

Book Anywhere Setup and Support Guide

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Your Responsibilities for Safe Use

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

Table of Contents

Book Anywhere Setup and Support Guide	4
Book Anywhere Outgoing/Client Setup	7
Join the Book Anywhere Network	7
Create Records to Represent Scheduling Locations	7
Allow Visit Types to Be Scheduled Externally	9
Specify Default Indications for Book Anywhere Visit Types	10
Specify Default Places of Service for Book Anywhere Scheduling	10
Create Reasons Why Appointments Are Scheduled Externally	11
Give Users Security to Schedule Book Anywhere Appointments	11
Customize Scheduling Preference Time Ranges for Book Anywhere	12
Book Anywhere Incoming/Server Setup	13
Join the Book Anywhere Network	13
Create a Background User for Scheduling Book Anywhere Appointments	13
Allow Book Anywhere to Create Potential Duplicate Patients	14
Allow Book Anywhere to Create Verified Patients	15
Create Your Book Anywhere Decision Tree	15
Test Your Book Anywhere Decision Tree	17
Show Schedulers Which Organization Scheduled an Appointment	17

Book Anywhere Setup and Support Guide

Use Book Anywhere to help patients get the care they need by allowing schedulers to directly schedule appointments at other Epic organizations.

- Health systems and retail clinics can partner to use Book Anywhere.
 - Retail clinics can schedule appointments at a local health system for patients who need more specialized care than the retail clinic can provide.
 - Health systems with full schedules can schedule appointments for patients to receive routine care at retail clinics.
- Share resources with partner organizations by using Book Anywhere to schedule remote video visits.

Book Anywhere uses FHIR to search for available appointment slots at another organization, find or create a patient record at that organization, and then schedule that patient into a slot. Book Anywhere also uses Care Everywhere to match, link, and create patients across organizations. Care Everywhere is used starting in November 2022 and in the following versions with special updates:

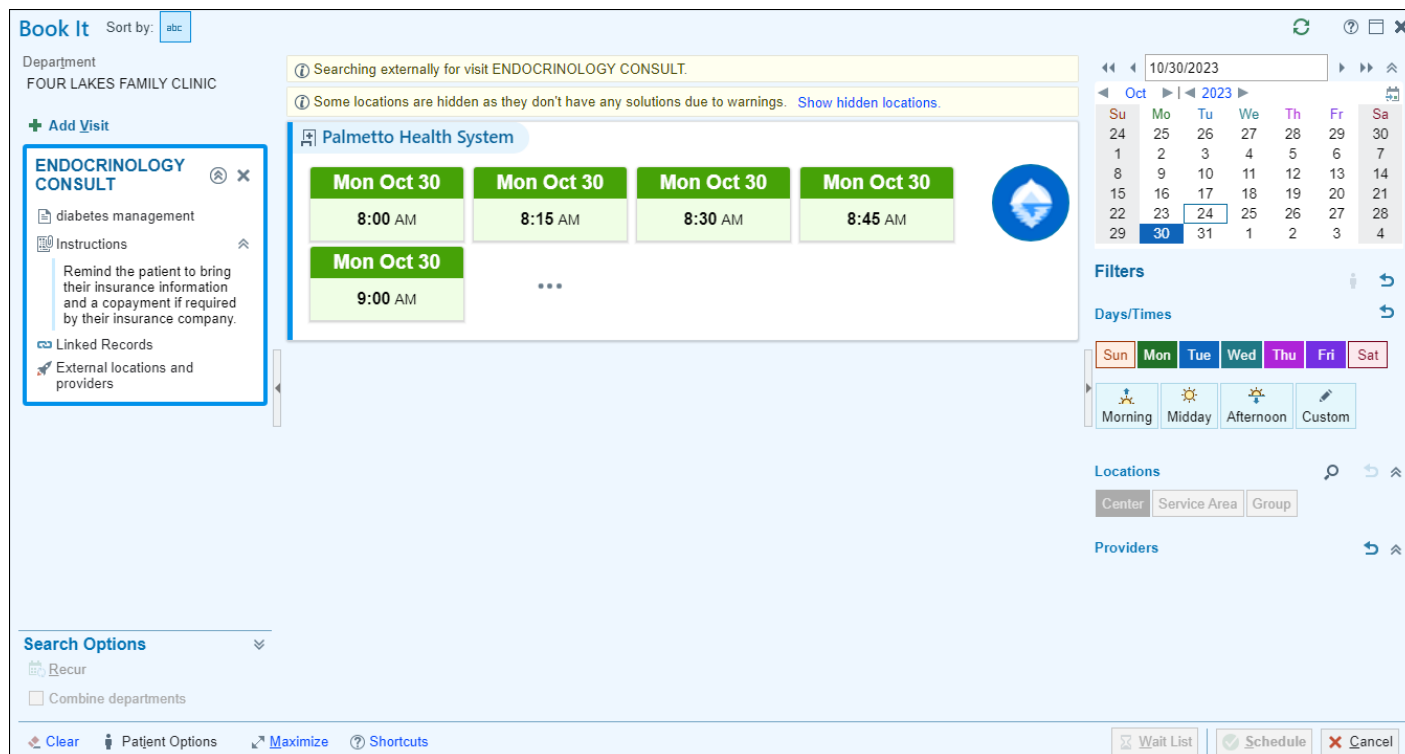
- May 2022: E10200037, C10200037-HSWeb, E10203746, E10203747, E10204333, E10208697
- February 2022: E10105718, C10105718-HSWeb, E10109526, E10109556, E10109998, E10113275
- November 2021: E9909840, C9909840-HSWeb, E9913017, E9913035, E991333

