Fast Pass Setup and Support Guide

Last Updated: November 1, 2024

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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Fast Pass Setup and Support Guide

Fast Pass is a wait list feature in Cadence that automatically sends patients text or email messages to notify them of a wait list appointment offering. Upon receiving the message, patients can then log in to the MyChart website or MyChart mobile app and claim the offer if it is still available or decline the offer to keep the original appointment and wait for another offer.

Fast Pass increases schedule utilization and patient satisfaction because providers' schedules are fuller and patients have the opportunity to be seen by providers earlier than originally scheduled. Fast Pass also relieves front desk staff from calling patients on the wait list to fill openings in the schedule.

For information about how Johns Hopkins Medicine implemented Fast Pass, refer to the Keep Provider Schedules Full and Reduce Front Desk Workload with Fast Pass document.

How It Works

Here's a visual overview of how the system uses a wait list report to find available openings and send offers to a single patient, and what happens when a patient accepts or declines an offer:
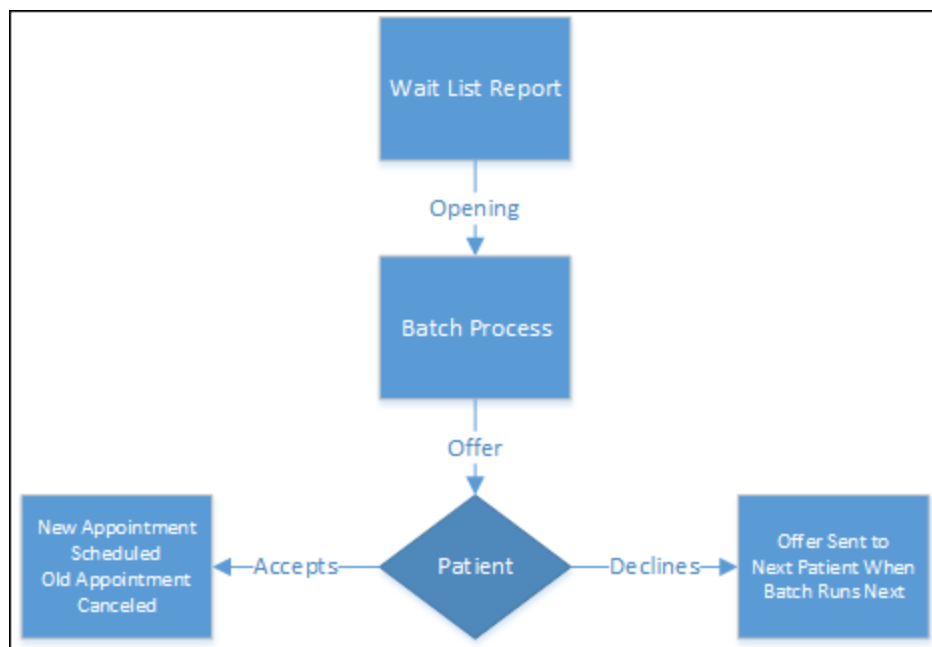
And here's a visual overview of sending offers to multiple patients at once:
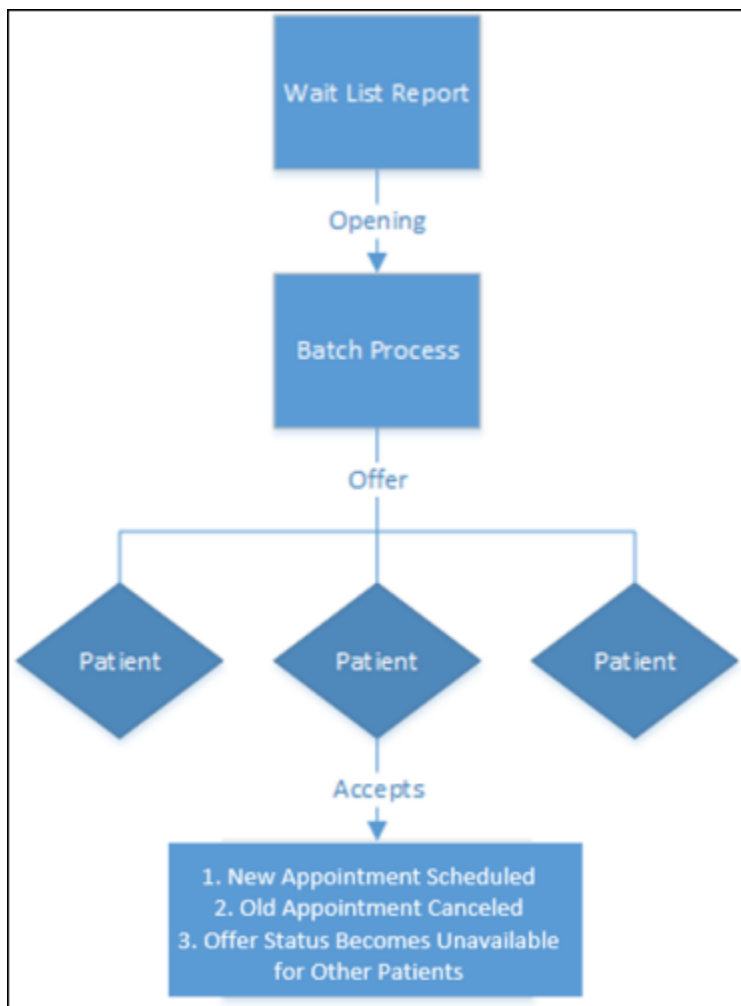
1. You set up one or more batch jobs to periodically search through wait list entries and look for potential appointments for those entries. In these batch jobs, you control which wait list reports to search, the priority of wait list entries, and whether to offer possible openings to multiple patients or one patient at a time, as well as other search behavior.

