

# **Decision Trees 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

<b>Decision Trees Setup and Support Guide</b>	<b>5</b>
<b>Decision Trees Strategy</b>	<b>9</b>
Determine Whether to Use Decision Trees or Scheduling Questionnaires	9
Designing Decision Trees	11
Maintaining Decision Trees	13
<b>Decision Trees Setup: Essentials</b>	<b>14</b>
Create a Decision Tree	14
Learn About the Types of Decision Tree Nodes	18
Create SmartText Instructions for Decision Tree Nodes	50
Map Indications to Request Entry Decision Trees	51
Define the Financial Decision Tree for Your Organization	53
Define the Patient Self-Triage Decision Trees for Your Organization	53
Make an Appointment Entry Decision Tree Available at the Visit Type or Panel Level	57
Define the Book Anywhere Decision Tree for Your Organization	58
Show the Results of an Appointment Entry Decision Tree to Schedulers	59
Show the Results of Scheduling Decision Trees to Clinicians	60
Show the Results of a Patient Self-Triage Decision Tree to Providers	60
<b>Decision Trees Setup: Bells &amp; Whistles</b>	<b>61</b>
Make an Appointment Entry Decision Tree Available at the Department or System Level	61
Limit How Many Times a Patient Can Start a Self-Triage Decision Tree in 24 Hours	61
Show Risk Score Information in Decision Trees	62
Show Related Orders and Appointments Requests in Decision Trees	62
Use Rules to Evaluate How Many Orders Are Linked to an Appointment	63
Use the Results of a Nested Decision Tree to Drive Other Actions	64
Use Nested Decision Trees to Give Patients Options in Self-Triage	71
Associate Self-Triage Decision Tree Orders With a Department	73
Let Patients Request an Appointment from Self-Triage	74
Bundle Orders with Appointments That Patients Can Schedule Together	75
Send Self-Triage Decision Trees from Appointment Desk	76
Define an Expected Path Through Appointment Entry Decision Trees	77
<b>Decision Trees Support: Ongoing Tasks</b>	<b>79</b>
View a Decision Tree	79
Edit a Released Decision Tree	79
Search Within a Decision Tree	79
Copy and Paste Nodes and Connections	80

Copy a Decision Tree Contact to a New or Existing Contact	80
View the Decision Making Path for a Decision Tree	81
Test Drive a Decision Tree	82
Mark a Decision Tree As Reviewed	84
View the Records That Are Linked to a Decision Tree	85
View the Audit Trail for Changes Made to a Decision Tree	85
Find Decision Tree Rules and Questionnaires That Contain Certain Question Records	86

# Decision Trees Setup and Support Guide

Decision trees help schedulers who work in complex specialty areas to schedule the right visit with the right provider and resources. Decision trees can handle advanced logic to offer a consistent scheduling experience for both schedulers and patients. Decision trees are typically built as a part of a larger project. When planning decision tree build, make sure to consider the other relevant pieces of functionality that are supported by decision tree build, such as templates, blocks, visit types, ordering workflows, and direct and ticket scheduling in MyChart. For more information about our recommendations for these related records, refer to the [Transitioning to System-Guided Scheduling](#) document.

There are several types of decision trees:

- **Appointment Entry.** Use appointment entry decision trees with your visit types to show a decision tree to a scheduler when she enters a particular visit type in Make Appointment and to a patient when he selects a particular visit type in MyChart. Patients can use them in MyChart direct scheduling and ticket scheduling, in the redesigned open scheduling widget starting in November 2021, and in the open scheduling wizard and when scheduling with a new provider in MyChart starting in February 2022.
- **Book Anywhere.** Use Book Anywhere decision trees to process requests from external locations to schedule appointments at your organization. For more information, refer to the [Book Anywhere Setup and Support Guide](#).
- **Financial.** Use financial decision trees to perform financial screening for a patient in an appointment request before you schedule a visit for the patient. For more information about financial screening, refer to the [Perform Financial Screening in Appointment Requests](#) topic.
- **Request Entry.** Use request entry decision trees in appointment requests to guide pre-scheduling workflows. For more information about appointment requests, refer to the [Use Appointment Requests for Intake](#) topic.
- **Patient Self-Triage.** Use self-triage decision trees to help direct patients to the right level of care, such as showing them instructions or helping them schedule a procedure.

Here is a scheduler's view of an appointment entry decision tree that opened when she selected the Consult - Dermatology visit type in Make Appointment:

The screenshot shows a software interface titled "Decision Tree for CONSULT - DERMATOLOGY". At the top, there is a question "What is the reason for visit?" followed by a horizontal row of buttons: Cosmetic Dermatology, Dermatopathology, Immunodermatology, Mohs Surgical, Pediatric Dermatology, Phototherapy, and Other. Below this, a section titled "Results - Continue Scheduling" displays the visit type "CONSULT - DERMATOLOGY" and a note "Replace the original visit type." A message states "DERMATOLOGY CONSULT POOL: Subgroup Dermatology - Cosmetic Dermatology will be added in place of the original providers." At the bottom right are two buttons: "Apply" with a checkmark icon and "Discard Tree".

Refer to this table for a comparison of the features offered by appointment entry decision trees and scheduling questionnaires:

<b>Feature</b>	<b>Decision Trees</b>	<b>Scheduling Questionnaires</b>
<b>Complex logic</b>	Decision trees support complex branching logic in a visual editor that's similar to drawing a flowchart.	Scheduling questionnaires can have conditional questions, but it can be difficult to build and maintain that logic in the Questionnaire Editor.
<b>Use data that's already in the system</b>	You can add rules to a decision tree that pull information from the system. For example, you might create a rule for a decision tree to follow a certain branch of logic for pediatric patients.	To do something similar with scheduling questionnaires, you need to create a question to capture the information you need and then build conditions off of the answer.
<b>Schedule with the right provider</b>	Decision trees can recommend specific providers, subgroups, or pools for scheduling that automatically populate in Make Appointment.	Scheduling questionnaires can only show instructions to a scheduler about which provider to schedule the appointment with. It's up to the scheduler to enter the correct provider in Make Appointment.
<b>Rich text formatting</b>	Decision trees support showing RTF or plain text instructions to schedulers.	Scheduling questionnaires support only plain text instructions.
<b>Show questions to schedulers as they go</b>	The questions in a decision tree appear one at a time for a scheduler to answer as the system evaluates the logic in the decision tree for what needs to happen next.	The questions in a questionnaire appear all at once. Questions can be enabled or disabled based on the answers to other questions in the questionnaire.
<b>Combine questionnaires from different levels of the facility structure</b>	Decision trees cannot be combined like scheduling questionnaires can. Instead, you can build logic for the situations you need to support and reuse the common questions in each situation. You can also use a decision tree within another decision tree.	The system can combine questionnaires from different levels of the facility structure and present them at once to a scheduler. You might use this when additional questions need to be asked for a visit type when it is being scheduled in a certain department.
<b>Change answers after filing</b>	Because decision trees drive scheduling, schedulers cannot edit the answers to a decision tree after it has been filed.	Schedulers can edit the answers to a scheduling questionnaire after it has been filed.
<b>Share with MyChart</b>	Decision trees are supported in MyChart in direct scheduling and ticket scheduling, in the redesigned open scheduling widget starting in November 2021, and in the open scheduling wizard and when scheduling with a new provider in MyChart starting in February 2022.	Scheduling questionnaires can be used in Cadence and MyChart.



Decision trees cannot be imported. You must build them in Hyperspace.

## In the Foundation System

The Foundation System has examples of appointment entry decision trees for many specialty areas that you can use as a starting point for your organization's build. To see the available appointment entry decision trees, log in to the Foundation Hosted environment as your organization's scheduling administrator (ESADM), open the Appointment Entry Decision Tree editor, and press enter to search for all records. To use Foundation System decision trees as a starting point for your organization's build, your Epic representative can help you migrate the decision trees into your own environment.

You can also try out decision trees in the Foundation System to see the functionality in action:

- 1170000004-ES Annual Wellness is used to determine whether a patient's annual wellness visit should use a Physical, Medicare Annual Wellness, or Welcome to Medicare visit type. The decision tree uses a rule to check the system for the presence of Medicare coverage or whether the patient had an appointment in the last year. If no coverage or appointments in the last year are found, the user is presented with several questions to confirm the findings. For example, if the patient is over 65 and the rule doesn't find Medicare in the system, then it asks the user in case the coverage hasn't been added to the patient's record yet. This decision tree also includes an example of a rule-based SmartText, 17984-ES Previous Medicare Visit Info. The SmartText shows schedulers previously completed or arrived Medicare visits the patient had scheduled at the facility to help them understand the workflow of the decision tree and when they could schedule the next Medicare visit based on Medicare requirements. To try out this tree, log in to the [Foundation Hosted environment](#) as your organization's front desk user (ESDESK) in the EMC Family Medicine department. Click Make Appt on a patient's Appointment Desk and select a visit type of 1005-Physical to launch the decision tree.
- 1170000002-ES Wound Check Preprocedure Resource appears when schedulers select a wound check visit type, which sometimes requires a preprocedure nurse to be present during the visit. The decision tree asks the scheduler if a preprocedure nurse is needed for the appointment. If the scheduler answers Yes, the system adds a Preprocedure Nurse to the appointment as an additional resource. To try out this tree, log in to the [Foundation Hosted environment](#) as your organization's front desk user (ESDESK) in the EMH Wound Care department. Go to Make Appt on the patient's Appointment Desk and select a visit type of 17106-Hospital Wound Check. Choosing this visit type launches the decision tree.
- 1170000006-ES Priority Patient Tag allows schedulers to schedule office visits for Priority patients into New Patient or Physical blocked slots so the patient can be seen more quickly. To try out this tree, log in to the [Foundation Hosted environment](#) as your organization's front desk user (ESDESK) in the EMC Family Medicine department. Open registration for a patient, go to the Additional Demographics form, and enter Priority in the Patient type(s) field. Then schedule an office visit for the patient with Family Medicine, Physician in a New Patient or Physical block on the provider's schedule. Note that this decision tree works behind the scenes and doesn't appear to the scheduler.
- 1170000012- ES Pulmonary Function Test (PFT) Duration determines the duration of the PFT visit type based on the type of PFT test being performed in the order. When providers place an order for a PFT, they're prompted to indicate which tests to run as a part of the evaluation. When a scheduler encounters a PFT appointment, the tree runs and evaluates the tests indicated by the provider, or presents the options to a scheduler if the required tests can't be determined, and ultimately adjusts the visit length to the appropriate visit length. The PFT decision tree uses "stacked" nodes to adjust the visit's timing. For more information on modified nodes, see the [Modify Original Visit](#) topic. To try out this tree, log in to the [Foundation Hosted environment](#) as a doctor (PULMD) in the EMC

## In the Foundation System

Pulmonary department and create an order for a PFT exam for a patient. Then, log in as a scheduler (ESDESK) in EMC Pulmonary and create and schedule an appointment for the patient. Try scheduling appointments with different tests selected and notice how the appointment length is adjusted.

- 1180000000-CV TEE Select Provider and 1180000005-CV Congenital TEE are Cupid-specific decision trees that appear when invasive schedulers select and schedule a transesophageal echo (TEE) visit type. TEE procedures can be performed in a variety of procedural areas and often require anesthesia. Based on rules and questions that the scheduler answers, the tree chooses the most appropriate resources and providers for the visit. To try out these trees, log in to the [Foundation Hosted environment](#) as your organization's invasive cardiology scheduler (CVINVSCHED) in the EMH Cardiac Cath Lab department. Go to Anc Orders and place an order for a TEE, making sure to answer the order-specific questions. Open the Snapboard activity and drag the order you placed on to the schedule for EMH Cath Lab 1. Dropping the order on to the schedule launches the decision tree.
- 95001000-ES Dental Consult is a Wisdom-specific decision tree that appears when Wisdom schedulers select a dental consult visit type when creating an appointment for a patient. The decision tree asks if the patient is experiencing certain symptoms. It also asks if the patient has specific bacterial problems in their medical history or have outstanding x-rays. Depending on the answers, the decision tree will recommend a new visit type to schedule, a new visit length, or will recommend speaking to a provider about antibiotics for the patient before dental treatment. To try out this tree, log in to the [Foundation Hosted environment](#) as your organization's Wisdom front desk user (WISDESK) in the EMC Wisdom West department. Go to Make Appt on a patient's Appointment Desk and select a visit type of 1099-Consult - Dental. Choosing this visit type launches the decision tree.

# Decision Trees Strategy

In this section, we'll cover decisions you need to make about how you want to use decision trees before you begin your build. We've also included some best practices for building and maintaining decision trees.

## Considerations

Avoid using decision trees to replicate other standard functionality. This approach allows you to streamline your decision trees and avoid unnecessary complexity. For example:

- Use a Smart Pool to apply providers when possible instead of using a decision tree.
- Use visit type modifiers to make provider- or department-specific adjustments to visit duration.
- Use rule-based patient instructions on the visit type to provide different instructions in different scenarios.
- Use Benefits Engine and provider network build to avoid coverage-based branches.
- Rely on location filters during the scheduling workflow in Book It or MyChart, as opposed to location-based filtering within your decision tree.

## Determine Whether to Use Decision Trees or Scheduling Questionnaires

Decision trees have several advantages over scheduling questionnaires for certain scheduling workflows. While both decision trees and questionnaires support changing appointment lengths and removing providers, the following features are only available with decision trees:

- Change providers at a pool-specific level.
- Use rules during evaluation.
- Use in appointment requests and when scheduling.
- Easier build using a graphical user interface.

This table shows our recommendations for which feature you should use, depending on your build, maintenance, and workflow goals.

I want to...	Recommendation	Rationale
Build complex branching logic into the questions that schedulers see.	Decision trees	Decision trees support branching logic in a visual editor that's similar to drawing in a flowchart. Although scheduling questionnaires can have conditional questions, it's easier to build and maintain branching logic in the Decision Tree Editor than the Questionnaire Editor.
Minimize the number of questions that schedulers need to answer.	Decision trees	Decision trees have two advantages over questionnaires when it comes to minimizing questions.  In decision trees, the questions appear one at a time and the system evaluates the answer

I want to...	Recommendation	Rationale
		<p>immediately to determine the next step. The next step might be another question, but it could also be scheduling instructions. For example, if the answer to the question "Do you have an implant?" is Yes, the system can immediately indicate that the patient can't be scheduled for an MRI. In questionnaires, the scheduler would need to answer all of the questions before getting instructions.</p> <p>Decision trees can also look at information already documented in the system, so the scheduler doesn't need to ask certain questions. In the MRI example, if the patient has a documented implant, the scheduler can get a recommendation without having to ask the question. Or you might create a rule for a decision tree to follow a certain branch of logic for pediatric patients without having to ask about patient age.</p>
Have the system choose a provider based on the scheduler's answers.	Decision trees	Decision trees can recommend specific providers, subgroups, or pools for scheduling that automatically populate in Make Appointment. Scheduling questionnaires can only remove providers or resources from an appointment.
Show eye-catching instructions to schedulers.	Decision trees	Decision trees support showing RTF or plain text instructions to schedulers. Scheduling questionnaires support only plain text instructions.
Override reserved time on a provider's schedule for certain patients.	Decision trees	<p>With appointment entry decision trees, you can use tags to override reserved time on a provider's schedule based on characteristics of the patient. For example, the Foundation System includes a Priority tag that allows schedulers to schedule office visits for Priority patients into New Patient or Physical blocks.</p> <p>These overrides are not supported by questionnaires.</p>
Use appointment requests at my organization.	Decision trees	Appointment requests can recommend decision trees to a scheduler based on the patient indications in the request. You can also use decision trees to conditionally deny appointment requests, suggest a conference call, show RTF scheduling instructions, or set certain information on the request. Scheduling questionnaires don't integrate with appointment

I want to...	Recommendation	Rationale
		requests.
Copy and modify an existing record to simplify build.	Decision trees	In the Decision Tree Editor, you can create a new tree by clicking Save As in an existing tree. This way, you can copy and modify similar trees instead of building them both from scratch. You can't copy and modify scheduling questionnaires in Hyperspace.
See an audit trail of all changes made to a record.	Decision trees	The Decision Tree Editor includes an audit trail. Scheduling questionnaires don't have this feature.
Use form questions.	Either	You can use form questions to build both decision trees and scheduling questionnaires.
Use the same questions in Cadence and MyChart.	Either	Starting in Epic 2018, you can share appointment entry decision trees between MyChart and Cadence as long as those decision trees don't use node types that aren't supported by MyChart. See the <a href="#">Learn About the Types of Decision Tree Nodes</a> topic for more information on which node types are not supported by MyChart. Prior to Epic 2018, if you use decision trees for scheduler workflows and you want to ask the same questions in MyChart, you need to maintain a similar scheduling questionnaire for patients to answer in MyChart.
Combine questions from different levels of the facility structure.	Scheduling questionnaires	The system can combine scheduling questionnaires from different levels of the facility structure and present them at once to a scheduler. You can't combine decision trees in this way, but you can build logic for the situations you need to support and reuse the common questions in each situation. You can also use a decision tree within another decision tree.
Allow schedulers to change the answer to a question after they've completed the questionnaire.	Scheduling questionnaires	Schedulers can edit the answers to a scheduling questionnaire after it has been filed. Because decision trees drive scheduling, schedulers cannot edit the answers to a decision tree after it has been filed.

## Designing Decision Trees

Before you start building decision trees in Hyperspace, it's best to draw them out as a diagram or flowchart first. You might even have the content for your decision trees already written down as procedures for schedulers to follow.

We recommend thinking about the end result of the decision tree first. What are you trying to accomplish? Decide where the decision tree should end, such as scheduling a visit for a certain kind of patient with a particular

provider, and build up from there.

Decision trees should only collect information that is needed to guide scheduling. Do not use decision trees to document notes, collect registration information, or complete clinical questionnaires. The answers also do not become part of the patient's legal medical record. While it is possible to map questions to places that clinicians can see later, including items and SmartData elements, it requires additional build, similar to the additional build required for mapping questions in questionnaires.

Try to design decision trees that work in both Hyperspace and MyChart. While you do have the option to use separate decision trees, using a single decision tree for a given visit type eases maintenance and provides a more consistent patient experience. For the most effective decision trees:

- Word question prompts in a way that makes sense to both a scheduler and a patient.
- Use branching logic within your tree if certain nodes should be skipped or should work differently between Hyperspace and MyChart. You can use a rule that looks for the MyChart background user as the scheduling user to accomplish this.
- Avoid logic that relies on a login department context because login department does not exist in MyChart.
- Keep in mind that decision trees used in open scheduling outside of MyChart do not have a patient record context, so not all types of nodes are supported.

Use more small trees as opposed to fewer large trees. The more logic that lives in a single tree, the more difficult the tree becomes to troubleshoot, maintain, and migrate with Data Courier or a Content Management ticket.

Using specialty- and procedure-specific visit types can help with this approach because you can design separate trees for individual specialties or procedures as opposed to fitting all the logic into one tree. You can also use nested decision trees to break up logic into smaller reusable pieces.

As you're planning your financial decision trees, 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 a separate decision tree for each scenario and bring those trees together in one decision tree for your organization.

Starting in May 2023 keep in mind that you can specify different self-triage decision trees in the facility structure for affiliate organizations. Refer to the Define Different Self-Triage Decision Trees for Affiliate Sites section in the [Define the Patient Self-Triage Decision Trees for Your Organization](#) topic for more information.



**To make it easy for you to get this content, we've created Turbocharger packages for MyChart Self-Triage Content. Starting in November 2020, these packages are available for download on the Available Packages tab of the Turbocharger activity (search: Turbocharger) and you can download them from this topic. Starting in November 2024, if your organization uses the Content Subscription Platform, you can subscribe to this content subscription Turbocharger package to receive updates automatically when they're available. For more information about importing these records, refer to the 284329-Decision Trees for MyChart Self-Triage topic.**

To view this content as a patient, log in to the [Foundation Hosted environment](#) as your MyChart patient and go to Health > Symptom Checker. To view the decision tree records themselves, log in as your MyChart administrator (MYCADM) and go to the Patient Self-Triage Decision Tree editor (Search: Patient Self-Triage Decision Tree). For a full list of symptoms built in Foundation System, refer to the [MyChart Symptom Checker and E-Visit Catalog](#).

## Maintaining Decision Trees

Make sure you know your organization's record naming and numbering conventions. This is especially important if you have a large decision tree scope. Epic's recommended convention is to name questions and questionnaires as <Application> <Specialty> <Description>, such as ES GAS New Patient for a scheduling questionnaire used by the gastroenterology department. Find additional information about naming and numbering conventions in the [Epic Style Guide Master File Naming and Numbering Conventions](#) document.