Note: The specified special updates for November 2021 require that your organization is using Care Everywhere in order to work.

How It Works

Patient Greg just saw his PCP at the Four Lakes Family Clinic and needs to follow up with an endocrinologist for his diabetes. The Four Lakes scheduler searches for appointments at local organizations that have agreed to take endocrinology patients. Greg leaves with his follow up appointment scheduled for him.

From a patient's Appointment Desk, schedulers click Book It to schedule appointments using Book Anywhere. On the left side of the activity, they select the visit type they want to schedule and they enter the locations to search. They can also enter the patient's indications and a specialty for the visit. Including this information in the search helps the external organization send back appropriate slots for the patient. Schedulers can enter appointment notes for the visit, but this information is not evaluated by the external organization to send back slots. The appointment notes are saved with the appointment that gets scheduled at the external organization and can be helpful for schedulers and clinicians who are reviewing a patient's upcoming appointments.



When schedulers select an appointment slot, the Appointment Details window appears. The slot is not held while schedulers are reviewing the appointment details. When they click Schedule, the system checks for a matching patient:

- If there is exactly one high-threshold match, the system links the patients.
- If there are no high- or low- threshold matches, the system creates a new patient and links it.
- If there are multiple high- or low-threshold matches, the system either creates a duplicate or denies scheduling depending on if the external organization is configured to allow duplicate patient creation, as described in the [Allow Book Anywhere to Create Potential Duplicate Patients](#) topic.

After the patient is linked, the system verifies that the slot is still available at the external organization and books the appointment if it is.

There are two interface errors that can appear in the Appointment Details window:

- 59190-FHIR - Book Anywhere Appointment Unschedulable. If the slot has been taken since the scheduler first searched for openings, the scheduler is notified so they can find another slot that works for the patient.
- 59191-FHIR - Book Anywhere Patient Is Locked. If the patient's record is locked in the remote system, the scheduler is notified that they cannot schedule the appointment.

Oct
30

Monday October 30, 2023 - CONSULT at Palmetto Health System



THIS APPOINTMENT HAS NOT BEEN SCHEDULED

Appt At		Location
8:00 AM		Palmetto Endocrinology
Until 8:15 AM (15 min)		1111 Main Street MADISON WI 53705
Time	Length	Provider
8:00 AM	15 min	Joyce Washington

Appointment Notes
diabetes management

Reason for Scheduling Externally

Services not available



Schedule

✕ Cancel

Book Anywhere Outgoing/Client Setup

Complete these tasks so you can schedule appointments in another organization's installation of Epic.

To schedule into an external location, you must be licensed for Care Everywhere and have the Cadence Book Anywhere license, which is included in the standard Cadence license. If you're not sure whether you have these licenses, contact your Epic representative and mention parent SLG 3550868.

Work with your Care Everywhere team and refer to the [Care Everywhere: Essential Setup and Support Guide](#) for additional information.

Join the Book Anywhere Network

You need to join the Book Anywhere network so that other organizations can connect with you.



You must have Bridges security point 44-Manage Network Participation to complete this setup.