2. If a batch job finds an appointment time that matches a wait list entry, the patient is MyChart active, and the patient has opted in for these types of notifications, the system sends the patient a text message or email. If the patient isn't signed up to receive text messages or emails, the system won't send them offers.

3. The patient uses the information in the text message or email to go to their MyChart account. From here, the patient can take one of several actions.

   o If the patient accepts the offer, the system cancels any previous appointments and schedules the new appointment based on the wait list entry. If you send offers to multiple patients at once, other patients offered the appointment see that the offer is no longer available.

   o If the patient declines the offer and keeps their original appointment, the system offers the time to the next applicable patient the next time the batch runs if you send offers to one patient at a time. If you send offers to multiple patients, the offer stands until it expires or until a patient accepts the offer.

   o If the patient doesn't accept or decline the offer in a specific amount of time that you define, the offer expires for that patient. If you send the offer to multiple patients at the same time, each patient has the same time frame in which to take action on the offer. If you sent the offer to one patient at a time, the system offers the time to the next applicable patient the next time the batch runs.

- If the patient calls the clinic regarding the offer, schedulers can accept or decline the offer for the patient using actions from the Appointment Desk.

Fast Pass Strategy

This section includes important considerations to take into account as you plan to implement Fast Pass in MyChart. Additional strategy information is available for specific types of scheduling, although many of the concepts below still apply. Refer to the following resources for more information:

- MyChart Scheduling Setup and Support Guide
- Open Scheduling Setup and Support Guide
- Wait List Setup and Support Guide

Why Use Fast Pass?

Fast Pass automatically sends notifications to MyChart patients about possible appointment openings. The ability for patients to accept earlier appointment slots will help keep providers' schedules full at your organization. Additionally, Fast Pass can increase patient satisfaction by offering earlier openings without having to contact the clinic.

Analysis and Build

This section contains a number of Epic recommendations for how to most effectively implement Fast Pass at your organization. We also recommend reviewing the build considerations in Johns Hopkins financial program, Keep Provider Schedules Full and Reduce Front Desk Workload with Fast Pass, to model your build.

The Cadence team should take the lead on this project, but they'll need to work with the MyChart team for testing and to configure the MyChart pieces, including security, notifications, and the tickler messages.

The time required to complete analysis of this feature will vary depending on coordination between your IT and operations teams to decide on build settings and a pilot program. After analysis, build requires a few hours to a day to complete. The primary decisions are to determine which wait lists to use, whether to send offers to multiple patients at a time, and whether to allow patients to add themselves to the wait list. Although Fast Pass can be beneficial for most areas if patients are allowed to add themselves to the wait list, departments that might be a good fit for Fast Pass are those that:

- Use the wait list today.
- Have a meaningful percentage of their patient population using MyChart.
- Have room for improvement in utilization, or struggle with late cancellations or lead time.

Cadence analysts need to make security changes, set up a batch job, and configure the Appointment Desk so schedulers can accept and decline offers. MyChart analysts need to add the tickler and alert types to the MyChart settings.

There is minimal training needed for Fast Pass because the system does most of the work. You should let schedulers and front desk users know about this new feature so that they can answer patient questions and so they can schedule the wait list offers if a patient calls to schedule rather than using MyChart. You might also remind these users to collect mobile phone numbers and emails from patients, so that patients can receive offers.