Reuse records in your decision trees whenever possible for easier maintenance. SmartTexts, visit types, decision trees, questionnaires, questions, and rules can all be reused in decision trees. When you reuse records instead of creating duplicates, it's easier to change your build later.

If you're migrating your scheduling questionnaires to decision trees, you can reuse your questionnaires in your decision trees. Note that any visit type conditions, such as changing the visit type, in the questionnaire do not apply when the questionnaire is used in a decision tree. Questionnaire conditions, such as disabling certain questions based on the answer to other questions, do carry over to the decision tree.

Whenever possible, create trees that you can embed into other trees. This modular strategy speeds up build and makes maintenance easier.

# Decision Trees Setup: Essentials

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



All of these instructions assume you are editing a decision tree in a non-production environment or an unreleased decision tree in your production environment. Refer to the [Edit a Released Decision Tree](#) topic for information about the potential consequences of editing released decision trees in your production environment.

## Create a Decision Tree

You build decision trees by creating nodes for things you want the decision tree to do, such as ask a question or return the value of a rule, and drawing connections between the nodes that define the logic you want the system to follow.

In the decision tree editors, nodes are represented by boxes and connections are represented by arrows. You can hover over a node to view the connection points that you can drag to draw an arrow between two nodes.



Some nodes support showing instructions to the scheduler. You can write the instructions directly in the node or create reusable SmartText records for the instructions in the Appointment Entry Tree Instructions Editor and Request Entry Tree Instructions Editor, which is used for both financial and request entry decision trees. We recommend using SmartTexts whenever possible to simplify maintenance.

## Considerations

Be consistent with how you arrange nodes and connections in the decision tree editors. For example, you might always put the default connection for a node on the right. It's also a good idea to add all of a node's connections before selecting the default connection.

The default connection determines the action that takes place if no other connections are satisfied. We recommend always using default connections so you avoid dead ends in a tree's logic, especially for questions that have a custom list of answers or are networked to an item. If the custom list or item changes and you don't update your decision tree to account for the change, the default connection is your fall back.

Tips for using questions and questionnaires in decision trees:

- Use a question when you need a scheduler to enter or confirm something. If you already have the answer in the system, use a rule to pull it in instead of duplicating work for the scheduler. For example, you can use a rule to get the patient's sex from the system instead of asking the scheduler to enter it.
- When a question has five or fewer answers, create quick buttons for those answers. They look nice in the decision tree and make answering the question faster for schedulers.
- Don't show the comment field for a question to schedulers unless you're planning to report on the text schedulers enter.
- Avoid including a question in a request entry decision tree if schedulers will need to answer it again when scheduling the appointment.
- Use questions instead of questionnaires unless the tree's branching logic depends on the answers to multiple questions.

## Create a Decision Tree Record

1. In Hyperspace in your build environment, open the decision tree editor for the type of tree you want to create by searching for:
  - Appointment Entry Decision Tree
  - Book Anywhere Decision Tree
  - Financial Decision Tree
  - Request Entry Decision Tree
  - Patient Self-Triage Decision Tree
2. Select the Create tab and enter and name and ID for your decision tree.
3. Complete the following information on the Basic Information tab:
  - Synonyms. Enter synonyms for the decision tree. These can help you look up the decision tree later.
  - Owners. Enter the users who are responsible for maintaining this decision tree. This field does not restrict who can edit the decision tree. It's only a way to know who to contact with questions.
  - Notes. Enter notes about what this decision tree is used for.
  - For patient self-triage decision trees, enter a patient-friendly name and description.

4. When you're ready to test your decision tree, click Test Release. This button is available starting in February 2019 and allows you to link the decision tree to other records for testing. In earlier versions, click Release Contact to test the decision tree and then create a new contact if you need to make any changes.
5. When you're ready to release the decision tree and move it to production, click Release Contact.
6. For request entry decision trees, select the Allow this decision tree to be manually searched check box to allow schedulers to search for this decision tree in the Decision Tree Search section of the Appointment Request activity. If you don't select this check box, the decision tree only appears in the Decision Tree Search section as a suggested decision tree if you map the decision tree to diagnoses and the patient has one of the mapped diagnoses entered in the Indications section of the Appointment Request activity.

**Appointment Entry Decision Tree Editor - ES WOUND CHECK PREPROCEDURE RESOURCE [1170000002]**

The screenshot shows the 'Appointment Entry Decision Tree Editor' interface for the 'ES WOUND CHECK PREPROCEDURE RESOURCE' decision tree. The window is divided into several sections:

- Record Information:** Contains fields for 'Name' (ES WOUND CHECK PREPROCEDURE RESOURCE) and 'Synonyms' (Preprocedure).
- Review Information:** Shows 'Owners' (ADMINISTRATOR, CADENCE [ESADM] and OPTIME, ADMIN [ORADM]) and a 'Mark as Reviewed' button.
- Additional Options:** Includes a checkbox for 'Allow this decision tree's score/output to be shown to end users'.
- Notes:** A text area stating 'This decision tree is used to determine when a preprocedure resource should be included on a Wound Check visit.'

At the bottom, there are buttons for 'Switch Contact', 'Test Release', 'Release Contact', 'Save As', 'Save', 'Accept', and 'Cancel'.

## Add Nodes to a Decision Tree

Select the Decision Tree tab in the decision tree editor and click Add Node, or right-click the workspace and choose Add Node.

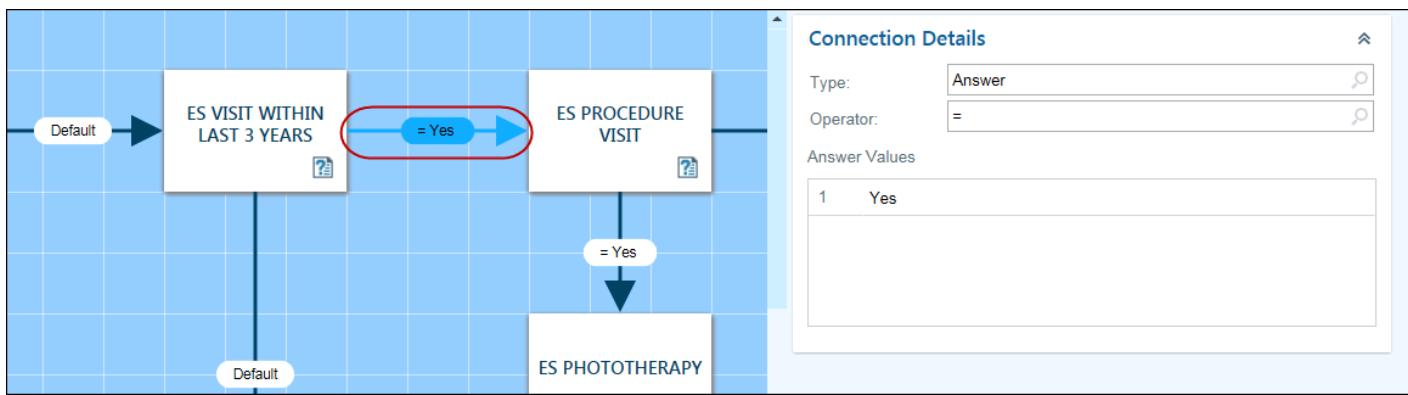


## Add Connections Between Nodes

Connections determine the logic of how a scheduler moves through a decision tree. Hover over a node to view the connection points. Click and drag one of the points to connect it to another node. All node connections can evaluate a rule except for question nodes.

- For appointment entry decision trees, choose from 5003-Appointment Entry Begin context rules. In Epic 2017 and earlier, this is the Visit Type Scheduling Restriction context.
- For Book Anywhere decision trees, choose from 5003-Appointment Entry Begin and 5060-Book Anywhere context rules.
- For financial and request entry decision trees, choose from 5008-Appointment Request context rules.
- For patient self-triage decision trees, choose from 32002-MyChart Patient Self-Triage rule context rules.
- Question nodes evaluate the question answers, and questionnaire nodes evaluate the 5001-Questionnaire context rules from the selected questionnaire for all decision trees except patient self-triage decision trees.
- Patient self-triage decision trees evaluate questionnaire nodes using the 32002-MyChart Patient Self-Triage rule context rules regardless of the kind of connection node, and you must use the 32980-Decision Tree Question Answer property when building rules for this kind of tree.

The connection logic options that are available depend on the type of node the connection is coming from.



By default, the system evaluates connections in the order you created them. You can change this order by selecting the node and rearranging the connections in the Connection Ordering section. The system evaluates the list of connections in the order they are listed and follows the path for the first true connection it finds.

### Node Details

Type: Question

Question mode: User Prompt Order Question

Question: ES VISIT WITHIN LAST 3 YEARS

Response type: Yes/No

Prompt: Have you been seen in this department within the last 3 years?

Allow Comments

---

### Scoring

---

### Connection Ordering

ⓘ Which connection is used?

1	= Yes
2	Default

## Learn About the Types of Decision Tree Nodes

Refer to this section for an explanation of each node type. You can also use the following table for an overview of which node types are available in the different kinds of decision trees.

Node Type	Appointment Entry	Book Anywhere	Request Entry	Financial	Patient Self-Triage

<b>Node Type</b>	<b>Appointment Entry</b>	<b>Book Anywhere</b>	<b>Request Entry</b>	<b>Financial</b>	<b>Patient Self-Triage</b>
Add Appointment Request					
Add E-Visit					
Add Indications	 Only for Book Anywhere visit types				
Add On-Demand Video Visit					
Add Order					
Add Panel	 (Not supported in anonymous MyChart patient contexts)				
Add Tag					
Add Task					
Add Visit	 (Not fully supported in MyChart)				

<b>Node Type</b>	<b>Appointment Entry</b>	<b>Book Anywhere</b>	<b>Request Entry</b>	<b>Financial</b>	<b>Patient Self-Triage</b>
Conference Call					
	(Not supported in MyChart)				
Decision Tree					
Deny Request					
Deny Scheduling					
Evaluate Score					
External Web Service					
Financial Decision					
Modify Original Visit					
Question					
Questionnaire					
Replace Visit					
Rule					
Schedule Appointment Request					

Node Type	Appointment Entry	Book Anywhere	Request Entry	Financial	Patient Self-Triage
Select Treatment/Therapy Plan					
Set Output Value					
Set Responsible Department					
Set Search Terms	 (Starting in November 2024)				
Set Specialty					
Set Telehealth Mode	 (Starting in May 2023)		 (Starting in August 2023)		 (Starting in August 2023)
Show Instructions					

## Add Appointment Request

Applies only to patient self-triage decision trees.

Adds an appointment request if a patient meets the criteria in a request entry decision tree you specific. When you specify a request entry decision tree, all nodes from the [Learn About the Types of Decision Tree Nodes](#) topic can be pulled in, with the exception of Conference Call nodes.

### Node Details

Type

Add Appointment Request

Decision Tree

## Add E-Visit

Applies only to patient self-triage decision trees.

Recommends an E-Visit to a patient, such as for a cough or rash. E-Visits are asynchronous, question-based visits that patients can use to give providers detailed information about specific symptoms.

You can use this node with either appointment-based E-Visits or legacy E-Visits, depending on which E-Visit workflow you use. If you use appointment-based E-Visits or are just starting to set up E-Visits, refer to the [E-Visits: Essentials](#) topic for more details. If you already use E-Visits but have not switched to the appointment-based E-Visit workflow, refer to the [E-Visits: Legacy Workflow Setup](#) topic for more details on legacy E-Visits.

### Considerations

If you are switching from legacy E-Visits to appointment-based E-Visits, starting in May 2023 you can use a utility to quickly identify patient self-triage decision trees you are currently using that use legacy E-Visit nodes and need to be updated. This utility is also available in February 2023 with special update E10400417, in November 2022 with special update E10307747, and in May 2022 with special update E10225227.

To run the utility, go to the MyChart System Manager Menu > Application Utilities > Telehealth Utilities > Check Self-Triage for Legacy E-Visit Nodes and enter a MyChart system definitions (WDF) record.

### Setup for Appointment-Based E-Visits

For this node, you must indicate that you're using appointment-based E-Visits and then enter the E-Visit reason that should be used to schedule the E-Visit. This field uses the Reasons (I LQL 32435) category list. E-Visits created with this node will schedule an E-Visit based on the configuration for the E-Visit reason found on the E-Visit Configuration 1 screen in Patient Access System Definitions, as described in the [Determine the Available Reasons for E-Visits](#) topic.

Starting in November 2022, you can use the Recipient field to route E-Visits that are created with this node differently from E-Visits that are created with a different Add E-Visit node or created outside the Symptom Checker workflow in MyChart. For example, you could use this configuration if you want to route E-Visits for rash to a specific group of providers if the E-Visit was recommended by a self-triage decision tree in Symptom Checker, perhaps due to the symptoms the patient indicated when answering the decision tree, rather than to the group of providers who normally receive E-Visits for rash.

If you enter a provider in this field, E-Visits created with this node will use the message routing configured for the E-Visit message type in that provider record, instead of using the standard routing configuration for E-Visits described in the [Configure Routing for Messages Sent to the Next Available Provider](#) topic. For example, you can create a generic provider record and configure its message routing so that E-Visit messages are routed to a specific pool. Refer to the [Configure Message Routing at the Provider Level](#) topic for more details on configuring message routing in a provider record.

**Node Details**

Type

**Use Appointment-Based E-Visit**

E-Visit Reason

Recipient

### Setup for Legacy E-Visits

For this node, you must select a symptom which is listed as patients' primary reason for visit. This field uses the Symptoms (I LQL 32420) category list. Optionally, you can add a complaint-specific questionnaire to the E-Visit, such as to collect HPI or ROS. E-Visits created with this node are routed using your entries in the Specialty and Pool fields according to the following hierarchy before falling back to your regular e-visit routing:

1. If you choose a specialty, then the E-Visit is first routed to any provider on the patient's care team with that specialty.
2. If the Specialty field is left blank or no provider on the patient's care team has that specialty, then the e-visit is routed to the specified pool.
3. If the Pool field is also left blank, the E-Visit is routed to the patient's PCP.

**Node Details**

Type:

Symptom:

Questionnaire:

Routing Options

Specialty:

Pool:

### Add Indications

Applies only to appointment entry decision trees that are linked to visit types that can be scheduled using Book Anywhere.

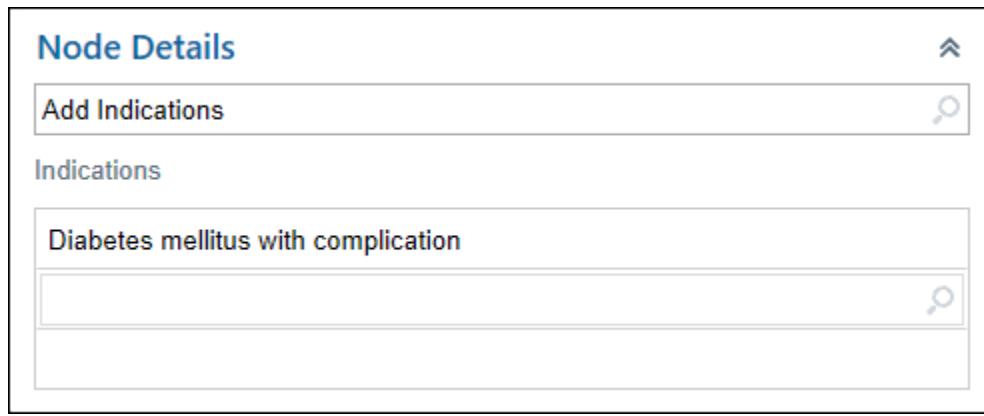
Adds the listed indications to the Indications field in Book It. This saves schedulers the time of entering indications manually and makes the indications sent to other organizations consistent across schedulers.

**Node Details**

Add Indications

Indications

Diabetes mellitus with complication



## Add On-Demand Video Visit

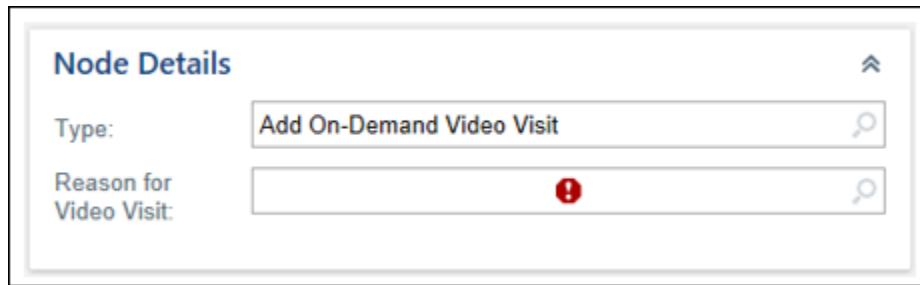
Applies only to patient self-triage decision trees.

Recommends an on-demand video visit to a patient. On-demand video visits are MyChart video visits where patients join a queue to have a video visit with the next available provider. For more details about setting up on-demand video visits, refer to the [Set Up On-Demand Video Visits](#) topic.

**Node Details**

Type: Add On-Demand Video Visit

Reason for Video Visit:



## Add Order

Applies only to patient self-triage decision trees.

Creates an order for a patient, such as for an imaging procedure. This node should typically be used with the Add Visit node. You can choose to have orders signed automatically or pended in the Action field. If you've configured an order to be automatically signed, you can add an associated diagnosis or diagnoses. If you've configured an order to be automatically pended, the clinician who signs the order can still change the diagnosis association before signing.

You need to do two things to set up a patient self-triage decision tree to generate orders:

- Work with your EpicCare Ambulatory team to create a Preference List that contains the order details for the orders that get generated.
- Set up Add Order nodes in your decision tree to generate orders for self-triage encounters, determine whether the orders are pended or signed, determine what diagnoses to associate with the orders, and determine where to route the In Basket messages generated by the orders.

### Create a Preference List for Orders That Need to Be Generated

Work with your EpicCare Ambulatory team to create a preference list record that contains the orders that you need generated by a patient self-triage decision tree if the patient needs to have an order done. The preference list record contains the details for how each order should be placed, such as the priority and status.

When you configure the preference list record:

- Select Procedures for the List Type.
- Select Patient Self-Triage for the Sub Type.
- Select Outpatient for the Ordering Mode.
- Select a Status of Future for each order.

For additional information about creating preference lists, refer to the [Create System Preference Lists for Orders](#) topic.

## Configure Add Order Nodes to Generate Orders in Patient Self-Triage Decision Trees

Set up Add Order nodes in your patient self-triage decision tree to generate orders for patients as needed. In the example shown below, the system generates a Spine CT (w/ Contrast) order for a patient, associates two diagnoses with it, and signs the order.

The screenshot shows the 'Node Details' configuration screen for an 'Add Order' node. The interface is organized into several sections:

- Type:** Add Order
- Order:** Spine CT (w/ Contrast)
- Action:** Sign
- Associated Diagnoses:** Injury of cervical spine (HCC), Transverse myelitis (HCC)
- Routing Options:** Specialty, Pool
- Order Summary:** Expected: 1 Week Approximate, Expires: 3 Weeks

Each section contains a search input field and a small navigation panel with up and down arrows.

Orders created by patient self-triage decision trees are routed to a provider using the following criteria:

- If you configure a specialty, the order is first routed to any provider on the patient's care team with that specialty.
- If the Specialty field is left blank or no provider on the patient's care team has that specialty, then the order

is routed to the specified pool.

- If the Pool field is also left blank, the order is routed to the patient's PCP.
- If there is no PCP for the patient or their PCP is not a valid destination, the order is routed to the department specified in the Default Department (I WDF 13540) setting. Within that department, the order is routed to the pool set in the Unsigned Orders Pool (I DEP 15001) setting.
- If not routed according to any of the previous criteria, orders are routed to the provider specified in the Default Provider (I WDF 13530) setting.

To configure an Add Order node in a patient self-triage decision tree:

1. In Hyperspace, open the decision tree editor, select the Decision Tree tab, and click Add Node.
2. Fill out the node details:
  - In the Type (I LQL 1200) field, enter Add Order.
  - In the Order (I LQL 32400) field, enter the procedure that will be ordered. These are records in the Procedures (EAP) master file.
  - In the Action (I LQL 32401) 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 are signed on the Patient Self-Triage encounter.
  - In the Associated Diagnoses (I LQL 32404) field, determine which diagnoses to associate with the order when it gets generated. This field is available starting in August 2020.
  - In the Specialty (I LQL 32402) field, enter a specialty.
  - In the Pool (I LQL 32403) field, enter a pool.
3. Make sure to set up a connection to the node from other nodes in the tree.

## Add Panel

Applies only to appointment entry and request entry decision trees. Note that this node type is not supported in new provider scheduling in versions prior to February 2022 or open scheduling.