1. From the Application Access menu in text, go to Interconnect > [WorldWise Admin](#) (in February 2022 and earlier, go to One Virtual System Admin).
2. On the Book Anywhere row, press J to join the network.
3. Follow the prompts on the screen to enter the patient-facing FHIR URL for your organization and the start and end dates for your participation in the Book Anywhere network. You can find your patient-facing FHIR URL on the Communication Details tab of the My Phone Book activity (search: My Phone Book) in Hyperspace. If you don't have a patient-facing FHIR URL follow the steps listed in the [Define Default URL Prefixes in the My Phone Book Activity](#) section. When entering the URL in WorldWise Admin (or One Virtual System Admin), append "api/FHIR/STU3" to the end of the URL, such as `https://<hostname>/<app>/api/FHIR/STU3`.

Create Records to Represent Scheduling Locations

For every organization that you want to schedule into, you need to create the following records:

- Place of service (EAF). This record represents the location at another organization that you're scheduling into from your system. It can represent the entire organization, a group of departments that are located at the same address, or a single department.
- ID type (IIT). For places of service that represent a subset of departments at the other organization, create an ID type where you specify those departments. If you don't have places of service that represent a subset of departments, you don't need to create ID types.

Then you need to configure Cadence System Definitions and visit types with the places of service that you're allowing for Book Anywhere scheduling. You can also specify default places of service to search in Cadence System Definitions, department records, and visit type records.

Create Place of Service Records

Create place of service records in the Facility Profile (EAF) master file to represent the location at another organization that you're scheduling into. The records can represent the entire organization, a group of departments that are located at the same address, or a single department.

Your place of service records use the external endpoint configuration you created to send patient and visit type

information to the external organization and display open appointment slots to schedulers. If you already have a place of service record created for an organization because you send referrals to it, you can reuse that record for Book Anywhere.

1. In Clinical Administration, go to Facility Structure > Places of Service (EAF) and create or edit a place of service record.
2. On the Care Everywhere screen, enter the Care Everywhere organization (DXO) record that represents the place of service in Care Everywhere Location (I EAF 77000) field.
3. Go to the Book Anywhere Configuration screen.
4. In the Exclude from Leaked Demand (I EAF 15502) field, enter Yes if scheduling appointments at this organization should not count as leaked demand for appointments from your organization in reports. The default value is No.
5. If the place of service record represents a subset of departments at the other organization, complete the steps in the [Create ID Types to Filter Departments for Scheduling](#) topic to specify which departments can be scheduled into.

Create ID Types to Filter Departments for Scheduling

If a place of service represents a subset of departments, you need to create an ID type where you specify those departments. Before completing these steps, you need to obtain the FHIR IDs for the departments from your counterpart at the other organization. For information about the fields not described in these steps, refer to the [Create ID Types](#) topic for detailed instructions on creating Identity ID types.



There's a utility you can run in Cadence Text to get the FHIR IDs for a list of departments. In Cadence Text, go to Book Anywhere > Get Department FHIR IDs and follow the prompts on the screen.

1. In Hyperspace, open Identity ID Types (search: ID Types) and create a new record with a unique name.
2. Configure the fields as follows:
 - For the Abbreviation field (I IIT 15), enter a unique abbreviation.
 - For the Used by INI field (I IIT 27), enter EAF.
 - For the Context field (I IIT 25), enter 5000-Book Anywhere Location.
 - For the External Location Using this ID Type grid (I IIT 500), enter the place of service record that represents the departments.
 - For the Generation method (I IIT 30), select User entered.
 - In May 2022 and earlier, the field name is Method.
 - For the Verification format (I IIT 70), select Verification extension.
 - For the Verification extension field (I IIT 85), enter 19763-ID Verification to Allow Everything.
 - For the Code System URL field (I IIT 2040), enter the URL from the REST endpoint for the organization, with /Location appended. For example, <https://book.example.com/interconnect-something/api/FHIR/STU3/Location>.
 - For Use temporary IDs? (I IIT 1000), select No.
 - For Allow records to have multiple IDs of this type? (I IIT 95), select Yes.
 - In May 2022 and earlier, the field name is Allow Multiple IDs?

3. Click Accept to save the ID.
4. In Hyperspace, open ID Maintenance (search: ID Maintenance).
5. For the Master file field, enter EAF.
6. For the Facility field, enter the place of service record that represents the departments.
7. Add identifier types for each department you're scheduling into:
 - Select the ID type you created above.
 - Enter the FHIR ID for the department in the Identifier field.