After implementing Fast Pass, notify patients so that they can sign up to use MyChart and receive appointment offers. And let your MyChart help desk staff know that you've implemented this feature so they can assist patients with any questions.

Use Existing Wait List Reports for Fast Pass

We recommend you use existing public wait list reports rather than creating new records if you have public wait lists already built for your departments. This not only reduces the necessary build but allows your scheduling staff to continue to use the same reports to offer times to non-MyChart patients. If you don't have public wait lists, create an individual wait list report for Fast Pass and include the departments you want to give Fast Pass functionality, rather than maintaining several wait list reports or batches.

If you use any wait list reports to record appointments scheduled beyond a provider's template, make sure to exclude these reports from the batch job. This is a good opportunity to review Cadence wait list workflows, specifically in regard to how patients are added to the wait list. Your workflow should include linking appointments to wait list entries, preferably during scheduling. If you want more information on how appointments can be linked to wait list entries, refer to the Link Appointments with Wait List Entries for Easy Maintenance topic.

If you want to create separate wait list reports to use with Fast Pass, refer to the Design Wait List Reports topic for instructions.

Send Offers to Multiple Patients at a Time

You can send offers to one patient at a time or multiple patients at once.

- If provider utilization and keeping schedules full is a top priority, consider sending the offer to multiple patients at a time. This option means providers have a greater chance of filling their schedules because more patients have the option to take an offer. Epic recommends using this option.
- If patient satisfaction is a top priority, consider sending an offer to one patient at a time. This option means patients aren't competing for offers and they get a chance to schedule their appointment earlier. However, this approach will not see the same benefits to provider utilization and could result in lower acceptance rates because the probability that a single patient will take the offered slot is lower than if multiple patients were getting an offer at the same time.

Run the Fast Pass Batch

Consider how often you want to run the batch job. Depending on how many patients you offer a slot to at a time, if the first patient turns down an offer the second patient will not be offered the slot until the batch runs again. In the Foundation System, the batch is configured to run multiple times per day so declined offers can be sent to more patients. Note that we don't recommend running this batch during late off hours such as 3:00 A.M.

Encourage Staff to Sign Up Patients for MyChart and Collect Contact Information

In order for patients to receive wait list offers, they need to be MyChart users and you need to have their email and mobile phone number in their patient record, depending on how you want to let patients know they have Fast Pass offers waiting in MyChart. Encourage your front desk and scheduling staff to collect this information from patients and take actions to encourage patients to sign up for a MyChart account.

Refer to the Enable Staff to Sign Up Patients for MyChart in Front Desk and Scheduling Workflows topic for information about setting up the MyChart signup workflow in Prelude and Cadence. Refer to the Prompt Patients to Sign Up for MyChart at the Kiosk topic for information about setting up the MyChart signup workflow in Welcome.

Allow Patients to Add Themselves to the Wait List

Epic recommends allowing patients to add themselves to the wait list for all visit types and departments in which you plan to use Fast Pass. This is a great way to build up the wait list for departments that don't already use it as

well as reduce the work required for departments that are using wait list reports.

Refer to the Let Patients Update Wait List Status from MyChart topic for more information.

Fast Pass Setup: Essentials

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

Identify and Send Fast Pass Offers from the Wait List

Using a batch job, you configure how Fast Pass searches for wait list openings and how it sends the offers to patients. You can also set up certain departments to allow Fast Pass to overrule block restrictions and offer blocked slots to patients.

Create a Batch Job to Search for Openings and Send Offers to Patients

Using a batch job, you configure how Fast Pass searches for wait list openings and how it sends the offers to patients. The batch job's mnemonics allow you to determine the following behavior:

> To create a batch, or use settings from an existing batch as a starting point, you can use the Build Wizard to set your batch mnemonics starting in November 2022. You can also import an existing batch record and make changes. The Build Wizard also creates a report (HRX) record if you choose not to use an existing Wait List report. To get started, open the Build Wizard (search: Build Wizard) and search for feature 420008-Enable Fast Pass (application: Cadence).