For appointment entry, this node adds a panel to Book It when the scheduler applies the decision tree. For request entry, this node adds a panel to the Visit section of the Appointment Request activity. You can optionally choose to:

- For appointment entry, change the length for each visit type in the panel:
  - Add or subtract time. Enter the number of minutes in multiples of 5.
  - Add Slot Lengths (starting in November 2023). Enter the number of default slot lengths, between 1-100 slots. A provider's default slot length is set in Slot Length (mins) field on the settings tab of the provider's template or by following the path Epic button > Admin > Schedule Admin > Templates > Rel Date/Defaults.
    - This option is especially useful when scheduling visits that you need to extend, but your providers each have different slot lengths on their templates.
    - Your providers might have slot lengths on their template that do not match their default slot length, so use caution when using this option with those providers. A scheduler could end up splitting the slots on a provider's scheduler if the extended visit length does not match the slots on the provider's schedule, in which case the other half of the split slot can't be scheduled.

- Here is an example of how this option works: Dr. Roberts has a Default Slot Length of 10 minutes and Dr. Chavez has a Default Slot Length of 15 minutes. The visits added in a panel by the decision tree are both 30 minutes. If you use an Add Panel node that adds 2 slot lengths, when scheduled with Dr. Roberts the final length of each visit in the panel is now 50 minutes and when scheduled with Dr. Chavez the final length of each visit in the panel is 60 minutes.
- Multiply (starting in November 2023). Enter the number of times to multiply the length, between 2-10 times its calculated length. The calculated length of a visit is affected by Visit Type Modifiers.
  - This option is useful if you need to extend the length of a visit in large increments depending on patient rules. For example, if you have a patient coming in for an annual physical, but they are also a new patient, you could have a decision tree automatically multiply the length of the physical by 3 times to allow the provider enough time to gather any required new patient paperwork.
  - Here is an example of how this option works: Say the visits in the panel added by the decision tree are each 15 minutes. When scheduled with Dr. Roberts who has a visit type modifier to add 5 minutes on both visit types, the new calculated length for each is 20 minutes. If you have an Add Panel node that multiplies the visits in the panel by 3, the final length for each visit will be 60 minutes.
- For appointment entry, replace the visit type the scheduler originally entered in Book It with the panel.
- For appointment entry, don't launch the decision tree or questionnaire that is linked to the panel when this decision tree is applied.
- For appointment entry and request entry, include instructions to tell schedulers what they should do next and how they should communicate the decision or next steps to the patient.

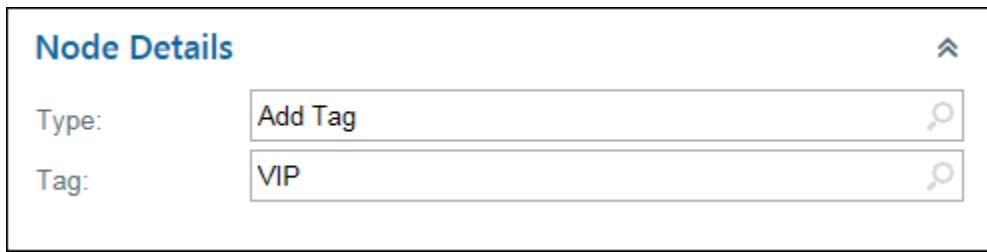
**Node Details**

Type:	Add Panel	<input type="button" value="🔍"/>								
Panel:	DAY TREATMENT PANEL	<input type="button" value="🔍"/> <input type="button" value="📝"/>								
Change length:	<input type="button" value="🔍"/> <input type="button" value="📅"/>	minutes								
<input checked="" type="checkbox"/> Replace original visit type in Appointment Entry <input type="checkbox"/> Don't launch decision tree or questionnaire for this panel										
<b>Visit Types</b>										
<table border="1"> <tr><td>1</td><td>GROUP THERAPY [1129]</td></tr> <tr><td>2</td><td>OCCUPATIONAL THERAPY [1130]</td></tr> <tr><td>3</td><td>LEISURE, EDUCATION, AND SKILLS [1131]</td></tr> <tr><td>4</td><td>MENTAL ILLNESS/CHEM DEPENDENCY [1134]</td></tr> </table>			1	GROUP THERAPY [1129]	2	OCCUPATIONAL THERAPY [1130]	3	LEISURE, EDUCATION, AND SKILLS [1131]	4	MENTAL ILLNESS/CHEM DEPENDENCY [1134]
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2	OCCUPATIONAL THERAPY [1130]									
3	LEISURE, EDUCATION, AND SKILLS [1131]									
4	MENTAL ILLNESS/CHEM DEPENDENCY [1134]									

## Add Tag

Applies only to appointment entry and request entry decision trees.

Sets a tag for the patient.



## Use Tags to Schedule Patients into Certain Visit Type Blocks

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.

## Use Tags to Request Resources for Appointments

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.

## Use Tags to Prevent Agent Conflicts or Override Patient Prep and Recovery Time

You can use tags to determine whether a particular agent associated with a visit type is used for a given appointment. Or, use tags to determine whether a patient prep and recovery time override applies to a given appointment. Use property 98238-Tags in your 5009-Appointment Agent & Patient Prep and Recovery rule. Refer to the [Prevent Agent Conflicts](#) and [Allow Time for Patients to Prepare for and Recover from Appointments](#) topics for more information.

## Use Tags to Show Custom Warnings During Scheduling

If a scheduler needs to be warned during scheduling about patients who have a certain tag, you can create a custom rule that checks a patient's tags and shows a warning if certain conditions are met. Use property 98238-Tags in a 5005-Appointment Entry Custom Check, 5006-Appointment Entry Provider Check, or 5007-Appointment Entry Date Check rule. Refer to the [Show Custom Warnings Based on Rules During Scheduling](#) topic for more information.

## Use Tags to Change the Patient Instructions for an Appointment

You can use tags to determine which patient instructions SmartText is used for an appointment. Use property 98238-Tags in your 5040-Visit Type Patient Instructions rule. Refer to the [Include Scheduling and Patient Instructions](#) topic for more information.

## Use Tags in Smart Pools

You can use tags to determine whether a row in the Pool Definition table for a Smart Pool gets evaluated for a particular visit. Use property 98238-Tags in your 5050-Pool Search Inclusion Rule rule. Refer to the [Organize Pools of Providers or Resources](#) topic for more information.

## Use Tags to Set the Telehealth Mode for an Appointment

Starting in May 2023, using the [Set Telehealth Mode](#) node is recommended to set a telehealth mode for an appointment instead of doing this setup to use a tag. The node is simpler to set up and you can do more with it.

You can use tags to identify the care setting in which an appointment takes place. To do so, you must map telehealth modes to tags in your system. Note that applying telehealth modes using decisions trees works for

both appointments scheduled in Hyperspace and in MyChart starting in November 2020. In previous versions, this decision tree configuration doesn't apply to MyChart scheduling.

1. In Hyperspace, open Cadence System Definitions and go to the Scheduling > Telehealth form.
2. In the Telehealth Settings table, map telehealth modes to decision tree tags by entering values for each on the same row in the Telehealth Mode (I SDF 12200) and Tag (I SDF 12210) columns, respectively.
3. If your system should use a specific patient arrival location whenever it sets a telehealth mode using a decision tree, enter that arrival location in the Override Arrival Location (I SDF 12220) column in the same row.

## Add Task

Applies only to request entry decision trees.

Adds a task to the Tasks section of the Appointment Request activity to indicate there is work to be done before the visit can be scheduled. For more information about tasks, refer to the [Use Tasks to Identify When a Request Is Ready to Be Scheduled](#) topic.

The screenshot shows a 'Node Details' panel with two fields. The first field, 'Type:', has a dropdown menu open with 'Add Task' selected. The second field, 'Task:', also has a dropdown menu open with 'Request Authorization' selected. Both dropdown menus include a magnifying glass icon for search.

## Add Visit

Applies only to appointment entry, request entry, and patient self-triage decision trees. Note that this node type is not fully supported for MyChart. In MyChart, this node can be used in appointment entry decision trees only if you are fully replacing the current visit with a different one, because MyChart does not support scheduling multiple appointments at one time. When using this node in a patient self-triage decision tree, all visit types suggested by the patient's answers appear as scheduling options for the patient, and multiple appointments can be scheduled.

For appointment entry, this node adds a visit type to appointment entry when the scheduler applies the decision tree. For request entry, this node adds a visit type to the Visit section of the Appointment Request activity. For patient self-triage, this node can suggest a visit type and pool or group of providers. You can optionally choose to:

- For appointment entry and patient self-triage, change the length for the visit:
  - Add or subtract time. Enter the number of minutes in multiples of 5.
  - Replace. Enter any amount of time as the final visit length. Overwrites previous length changes. Open decision tree 1170000012-ES Pulmonary Function Test (PFT) Duration tree in the Foundation System to see an example of the Replace option.
    - Starting in November 2025, in August 2025 with special updates E11500068, E11500069, and C11500068, in May 2025 with special updates E11404771, E11405457, and C11404771, in February 2025 with special updates E11309529, E11309946, and C11309529, and in November 2024 with special updates E11213303, E11213527, and C11213303, select the "Use this length as the final visit length" checkbox to prevent any further changes from being made to the visit length.
  - Add Slot Lengths (starting in November 2023). Enter the number of default slot lengths, between 1-

100 slots. A provider's default slot length is set in Slot Length (mins) field on the settings tab of the provider's template or by following the path Epic button > Admin > Schedule Admin > Templates > Rel Date/Defaults.

- This option is especially useful when scheduling visits that you need to extend, but your providers each have different slot lengths on their templates.
  - Your providers might have slots lengths on their template that do not match their default slot length, so use caution when using this option with those providers. A scheduler could end up splitting the slots on a provider's scheduler if the extended visit length does not match the slots on the provider's schedule, in which case the other half of the split slot can't be scheduled.
  - Here is an example of how this option works: Dr. Roberts has a Default Slot Length of 10 minutes and Dr. Chavez has a Default Slot Length of 15 minutes. The visit added by the decision tree is 30 minutes. If you use an Add Visit node that adds 2 slot lengths, when scheduled with Dr. Roberts the final length of the visit added is now 50 minutes and when scheduled with Dr. Chavez the final length of the visit added is 60 minutes.
- Multiply (starting in November 2023). Enter the number of times to multiply the length, between 2-10 times its calculated length. The calculated length of a visit is affected by Visit Type Modifiers.
    - This option is useful if you need to extend the length of a visit in large increments depending on patient rules. For example, if you have a patient coming in for an annual physical, but they are also a new patient, you could have a decision tree automatically multiply the length of the physical by 3 times to allow the provider enough time to gather any required new patient paperwork.
    - Here is an example of how this option works: Say the visit added by the decision tree is 15 minutes. When scheduled with Dr. Roberts who has a visit type modifier to add 5 minutes for that visit type, the new calculated length is 20 minutes. If you have an Add Visit node that multiplies the visit by 3, the final length for the visit is 60 minutes.
- For appointment entry, replace the visit type the scheduler originally entered in Make Appointment with this one.
  - For appointment entry, don't launch the decision tree or questionnaire that is linked to the visit type when this decision tree is applied.
  - For appointment entry and request entry, specify the providers and subgroups that the visit should be scheduled with. You can also enter 5003-Appointment Entry Begin rules for certain department/provider and department/subgroup combinations. For example, you could specify that patients who are older than 65 need to see a particular provider.
  - For advanced visit types in appointment entry and request entry, add or remove department/provider or department/subgroup combinations from the selected pool. Each pool in an advanced visit type has its own tab. Select the Replace all original providers check box to quickly replace all providers and subgroups in a pool with a list of providers and subgroups you specify in the node. You can use the Replace all original providers check box for simple visit types as well as for advanced visit types.
  - For appointment entry and request entry, include instructions to tell schedulers what they should do next and how they should communicate the decision or next steps to the patient.
  - For patient self-triage, the Replace original visit type in Appointment Entry option does not appear, and you must use SmartText instructions.

**Node Details**

Type  
Add Visit

Visit Type  
ULTRASOUND - UROLOGY

Change Length

Use this length as the final visit length

Replace original visit type in Appointment Entry

Don't launch decision tree or questionnaire for this visit

ALL UROLOGY MID-LEVELS AND N...

Replace all original providers

Providers

Rule	Department	Provider	Mod
<input type="button" value=""/>	<input type="button" value=""/>	<input type="button" value=""/>	

Subgroups

Rule	Department	Subgroup	Mod
<input type="button" value=""/>	<input type="button" value=""/>	<input type="button" value=""/>	

## Conference Call

Applies only to appointment entry and request entry decision trees. Note that this node type is not supported for MyChart.

Gives schedulers instructions for setting up a conference call to decide how to proceed with scheduling for the patient. If you don't enter an override phone number, the system displays the appointment phone number (I DEP 5060) or, if that's blank, the department phone number (I DEP 150) to the scheduler.

**Node Details**

Type: Conference Call

Department: EMC DERMATOLOGY

Override phone:

## Decision Tree

Applies to all types of decision trees.

Branches to another decision tree. For schedulers, the embedded decision tree appears inline with the first decision tree for a seamless transition between trees.

**Node Details**

Type:	Decision Tree
Decision tree:	EHS NEUROLOGY APPOINTMENT REQUEST
Output type:	No Output
Notes:	This decision tree is used to evaluate whether a patient being referred to Neurology for headaches meets criteria to be scheduled.

## Deny Request

Applies only to request entry decision trees.

Shows instructions to the scheduler for denying the patient's request for an appointment. A Deny Request node should be an end point in a decision tree. Any connections from a Deny Request node have no effect on the request.

Select a reason from the Cancel Reason (I ORD 1510) category list for why the request was denied. For more information, refer to the [Collect Reasons Why Requests Are Canceled or Denied](#) topic.

**Node Details**

Type:	Deny Request
Denial reason:	Patient

This is an end node. Evaluation will stop at this node.

## Deny Scheduling

Applies only to appointment entry and Book Anywhere decision trees.

Shows instructions to the scheduler for denying scheduling of the visit for the patient. A Deny Scheduling node should be an end point in a decision tree. Any connections from a Deny Scheduling node have no effect on scheduling. You can enter instructions in Book Anywhere decision trees to be passed back to the scheduler.

The Create Canceled Request for Tracking Denials? checkbox can be used to track appointments that couldn't be scheduled. Refer to the [Follow Up on Appointment Requests Where Scheduling Was Denied](#) topic for more information on this option.

We configured an example of this setup in the Foundation System on the Deny Scheduling node on the decision tree 1170000010-ES Book Anywhere.

**Node Details**

Type  
Deny Scheduling

Create Canceled Request for Tracking Denials?

This is an end node. Evaluation will stop at this node.

## Evaluate Score

Applies to all types of decision trees.

Use this node to evaluate the scores set by other nodes in the tree. You specify how to evaluate the score in the connection you draw from the node. Refer to the [Use the Results of a Nested Decision Tree to Drive Other Actions](#) topic for more information.

**Node Details**

Type: Evaluate Score

**Connection Ordering**

Which connection is used?

1 Score > 1	<input type="button" value="▲"/> <input type="button" value="▼"/>
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## External Web Service

Applies only to request entry, patient self-triage, and appointment entry decision trees.

This node calls to an external web service to return one or more values. Starting May 2023, the patient ID value is not returned if the patient is a new patient using self-triage for all.

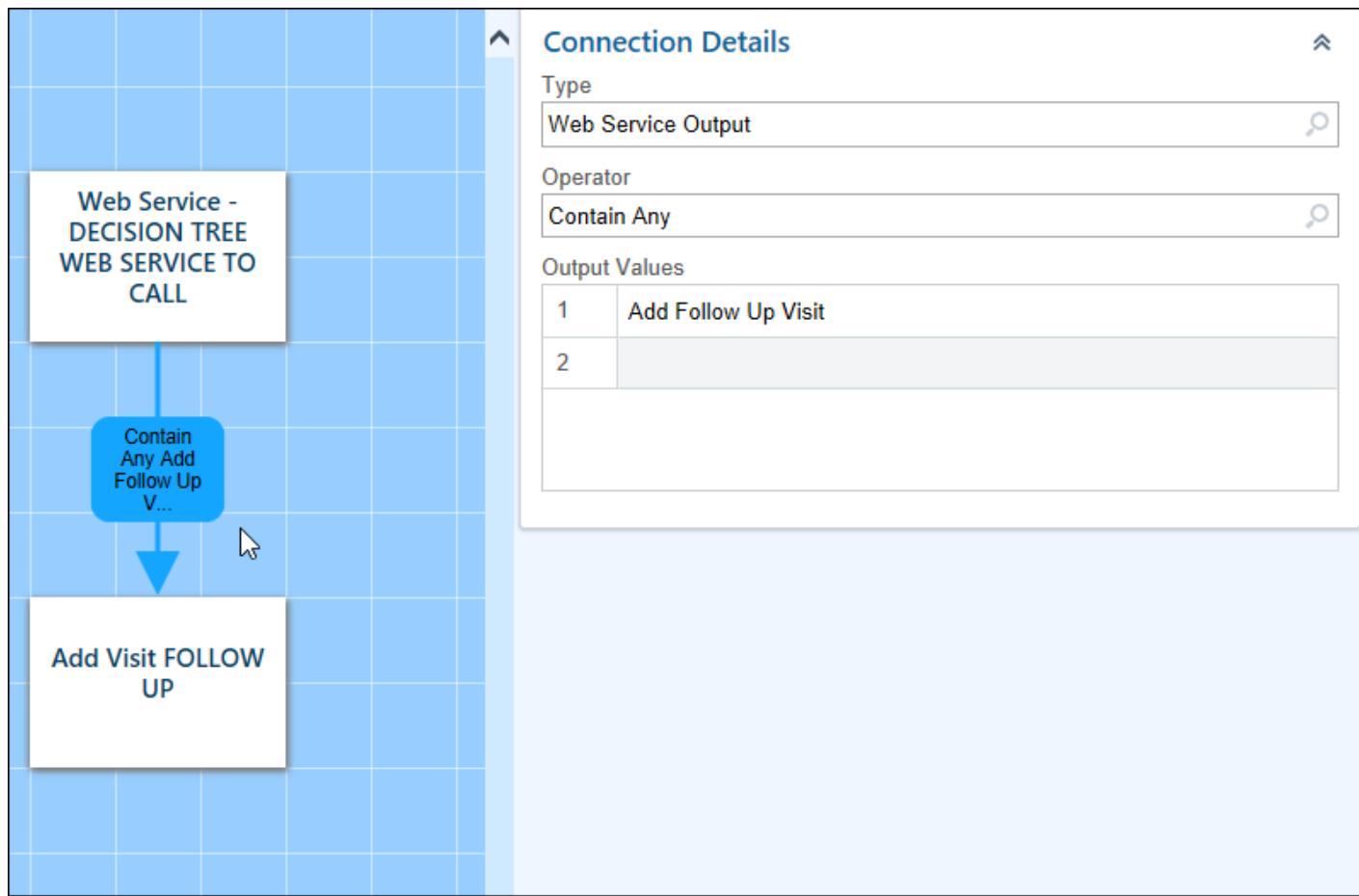
**Node Details**

Type  
External Web Service

Web Service  
DECISION TREE WEB SERVICE TO CALL

The connection node stemming from an External Web Service node looks to the output of the web service. Output values that are used in connection node logic are stored in the Decision Tree - Action Node - Web Service

Output (I HQA 412) item.



To view the web service output values from a request entry tree on the Appointment Desk, add report column 5100-Appt Request Decision Tree Web Service Outputs to the Active Requests tab of the Appointment Desk.

Refer to the [Design the Look and Use of the Appointment Desk Tabs](#) topic for instructions on designing the Appointment Desk tabs.

Future	Past	Orders	Admissions	Referrals	Active Requests	Finalized Requests
ID	Status		Creation Date	On Wait L...	DTree Web Service Outputs	
6001376160	Needs Scheduling		09/13/2021		Add Follow Up Visit	

## Financial Decision

Applies only to financial decision trees.

Shows the outcome of the financial decision tree and any instructions to the scheduler. This outcome can be for your entire facility or a certain region. A region can be any part of your facility structure (EAF), including service areas, locations, places of service, groups, and regions.

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, such as proceed after authorization has been obtained or proceed to financial assistance.

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.

The screenshot shows a 'Node Details' dialog box with three fields:

- Type: Financial Decision
- Region: EHS CLINIC
- Financial Decision: Schedule

Each field has a search icon to its right.

## Modify Original Visit

Applies only to appointment entry and Book Anywhere decision trees.