Add Places of Service to Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Book Anywhere form.
3. In the Allowed Places of Service (I SDF 5003) column, enter the place of service records that are allowed for Book Anywhere scheduling. If certain places of service should be searched by default when schedulers use Book Anywhere, enter Yes in the Default (I SDF 5004) column. Schedulers can manually search places of service that do not have the Default column set to Yes.

Allow Visit Types to Be Scheduled Externally

When schedulers use Book Anywhere to schedule an appointment, they need to enter a visit type just like they do when scheduling an appointment at your organization. Only visit types that you enable for Book Anywhere can be entered and scheduled externally.

You can choose to enable your current visit types for both local and external scheduling, or you can create new visit types for use only in Book Anywhere. If an external organization is expecting to receive a specialty for visits requested by your organization, consider creating separate Book Anywhere visit types for each specialty so that schedulers do not need to specify the specialty each time they schedule an appointment. The visit types you identify in your system for Book Anywhere are not sent to the external organization and do not need to match that location's visit types. They are used only to support Book Anywhere scheduling from your system.

Schedulers can use Book Anywhere to schedule appointment requests and orders externally if the visit type for the request or order is linked to a visit type that is enabled for Book Anywhere. Complete order information is not sent to the other organization, so this feature is best used with requests or orders for specialty consults or follow-up visits.

1. In Hyperspace, open a visit type record (search: Visit Type).
2. Select the Book Anywhere form.
3. Select the Enable for Book Anywhere (I PRC 1041) check box.
4. Select the Only Allow Scheduling Through Book Anywhere (I PRC 1046) check box if you never schedule this visit type at your organization. This makes the visit type unavailable for scheduling locally at your organization.
5. In the Specialties (I PRC 1044) field, enter specialties from the Specialty (I DEP 110) category list that are used by default to schedule the appointment. The external organization can return appointment slots to you based on the specialty information you send them with the visit type. Schedulers can add and remove specialties for a visit during scheduling.
6. If this visit type can be scheduled in all of the places of service specified in Cadence System Definitions plus more, list the additional places of service in the Allowed Places of Service (I PRC 1045) column and

select the Combine with System Places of Service (I PRC 1043) check box. This appends the list of places of service specified in Cadence System Definitions (I SDF 5003) to the list of places of service specified in the visit type. If you list places of service in the visit type and do not select the Combine with System Places of Service check box, the system level places of service are not used when scheduling this visit type externally.

7. If certain places of service should be searched by default when schedulers use Book Anywhere, enter Yes in the Default (I PRC 1047) column. Schedulers can manually search places of service that do not have the Default column set to Yes.

Specify Default Indications for Book Anywhere Visit Types

Other organizations can use the indications schedulers enter in the Book Anywhere activity in their Book Anywhere decision tree to return appointment times to you. To ensure consistency of the indications that you send so that appointments are scheduled properly, you can create appointment entry decision trees that add specific indications to the Indications field when schedulers select a visit type that is linked to the decision tree. Use an Add Indications node in your decision tree to do this. For additional information, refer to the [Create a Decision Tree](#) topic and the [Make an Appointment Entry Decision Tree Available at the Visit Type or Panel Level](#) topic.

Specify Default Places of Service for Book Anywhere Scheduling

To save schedulers the time of selecting which places of service to search in Book Anywhere, you can specify default places of service in Cadence System Definitions, department records, and visit type records.

Specify Default Places of Service in Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Book Anywhere form.
3. Enter Yes in the Default (I SDF 5004) column for any allowed places of service that should be searched by default when schedulers use Book Anywhere. Schedulers can manually search places of service that do not have the Default column set to Yes.

Specify Default Places of Service in Department Records

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Book Anywhere form.
3. In the Default Places of Service (I DEP 3500) field, enter the places of service that should be searched by default when schedulers who are logged in to this department use Book Anywhere. These places of service are searched only if they are allowed places of service in Cadence System Definitions (I SDF 5003) or for the visit type being scheduled (I PRC 1045).

Specify Default Places of Service in Visit Type Records

1. In Hyperspace, open a visit type record (search: Visit Type).
2. Select the Book Anywhere form.
3. Enter Yes in the Default (I PRC 1047) column for any allowed places of service that should be searched by

default when schedulers use Book Anywhere for this visit type. Schedulers can manually search places of service that do not have the Default column set to Yes.

Create Reasons Why Appointments Are Scheduled Externally

To help you report on appointments that are scheduled outside your organization, create reasons why appointments get scheduled externally. When a scheduler makes an appointment using Book Anywhere, the system creates an appointment request behind the scenes and stores a reason why it was scheduled externally. You can specify a default reason at the system level and visit type level. Schedulers can also change the reason for an individual appointment in the Appointment Details window during scheduling.