Mnemonic	Behavior	Epic Recommendation
Report	Determines which wait list reports to use for searching.	Use your organization's wait list report. For information about creating a custom wait list report, refer to the Design Wait List Reports topic.
Primary Sort Order	Determines which entries to search for first. You can select from priority (highest first), start date (earliest first), wait list appointment linked to appointment first, wait list appointment not linked to appointment first, or risk score (highest risk first).	1-Priority - highest first
Secondary Sort Order	Determines how to prioritize wait list entries to search for when multiple wait list entries meet the primary sort order criteria. If nothing is specified here, the order in which the wait list entries were created is used.	2-Start date - earliest first

Mnemonic	Behavior	Epic Recommendation
Tertiary Sort Order	Determines how to prioritize wait list entries to search for when multiple wait list entries meet the primary and secondary sort order criteria. If nothing is specified here, the order in which the wait list entries were created is used.	(Blank)
Start Date	Determines when to start searching the schedules for matching openings.	T+2
End Date	Determines when to stop searching the schedules for matching openings.	T+14
Min Days Improvement	Determines how many days' improvement over existing appointments the openings need to match in order to send the patient an offer.	3
Max Daily Offers (Entry)	Determines how many offers are sent to a patient for one wait list entry in a single day.	1
Max Slot Offers Per Run	Determines how many patients are sent offers when multiple wait list entries match a schedule opening. This is the maximum number of offers that can be sent out for a slot with each run of the batch	10
Max Slot Offers Total	Determines how many patients can have an active offer for a single opening. This is the maximum number of offers that can be made for a slot overall (across all batch runs) in a single day.	10
Timeout Length (Minutes)	Determines how long the offers are good for before they expire.	480
Overrule Offers?	Determines whether Cadence users with the proper security can schedule into slots that have been offered to a patient by Fast Pass.	2-Yes, no security
Rule	Enter a Wait List rule record to prevent sending offers to certain wait list entries. If the rule returns true, the entry will not be sent an offer.	(Blank)

Mnemonic	Behavior	Epic Recommendation
Risk Score Rule ID	Enter a risk score rule record to prioritize sending offers to patients with a higher risk score or lower care score.	(Blank)
Min Appt Delay	Enter the minimum number of minutes between when the offer is sent and the appointment start time for same day appointments.	120 minutes
Debug Log Directory	Enter the directory where the file should be saved. When a directory is listed in this mnemonic, a log file is created. The log file includes information about wait list entries that were considered for Fast Pass offers. This allows users to troubleshoot any issues that they are having with Fast Pass.	Enter a directory to save log files.

Refer to the 21300-ES Auto Wait List topic for information about each available mnemonic. You can also refer to batch job 1172130001-ES Auto Wait List in the Foundation System to see how we configured the batch job for the Foundation System.

After you've determined how you want to set each mnemonic, create a batch job based on template 21300 and add the batch to a recurring run. Refer to the Batch Scheduler Setup and Support Guide for more information about setting up batches and runs.

Allow Fast Pass to Overrule Block Restrictions in Certain Departments

By default, Fast Pass does not overrule block restrictions even when the MyChart scheduling user has the security to do so (Cadence security point Block overrule (I ECL 5145) is set to Yes) and you allow overruling in MyChart (the Allow overruling in MyChart (I WDF 847) field is set to 2-Allow overrule when required). This can leave open slots unfilled in your schedules.

To avoid this, you can allow Fast Pass to overrule block restrictions for visits in certain departments. When the visit type for a particular wait list entry does not match the blocks on the schedule, but the visit type can be scheduled into any block when a user has block overrule security, Fast Pass will offer these blocked slots to the waiting patient. All departments linked to a wait list entry must allow Fast Pass to overrule block restrictions for the system to offer blocked slots to the patient.

Ensure that your MyChart scheduling user has the security to overrule block restrictions:

1. First, identify your MyChart scheduling user:

    a. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Options 1 screen.

    b. The MyChart scheduling user is specified in the User (I WDF 800) field under Default Settings for Cadence.

2. Then, find out what Cadence security that user has:

    a. In Hyperspace, open User Security for the user (search: User Security).

    b. Go to the Cadence form.

    c. The user's Cadence security is listed in the Default security class (I EMP 5110) field.

3. Finally, verify the user's Cadence security:

    a. In Hyperspace, open the user's Cadence security class (search: Cadence Security).

    b. On the Appointments form, verify that the Block overrule (I ECL 5145) field is set to Yes.

To set up a department to allow Fast Pass to overrule block restrictions:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.

2. Select the Templates > Block Restrictions form.

3. Enter Yes in the Allow Fast Pass overrule? (I DEP 3650) field.

Prevent Fast Pass From Sending Offers Past an Administrative Pathway's Breached Date

Prerequisites

Your organization must be licensed for Springboard to use this feature.

⮕ **Starting in November 2024**

✪ **August 2024 by SUs C11105609, E11105609**

✪ **May 2024 by SUs C10910807, E10910807**

When a scheduler books an appointment for a patient that would be past the linked administrative pathway's due date, a warning appears that the chosen date would result in the administrative pathway becoming breached before treatment takes place. By default, Fast Pass ignores these breached warnings when offering appointments because Fast Pass offers the earliest appointment available, regardless of the administrative pathway's due dates.