Modifies the original visit type or panel that the scheduler entered in Make Appointment. You can choose to:

- Change the length for the visit type or each visit type in a panel. For visits that have pools, the length change applies only when the visit type uses the CALC mnemonic to determine the length of the pools.
  - Add or subtract time. Enter the number of minutes in multiples of 5.
  - Replace. Enter any amount of time as the final visit length. Overwrites previous length changes. Open decision tree 1170000012-ES Pulmonary Function Test (PFT) Duration tree in the Foundation System to see an example of the Replace option.
    - Starting in November 2025, in August 2025 with special updates E11500068, E11500069, and C11500068, in May 2025 with special updates E11404771, E11405457, and C11404771, in February 2025 with special updates E11309529, E11309946, and C11309529, and in November 2024 with special updates E11213303, E11213527, and C11213303, select the "Use this length as the final visit length" checkbox to prevent any further changes from being made to the visit length.
    - This option is especially useful when scheduling visits that you need to extend, but your providers each have different slot lengths on their templates.
    - Your providers might have slots lengths on their template that do not match their default slot length, so use caution when using this option with those providers. A scheduler could end up splitting the slots on a provider's scheduler if the extended visit length does not match the slots on the provider's schedule, in which case the other half of the split slot can't
- Add Slot Lengths (starting in November 2023). Enter the number of default slot lengths, between 1-100 slots. A provider's default slot length is set in Slot Length (mins) field on the settings tab of the provider's template or by following the path Epic button > Admin > Schedule Admin > Templates > Rel Date/Defaults.
  - This option is especially useful when scheduling visits that you need to extend, but your providers each have different slot lengths on their templates.
  - Your providers might have slots lengths on their template that do not match their default slot length, so use caution when using this option with those providers. A scheduler could end up splitting the slots on a provider's scheduler if the extended visit length does not match the slots on the provider's schedule, in which case the other half of the split slot can't

be scheduled.

- Here is an example of how this option works: Dr. Roberts has a Default Slot Length of 10 minutes and Dr. Chavez has a Default Slot Length of 15 minutes. The original visit linked to the decision tree is 30 minutes. If you use an Modify Original Visit node that adds 2 slot lengths, when scheduled with Dr. Roberts the final visit length is now 50 minutes and when scheduled with Dr. Chavez the final visit length is 60 minutes.
- Multiply (starting in November 2023). Enter the number of times to multiply the length, between 2-10 times its calculated length. The calculated length of a visit is affected by Visit Type Modifiers as well as any other Modify Original Visit nodes added earlier in the tree that have altered the visit length by adding, subtracting, or multiplying time or adding slot lengths.
  - This option is useful if you need to extend the length of a visit in large increments depending on patient rules. For example, if you have a patient coming in for an annual physical, but they are also a new patient, you could have a decision tree automatically multiply the length of the physical by 3 times to allow the provider enough time to gather any required new patient paperwork.
  - Here is an example of how this option works: Say the original visit linked to the decision tree is 15 minutes. When scheduled with Dr. Roberts who has a visit type modifier to add 5 minutes, the new calculated length is 20 minutes. If you have a Modify Original Visit node that adds 10 minutes followed by another Modify node that multiplies the visit by 3, the final visit length will be 90 minutes.
- Change the providers or subgroups for a visit that doesn't have pools.
- Change the contents of the pools for a visit that has pools. Select the Replace all original providers check box to quickly replace all providers and subgroups in a pool with a list of providers and subgroups you specify in the node. You can use the Replace all original providers check box for simple visit types as well as for advanced visit types.
- Include instructions to tell schedulers what they should do next and how they should communicate the decision or next steps to the patient.

You can "stack" multiple Modify Original Visit nodes in a decision and have the results from each node be cumulative by leaving the Replace previous modify original visit nodes check box cleared. This includes length changes, provider and pool changes, and instructions. For example, if you have three nodes that each add a provider to the visit, the end result is a visit with three providers. A few notes about how this works when the check box is cleared:

- If a node adds provider A to a pool that already has providers B and C in it and a later node removes provider B, providers A and C remain in the pool.
- Adding and subtracting length changes are added up. If one node adds 30 minutes to a 30-minute visit and a later node subtracts 15 minutes, the end result is a 45-minute visit.
- If any node in the chain replaces the original visit length, that new visit length is used through the rest of the decision tree. So if one node adds 30 minute to a 30-minute visit, a later node replaces the visit length with 45 minutes, and another node subtracts 15 minutes, the end result is a 30-minute visit.

**Node Details**

Type  
Modify Original Visit

Change Length  
Add 15 minutes

Replace previous modify original visit nodes  
 Use this length as the final visit length

[How is length change applied to pools?](#)  
[How are providers and subgroups applied?](#)

Simple Visit Modifications

Pool-Specific Modifications

Add pool modifications +  
ALL UROLOGY MID-LEVELS AND N...

Replace all original providers

Providers

Rule	Department	Provider
EMC UROLOGY [10...	UROLOGY, PHYSIC...	

Subgroups

Rule	Department	Subgroup

[Remove Pool](#) [Edit Pool](#)

## Question

Applies to all types of decision trees.

Shows a form question to the scheduler or retrieves an answer from an order-specific question. In patient self-triage decision trees, the scheduler is the patient. To show a form question to a scheduler, select the User Prompt mode. You can choose to allow the scheduler to enter any comments related to the answer they enter. You cannot include decision tree instructions for this type of node; however, notes you enter in the question record do appear to the scheduler in the decision tree.

Note that questions in decision trees are always required, regardless of the value in Response required? (I LQL 150) in the question record. If you are building a patient self-triage decision tree, you can use questions only of type 100-Patient Entered Question that are Yes/No, Custom List, Category, Date, Time, and Numeric Response type. The Question mode and Allow comments options are not available for this type of decision tree.

The networked question Response type and the Allow comments checkbox are not available for decision trees

that appear in MyChart.

**Node Details**

Type:	Question
Question mode:	User Prompt <input checked="" type="radio"/> Order Question <input type="radio"/>
Question:	ES VISIT WITHIN LAST 3 YEARS <input type="button" value="Search"/> <input type="button" value="Edit"/>
Response type:	Yes/No
Prompt:	Have you been seen in this department within the last 3 years?
<input type="checkbox"/> Allow Comments	

To use the answer to an order-specific question to drive the rest of the decision tree, select the Order Question mode. You can choose to show a form question to the scheduler when the order-specific question hasn't been answered. You can select only from the form questions that are linked to the order-specific question in the entered in the Link to Question settings (I LQL 167 and I LQL 168) in the form question record.

**Node Details**

Type:	Question
Question mode:	User Prompt <input type="radio"/> Order Question <input checked="" type="radio"/>
Order question:	RIS INVASIVE SEDATION NEED OSQ <input type="button" value="Search"/> <input type="button" value="Edit"/>
Response type:	Custom List
Prompt:	What is the patient's sedation requirement?
<b> ⓘ If the order question isn't answered, prompt the form question.</b>	
Form question:	RIS INVASIVE SEDATION SCHED <input type="button" value="Search"/> <input type="button" value="Edit"/>
Response type:	Custom List
Prompt:	What is the patient's sedation requirement?
<input type="checkbox"/> Allow Comments	

For more information on building question records, refer to the [Form Questions and Questionnaire Setup and Support Guide](#).

## Questionnaire

Applies to all types of decision trees.

Shows a visit type questionnaire to the scheduler. In patient self-triage decision trees, the scheduler is the patient. The list of questions in the questionnaire cannot be modified in the decision tree. You cannot include decision tree instructions for this type of node.

Any visit type conditions in a questionnaire, such as changing the visit type, do not apply when the questionnaire is used in a decision tree. Questionnaire conditions, such as disabling certain questions based on the answer to other questions, do carry over to the decision tree.

To use the scoring section of a questionnaire node, you need to create a Questionnaire context rule that uses the questionnaire utilized in the node.

If you are building a patient self-triage decision tree, only questionnaires of type 100-Patient Entered Questionnaires are allowed, and PROMIS CAT questionnaires are not supported.

**Node Details**

Type: Questionnaire

Questionnaire: IMAGING SCHED MRI

This questionnaire has visit type conditions configured. These conditions will not be evaluated when used within a decision tree.

Questions:

1	RIS SEDATION NEED SCHED 12 OR UNDER [1050040]
2	RIS SEDATION NEED SCHED OVER 12 [1050041]
3	OR PAT NEEDED [1071206131]
4	RIS MRI WEIGHT [1050104]
5	RIS MRI CLAUSTROPHOBIC [1050106]

For more information on building questionnaire records, refer to the [Form Questions and Questionnaire Setup and Support Guide](#).

## Replace Visit

Applies only to Book Anywhere decision trees.

Replaces the visit type sent from the external location with the visit type used by your organization.

You can change the length of the visit:

- Add or subtract time. Enter the number of minutes in multiples of 5.
- Replace. Enter any amount of time as the final visit length. Overrides every other change option. Open decision tree 1170000012-ES Pulmonary Function Test (PFT) Duration tree in the Foundation System to see an example of the Replace option.
- Add Slot Lengths (starting in November 2023). Enter the number of default slot lengths, between 1-100 slots. A provider's default slot length is set in Slot Length (mins) field on the settings tab of the provider's template or by following the path Epic button > Admin > Schedule Admin > Templates > Rel Date/Defaults.
  - This option is especially useful when scheduling visits that you need to extend, but your providers each have different slot lengths on their templates.

- Your providers might have slots lengths on their template that do not match their default slot length, so use caution when using this option with those providers. A scheduler could end up splitting the slots on a provider's scheduler if the extended visit length does not match the slots on the provider's schedule, in which case the other half of the split slot can't be scheduled.
- Here is an example of how this option works: Dr. Roberts has a Default Slot Length of 10 minutes and Dr. Chavez has a Default Slot Length of 15 minutes. The visit added by the decision tree is 30 minutes. If you use an Replace Visit node that adds 2 slot lengths, when scheduled with Dr. Roberts the final length of the visit added is now 50 minutes and when scheduled with Dr. Chavez the final length of the visit added is 60 minutes.
- Multiply (starting in November 2023). Enter the number of times to multiply the length, between 2-10 times its calculated length. The calculated length of a visit is affected by Visit Type Modifiers.
  - This option is useful if you need to extend the length of a visit in large increments depending on patient rules. For example, if you have a patient coming in for an annual physical, but they are also a new patient, you could have a decision tree automatically multiply the length of the physical by 3 times to allow the provider enough time to gather any required new patient paperwork.
  - Here is an example of how this option works: Say the visit added by the decision tree is 15 minutes. When scheduled with Dr. Roberts who has a visit type modifier to add 5 minutes for that visit type, the new calculated length is 20 minutes. If you have an Replace Visit node that multiplies the visit by 3, the final length for the visit is 60 minutes.

For advanced visit types, select the Replace all original providers check box to quickly replace all providers and subgroups in a pool with a list of providers and subgroups you specify in the node.

You can also specify instructions to be passed back to the scheduler.

**Node Details**

Type  
Replace Visit

Visit Type  
NEUROLOGY CONSULT

Change Length

LAO MRIS

Replace all original providers

Providers

Rule	Department	Provider	Mod
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>			

Subgroups

Rule	Department	Subgroup	Mod
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>			

 Edit Pool

## Rule

Applies to all types of decision trees.

Creates a node for adding a connection that evaluates a rule to determine how to proceed in the decision tree. For example, you might branch a decision tree based on the patient's age.

- For appointment entry decision trees, choose from 5003-Appointment Entry Begin context rules. If you're configuring a decision tree for MyChart open scheduling, make sure to avoid rules that evaluate patient data, since no authenticated patient record exists yet.
- For Book Anywhere decision trees, choose from 5003-Appointment Entry Begin and 5060-Book Anywhere context rules.
- For financial and request entry decision trees, choose from 5008-Appointment Request context rules.
- For patient self-triage decision trees, choose from 32002-MyChart Patient Self-Triage context rules.

You specify the rule to use in the connection you draw from the rule node to the next node in your tree. Refer to the Add Connections Between Nodes topic for more information.

### Node Details

Type:  🔍

## ➡ Starting in May 2025

Using the Rule Tester, you can test rules that use context 5003-Appointment Entry Begin such as those used in appointment entry decision trees. This is a great way to troubleshoot rule logic and save time by not needing to fully run a decision tree in a scheduling workflow.

**Rule Tester - ES PATIENT IS 65 OR OLDER [694060]**

Rule:	ES PATIENT IS 65 OR OLDER [694060] <span style="float: right;"><input type="button" value="Run Test"/></span>		
Visit Type:	<input type="text"/>		
Patients:	<input type="text" value="Cadence, Chris [24530]"/> <span style="float: right;">🔍</span>		
Orders:	<input type="text"/>		
Referrals:	<input type="text"/>		
Encounters:	<input type="text"/>		
Search Terms:	<input type="text"/>		
App Mode:	<input type="text"/>		
Beacon Plan:	<input type="text"/>		
Infusion Appt Length:	<input type="text"/>		
Client Billing: Client:	<input type="text"/>		
Client Billing: Services:	<input type="text"/>		
Waiting Lists:	<input type="text"/>		

**Evaluation Details**  
Properties appear in the order evaluated.

Criteria	Property	Operator	Value
1 ✓	New Appointment » Patients » Age: Years Line 1: CADENCE,CHRIS [202418]: 69	>=	65

**Performance Metrics**

A few things to keep in mind when using the Rule Tester for Appointment Entry Begin rules:

- The system cannot hide or filter fields based on responses to other fields in the Rule Tester. This means it's possible to pick "incompatible" records. For example, you can select a visit type, then select an order that has a completely different Visit Type attached to it. We suggest filling out as few fields as possible in the Rule Tester to test all the conditions in your rule. This ensures you don't run into any issues with incompatible records and makes it easier to verify individual conditions are working properly.
- All multi-select fields are evaluated with the records in that field, in addition to records in other fields in the Rule Tester. For example, if you select Patient A in the Patient field, but select one of Patient B's encounters in a different field, the rule is evaluated for both Patient A and B.

## Schedule Appointment Request

Applies only to patient self-triage decision trees.

Use this node after an Add Appointment Request node to allow patients to schedule a visit if it meets certain criteria. Create rules in the context 5008-Appointment Request to connect the nodes. For example, you might create a rule that checks the status of the appointment request after it's been created. If the appointment request is at a status where it's ready to be scheduled, you might link it to a Schedule Appointment Request node.

**Node Details**

Type

Schedule Appointment Request

No configuration is necessary for this node. When placed after an Add Appointment Request node, this node allows patients to schedule a single visit added from a request entry tree.

## Select Treatment/Therapy Plan

### Starting in February 2024

★ November 2023 by SU E10703445, C10703445-HSWeb, E10703455, E10703456

★ August 2023 by SU E10608089, C10608089-HSWeb, E10608099, E10608100

★ May 2023 by SU E10514309, C10514309-HSWeb, E10514324, E10514325

★ February 2023 by SU E10417133, C10417133-HSWeb, E10417137, E10417138

Applies only to appointment entry decision trees.

You can use the Select Treatment/Therapy Plan node to make it easy for scheduling staff to schedule the right visit length for a patient's infusion if your organization meets either of the following conditions:

- You don't generate appointment requests for infusions from treatment or therapy plans.
- You generate appointment requests for infusions from treatment or therapy plans, but there are occasions when schedulers don't use the appointment requests for scheduling. For example, a scheduler might not use an appointment request if the clinician hasn't signed orders yet or is updating the patient's treatment or therapy plan.

The Select Treatment/Therapy Plan node prompts schedulers to select the treatment plan or therapy plan for which they are scheduling a visit. If the system can determine a length for the visit, that length appears automatically in the Infusion appointment length field in the decision tree. Schedulers can override the calculated visit length or specify a length if one wasn't calculated. Schedulers can expand the decision tree sidebar to see details about the selected treatment plan or therapy plan so they can be confident they selected the right one. By linking the appointment to the patient's treatment plan or therapy plan, the system is also able to link any referrals for the treatment plan or therapy plan to the patient's appointment.

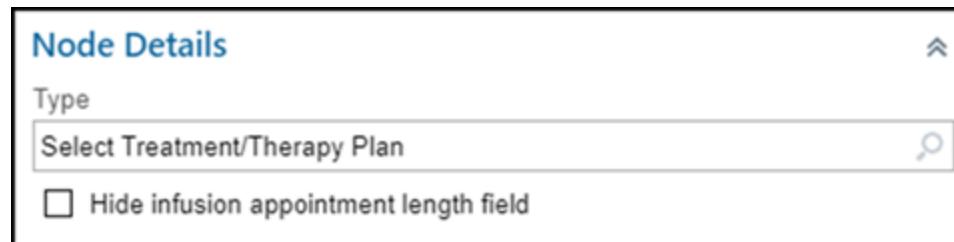
The system doesn't calculate visit lengths for therapy plans, so schedulers always need to enter a length for therapy plan visits. The system can automatically determine a length for a treatment plan visit if either of the following is true:

- You've configured the infusion duration table, as described in the [Build the Infusion Duration Table](#) topic.
- You're allowing automatic visit length calculations using medication offsets and durations, as described in the [Calculate Infusion Duration Using Medication Offsets and Durations](#) topic.

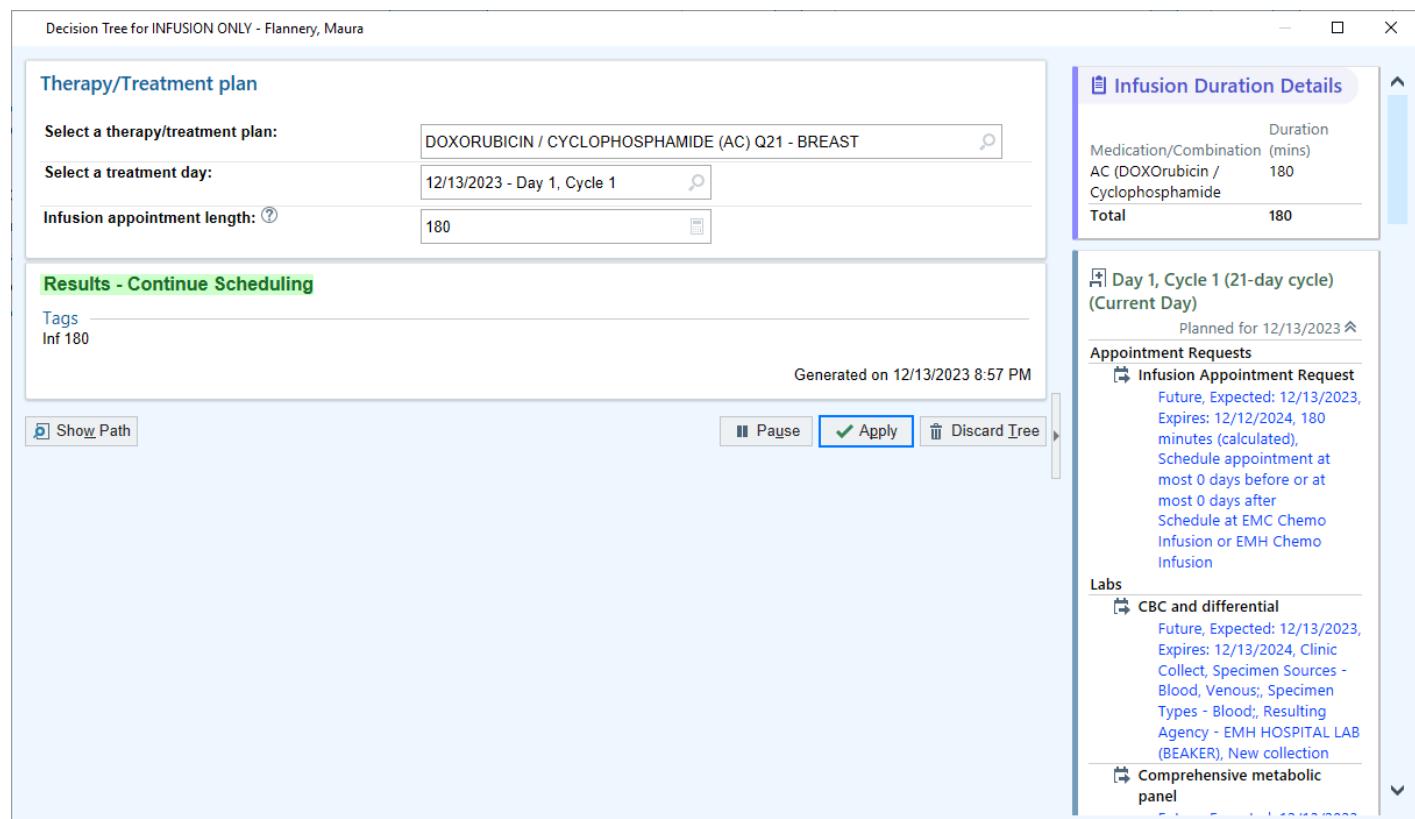
Starting in February 2025 and in November 2024 with special updates E11200791, E11200790, and E11200695; and in August 2024 with special updates E11106471, E11160470, and E1116408, decision tree builders can choose to hide the length question from schedulers when a tree is run. To hide the length question, select the Hide infusion appointment length field (I LQL 1260) checkbox in the node. When the length question is hidden from schedulers, the appointment length is based on the default length of the visit type with any modifications supplied by the decision tree.