You define these reasons in the External Appointment Reason (I ORD 67801) category list. You might already have created reasons if you allow schedulers to record when orders or appointment requests are scheduled externally, as described in the [Allow Schedulers to Record When an Order Was Scheduled Externally](#) topic. The following released values are available, but you can deactivate these or add your own:

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

Create Reasons Why Appointments Are Scheduled Externally

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

Specify Default Reasons for Cadence System Definitions and Visit Types

To specify a default reason why appointments are scheduled externally in Cadence System Definitions:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > Book Anywhere form.
3. In the Default Reason for Scheduling Externally (I SDF 5002) field, enter a reason from the External Appointment Reason (I ORD 67801) category list.

To specify an override default reason why appointments for a particular visit type are scheduled externally:

1. In Hyperspace, open a visit type record (search: Visit Type).
2. Select the Book Anywhere form.
3. In the Default Reason for Scheduling Externally (I PRC 1042) field, enter a reason from the External Appointment Reason (I ORD 67801) category list.

Give Users Security to Schedule Book Anywhere Appointments

Access to schedule Book Anywhere-enabled visit types is controlled by a Cadence security point. Complete the following steps to assign this security point to the Cadence security class for users who need to schedule Book Anywhere visits.

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

2. Select the Appointment Entry form.
3. In the Book Anywhere section, enter Yes in the Schedule appointments (I ECL 5155) field.

Customize Scheduling Preference Time Ranges for Book Anywhere

In Book Anywhere, schedulers can select from three default categories for a patient's time-of-day preference instead of manually entering a time range. The default time of day categories for the Preferences section in Book Anywhere are listed below. You can customize the time ranges for these categories and also add an additional category for evening or create custom categories if certain locations are open earlier or later.

- Morning: 7:00 AM to 11:00 AM
- Midday: 11:00 AM to 2:00 PM
- Afternoon: 2:00 PM to 5:00 PM



These settings also affect how scheduling preference time ranges appear in Order Up and Book It (available starting in February 2022).

To create custom categories, add values to the Time Range (I SDF 13110) category list. Refer to the [Modify a Category List's Values](#) topic for additional information.

To define the time ranges to use in your system:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Controls Configuration form.
3. Complete the Time Range Configuration table:
 - Time Range (I SDF 13110). Enter the time range you want to define. Choose from Morning, Midday, Afternoon, Evening, or any custom time ranges you created.
 - Start Time (I SDF 13111). Enter the start time for the time range.
 - End Time (I SDF 13112). Enter the end time for the time range.

Book Anywhere Incoming/Server Setup

If you're allowing another organization to schedule appointments in your system, it is recommended you are licensed for Care Everywhere. Care Everywhere is used to improve patient matching, linking, and creation starting in November 2022 and in the following versions with special updates:

- May 2022: E10200037, C10200037-HSWeb, E10203746, E10203747, E10204333, E10208697
- February 2022: E10105718, C10105718-HSWeb, E10109526, E10109556, E10109998, E10113275
- November 2021: E9909840, C9909840-HSweb, E9913017, E9913035, E9913333

In November 2021, with special updates, Care Everywhere is required for Book Anywhere to work.

In May 2022 and earlier without special updates, Care Everywhere isn't used.

Work with your Care Everywhere team and refer to the [Care Everywhere: Essential Setup and Support Guide](#) for additional information.

Complete these tasks so you can send solutions to external organizations that you're allowing to schedule into your installation of Epic.

Join the Book Anywhere Network

You need to join the Book Anywhere network so that you can connect with other organizations.



You must have Bridges security point 44-Manage Network Participation to complete this setup.

1. From the Application Access menu in text, go to Interconnect > [WorldWise Admin](#) (in February 2022 and earlier, go to One Virtual System Admin).
2. On the Book Anywhere row, press J to join the network.
3. Follow the prompts on the screen to enter the patient-facing FHIR URL for your organization and the start and end dates for your participation in the Book Anywhere network. You can find your patient-facing FHIR URL on the Communication Details tab of the My Phone Book activity (search: My Phone Book) in Hyperspace. If you don't have a patient-facing FHIR URL follow the steps listed in the [Define Default URL Prefixes in the My Phone Book Activity](#) section. When entering the URL in WorldWise Admin (or One Virtual System Admin), append "api/FHIR/STU3" to the end of the URL, such as `https://<hostname>/<app>/api/FHIR/STU3`.