When a patient does not have an appointment yet, Fast Pass ignores the administrative pathway's due date when offering appointments to the patient. You can configure Fast Pass to prevent offering patients appointments after the administrative pathway's due date:

1. In Hyperspace, open Springboard System Definitions for your facility (search: Springboard System Definitions).

2. Select the MyChart Settings form.

3. Select 1-Yes in the Prevent offering Fast Pass slots past breached dates for unscheduled wait lists? (I EAF 31240) field.

Notify Patients When There Is a Wait List Offer

You need to do a few tasks to allow patients to get notifications about a wait list offer. First, you need to make sure the MyChart scheduling user record has appropriate security to find open slots to offer to patients. Then, you need to ensure that patients have the security to receive Fast Pass offers. MyChart patient access security controls whether patients can receive Fast Pass offers, regardless of how patients are receiving the notifications. You can notify patients in the following ways:

- Show health feed cards on the MyChart home page or in the MyChart mobile app. This feature requires that patients have a MyChart account.

- Starting in February 2023, use Hello World's SMS gateway and two-way engine to send two-way text messages to notify patients of an offer and allow them to accept or decline it from the text message instead of needing to log in to MyChart. You can send text messages to all patients who are on a wait list, regardless of whether they already have an appointment scheduled. This feature does not require patients to have a MyChart account.

- Use the tickler message framework to send patients an email or one-way text message. To send tickler messages by text, you need to work with a third-party SMS vendor. You specify the tickler message content for emails in SmartText records. For text messages, you can use content from Hello World (available starting in February 2023) or use SmartText records. This feature requires that patients have MyChart accounts.

> If you are licensed for Hello World's SMS gateway and two-way engine (Hello World license keys C and E), the two-way workflow described in the Notify Patients of Fast Pass Offers with Two-Way Text Messages from Hello World topic overrides the one-way workflow.

Ensure That the MyChart Scheduling User Has Appropriate Security for Fast Pass

To ensure that the batch job that sends appointment offers can find open slots, the MyChart scheduling user must have appropriate security in the assigned Cadence security class. You can also allow Fast Pass to overrule block restrictions and offer blocked slots to patients in certain departments.

To identify your MyChart scheduling user:

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to the Scheduling Options 1 screen.

2. The MyChart scheduling user is specified in the User (I WDF 800) field under Default Settings for Cadence.

To verify the user's Cadence security:

1. In Hyperspace, open the Cadence security class assigned to that user (search: Cadence Security).

2. On the Appointments form, enter Yes in the Block overrule (I ECL 5145) field to allow Fast Pass to offer block slots to patients for certain departments. For more information, refer to the Allow Fast Pass to Overrule Block Restrictions in Certain Departments topic.

3. On the Reports/System Administration form, verify that the Reports (I ECL 5115) field is set to Yes.

Give Patients Security to Access Wait List Offers

Your MyChart patient access security classes need to include the security points listed below so that the system can send Fast Pass offers to patients, including patients who don't have MyChart accounts.

- 161-Auto Wait List Alerts. This allows patients who have an appointment scheduled and are on a wait list to receive Fast Pass offers by any method, including MyChart tickler messages and Hello World text messages. It also allows patients to view the offers in MyChart.
- 167-Auto Wait List Standalone Offers. This allows patients who don't have an appointment scheduled and are on the wait list to receive Fast Pass offers by any method, including MyChart tickler messages and Hello World text messages. It also allows patients to view the offers in MyChart.

Refer to the Build and Assign Patient Access Classes topic for information about modifying your patient access classes.

Notify Patients of Fast Pass Offers with Two-Way Text Messages from Hello World
➲ Starting in February 2023

You can use Hello World's SMS gateway and two-way engine, which are license keys C and E for Hello World, to send text messages to patients about Fast Pass offers. You can send text messages to patients who already have an appointment but are on the wait list for an earlier one, as well as patients who are on the wait list and don't have an appointment scheduled yet. If you don't have these licenses, you can use the one-way tickler framework to notify patients about Fast Pass offers. Refer to the Notify Patients of Fast Pass Offers with Tickler Messages topic for additional information.

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 Wait List Offer communication concept, 28516-New Auto Wait List Offer, in the Communication Preferences activity.

> 🖥 If you enable two-way text messages for Fast Pass with Hello World for Fast Pass text messages and also have MyChart SMS ticklers enabled for Fast Pass, the system uses Hello World to send a text message if Fast Pass content is enabled at any level of the appointment department's facility structure (department, location, service area, or facility). Otherwise, the system uses your tickler setup to send a text message.