If a patient doesn't have a treatment plan or therapy plan, the new node doesn't appear to schedulers. If schedulers aren't sure which treatment plan or therapy plan to select, they are not required to select one.

To see an example of how the Select Treatment/Therapy Plan node is used in a decision tree, log in to the [Foundation Hosted environment](#) as your organization's Cadence administrator (ESADM) and check out decision tree 444444-EMH Chemo Infusion Tree.



*The Node Details section in the Appointment Entry Decision Tree Editor*



*An example of how the Select Treatment/Therapy Plan decision tree node appears to schedulers*

## Set Output Value

Applies to all types of decision trees when the output value is set to Custom Value.

Use this node as an end node in a child decision tree to set an output value for the parent decision tree to use in

its logic. Refer to the [Use the Results of a Nested Decision Tree to Drive Other Actions](#) topic for more information.

Node Details	
Type:	Set Output Value <input type="button" value="🔍"/>
Output value:	Hand <input type="button" value="🔍"/>
This is an end node. Evaluation will stop at this node.	

## Set Responsible Department

Applies only to request entry decision trees.

Use this node to automatically set the responsible department (I ORD 67002) for the request. Schedulers can also manually set or change the responsible department in the Request Routing section of the Appointment Request activity. You can set up appointment requests workqueues to look for requests for a particular responsible department.

Node Details	
Type:	Set Responsible Department <input type="button" value="🔍"/>
Department:	EMC NEUROLOGY <input type="button" value="🔍"/>

## Set Search Terms

⌚ Starting in November 2024

⭐ August 2024 by SU E11100759

Applies only to appointment entry decision trees.

Use this node to automatically set search term values for specialty, subspecialty, condition, treatment, or keyword in scheduling workflows. The value in a given field adds the indicated search term of that type and replaces any existing search term of that type on the order. If a field is empty, no changes are applied to the search term of that type. Values in the Set Subspecialty, Set Condition, and Set Treatment fields must have the same parent specialty, and you cannot enter values in these fields that have a different Parent Specialty (I MAG 2000) or Associated Specialty (I MAG 2010) than the one entered in the Set Specialty field. When this node adds a specialty, subspecialty, condition, or treatment search term that does not match the parent or associated specialty of a specialty, subspecialty, condition, or treatment search term already on the order, the mismatched search terms are cleared.

### Node Details

Type

Set Specialty

Set Subspecialty

Set Condition

Set Treatment

Set Keyword

For example, if you enter Cardiology in the Set Specialty field, Cardiac Electrophysiology in the Set Subspecialty field, and leave the Set Condition, Set Treatment, and Set Keywords fields blank, the node adds the Cardiology and Cardiac Electrophysiology search terms to the order, replacing any previous specialty and subspecialty search terms. If the condition or treatment search terms already on the order have Cardiology as a parent specialty, they are not affected. If the condition or treatment search terms already on the order have an associated specialty other than Cardiology, the search terms are removed from the order.

## Set Specialty

Applies only to request entry decision trees.

Use this node to automatically set the specialty (I ORD 67260) and subspecialty (I ORD 67261) for the request. Schedulers can also manually set or change the specialty and subspecialty in the Destination section of the Appointment Request activity. You can set up appointment requests workqueues to look for requests for a particular specialty or subspecialty. For more information about defining the specialty and subspecialty category lists, refer to the [Define Specialties and Subspecialties Where Requests Should Be Scheduled](#) topic.

### Node Details

Type:

Specialty:

Subspecialty:

## Set Telehealth Mode

**Starting in May 2023**

This topic applies to:

- Appointment entry decision trees
- Request entry decision trees (starting in August 2023)
- Patient self-triage decision trees (starting in August 2023)

Use this node to add supported telehealth modes to a visit in a way that is simpler and more powerful than using tags. The advantages of using this node over telehealth tags include being able to specify what telehealth modes are allowed for the scheduling workflow, setting a default telehealth mode for a visit type, and choosing whether to apply the mode to all visit types or specific visit types.

You have the following options to configure this node:

- The Allowed Telehealth Modes (I LQL 1256) grid in the node allows you to specify allowed telehealth modes for a visit, and is required.
- The Default Telehealth Mode (I LQL 1255) field allows you to select a default telehealth mode for a visit. This field is also optional. In Cadence, leaving this field blank means the scheduler needs to choose a telehealth mode manually when scheduling. In MyChart when the field is blank, the system automatically selects the first telehealth mode in the list of options and the patient has the option to change it. Only In Person, Video, and Telephone Telehealth modes appear in MyChart.
- The Apply to all visit types? (I LQL 1257) checkbox, when checked, applies the telehealth mode to all visits being scheduled. When this checkbox is not checked, you must specify the visit types you want the node to apply to in the Visit Types (I LQL 1258) grid. You can also use this grid to apply the results of a decision tree to individual visits within a panel rather than to the entire panel.

### Node Details

Type

Set Telehealth Mode

Allowed Telehealth Modes

Clinic to Clinic Video

Patient Not Present

Telephone

Video

Default Telehealth Mode

Video

Apply to all visit types?

Visit Types

OFFICE VISIT [6]

## Show Instructions

Applies only to appointment entry, Book Anywhere, request entry, and patient self-triage decision trees.

For appointment entry and request entry decision trees, this shows instructions to the scheduler. For patient self-triage decision trees, this shows instructions to the patient or, instructions to the provider. You can type instructions in this node or, if you have instructions that need to be reused in several places, select the Use SmartText instructions check box and enter a SmartText record that uses the 3041-Cadence Appt Entry Tree Instructions context for appointment entry, the 3040-Cadence Request Entry Tree Instructions context for request entry, or the 8060-WP Patient Self-Triage Instructions context for patient self-triage. Click the Open SmartText button on the toolbar to open the Appointment Entry Tree Instructions Editor, Request Entry Tree Instructions Editor, or the Patient Self-Triage Instructions Editor. You must use SmartText for patient self-triage decision trees.

### Considerations

When used in MyChart open scheduling, Show Instructions nodes should not include SmartTexts that return data from a patient's chart, because the system doesn't yet have a patient's information.

To show instructions in a patient self-triage decision tree to only providers, select the Provider Only (I LQL 1226) button. For example, you might use this option to share best practices for follow-up based on different patient scores or to provide links to related resources. The instructions then appear in print groups [32502-MyChart - Self-Triage Instructions](#) and [32503-MyChart - Self-triage Outcomes and Instructions](#), and copies, which you can add to Chart Review reports that clinicians use to review patient self-triage decisions.

Starting in May 2024, you can require patients to act on the instructions shown in self-triage by selecting the Requires Patient Acknowledgement button. For example, you might use this option to provide the patient with self-care instructions that require them to make certain lifestyle modifications before you have them schedule an appointment for their symptoms. If you require acknowledgement, you also have the option to customize the button text shown to the patient. If you enter nothing in the Acknowledgement Button Label (I LQL 32453) field the patient will see "Acknowledge" below your configured SmartText. You can also optionally use the acknowledgement button to jump the patient to another resource by putting a link in the Acknowledgement Destination URL (I LQL 32452) field. For example, if you want to redirect the patient to an external resource about managing their high blood pressure, you could configure the button to redirect there when the patient accepts their self-care options. If you redirect the patient, the acknowledgement button will show "Learn More" unless you also specify an Acknowledgement Button Label (I LQL 32453). By default, all self-triage Show Instructions nodes are informational, appear at the top of the recommendations page, and are automatically completed when the patient sees their care recommendations. If the Requires Patient Acknowledgement button is selected, the Show Instructions node is actionable, appears with other actionable recommendations, such as Add Visit nodes, and is considered completed when the patient completes all their recommendations. Actionable instructions appear in print groups [32501-MyChart - Self-triage Outcomes](#) and [32503-MyChart - Self-triage Outcomes and Instructions](#).

## In the Foundation System

Decision tree 1170000004- ES Annual Wellness uses rule-based SmartText 17984-ES Previous Medicare Visit Info to help schedulers understand the workflow of the decision tree and when they could schedule the next Medicare visit based on Medicare requirements when making Medicare appointments for patients. Because the ES Annual Wellness tree is configured to schedule different appointments based on whether the patient has had previous Medicare visits, the SmartText in this node shows schedulers previously completed or arrived Medicare visits the patient had scheduled at the facility.

Decision tree 1170000010-ES Book Anywhere features a custom message using Show Instructions on the Deny Scheduling node.

### Node Details

Type  
Show Instructions

**Provider Only   Requires Patient Acknowledgement**

Acknowledgement Button Label  
[Empty Text Box]

Acknowledgement Destination URL  
[Empty Text Box]

---

### Instructions

Title  
Self-Care Instructions

SmartText:  
HIGH BLOOD PRESSURE SELF CARE LO...

Your responses suggest that your high blood pressure may improve on its own. There are several things you can do at home to help you feel better. Here are some helpful tips:

**Maintain a healthy weight:**  
Being overweight or obese can increase the risk of high blood pressure. If you are overweight, losing even a small amount of weight can have a positive impact on your blood pressure.

**Follow a healthy diet:**  
Adopting a diet that is low in sodium, saturated fats, and

## Create SmartText Instructions for Decision Tree Nodes

You can specify SmartText instructions to tell schedulers what they should do next and how they should communicate the decision or next steps to the patient. We recommend using SmartText instructions instead of writing the instructions directly in the node because you can use the same SmartText in multiple decision trees. If you need to make updates to the instructions, you just need to update the one SmartText instead of updating each decision tree. SmartText instructions also allow you to pull in information dynamically when the user creates the appointment request or schedules the appointment.

Self-triage decision trees show patients the base SmartText as it appeared on the date they completed self-triage. This means that if you edit the base SmartText record without creating a new contact after the patient initially reviews their instructions, the patient can still see the SmartText as it appeared on the day they completed self-triage in Symptom Checker History. For rule-based SmartText overrides, including language overrides, patients see the latest update to the base SmartText record in Symptom Checker History. If it's not appropriate to show a patient the latest update you make to an override SmartText, we recommend creating a new contact for the SmartText record rather than updating the base record.

SmartText instructions are available for these node types:

- Add Order
- Add Panel
- Add Visit
- Conference Call
- Deny Request
- Deny Scheduling
- Financial Decision
- Modify Original Visit
- Show Instructions

The instructions are read-only for schedulers, so while you use SmartText to write the instructions, don't use SmartLists or other elements that a scheduler would need to interact with.

Select the Use SmartText instructions check box and enter a SmartText record that uses the 3041-Cadence Appt Entry Tree Instructions context for appointment entry decision trees, 3040-Cadence Request Entry Tree Instructions context for request entry and financial decision trees, or the 8060-WP Patient Self-Triage Instructions context for patient self-triage decision trees. Follow one of these paths to create a SmartText record that can be used in decision trees:

- Search: Appointment Entry Tree Instructions or Request Entry Tree Instructions.
- From the Decision Tree tab of the decision tree editor, click the Open SmartText button.
- For patient self-triage decision trees, open the SmartText Editor directly (search: SmartText).

## Formatting Considerations

SmartTexts in patient self-triage appear in the formatting specified in the SmartText editor. If this formatting doesn't match the rest of the page, the inconsistent visual experience can be disorienting or unpleasant for patients.

To create a consistent visual experience with other elements on the page, we recommend the following formatting guidelines for patient-facing SmartText content:

- Set the Font Type (star menu > All Other Tools > Font Type) to Segoe UI.
- Set the Font Size (star menu > All Other Tools > Font Size) to 12 pt.
- Set the text color to the same shade as other text on the page. Open the Text Color activity (star menu > All Other Tools > Text Color), click Define Custom Colors, and enter 54 in the Red, Green, and Blue fields, then click OK.

For more information about creating SmartText records, refer to the [SmartTexts](#) topic. Starting in May 2023, you need Shared security point 11-Edit SmartText to access these activities.

## 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 indication.

**Indications**

Include indications that are not linked to a decision tree

Add indication

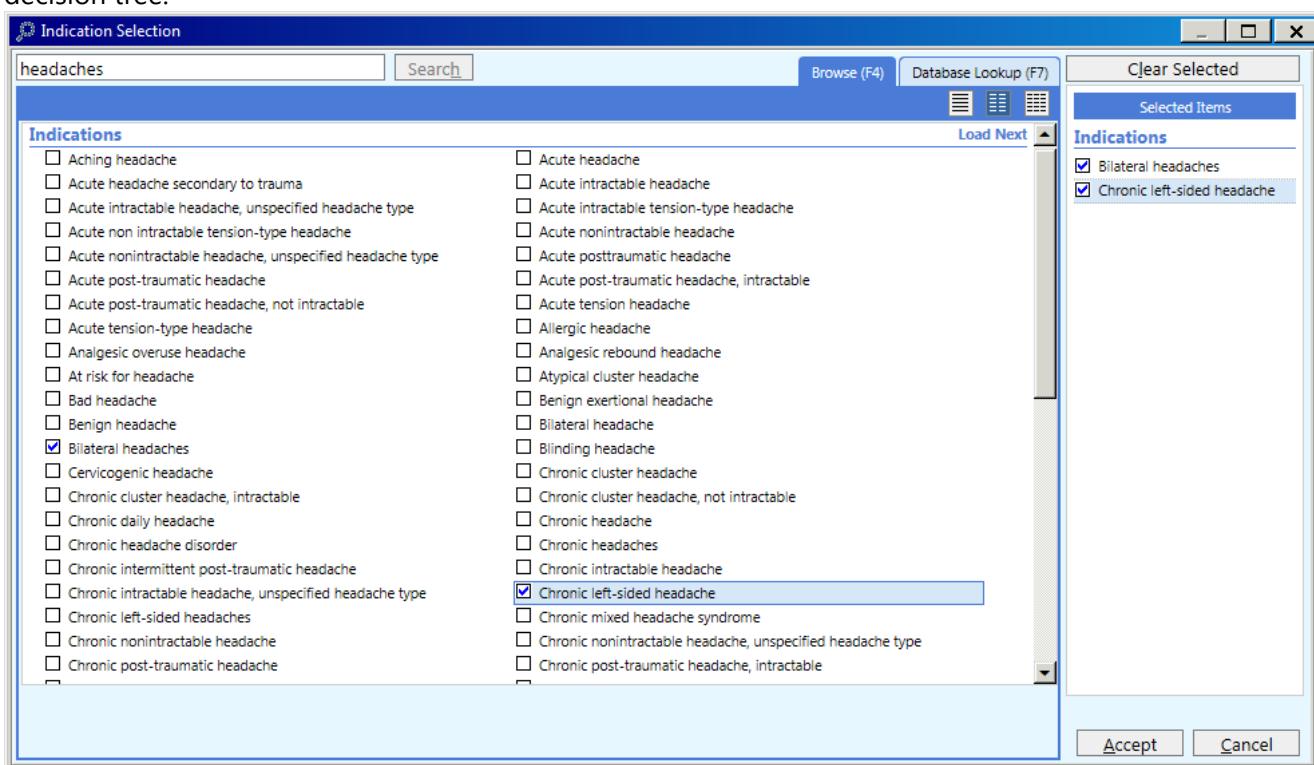
Indication	Comment	Primary
Bilateral headaches [R51]	<input type="checkbox"/>	<input type="button" value="-"/>

**Decision Tree Search**

Suggested Trees

Decision Tree	Indications
EHS NEUROLOGY APPOINTMENT REQUEST ↗	Bilateral headaches [R51]

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 indications.
4. In the Indication Selection window, select the check boxes for the indications you want to map to this decision tree.



5. Click Accept.

**Request Entry Decision Tree - EHS NEUROLOGY APPOINTMENT REQUEST [1170000003]**

Basic Information	Indications	Output	Decision Tree	Linked Records	Audit Trail																								
<b>Search for Indications</b> <input type="text" value="Enter search text"/> 																													
<b>Indications</b> <table border="1"> <thead> <tr> <th>Code</th> <th>Indication</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>R51</td> <td>Bilateral headaches</td> <td></td> </tr> <tr> <td>R51</td> <td>Chronic left-sided headaches</td> <td></td> </tr> <tr> <td>G44.229</td> <td>Chronic tension headaches</td> <td></td> </tr> <tr> <td>Z84.89</td> <td>Family history of headaches</td> <td></td> </tr> <tr> <td>Z82.0</td> <td>Family history of migraine headaches in brother</td> <td></td> </tr> <tr> <td>Z82.0</td> <td>Family history of migraine headaches in grandfather</td> <td></td> </tr> <tr> <td>Z82.0</td> <td>Family history of migraine headaches in maternal grandfather</td> <td></td> </tr> </tbody> </table>						Code	Indication	Type	R51	Bilateral headaches		R51	Chronic left-sided headaches		G44.229	Chronic tension headaches		Z84.89	Family history of headaches		Z82.0	Family history of migraine headaches in brother		Z82.0	Family history of migraine headaches in grandfather		Z82.0	Family history of migraine headaches in maternal grandfather	
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Z82.0	Family history of migraine headaches in maternal grandfather																												

## Define the Financial Decision Tree for Your Organization

You define the financial decision tree that the system runs when a user clicks Run Financial Screening in the Financial Screening Outcome section of the Appointment Request activity.

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.

## Define the Patient Self-Triage Decision Trees for Your Organization

To allow patients to use self-triage, you need to make your decision trees available to MyChart patients by listing them in one of three places:

- Patient Access System Definitions. We recommend starting with listing your decision trees here.
- If you use patient profiles to customize patients' experience with MyChart, you can list your decision trees in your patient profiles.
- Starting in May 2023, if you have affiliate organizations, you can make your decision trees available in your facility structure.

Optionally, you can use filtering rules to hide certain trees for a particular MyChart user. For example, you might want to omit adult-specific decision trees for patients under a certain age. For information about working with rules, refer to the [Create or Edit a Rule](#) topic.

You can optionally associate self-triage encounters created at affiliate sites with affiliate-specific departments. If you are making decision trees available in your facility structure, you need to complete this set up.

Starting in May 2023, the system uses the following hierarchy to determine which decision tree to use for self-triage:

1. Location level.

2. Service area level.
3. Patient profile.
4. Facility level.
5. Patient Access System Definitions (WDF 1).

We recommend against configuring self-triage in both your facility structure and patient profiles because it leads to a more complicated hierarchy, which makes it more likely to accidentally configure decision trees at the incorrect level of the hierarchy. If you don't configure it as intended, patients might not have access to the expected decision trees on the Symptom Checker landing page.

## Configure Decision Trees in Patient Access System Definitions or Patient Profiles

To make your decision trees available in your Patient Access System Definitions or patient profiles:

1. From the MyChart System Manager Menu, select either:
  - For Patient Access System Definitions, select Care Companion & Pat-Entered Data (named Patient Entered Data in November 2024 and earlier versions).
  - For patient profiles, select Patient Profile Settings and open your patient profile.
2. Go to the Self-Triage Settings screen and set the following items:
  - In the Store partially completed decision trees for (I WDF 13520) field, enter a number of hours after which partially completed self-triage decision trees are no longer available to the patient. Partially completed decision trees, or decision trees that the patient began but didn't receive triage recommendations from, older than the number of hours specified here are removed from the patient's MyChart during the next login. The default is 48 hours. Starting in May 2023, partially completed trees older than the number of hours specified here are marked as abandoned but are not deleted, which allows for reporting on self-triage abandonment. In February 2023 and earlier, qualifying decision tree data is purged from the database.
  - Starting in February 2024, in the Store actionable decision trees for (I WDF 13525) field, enter a number of hours after which actionable self-triage decision trees are no longer available to the patient. Actionable decision trees, or decision trees that the patient began and received triage recommendations from, older than the number of hours specified here are removed from the patient's MyChart during the next login. The actionable decision trees are marked as abandoned but are not deleted, which allows for reporting on self-triage abandonment. The default is 48 hours. If you have a case where you want the triage recommendations to always be available to the patient, edit that symptom's decision tree build by selecting the Prevent expiration if tree has incomplete recommendations (I LQF 700) checkbox. Starting in May 2025, February 2025 with special updates C11303610, E11303646, E11303647, and E11303649, you can set the number of hours that the actionable recommendations remain available at the decision tree level (I LQF 705).
  - In the Default Provider (I WDF 13530) field, enter your default provider. This provider is listed as the ordering and signing provider if orders are signed automatically, as well as the default for encounter creation and order and results routing. The default provider must be an active provider record, an orders-authorizing provider (I SER 8220), and must be linked to a user (EMP) record.
  - In the Default Department (I WDF 13540) field, enter your default department for encounter creation and order routing purposes. To learn how this affects routing in more detail for the Add Order node, refer to the [Add Order](#) topic.
3. Go to the Self-Triage Decision trees screen (in May 2022 and earlier, stay on the Self-Triage Settings screen and use the Available Decision Trees table) and add your decision trees and filter rules.