Create a Background User for Scheduling Book Anywhere Appointments

Book Anywhere appointments get scheduled in your system by a background user that has security to schedule appointments and create new patient records. You need to create this user record and associate it with the external client records for the organizations that you're allowing to schedule appointments.

1. [Create a background user](#) for Book Anywhere that has the following security points:
 - Cadence security point View schedules (I ECL 5055) set to Yes
 - Cadence security point Enter appointments (I ECL 5050) set to Yes

- At least one of the following security points to create new patient records:
 - Cadence security point Open New Patient Records (I ECL 5201) set to Yes. This security point is available only in Cadence Text.
 - EpicCare security point 35-Create New Patient
 - Identity security point 1-Create Record
- 2. Refer to the [Backend OAuth2 \(Client Credentials\)](#) topic to associate the user with the client.
- 3. Repeat step 2 for each organization you've partnered with.



If an external client doesn't exist in your production environment, you can run an ad hoc query to obtain updated clients from Epic's servers:

1. In text, go to the Epic Utilities menu.
2. Prior to February 2023, go to the App Orchard menu and select "Retrieve registered clients from Epic."
3. Starting in February 2023, go to the Client and Network Sync menu and select "Retrieve registered clients from Epic."
4. The utility performs the query and notifies you when the client records have been retrieved. This might take a minute or so.

Allow Book Anywhere to Create Potential Duplicate Patients

➡ Starting in November 2022

★ May 2022 by SU E10200037, C10200037-HSWeb, E10203746, E10203747, E10204333, E10208697

★ February 2022 by SU E10105718, C10105718-HSWeb, E10109526, E10109556, E10109998, E10113275

★ November 2021 by SU E9909840, C9909840-HSweb, E9913017, E9913035, E9913333

When an external organization searches your system for matching patient records, Book Anywhere needs to know if it is allowed to create a new patient record when there are multiple potential patient matches. Complete the following steps to allow duplicate patients to be created if an exact match cannot be found.

1. Open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Book Anywhere form.
3. Set the Allow Creation of Duplicate Patient Records (I SDF 5005) field to Yes to allow duplicate creation or No to not allow duplicate creation. The default behavior is No.
 - When set to Yes, a duplicate record will be created if there are multiple patient matches.
 - When set to No, a duplicate record is never created when there are multiple patient matches. The scheduler is warned, and scheduling is not allowed to continue.
 - Whether set to Yes or No, a new patient record is created when there are no matching patient records.

Prerequisites

For May 2022 without SU E1022448 and E10224041, February 2022, and November 2021 the Allow Creation of Duplicate Patient Records (I SDF 5005) item only applies if Care Everywhere is used by your organization.

Allow Book Anywhere to Create Verified Patients

➔ Starting in February 2023

Book Anywhere uses the FHIR web service when creating patient records, which creates unverified patients by default. This gives patients access to different MyChart functionality, which is described in the [Unverified Patients Setup and Support Guide](#). If clinicians and registrars physically verify the patient's identity before you create their record and want patients to be verified by default instead of unverified, you can set up a web services mnemonic for two client IDs:

1. Find the client ID (I E0E 100) that you are currently using in patient creation web service integrations. To do so:
 - a. In the Chronicles screen, search for database initials E0E.
 - b. From the Search Menu, select Search.
 - c. In the Search screen, enter the target application name where it says Clients.
2. From the MyChart System Manager Menu, select General System Definitions and access the General System Definitions screen.
3. In the Mnemonic/Module (I WDF 100) column, enter MYC_WEBSERVICE_VERIFIED.
4. In the corresponding Value (I WDF 110) column, enter the client ID for each integration you are using. You can separate different client IDs by entering ^ between them.

Starting in November 2024, August 2024 with special update E11104421, May 2024 with special update E10909853, February 2024 with special update E10813179, November 2023 with special update E10813179, August 2023 with special update E10613934, and May 2023 with special update E10518427 you can use a mnemonic to set up more client IDs.

To set up more than two client IDs:

1. In the Mnemonic/Module (I WDF 100) column, enter MYC_WEBSERVICE_VERIFIED_1.
2. In the corresponding Value (I WDF 110) column, enter the client ID for each integration you are using. You can separate different client IDs by entering ^ between them.
3. Repeat steps 3 and 4 but increment the last number in the mnemonic (ie. MYC_WEBSERVICE_VERIFIED_2) for additional client IDs.