A sample text message exchange with a patient about a Fast Pass offer

Allow Patients and Registrars to Select the Text Message Delivery Method for Fast Pass Offers in Communication Preferences

In February 2023, we made updates to communication concept 28516-New Auto Wait List Offer so that patients

can set their own communication preference for Fast Pass in MyChart. If you have an override of this concept that you created in November 2022 or earlier, you need to delete it and create a new one to pick up this change. Regardless of your version, you also need to make sure that the text message media setting is turned on in the communication concept so that patients and registrars can select the text message delivery method for Fast Pass offers.

1. In Hyperspace, open communication concept 28516-New Auto Wait List Offer (search: Communication Concept Editor).

2. If you have an override of the record that you created in November 2022 or earlier, you need to delete it and create a new one. You can tell whether you already have an override if the Delete Override button is available. If it is available, click it and confirm that you want to delete the override.

3. If you just deleted your old override or didn't have one before, click Create Override.

4. By default, the text message option isn't selected for patients and registrars in the Communication Preferences activity. This means that patients and registrars need to select it before text messages are sent for Fast Pass offers. You can change the default behavior if needed by selecting a different Status (I HST 59001) value. Refer to the Set a Communication Concept's Default Settings and Lock a Media Setting On or Off topics for additional information.

> ℹ️ You can use the Communication Preferences Update utility to update patients' communication preference (OYO) records to automatically opt them in to receiving text messages. Refer to the Make Bulk Updates to Communication Preference Records topic for additional information.

Enable and Approve Hello World Content for Fast Pass

Hello World includes sample content that you can use to communicate with patients by text message about their Fast Pass offers. After your organization has set up Hello World's SMS gateway, there are several communication templates that you need to configure to allow Fast Pass to use Hello World instead of MyChart SMS tickler messages.

Starting in November 2024, Fast Pass offers are sent using the SMS notifications in communication topic 60147-Fass Pass Offer. The notifications use 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 versions, the two primary communication templates for Fast Pass are:

- 60013-Fast Pass Offer - Reschedule - 2-Way. This communication template allows patients who already have an appointment scheduled but are on the wait list for an earlier one to accept the new appointment, decline the new appointment, or remove themselves from the wait list.

- 60014-Fast Pass Offer - Standalone - 2-Way. This communication template allows patients who are on the wait list but don't already have an appointment scheduled to accept or decline the appointment offer.

Behind the scenes, there are additional communication templates that are used to send messages back to the patient based on how they reply:

- 60015-Fast Pass Accept Offer Success. This response is sent after a patient accepts an offer and the system was able to reschedule the patient's visit.

- 60016-Fast Pass Decline Offer Success. This response is sent after a patient declines an offer.

- 60017-Fast Pass Remove from Wait List Success. This response is sent after a patient requests to be

removed from the wait list and the system was able to remove the appointment from the wait list.

- 60018-Fast Pass Failure. This response is sent when the system wasn't able to complete the action the patient requested. The patient is provided with a phone number to call instead.
- 60019-Fast Pass Offer Not Available. This response is sent when a patient accepts an offer that is no longer available.
- 60020-Fast Pass Offer Already Accepted. This response is sent when a patient accepts an offer that was already accepted for them by someone else, such as a proxy or scheduler.

Review the released content with your stakeholders and determine whether any changes are needed. Whether you use the content as released or need to make changes to it, you need to create an override of communication templates, which automatically creates overrides for all of the reply communication templates. The override templates are what the system actually uses to send messages. You can set them at different levels of your facility structure. We recommend creating overrides only for the facility level if possible; however, you can also create overrides at the service area, location, or department level. In the override records for communication templates, you can customize the content for the initial messages and the replies if needed and then enable them for use and mark them as approved.

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 and two-way engine have been set up for your organization to send text messages to patients.

2. Review released communication templates with stakeholders at your organization to determine whether you can use the sample content. Refer to the steps in the Manage Message Content topic to create overrides of the communication templates attached to communication workflow 60012-Fast Pass Offer.

3. When you're ready to use the content, work with your Hello World team to enable and approve the communication templates as described in the Approve Message Content topic so you can move them to your production environment with Data Courier.

Notify Patients of Fast Pass Offers with Tickler Messages

You can send patients a tickler message by text or email when they have a new Fast Pass offer.