- In the Decision Tree (I WDF 13500) column, enter your decision tree.
  - If you want to use a filtering rule, create a filter rule with a context of 32500-Patient (No Default Contact), as described in the [Create or Edit a Rule](#) topic. Then enter the filter rule in the Filtering Rule (I WDF 13510) column. If the rule evaluates to true, the decision tree is available to the patient.
  - Starting in November 2022, in the Deep Link Only (I WDF 13515) column, enter 1-Yes to make the decision tree available only for deep linking. This also hides the decision tree on the Symptom Checker landing page. If this field is left blank, the default value is 0-No and the decision tree is available on the Symptom Checker landing page.
4. If you have turned on self-triage for patients without a MyChart account (available starting in August 2023 and in May 2023 with special update E10501418), go to the Self-Triage for All Decision Trees screen and add your decision trees.
    - a. In the Decision Tree (I WDF 13600) column, enter the self-triage decision trees that should be available to new patients for self-triage. Each decision tree acts as an individual point of entry for the patient to initiate a self-triage workflow without a MyChart account.
    - b. In the Deep Link Only (I WDF 13615) column, enter 1-Yes to mark a decision tree for deep linking only which means the decision tree does not show up on the Symptom Checker page for patients without a MyChart account. If left blank, this field is set to 0-No and new patients can see this decision tree on the self-triage for all landing page. Refer to the [Link Patients Directly to Self-Triage Decision Trees](#) topic for more information about linking directly to self-triage decision trees.
  5. Starting in November 2024, go to the Self-Triage Secure Link Settings screen and add your decision trees in the Decision Tree (I WDF 13490) column. These self-triage decision trees are then available to send to patients from the Send Self-Triage Tree activity in Appointment Desk. Refer to the [Send Self-Triage Decision Trees from Appointment Desk](#) topic for more information about sending links to trees from Appointment Desk.

## Configure Affiliate-Specific Departments for Self-Triage Encounters

You can associate self-triage encounters created at affiliate sites with affiliate-specific departments by configuring the Affiliate Settings table in Patient Access System Definitions:

1. From the MyChart System Manager Menu, select Login and Access Configuration and access the Affiliate Settings screen.
2. In the Affiliate Site Name (I WDF 2570) field, enter the Site ID for the affiliate.
3. In the Affiliate Default Department (I WDF 2575) field, enter the department that should be used for self-triage encounters and orders. If you set the Default Department (I EAF 32702) field in the location or service area level, that department is used instead for self-triage encounters and orders.

## Configure Decision Trees in the Facility Structure

### Starting in May 2023

You can configure decision trees in your facility structure to allow affiliate organizations to use different self-triage decision trees. For example, you can use a different decision tree for fever that has different questions and nodes in your affiliate's Service Area Profile to account for children at an affiliate children's hospital.

## Prerequisites

To define self-triage decision trees for affiliate site, you need to complete additional setup for affiliates:

- Define the site IDs and URLs for your affiliate organizations on the MyChart Access URL Configuration screen as described in the [Define URLs for Affiliates](#) topic.
- Configure the Affiliate Settings table as described in the Configure Affiliate-Specific Departments for Self-Triage Encounters section in the [Define the Patient Self-Triage Decision Trees for Your Organization](#) topic,

To make the trees available to MyChart patients:

1. In MyChart System Manager Menu, select Master File Edit.
2. Select either Facility, Service Area Profile, or Location depending on what facility structure level you want to configure and open your record.
3. Go to the Self-Triage Settings screen.
4. In the Store partially completed decision trees for (I EAF 32700) field, enter the number of hours after which partially completed self-triage decision trees are no longer available to the patient. Partially completed decision trees, or decision trees that the patient began but didn't receive triage recommendations from, older than the number of hours specified here are removed from the patient's MyChart during the next login. The default is 48 hours. Starting in May 2023, partially completed trees older than the number of hours specified here are marked as abandoned but are not deleted, which allows for reporting on self-triage abandonment. In February 2023 and earlier, qualifying decision tree data is purged from the database.
5. Starting in February 2024, in the Store actionable decision trees for (I EAF 32705) field, enter a number of hours after which actionable self-triage decision trees are no longer available to the patient. Actionable decision trees, or decision trees that the patient began and received triage recommendations from, older than the number of hours specified here are removed from the patient's MyChart during the next login. The actionable decision trees are marked as abandoned but are not deleted, which allows for reporting on self-triage abandonment. The default is 48 hours. If you have a case where you want the triage recommendations to always be available to the patient, edit the symptom's decision tree build by selecting the Prevent expiration if tree has incomplete recommendations (I LQF 700) checkbox. Starting in May 2025, February 2025 with special updates C11303610, E11303646, E11303647, and E11303649, you can set the number of hours that the actionable recommendations remain available at the decision tree level (I LQF 705).
6. In the Default Provider (I EAF 32701) field, enter your default provider. This provider is listed as the ordering and signing provider if orders are signed automatically, as well as the default for encounter creation and order and results routing. The default provider must be linked to a user (EMP) record.
7. In the Default Department (I EAF 32702) field, enter the same department you entered in Affiliate Default Department (I WDF 2575) field. If you want to use a different department for encounter creation and order routing purposes at your Location or Service Area level rather than what you use in the Affiliate Default Department (I WDF 2575) field, enter a different department in this field. To learn how this affects routing in more detail for the Add Order node, refer to the [Add Order](#) topic.
8. Go to the Self-Triage Decision trees screen and add your decision trees and filter rules.
  - a. In the Decision Tree (I EAF 32710) column, enter your decision tree.
  - b. If you want to use a filtering rule, create a filter rule with a context of 32500-Patient (No Default

- Contact), as described in the [Create or Edit a Rule](#) topic. Then enter the filter rule in the Filtering Rule (I EAF 32711) column. If the rule evaluates to true, the decision tree is available to the patient.
- c. In the Deep Link Only (I EAF 32712) column, enter 1-Yes to make the decision tree available only for deep linking. This also hides the decision tree on the Symptom Checker landing page. If this field is left blank, the default value is 0-No and the decision tree is available on the Symptom Checker landing page.
9. If you have turned on self-triage for patients without a MyChart account (available starting in August 2023 and in May 2023 with special update E10501418), complete the following:
- a. Go to the Self-Triage for All Settings screen.
  - b. Starting in February 2024, you can use the Demographics to Collect at Start of Workflow (I WDF 13625) field to specify whether full demographic collection happens at the start of the workflow or after the patient has acted on a decision tree's recommendation.
  - c. In the New Patient Demographic Fields (I EAF 32745) column, enter up to three demographics that you want to collect in the initial patient arrival form at the beginning of the self-triage for new patient's workflow.
  - d. In the Status (I EAF 32746) column, enter 1-Required to require new patients to fill out the associated demographic. If left blank, this field is set to 0-Optional and new patients can optionally fill out the associated demographic.
  - e. Go to the Self-Triage for All Decision Trees and set your decision trees.
  - f. In the Decision Tree (I EAF 32730) column, enter the self-triage decision trees that should be available to new patients for self-triage. Each decision tree acts as individual points of entry for the patient to initiate self-triage workflow without a MyChart account.
  - g. In the Deep Link Only (I EAF 32732) column, enter 1-Yes to mark a decision tree for deep linking only which means the decision tree does not show up on the Symptom Checker page. If left blank, this field is set to 0-No and new patients can see this decision tree on the Symptom Checker page. Refer to the [Link Patients Directly to Self-Triage Decision Trees](#) topic for more information about linking directly to self-triage decision trees.
10. Starting in November 2024, go to the Self-Triage Secure Link Settings screen and add your decision trees in the Decision Tree (I EAF 32790) column. These self-triage decision trees are then available to send to patients via the Send Self-Triage Tree activity in Appointment Desk. Refer to the [Send Self-Triage Decision Trees from Appointment Desk](#) topic for more information about sending links to trees from Appointment Desk.

## Make an Appointment Entry Decision Tree Available at the Visit Type or Panel Level

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

You can also set up a decision tree at other levels, but the need for this is highly situational. For example, you can set up department-level decision trees for questions that a department's schedulers always need to answer, regardless of the visit type. For details about this setup, refer to the [Make an Appointment Entry Decision Tree Available at the Department or System Level](#) topic.

To set up a decision tree at the visit type level or panel level for schedulers:

1. In Hyperspace, open the visit type or panel to associate with a decision tree:
  - Visit type: Epic button > Admin > Schedule Admin > Master File Edit > Visit Type
    - Starting in November 2023, select the Decision Support form.
    - In August 2023 and earlier, select the After VT Entry form.
  - Panel: Epic button > Admin > Schedule Admin > Master File Edit > Panel > After VT Entry form
    - Starting in February 2024, select the Decision Support form.
    - In November 2023 and earlier, select the After VT Entry form.
2. Enter Decision Tree in the After visit type selection action (I PRC 800) field.
3. Enter your decision tree in the Decision tree (I PRC 805) field.
4. Optionally, choose what happens after cancelling the decision tree by setting a value in the After form cancel action (I PRC 840) field. If left blank, Abort Scheduling will be used by default.

To set up a decision tree at the visit type level for MyChart direct scheduling and ticket scheduling and new provider scheduling:

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type, open a visit type record, and access the Scheduling Settings 1 screen (called Cancellation & Scheduling Settings in November 2019 and earlier versions).
2. In the Known patient decision tree (I PRC 32080) field, enter the decision tree you want to use for this visit type. For more information about configuring decision trees for use in these workflows, refer to the [Use Decision Trees to Guide Scheduling Workflows](#) topic.

To set up a decision tree at the visit type level for the redesigned MyChart open scheduling widget (available starting in November 2021) and open scheduling wizard (available starting in February 2022):

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type, open a visit type record, and access the Scheduling Settings 1 screen.
2. In the Anonymous patient decision tree (I PRC 32085) field, enter the decision tree you want to use for this visit type. For more information about configuring decision trees for use in open scheduling, refer to the [Guide Patients to the Right Visit with Decision Trees](#) topic.

To set up a decision tree at the panel level for patients in MyChart (available starting in August 2019):

From the MyChart System Manager Menu, select Master File Entry > Panel (PRC), open a panel record, and access the Panel Settings screen.

In the MyChart scheduling decision tree (I PRC 32080) field, enter the decision tree you want to use for this panel.

## Define the Book Anywhere Decision Tree for Your Organization

You define the Book Anywhere decision tree that the system runs when it receives requests for appointments from an external location.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Schedule > Book Anywhere form.
3. In the Decision Tree (I SDF 5001) field, enter your Book Anywhere decision tree.

# Show the Results of an Appointment Entry Decision Tree to Schedulers

Appointment entry decision trees drive how appointments get scheduled, so it can be helpful for managers and schedulers to view the results of a decision tree for an appointment should questions arise. For this reason, decision tree information appears by default in the Expand Appointment window that shows detailed appointment information when schedulers double-click an appointment on a patient's Appointment Desk. Schedulers can click the name of the decision tree to view detailed results.

Note that if you use appointment entry decision trees in MyChart, the results of those decision trees are also visible to schedulers.

The screenshot shows the 'Expand' appointment window with the following details:

**Appointment Information:**

- Name: WILKINS, MAX
- Date: 2/15/2017
- MRN: 203652
- Status: Sch
- Arrive By: 8:45 AM
- Appt Time: 9:00 AM
- Length: 10
- Visit Type: NEW PATIENT [1003]
- Copay: \$0.00
- Provider: Tanya Allen, RN
- Department: EMC DERMATOLOGY
- Bill Area:
- Referral Number:
- Referral Status:
- Rescheduled From: [Wed Feb 15, 2017 0800](#)
- Rescheduled: 2/7/2017 8:26 AM
- By: JENSEN, NORA [24784] (ES)

**Decision Tree Information:**

Results from [ES DERM VISIT TYPE SELECTION](#) on 2/7/2017 8:18 AM

**Selected Displays:**

- Appointment Information
- Decision Tree Information
- Appointment Information

**Buttons:**

- Close

The decision tree summary appears in HTML table 10670-AS Appt Decision Tree Information, which is included in standard HTML display 4-AS Appointment for the Expand Appointment window.

Complete these steps if you override standard HTML display 4 and want to add decision tree information to your custom overrides. If you're not sure whether you have overrides for this display, refer to the [Use Record Viewer to Find HTML Display Overrides](#) topic for instructions about how to search for overrides.

1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and open your override of HTML display 4.

2. Add HTML table 10670 to the list of HTML tables that appear in the HTML display.

## Show the Results of Scheduling Decision Trees to Clinicians

You can show the results of the appointment entry or request entry decision tree that used to schedule an appointment to clinicians in Chart Review. Clinicians can use the decision tree answers to understand how the patient came to be scheduled for a particular visit.

Print group [62056-ES Active Decision Tree Results](#) shows this information. For more information about customizing your Chart Review reports, refer to the [Configure Chart Review Tabs](#) topic.

## Show the Results of a Patient Self-Triage Decision Tree to Providers

You can show the results of the patient self-triage decision tree to clinicians in Chart Review or a Visit Navigator section. For example, clinicians can use the decision tree answers to understand how the patient came to be scheduled for a particular visit, had a lab order placed for them, or started taking an over-the-counter medication.

The following print groups show this information to clinicians:

- [32500-MyChart - Self-triage Answers](#)
- [32501-MyChart - Self-triage Outcomes](#)
- [32502-MyChart - Self-triage Instructions](#)
- [32503-MyChart - Self-triage Outcomes and Instructions](#)

You can also add the Patient Self-Triage navigator section (32500-SEC\_WP\_SELF-TRIAGE) to the same navigator topic as your Questionnaires navigator section. This navigator section shows clinicians questions and answers from self-triage questionnaires as well as the instructions patients saw after completing the questionnaire and any orders placed or appointments scheduled as a result. To add the Patient Self-Triage navigator section to a navigator:

1. In Hyperspace, open the navigator template you want to modify (search: Navigator Template).
2. In the topic you want to add the section to, use the Add button to add navigator section 32500-SEC\_WP\_SELF-TRIAGE.

Starting in August 2020, you can add a column to Chart Review that shows the patient's selected symptom from self-triage so clinicians can see the patient's symptom(s) at a glance. To add the column:

1. In Clinical Administration, go to Management Options > Profiles (LPR) > Chart Review, Summary Report.
2. Go to the Chart Review Encounter Reports screen.
3. In the Contact Type (I LPR 10000) column, find the entry for Patient Self-Triage.
4. In the corresponding Description Code (I LPR 10008) column, enter extension 32575-Self-Triage Symptom Selection.

# Decision Trees Setup: Bells & Whistles

In this section, we'll show you more configuration options for appointment entry decision trees.

## Make an Appointment Entry Decision Tree Available at the Department or System Level

Although Epic recommends that you set up your appointment entry decision trees at the visit type or panel level, it's also possible to set them up at the department or system level, with the exception of appointment entry decision trees used for MyChart, which can be set up only at the visit type level.

- Department-level decision trees appear when appointments are scheduled in that department. This might be useful for decision trees that really do apply to the department and not the visit type. For example, if you have a department located far out of town away from the rest of your departments, you might set up the decision tree for each radiology department so the scheduler always follows that decision tree, regardless of what visit type she uses. If you use department-level decision trees, keep in mind that you'll have to maintain this second layer of build.
- If you set up a decision tree at the system level, it appears for every visit scheduled at your organization. It's unlikely that a system-level decision tree could provide a meaningful backup when no decision tree is set up at more specific levels.

Department and system decision trees appear as a backup when no decision tree is set up at more specific visit type or panel levels. Unlike with questionnaires, decision trees at a visit type level cannot be combined with decision trees at a higher level.

### Make a Decision Tree Available at the Department Level

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Open your department record.
3. Select the Scheduling > Decision Support form. In February 2024 and earlier versions, select the After VT Entry form.
4. Enter Decision Tree in the After visit type selection action (I DEP 1450) field.
5. Enter your decision tree in the Decision tree (I DEP 1455) field.

### Make a Decision Tree Available at the System Level

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Decision Support form. In February 2024 and earlier versions, select the After VT Entry form.
3. Enter Decision Tree in the After visit type selection action (I SDF 14050) field.
4. Enter your decision tree in the Decision tree (I SDF 14072) field.

## Limit How Many Times a Patient Can Start a Self-Triage Decision Tree in 24 Hours

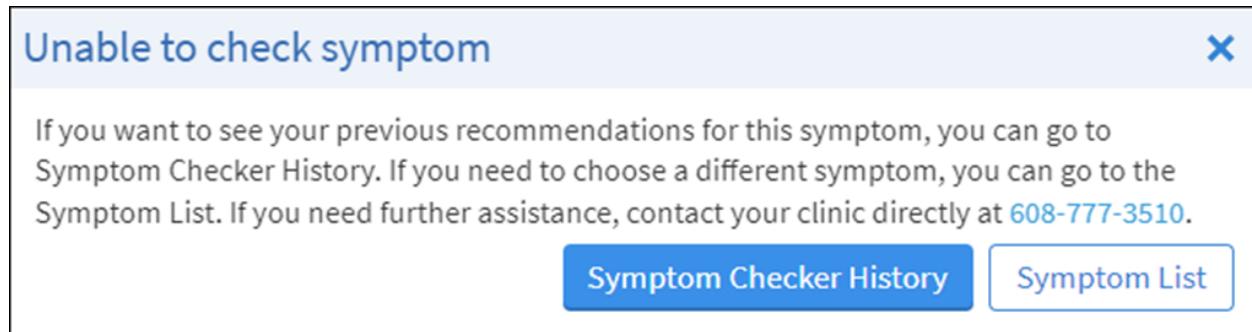
 Starting in May 2024

Self-triage decision trees allow patients to pick recommendations, such as creating pended orders or scheduling a

visit, for themselves after answering questions about their symptoms. You can limit how many times patients can start each decision tree from a specific symptom in a 24-hour period, which is helpful for preventing patients from using self-triage to get inappropriate or duplicate recommendations. When they have reached the daily limit, the patient sees a message that directs them to their Symptom Checker History. We recommend you limit patients to two times in a 24-hour period if you're having issues with patient self-triage decision trees, such as duplicate orders coming from patients in single a day.

This setting applies only when the system can identify the patient before they start the decision tree. For this setting to apply, one of the following must be true:

- The patient has already logged in to MyChart when they start the decision tree.
- You collect full demographics when patients use self-triage, which is the case if the Demographics to Collect at Start of Workflow (I WDF 13625) field is set to either 1-Full-Allow new patients or 2-Full-Don't allow new patients. Refer to the [Let Patients Without a MyChart Account Use Self-Triage](#) topic for more information.



To limit decision tree uses:

1. In MyChart System Definitions, go to the Self-Triage Settings screen.
2. In the Maximum Usage Per 24 Hours (I WDF 13523) field, enter the maximum number of times a patient can access an available decision tree within a 24-hour period. By default, there's no limit.

## Show Risk Score Information in Decision Trees

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 or scheduling 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.

## Show Related Orders and Appointments Requests in Decision Trees

 Starting in May 2024

You can show schedulers a patient's related orders and appointment requests in a decision tree sidebar report so they can refer to them while they schedule from an appointment request without needing to pause the decision tree to hunt down the information.

To add orders and appointment requests to a sidebar report, add a copy of print group 63506-ES Patient Appt Requests Sidebar to a copy of report 62044-ES Book It Linked Records. This print group in this sidebar report appears only when schedulers are scheduling from an appointment request that opens a decision tree.

## Optionally, Adjust the Information that Appears in the Print Group

You can change some of the parameters in the print group to adjust the information schedulers see in their sidebar report. For example, if you need to know whether a patient has been seen for a specific order in the past 90 days, you can alter the start date to T-90 to show that information in the decision tree sidebar. You can also choose to hide completed requests if that information is not necessary for schedulers when completing decision trees.

1. Open the Print Group (LPG) master file in Text and duplicate the print group 63506-ES Patient Appt Requests Sidebar.
2. Open your copy and go to the Parameters screen.
3. To change the start date of the expected date range for appointment requests, change parameter 1, Start Date. The default setting is T-60.
4. To change the end date of the expected date range for appointment requests, change parameter 2, End Date. The default setting is T+60.
5. To hide completed appointment requests, change parameter 9, Hide Completed requests?. By default, this parameter is set to No.
6. Configure other parameters as desired if you think they might find some of the other parameters useful, too.