Create Your Book Anywhere Decision Tree

For cross-organization scheduling, you need to create a Book Anywhere decision tree and specify it in Cadence System Definitions so your system can evaluate incoming appointment requests, determine which visit types and providers can be scheduled with, and send back available slots. You'll receive the following information from the external organization:

- Patient demographics and scheduling preferences

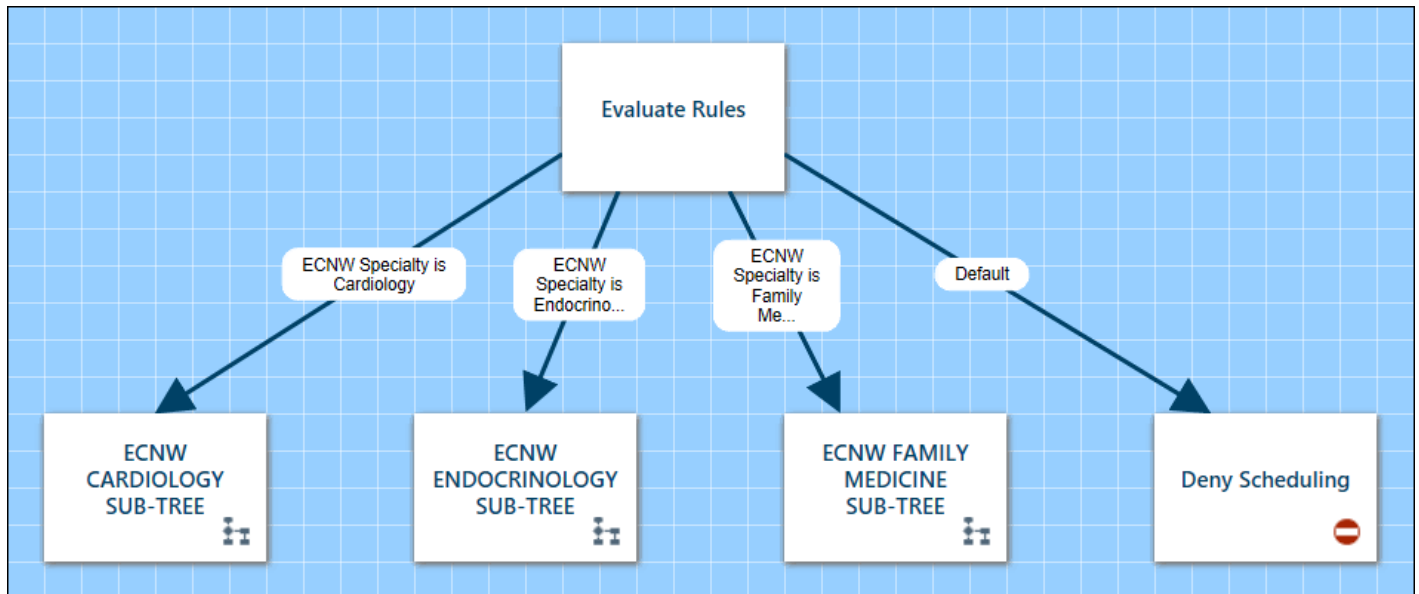
- Specialties
- Indications
- Care Everywhere referrals (starting in August 2023)
- Visit types (starting in August 2023)

