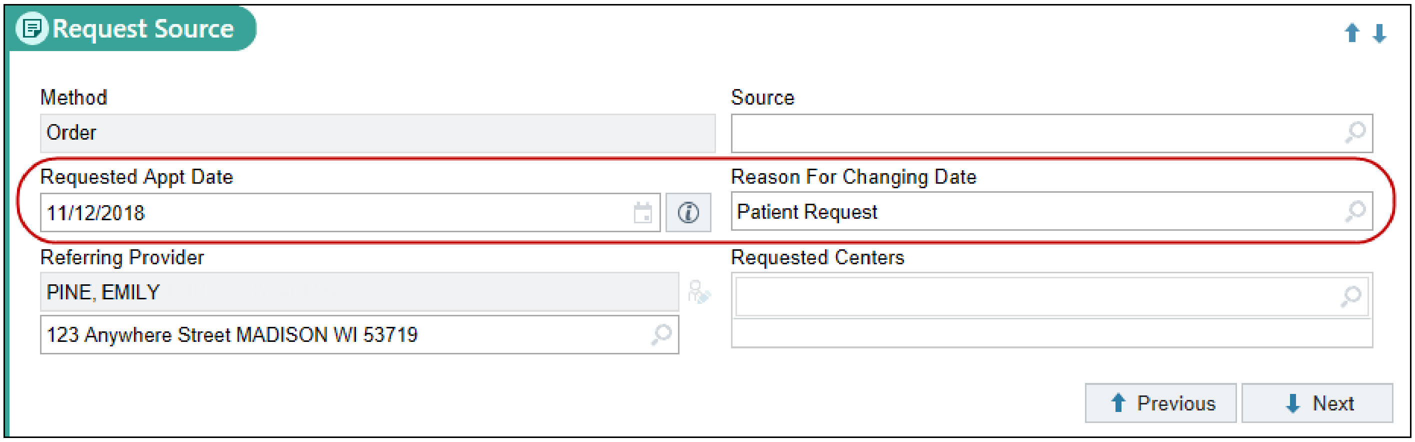
You can configure the Appointment Request activity toolbar to include a Quick CRM menu, which makes documenting calls from the Appointment Request activity fast and easy. Note that the quick CRM must have an attachment type of Appointment Request. To give schedulers the ability to use Quick CRMs, add a Quick CRM menu to your Appointment Request activity toolbar menu (ES_MT_APPTREQUEST). Refer to the Use Quick CRMs to Speed Up Documentation topic for more information on how to add a Quick CRM menu.

If you use this feature, we recommend that you add print group 63217-ES Sidebar Communication History to patient Call Hub reports so call center users can view a history of all phone calls made by schedulers.

Collect a Reason When Schedulers Change the Requested Appointment Date for Future Orders

Starting in November 2018

Schedulers can edit the requested appointment date for a future order if they have Cadence security points Edit request (I ECL 5723) and Edit order requested date (I ECL 5725) both set to Yes. If you want schedulers to record a reason when they change a date, you can build reasons for them to select. After you do this, the Reason for Changing Date field appears next to the Requested Appt Date field when schedulers change the date, and schedulers are required to enter a reason. The Foundation System includes Clinical Needs Changed, Patient Request, and Error as reasons.



Create your reasons as values in the Request Appt Date Audit Reason (I ORD 67939) category list. Refer to the Add a Value to a Category List topic for more information.

View the Audit Trail for an Appointment Request

Get a picture of who created and edited an appointment request in the appointment request audit trail. From the Appointment Request activity, click Audit Trail to open the Audit Trail window.

The system audits the following changes and keeps that information forever in the Appointment Request Audit Trail (SI ORD 67900) superitem for a request:

- Edit date and time
- Edit action
- Edit user
- Custom status
- Base status
- Triage status
- Specialty
- Subspecialty
- Responsible department
- Defer reason
- Defer until date and time
- Defer comment
- Previous custom status
- Previous base status


Audit Trail
Action
User
Date and Time
Request Deferred
Jensen, Nora
2/7/2017 2:10:35 PM
Status: Deferred ~~Needs Scheduling~~
Defer until: 2/14/2017 12:00:00 AM
Defer reason: Patient is not available
Defer comment: On vacation
Request Edited
Jensen, Nora
2/7/2017 1:30:17 PM
Request Edited
Jensen, Nora
2/7/2017 9:28:10 AM
Request Created
Jensen, Nora
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Create Appointment Requests for Abandoned Scheduling Workflows

You can set up the system to create appointment requests so you have a record of when schedulers started a scheduling process in Book It (starting in February 2022) or Make Appointment (November 2021 and earlier) but didn't finish it. These abandoned scheduling workflows can represent leaked demand for appointments at your organization or situations where the scheduler was interrupted and couldn't finish scheduling, such as a dropped call with a patient. For more information, refer to the Keep Track of Abandoned Scheduling Attempts topic.

To create appointment requests for abandoned scheduling workflows, 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.