## Add the Print Group to the Report

1. Access the Report (LRP) master file in Text and duplicate report 62044-ES Book It Linked Records.
2. Open your duplicated report and add print group 63506-ES Patient Appt Requests Sidebar to the Report Definition screen.
3. Access Hyperspace, open HTML Display Configuration Edit, and select 225-Book It Linked Records.
4. Select whether you want to override at the department, location, or system level.
5. Add your custom report to the Report column.

## Use Rules to Evaluate How Many Orders Are Linked to an Appointment

You can use rule property 98269-Linked Order Count in a decision tree to suggest or cause actions on an appointment based on how many orders are linked to it. For example, you can use a rule with this property in a decision tree to extend the appointment's length to accommodate the number of orders linked to that appointment. This can negate the need to maintain additional visit types for the sole purpose of extending appointment lengths depending on how many orders are scheduled for the appointment.

This rule property is available only for Appointment Entry Begin rules, so you can use it with only Appointment Entry and Book Anywhere decision trees.

Before beginning any decision tree build, you should plan how you want your decision tree to work. For the example above, this involves deciding how much additional time an appointment needs for how many orders it has attached. A sample configuration for this build is as follows:

<b>Count of Linked Orders</b>	<b>Time to Add to the Appointment</b>	<b>Rule to Create</b>	<b>Connection to Use</b>
0-3	0 minutes	None	1-Default
4-6	20 minutes	Linked order count > 3, Linked order count < 7	3-Rule
7-9	35 minutes	Linked order count > 6, Linked order count < 10	3-Rule
10+	50 minutes	Linked order count > 9	3-Rule

To configure your system similarly to the example above:

1. Create or edit an Appointment Entry Begin rule and add rule property 98269-Linked Order Count to it. Refer to the [Create or Edit a Rule](#) topic for instructions. Repeat this step for as many different rules as you'll need.
2. Create either an Appointment Entry or a Book Anywhere decision tree. Refer to the [Create a Decision Tree](#) topic for instructions.
3. Create and configure as many Modify Original Visit type nodes as you decided you'd need in your pre-build planning. Refer to the [Modify Original Visit](#) topic for more information about this node type.
4. Add connections between the nodes. The connections should have a type of 3-Rule and use the rules you created in step 1. The connection for the path you didn't create a rule for should have a type of 1-Default.
5. Make your decision tree available in your system.
  - If you made an Appointment Entry decision tree, refer to the [Make an Appointment Entry Decision Tree Available at the Visit Type or Panel Level](#) topic for instructions.
  - If you made a Book Anywhere decision tree, refer to the [Define the Book Anywhere Decision Tree for Your Organization](#) topic for instructions.

## Use the Results of a Nested Decision Tree to Drive Other Actions

Complex decision trees can branch out to child decision trees that you share across multiple parent decision trees. If you don't want the parent tree's logic to end at the child tree and instead you want the child decision tree to be in the "middle" of the parent decision tree's logic, you can set up the child decision tree to save a custom value or calculate a score that is returned to the parent decision to use in the rest of its logic.

- Use custom values when you want to assign a value that doesn't come from a question or rule.
- Use scores when you want to assign a value based on the answer to a question or based on how the system evaluates rules, either from a visit type questionnaire or a rule node.

When you've set up decision trees to save a custom value or calculate a score, and that value or score is meaningful for a scheduler to help them understand why an appointment was scheduled a certain way, you can make it visible to them in scheduling workqueues and reports.

For example, decision tree 1170000013-Headache Scoring is nested in request entry decision tree 1170000003-EHS Neurology Appointment Request in the Foundation System. The child decision tree asks questions about the

severity, frequency, and triggers of a patient's headaches and applies scores based on the responses. If the total score is at least 10, the decision tree results include an Urgent tag that allows the scheduler to schedule into slots with an Urgent block so the patient can be seen sooner. To see how these scheduling trees are set up, log in to the [Foundation Hosted environment](#) as your organization's Cadence analyst (ESADM) and open them in the Request Entry Decision Tree activity (search: Request Entry Decision Tree).

The steps below assume you've already created a decision tree and know how to add nodes and draw connections.

## Define and Use Custom Output Values in Decision Trees

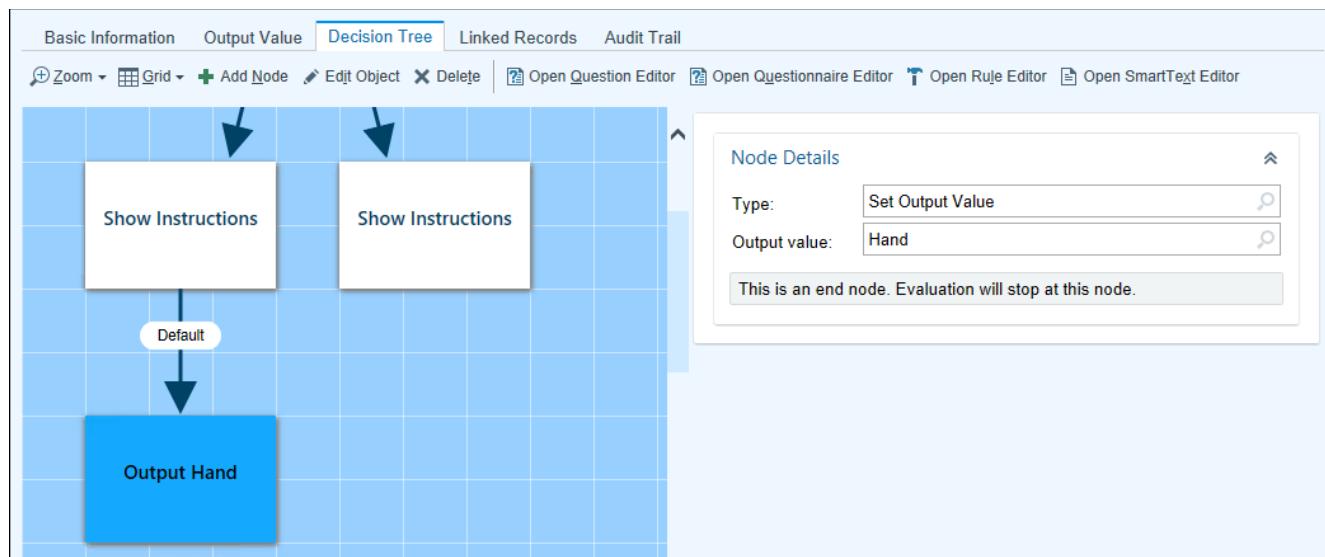
To use custom output values, you need to define those values and set them in the logic of a child decision tree and then set up a parent decision tree to evaluate the output values that are set by the child decision tree.

### Set Up a Child Decision Tree to Output Custom Values

1. In the decision tree editor, select the Output Value tab.
2. Select Custom Value.
3. Add the custom values that the decision tree can output, or copy values from another decision tree.
4. Select a default value to use if a decision tree branch ends without specifying a value.

The screenshot shows the 'Output Value' tab of a decision tree configuration interface. At the top, there are tabs for 'Basic Information', 'Output Value' (which is selected and highlighted in blue), 'Decision Tree', 'Linked Records', and 'Audit Trail'. Below the tabs, under 'Output value type', the 'Custom Value' option is selected. The main area is titled 'Custom Values' and contains three entries: 'Hand', 'Foot or Ankle', and 'Knee'. Each entry has a small 'X' icon to its right. Below this section is another titled 'Default Output' with a placeholder text 'If any decision tree branch ends without explicitly specifying a value, output the value below:' and a 'Select a value' input field.

5. Select the Decision Tree tab.
6. Add Set Output Value nodes as end nodes in the tree logic to set the custom values you created.

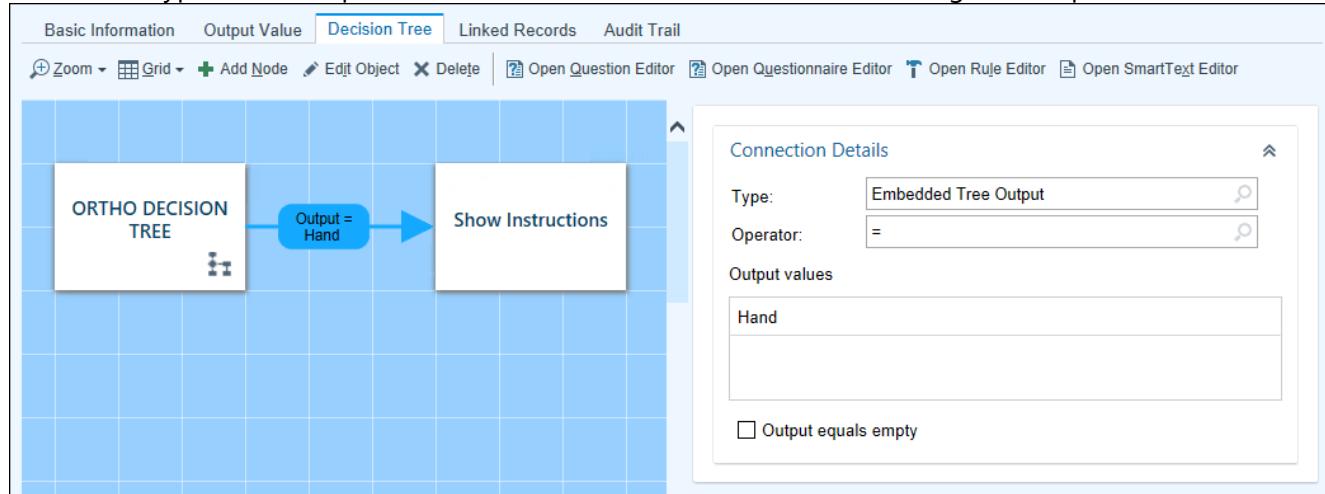


### Set Up a Parent Decision Tree to Use Custom Values Set by a Child Decision Tree

1. Use a Decision Tree node to add a child decision tree. The Node Details show the output type and possible output values.

The screenshot shows the 'Node Details' panel for a 'Decision Tree' node. The 'Type' is set to 'Decision Tree', 'Decision tree' is set to 'ORTHO DECISION TREE', and 'Output type' is set to 'Custom Value'. Below this, under 'Possible output values:', there is a list with three items: 1 Hand, 2 Foot or Ankle, and 3 Knee.

2. When you draw connections from a Decision Tree node to other nodes, select the Embedded Tree Output connection type to use output values from the child decision tree to drive logic in the parent tree.



### Define and Use Scores in Decision Trees

To use scores, you need to set them in the logic of a child decision tree and then set up a parent decision tree to evaluate the scores that are set by the child decision tree. You can also evaluate a score within a child or parent decision tree.

### Set Up a Child Decision Tree to Output Scores

1. In the decision tree editor, select the Output Value tab.
2. Select Score.
3. Select the Decision Tree tab.
4. Select or add a Question, Questionnaire, or Rule node.
5. Use the Scoring section to define scores for each answer for a question, each rule in a questionnaire, or the Appointment Entry Begin rules you specify.

The screenshot shows two stacked sections of a decision tree configuration interface.

**Node Details:**

- Type: Question
- Question mode: User Prompt (selected)
- Question: SEVERITY OF HEADACHES
- Response type: Custom List
- Allow Comments
- Prompt:  
What is the severity of the patient's headaches?

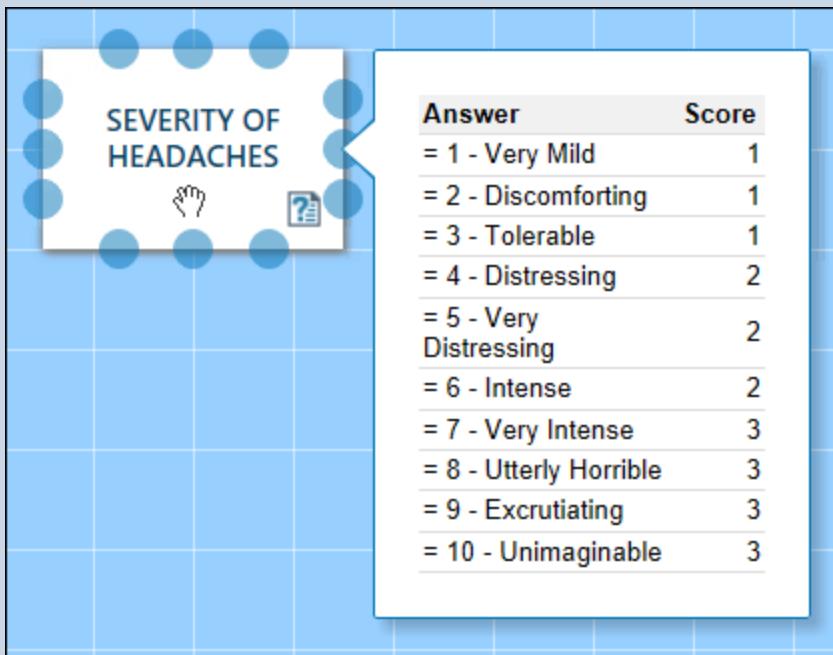
**Scoring:**

Operator	Answer Value	Score
1 =	1 - Very Mild	1
2 =	2 - Discomfort...	1
3 =	3 - Tolerable	1

Default score: [input field with calculator icon]



Hover the mouse pointer over a node to view a tooltip with score details for the node.

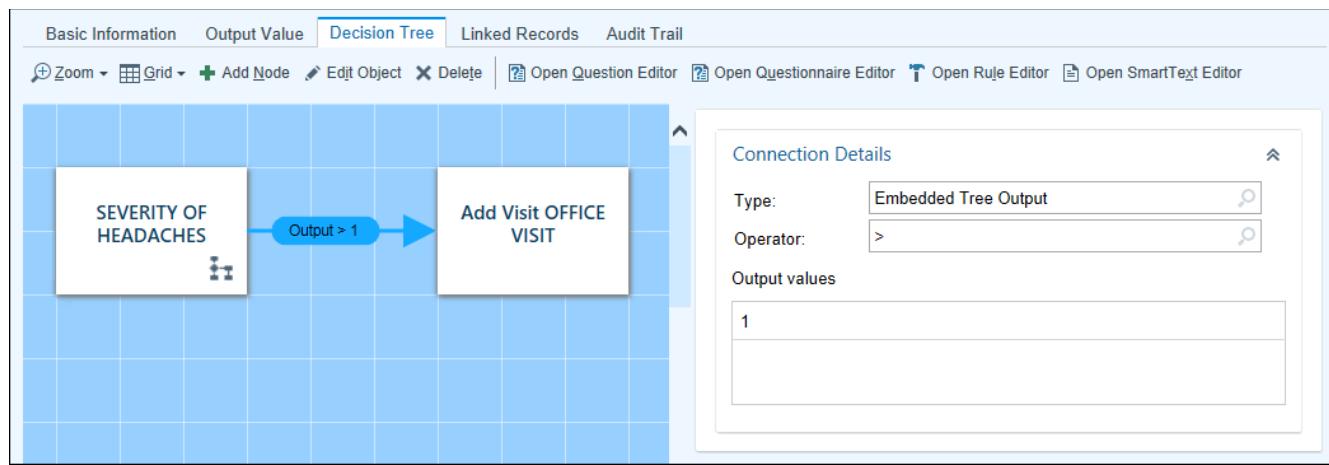


### Set Up a Parent Decision Tree to Use Scores Set by a Child Decision Tree

1. Use a Decision Tree node to add a child decision tree. The Node Details show the output type.

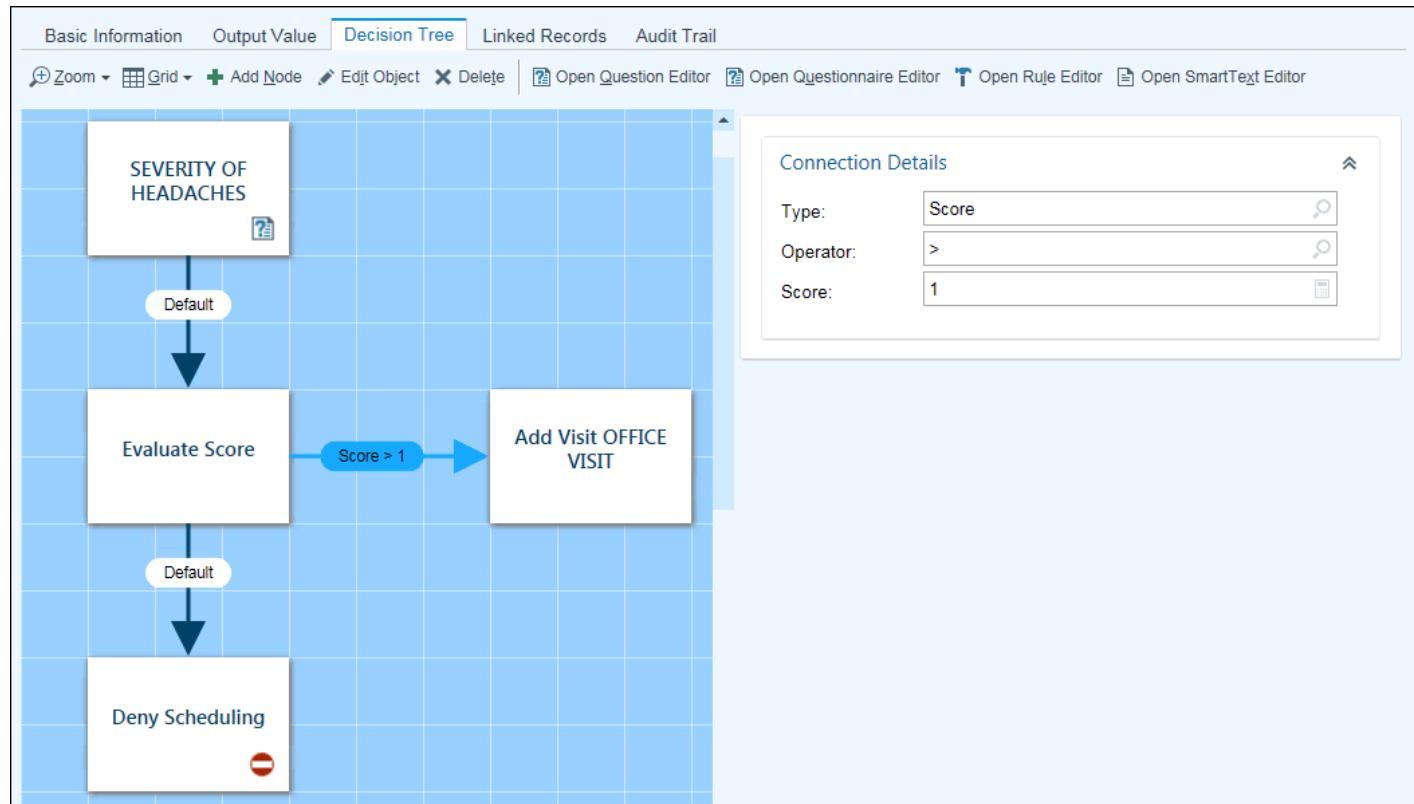
The screenshot shows the "Node Details" dialog box for a "Decision Tree" node. The "Type" field is set to "Decision Tree". The "Decision tree" field contains the name "SEVERITY OF HEADACHES". The "Output type" field is set to "Score". There is also a "Notes" section at the bottom.

2. When you draw connections from a Decision Tree node to other nodes, select the Embedded Tree Output connection type to use scores from the child decision tree to drive logic in the parent tree.



## Evaluate Scores in the Same Tree Where They Are Set

To evaluate a score within a child or parent decision tree, add an Evaluate Score node after the Question, Questionnaire, and Rule nodes that set scores in the tree. In the connections you draw from the Evaluate Score node, select the Score type and enter the score value to evaluate.



## Show Decision Tree Output Values and Scores to Users

If the custom values and scores saved by decision trees are meaningful to users to help them understand why an appointment was scheduled a certain way, you can show them in columns in patient workqueues; schedule orders/appointment request workqueues; Cadence reports, such as Appointment Desk tabs and the Department Appointments report; and appointment-based Reporting Workbench reports.

### Make a Decision Tree's Output Values or Scores Visible to Users

In the decision tree editor, on the Basic Information tab, select the Allow this decision tree's score/output to be shown to end users (I LQF 690) check box.

### Add Decision Tree Output Value and Score Columns to Workqueues

There are two properties you can use as columns in schedule orders/appointment request workqueues and patient workqueues to show users the output value or score from the decision trees that are associated with a request or appointment:

- 98267-Appt Request - Tree Score and Custom Output. Shows the output value or score from the request entry decision trees associated with a request in a schedule orders/appointment request workqueue.
- 98268-Decision Tree Score and Custom Output Value. Shows the output value or score from the appointment entry and request entry decision trees associated with an appointment in a patient workqueue.