> ⚠ If you are licensed for Hello World's SMS gateway and two-way engine (Hello World license keys C and E), you cannot use the one-way tickler message framework to notify patients about Fast Pass offers. You must use the two-way workflow described in the Notify Patients of Fast Pass Offers with Two-Way Text Messages from Hello World topic if you are licensed for the Hello World two-way engine.

Send Tickler Messages by Text Message

> **Prerequisites**
>
> To send text messages, you need to use Hello World's SMS gateway or work with a third-party SMS vendor. Refer to the Hello World Setup and Support Guide for information about Hello World. Refer to the Text Messaging Setup and Support Guide for information about working with a third-party SMS vendor.
>
> To notify patients about Fast Pass offers using content from Hello World, you must be licensed for the Core and Content Management modules, which are included in the standard Hello World license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

There are two ways that you can define the content that is sent in tickler text messages about Fast Pass offers:

- Starting in February 2023, you can use communication template 60034-Fast Pass Offer - 1-Way from Hello World with tickler concept 28516-Wait List Offer. Refer to the Customize and Approve Text Message Tickler Content for Hello World topic for complete instructions.
- You can create SmartText records that include the content you want to send in tickler text messages about Fast Pass offers. You can specify different SmartText records to use for patients and proxies. After you create your SmartText records, associate them with tickler concept 28516-Wait List Offer in Patient Access System Definitions. Refer to the Create SmartText Text Message Tickler Content topic for complete instructions.

Send Tickler Messages by Email

> **Prerequisites**
>
> If you haven't already done so, complete the general setup needed to send tickler messages by email. Refer to the Create Email Tickler Messages topics for complete instructions.

To send Fast Pass offer ticklers by email, create SmartText records for the email content and associate the records with tickler concept 28516-Wait List Offer in Patient Access System Definitions. Refer to the Send Different Email Tickler Messages for Different Types of Information topic for complete instructions.

Allow Cadence Users to See, Schedule, and Overrule Fast Pass Offers

You can set up tools for Cadence users to manage Fast Pass offers in Hyperspace. Users can:

- See which wait list entries have outstanding Fast Pass offers.
- Accept or decline an offer for a patient.
- Overrule reserved time for outstanding Fast Pass offers.
- See when patients accept offers in MyChart using In Basket.

Show Wait List Offers in Wait List Activities

You can add report column 1500-Wait Appt Has Offer to your wait list reports and the Wait List tab on the Appointment Desk so users can quickly see whether a wait list entry has any outstanding offers.

Refer to the Report Repository topics for the Wait List Report and the IP Wait List Report for more information about adding columns to these reports.

Refer to the Design the Look and Use of the Appointment Desk Tabs topic for more information about adding columns to Appointment Desk tabs.

Allow Cadence Users to Accept and Decline Offers for Patients

You can add the Accept Offer and Decline Offer actions to the right-click menu and the tab actions for the Appointment Desk's Wait List tab. Scheduling users can use these actions when a patient calls the clinic to accept or decline a Fast Pass offer rather than accepting or declining the offer himself in MyChart.

Refer to the Design the Look and Use of the Appointment Desk Tabs topic for more information on adding actions to Appointment Desk tabs.

Allow Cadence Users to Overrule Reserved Time

Set the Overrule reserved time (I ECL 5084) security point to Yes in your Cadence security classes to allow users to schedule into times that are reserved for patients with outstanding offers in case an urgent scheduling request requires that time.

Send Users In Basket Messages When Patients Schedule Appointments Online or Accept Fast Pass Offers
⊙ Starting in February 2024

To keep track of what appointments patients schedule for themselves, including Fast Pass offers, you can set up In Basket messages to send to users when patients accept offers. You can do this instead of maintaining a custom report on Fast Pass offers that are accepted.

To send In Basket messages when patients schedule appointments online, including accepting Fast Pass offers (starting in February 2024):

1. From the MyChart System Manager Menu, select Master File Entry > Department and access the Direct Scheduling Settings 2 screen.

2. In the Create In Basket and MyChart messages (I DEP 53860) field, enter one of the following values:

- 2-EOW only. MyChart creates only an In Basket message.
- 3-None. MyChart creates no messages.

Let Patients Update Wait List Status from MyChart

To help find appointment times that are most convenient for them, patients can update their wait list standing directly from MyChart. If a patient is not currently on the wait list but would like to be notified if an earlier appointment becomes available, he can add himself to the wait list. If a patient is already on the wait list but no longer wants to move his appointment time, he can remove himself from the wait list so that he no longer receives appointment offers for that appointment.

If you use Fast Past appointment offers, patients receive an appointment offer if a wait list appointment becomes available. If you do not use Fast Pass, scheduling staff can process patient-added wait list entries using their normal workflows (for example, by running the Wait List report) and then notify patients by email, phone, or MyChart message when a wait list appointment is available.