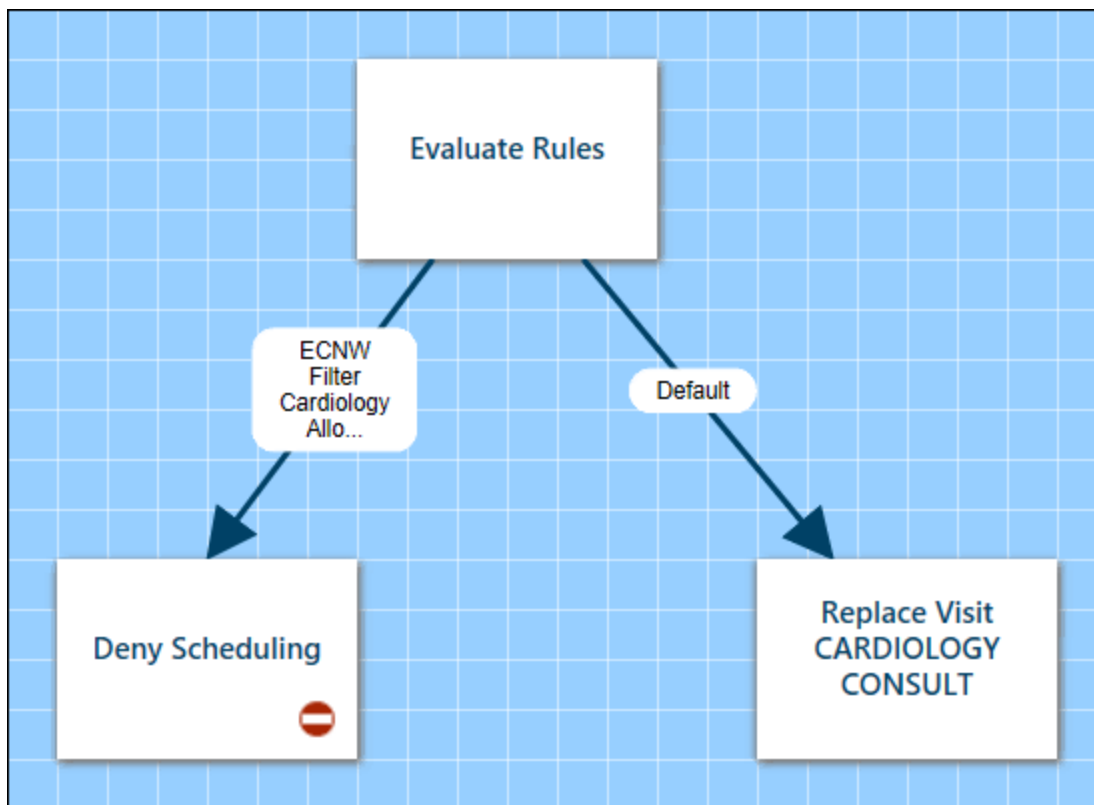
We recommend structuring your decision tree by specialty. You could alternately structure it by the organization that is sending the request, but you'll likely end up duplicating lower levels of the tree if multiple organizations are requesting visits for the same specialty. In the example decision trees below, the decision tree allows scheduling for specialties of cardiology, endocrinology, and family medicine and denies scheduling for all other requests. The cardiology sub-tree checks that the request is from an allowed organization. If it is, it sends back open slots for the Cardiology Consult visit type.

You can specify custom messages in your decision tree that get returned to the scheduler to help them understand how to schedule the visit. When you create your decision tree, you can specify custom messages in the following decision tree node types:

- Deny Scheduling
- Modify Original Visit
- Replace Visit
- Show Instructions

In the Foundation System, a custom message is included in the Deny Scheduling node on the decision tree 1170000010-ES Book Anywhere.





Considerations

If you choose to structure your decision tree by specialty, review the [Configure Department and Provider Specialties for Direct Messaging](#) topic to learn how your organization has mapped department and provider specialties from outside organizations to the department and provider specialties at your organization. Work with your Care Everywhere team if you need to update the mapping.

Starting in August 2023, if you choose to use the visit type rule property configure an ID Type (IIT) that maps to the community ID (I PRC 11) of the incoming visit type and set that ID type in a Book Anywhere rule using the visit type property. That rule can then be used in your decision tree to direct which visit is offered. Refer to the [Create ID Types](#) topic for detailed instructions on creating ID types.

1. In Hyperspace, open the Book Anywhere Decision Tree Editor (search: Book Anywhere Decision Tree).
2. Create a decision tree record. Refer to the [Create a Decision Tree](#) topic for more information.
3. Open Cadence System Definitions (search: Cadence System Definitions).
4. Select the Scheduling > Book Anywhere form.
5. In the Decision Tree (I SDF 5001) field, enter your Book Anywhere decision tree.

Test Your Book Anywhere Decision Tree

You can test that your Book Anywhere decision tree returns the slots you expect based on the user and patient information you provide. In Cadence Text, go to Book Anywhere > Test Visit Type Resolution and follow the prompts on the screen.

Show Schedulers Which Organization Scheduled an

Appointment

To help schedulers identify appointments that were scheduled by an outside organization, you can add report column 1947-Book Anywhere External Client ID to the [Department Appointments report](#), the [Future and Past tabs of the Appointment Desk](#), and [Reporting Workbench reports](#). The column shows the scheduling organization's name from their Care Everywhere organization (DXO) record. In November 2019 and earlier, the column shows the scheduling organization's client ID.

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