For more information, refer to the Let Patients Update Wait List Status from MyChart topic.

Notify Patients When an Unscheduled Ticket Has Availability

⊙ **Starting in May 2024**

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

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.

For more information about this feature and details on configuration, refer to the Automatically Send Scheduling Ticket Notifications for New Availability topic.

Enable Fast Pass for Open Scheduling

⊙ **Starting in November 2024**

Your patients can get on the wait list and receive Fast Pass offers in open scheduling. This means you can send offers to patients without a MyChart account. You can set up your visits to be available for the wait list in open scheduling just like you would for MyChart. Refer to the Let Patients Update Wait List Status from MyChart topic for more details on general Fast Pass in MyChart setup.

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

If your open scheduling lets patients join the wait list, you need to set up open scheduling to collect a patient's mobile phone number so patients can receive offers.

1. From the MyChart System Manager Menu, select Scheduling Configuration and go to Open Scheduling Signup Settings screen.

2. In the Demographic Field (I WDF 12570) column, add Mobile Phone.

3. To clear the open scheduling cache to apply your changes from the MyChart System Manager Menu, go to System utilities > Scheduling Utilities > Clear New Provider Cache and enter Yes. If you don't clear the open scheduling cache, your changes appear the next day.

Fast Pass Setup: Bells and Whistles

Send Offers to Patients Based on Risk Scores

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 Fast Pass to help schedulers offer appointments to high-risk patients first. For information about showing risk score information in Fast Pass and other scheduling tools, refer to the Use Risk Scores to Guide Appointment Scheduling topic.

Track a Patient's Reason for Joining the Wait List
⮕ Starting in November 2024

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

Fast Pass Support: Ongoing Tasks

Monitor Fast Pass Effectiveness

There are four available Radar dashboard components you can use to keep tabs on the effectiveness of your Fast Pass configuration and use:

- 55080-ES Fast Pass - Improvement by Dept Specialty shows how much earlier patients with existing appointments were seen in different departments because those patients were sent and accepted Fast Pass offers over the past month.

- 55081-ES Fast Pass - Offer Status Count by Lead Days shows how many Fast Pass offers have been made over the past month, as well as how many offers were accepted, how many offers expired without a response, and how many could not be completed because the patient could not be reached.

- 55120-ES Fast Pass - Success Rate shows the success rate of slot openings offered over the past month using Fast Pass, grouped by the number of offers sent for that slot.

- 32680- MYC Average Days Saved By Accepting a Fast Pass Offer shows the average days saved when accepting a Fast Pass offer from MyChart. This component is available starting in August 23 or in May 2023 with special update E10500220, February 2023 with special update E10406883, November 2022 with special update E10313334, or May 2022 with special update E10228922.

The first three components gather their data using reports built from two Reporting Workbench templates, 55038-ES Fast Pass Offers and 55039-ES Fast Pass Slots. You can write and run reports based on these templates to investigate other Fast Pass statistics as needed. Component 32680-MYC Average Days Saved By Accepting a Fast Pass Offer uses data from Caboodle.

Fast Pass Support: Troubleshooting and Common Issues

This section describes how to set up troubleshooting and lists some common issues that you might encounter with Fast Pass. It also provides possible solutions for addressing each issue.

Troubleshooting

⮕ **Starting in August 2024**

In order to troubleshoot any issues with Fast Pass, use mnemonic 86069-Debug Log Directory as part of batch jobs based on template 21300-ES Auto Wait List. By entering a directory where the file can be saved, a log file is created when the batch job is run. The log file includes information about wait list entries that were considered for Fast Pass offers, giving you information about possible issues and areas to investigate.

No offers are being sent to patients.

Solution

- Check that the default MyChart scheduling user has security to run Cadence reports.
- Make sure your patients have security to access wait list offers.
- Make sure that you set up an alert extension or tickler type to notify patients.
- Make sure the patient has opted in to receiving wait list offers in their Communication Preferences.
- Make sure the communication concept 28516-New Auto Wait List Offers is turned on. See the Edit Communication Concepts topic for more information on how to turn on a concept.

Some wait list entries are not being considered for offers.

Solution

- The only wait list entries that are considered for offers are those with a Pending status or one of the custom statuses listed in the Custom statuses to trigger jump to wait list after cancel (I SDF 10805) setting on the Wait List form in Cadence System Definitions.
- Fast Pass does not support visit types that lead to scheduling more than one appointment, such as panels and prerequisites.