As released, these properties show scores and output values from all decision trees that have been applied to a request or appointment along with the decision tree names. You can customize copies of these properties to show scores and output values from specific decision trees and also hide the decision tree names.

1. In Hyperspace, open the Property Editor and select the appropriate context for the property you want to customize:
  - For property 98267, select the Appointment Request or Order context.
  - For property 98268, select the Patient context.
2. Expand the advanced search options and search for the property you want to copy by record ID.
3. Select the property and click Copy. Starting in May 2024, the General, Lookup, and Restrictions tabs have been converted into sections.
4. Go to the Lookup tab/section for your copied property and customize the parameters as needed:
  - Decision Tree IDs. Enter the ID numbers of the decision trees you want to show scores and output values for. As released, this parameter is blank, and scores and output values appear for all decision trees that have been applied to the appointment.
  - Hide Decision Tree Name? Enter Yes to hide the names of decision trees in the column. As released, this parameter is blank, and decision tree names appear in the column.

Refer to the [Define Workqueue Columns and Sort Order](#) topic for information about adding columns to workqueues.

### Add Decision Tree Output Value and Score Columns to Reports

There are two columns that you can add to Cadence and Reporting Workbench reports to show users the output value or score from the decision trees that are associated with an appointment:

- 1949-Decision Tree Score and Custom Value Output. Shows the output value or score from the appointment entry and request entry decision trees associated with an appointment.
- 1967-Appt Request Score and Custom Value Output. Shows the output value or score from the request entry decision tree associated with an appointment.

As released, these columns show scores and output values from all decision trees that have been applied to an appointment along with the decision tree names. You can customize copies of these columns to show scores and output values from specific decision trees and also hide the decision tree names.

1. In Chronicles, access the Extension (LPP) master file.

2. Duplicate one of the following extensions, depending on which column you're customizing:
  - For column 1949, duplicate extension 42416-ES PAF Decision Tree Scores and Custom Value Outputs.
  - For column 1967, duplicate extension 42418-ES PAF Request Tree Scores and Custom Value Outputs.
3. Customize the parameters as needed:
  - Decision Tree IDs. Enter the ID numbers of the decision trees you want to show scores and output values for. As released, this parameter is set to null (""), and scores and output values appear for all decision trees that have been applied to the appointment.
  - Hide Decision Tree Name? Enter Yes to hide the names of decision trees in the column. As released, this parameter is set to null (""), and decision tree names appear in the column.
4. In Hyperspace, open the Column Editor (search: Column Editor).
5. Select the Create New Column tab and duplicate column 1949 or 1967.
6. In your copied record, replace the standard extension with your copy in the Text Ext (I PAF 60) field.

## Use Nested Decision Trees to Give Patients Options in Self-Triage

 Starting in May 2024

By default, patients are required to complete all options presented to them at the end of a Self-Triage workflow for that decision tree to be marked as complete. The Patient Self-Triage Decision Tree editor allows you to use "and" logic (the default behavior) or "or" logic to give patients options to choose from. You can use a combination of "and" and "or" trees to create groups of options. Patients can pick between option groups but are required to complete all recommendations within the group they select. The patient continues to have both options until they commit to completing one.

For example, if you were building out a decision tree for patients who are seeking care for their high blood pressure, you might want to give them options depending on whether they prefer in person or virtual care.

Morgan  
Switch ▾

## Symptom Checker



Here's what we recommend for you



### Instructions

We recommend that you talk to a provider, request labs, and complete self-care instructions at home for your symptoms. You may choose to talk to a provider by completing an E-Visit or scheduling an in-person visit.

### Choose 1 of 2 recommendation options

These recommendations will be available to accept until 03/29/2024 at 8:39 PM.

#### Option 1



Schedule Office Visit



Labs: Lipid Panel



Complete Self-Care Instructions

[View](#)

#### Option 2



Tell a provider about your symptoms



Labs: Lipid Panel



Complete Self-Care Instructions

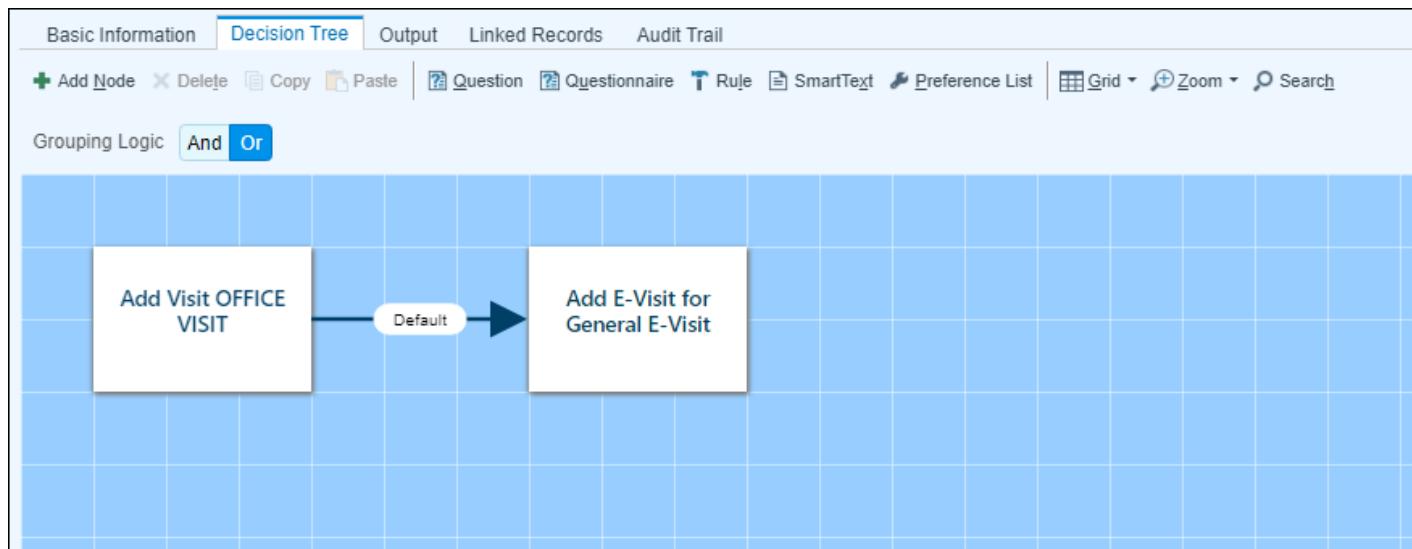
[View](#)

You can update existing decision trees or create child decision trees to show patients option groups:

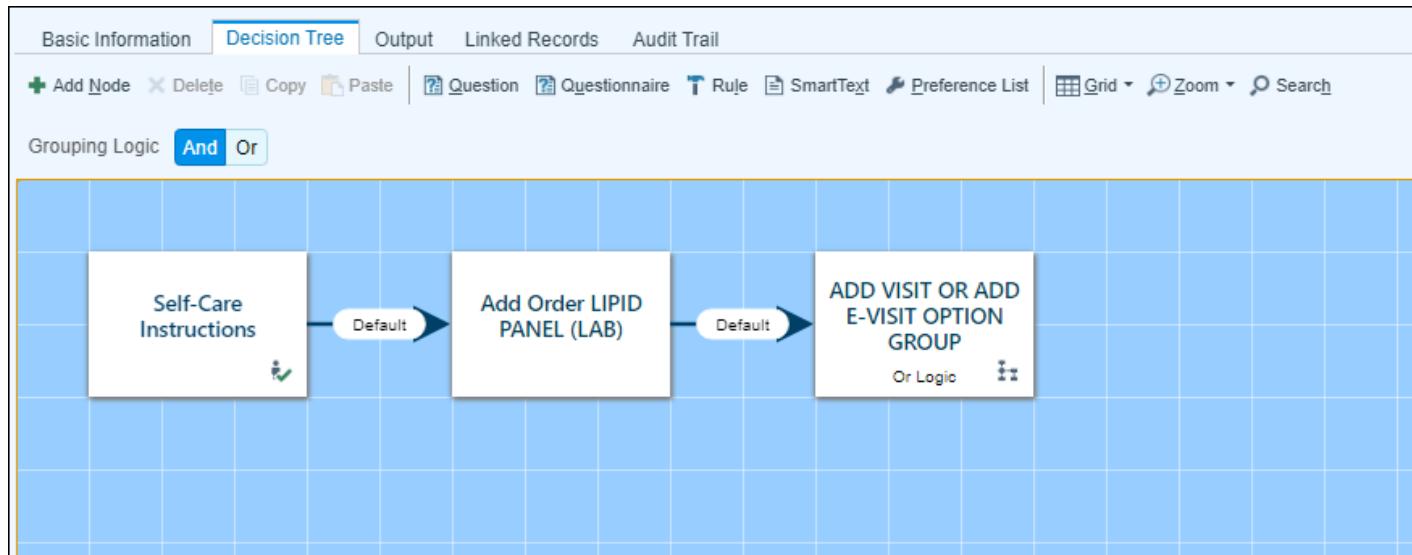
1. In Hyperspace, open the Patient Self-Triage Decision Tree Editor (search: Self-Triage), and create a decision

tree for the options that the patient can choose between. In the example above, the patient can pick between an E-Visit, and an office visit. This tree should only contain an Add E-Visit node and an Add Visit node.

- a. Creating child decision trees with the recommendation options as the only nodes in that tree allow for easier maintenance going forward; however, it is also an option to use "Or" logic in a parent decision tree.
2. At the top of the decision tree editor, select the "Or" button to use "Or" grouping logic.
3. Create another new decision tree to contain all the options that should be shared and required across all options. This tree uses "And" grouping logic. For example, both options shown to the patient should include a lipid panel and self-care instructions. This tree should contain the Add Order and the Show Instruction nodes.
4. Add a new Decision Tree node that contains the decision tree from Step 1.



An example of a decision tree using "Or" grouping logic.



An example of a parent decision tree using "And" grouping logic with a child decision tree using "Or" grouping logic.

## Associate Self-Triage Decision Tree Orders With a

# Department

You can associate a department with a specific self-triage decision tree, rather than associating every self-triage decision tree with a default department, so that orders placed for the self-triage encounter reflect a more specific department. You might do this to ensure that billing and reporting reflect the department where orders for a self-triage encounter took place.

1. In Chronicles, go to the Extensions (LPP) master file and create a copy of extension 32362-MyChart Self-Triage Add Order Node Department.
2. Open your copy of the extension and go to the Parameters screen.
3. In the Tree & Department parameter, press F6 to edit the parameter. In the List section, press Tab to edit a row. In the Value column, enter a self-triage decision tree and its associated department record ID.
4. From the MyChart System Manager Menu, select Care Companion & Pat-Entered Data (named Patient Entered Data in November 2024 and earlier versions) and go to the Self-Triage Settings screen.
5. In the Order node department extension (I WDF 13550) field, enter your copy of extension 32362.

## Let Patients Request an Appointment from Self-Triage

### Version Considerations

Starting in February 2023, May 2022 with special update E10222525, and November 2022 with special update E10304458, you must do some setup for pending appointment requests created through self-triage to appear on the Appointments and Visits page. For more information, refer to the [Customize Pending Appointment Requests on the Appointments and Visits Page](#) topic.

In February 2022 and without the special updates in May 2022 and November 2022 above, appointment requests created through self-triage automatically appear on the Appointments and Visits page.

When a patient wants to make an appointment in MyChart, they have two options: direct scheduling and ticket scheduling. Direct scheduling allows the patient to choose the appointment provider and time, without interacting with schedulers. With ticket scheduling, the patient can request an appointment, which a scheduler can approve and then send the patient available providers and times to choose from. Scheduling tickets can also be sent to the patient automatically if the patient and appointment meet certain criteria.

If a patient isn't sure whether they need to make an appointment, they can use self-triage to figure out the best course of action, whether it's scheduling an appointment or sending an E-Visit message. If you have direct scheduling enabled in MyChart, you can add it as the outcome of a self-triage decision tree so patients can schedule their appointment after they complete self-triage. If you have appointment request-based ticket scheduling enabled, as described in the [Appointment Request Scheduling Setup and Support Guide](#), you can also complete decision tree build to allow the patient to use ticket scheduling after they complete self-triage.

Before you start your build, you should map out your planned decision tree content and outcomes. Refer to the [Designing Decision Trees](#) topic for recommendations.

The new Add Appointment Request node is designed to work with existing request entry decision trees. When you use the Add Appointment Request node, you specify a request entry decision tree to determine whether the patient can request an appointment. When you specify a request entry decision tree, all nodes from the [Learn About the Types of Decision Tree Nodes](#) topic can be pulled in, with the exception of Conference Call nodes. If you don't yet have request entry decision trees, you must first create them. Refer to the [Create a Decision Tree](#) topic to do so.

Then, create a new self-triage decision tree with the new nodes:

1. In Hyperspace, open the Patient Self-Triage Decision Tree Editor and create a new decision tree. Refer to the [Create a Decision Tree Record](#) topic for general instructions.
2. On the Decision Tree tab, click Add Node and add the new Add Appointment Request or Schedule Appointment Request node to your decision tree.
  - In the Add Appointment Request node, specify the request entry that determines whether the patient can request the appointment.
  - If you want the patient to be able to schedule a visit if it meets certain criteria, add the Add Appointment Request node followed by the Schedule Appointment Request node.
    - The request can only have one visit type to be scheduled. If the request has more than one visit type, the patient can request the appointment but cannot schedule the appointment.
3. Refer to the [Add Connections Between Nodes](#) topic to connect the nodes.
  - If you added the Add Appointment Request node followed by the Schedule Appointment Request node, create rules in the context 5008-Appointment Request to connect the nodes. For example, you might create a rule that checks the status of the appointment request after it's been created. If the appointment request is at a status where it's ready to be scheduled, you might link it to a Schedule Appointment Request node.
4. Complete the steps in the [Define the Patient Self-Triage Decision Trees for Your Organization](#) topic to define the new decision tree as your self-triage decision tree. If the Store partially completed decision trees for (I WDF 13520) field is not set, incomplete decision trees are stored for 48 hours. If you don't specify a value in this field, the patient can't click Finish Later while completing the decision tree.

Starting in February 2023, there is an additional setting called Automatically accept appointment requests (I WDF 13570), which can be found in the Self-Triage Settings page in Patient Access System Definitions. It allows you to bypass an appointment request order's Draft status by automatically accepting appointment requests coming from the self-triage workflow. However, we do not recommend setting this option because the Draft status prevents these orders sending triage-related In Basket messages, creating referrals prematurely, and appearing in any appointment request workqueues before the patient has decided to follow through with the recommendation and be seen at your organization. Contact your Epic representative if you are considering enabling this new item.

## Bundle Orders with Appointments That Patients Can Schedule Together

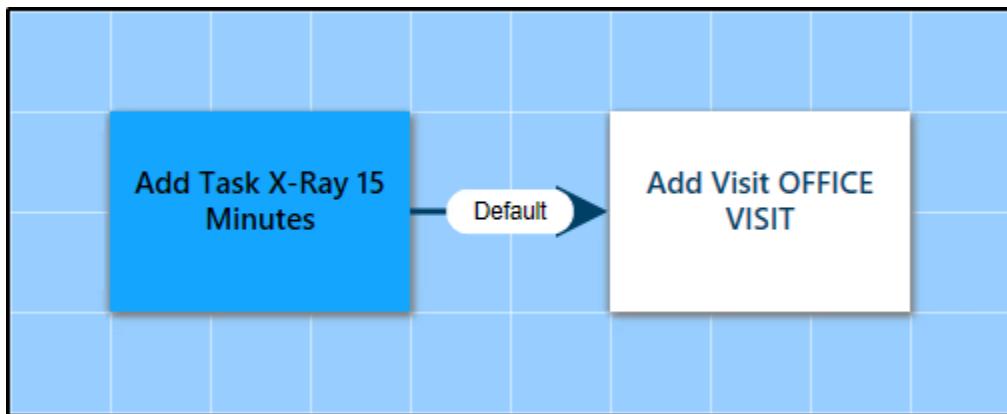
In request entry workflows for both MyChart's Symptom Checker and Cadence, you can bundle order tasks generated by Add Task nodes in request entry decision trees with an appointment generated by an Add Visit node. Doing so lets patients schedule an order and appointment, such as an x-ray and a follow-up orthopedics visit, in the same workflow.

If your organization is interested in using and sending bundles to patients outside of the Symptom Checker, refer to the [Allow Schedulers to Create Request Bundles for Patients to Schedule Multiple Appointment Requests](#) topic for information about how to directly send bundles to patients for scheduling.

Request entry trees are accessible to patients in MyChart only through self-triage decision trees. After building the request entry tree containing the order bundle, if you want to make it available to patients in MyChart, you must link it through an Add Appointment Request node within a self-triage decision tree. Otherwise, it will be available only in Cadence request entry tree workflows.

To set up order bundling in a request entry tree:

1. In Hyperspace, open the Request Entry Decision Tree Editor (search: Request Entry Decision Tree Editor) and create a new decision tree. Refer to the [Create a Decision Tree Record](#) topic for general instructions.
2. On the Decision Tree form, click Add Node and add an Add Task node configured with the prerequisite order you want to bundle.
3. In the Add Task node, select the Allow bundling with other visits checkbox. From here, you can specify the minimum and maximum time between the order and appointment. Note that the checkbox is not enabled for Panel visits and Procedures with multiple visit types.
4. Add an Add Visit node configured with the appointment you want bundled with the prerequisite order.
5. Release your decision tree.



To link your request entry tree to a self-triage decision tree:

1. In Hyperspace, open the Self-Triage Decision Tree Editor (search: Self-Triage Decision Tree Editor) and create a new decision tree.
2. Add an Add Appointment Request node with your request entry tree selected.
3. Add a Schedule Appointment Request node after the Add Appointment Request node.
4. Complete the steps in the [Define the Patient Self-Triage Decision Trees for Your Organization](#) topic to make the decision tree available for your patients.

## Send Self-Triage Decision Trees from Appointment Desk

 Starting in November 2024

Staff can send patients symptom-appropriate self-triage decision trees from the Send Self-Triage Tree activity in the Patient Options menu on the Appointment Desk so that patients can get care sooner. Patients with and without MyChart and their proxies can receive links to self-triage decision trees. This feature uses Secure Link Authentication. See the [MyChart Patient Access Setup: Customize Secure Link Authentication](#) topic for more information.

Follow these steps to make the activity available in the Patient Options menu:

1. Set up email and text message ticklers for self-triage, if you don't use them already, as described in the [MyChart Ticklers and Alerts Setup and Support Guide](#). The Epic-released tickler concept (HST) records related to self-triage decision tree links are Self-Triage Direct Link and Questionnaire Available.

2. To find the IDs of these SmartTexts, go to the Tickler Concepts (I WDF 573) field in Patient Access System Definitions and check the Body (I WDF 99576 and I WDF 99577) and Proxy Body (I WDF 99579 and I WDF 99579) fields.
3. In Hyperspace, open the SmartText Editor (search: SmartTextEditor) and open the SmartTexts you use for the Self-Triage Direct Link ticklers.
4. Add SmartLink 32054 to each SmartText to generate a link to the decision tree. SmartLink 32054 is included in Epic-released base communication template 32140-Self-Triage Secure Link.

To make self-triage decision trees available in the Send Self-Triage Tree activity, follow the steps in the [Define the Patient Self-Triage Decision Trees for Your Organization](#) topic to configure the Self-Triage Secure Link - Allowed Tree (I WDF 13490 or I EAF 32790) item. Which decision trees are available in the activity is determined by the department that staff log into when logging into Hyperspace. If that department maps to a location, service area, or facility (EAF) record that is configured for self-triage, the decision trees in I EAF 32790 are available. If the mapped location, service area, or facility (EAF) record is not configured for self-triage, the decision trees in I WDF 13490 are available.

## Define an Expected Path Through Appointment Entry Decision Trees



You can configure decision trees to preemptively traverse a certain path to find expected scheduling availability in some patient workflows. For example, in workflows such as capacity ticket notifications as seen the [Notify Patients Based on Capacity](#) topic, the system can't calculate the result of a node that requires user input, such as a patient-answered Questionnaire or an Order Question. Therefore, you can specify which answer the system should expect in the Appointment Entry Decision Tree editor.

- Note that configuring an expected path through a decision tree doesn't affect which questions a patient sees while scheduling. The system still guides patients through the tree according to their answers.
- Starting in February 2025, patients see the next available appointment in Symptom Checker with their recommendation options if you have defined an expected path through appointment entry decision trees attached to those appointment options.

To specify the connections that automated workflows should use:

1. In Hyperspace, open your decision tree in the Appointment Entry Decision Tree activity (search: Appointment Entry Decision Tree).
2. Double click on the connection for the answer that you want to specify.
3. In the Connection Details pane, click the "Use this connection for automated workflows" box.

### Connection Details

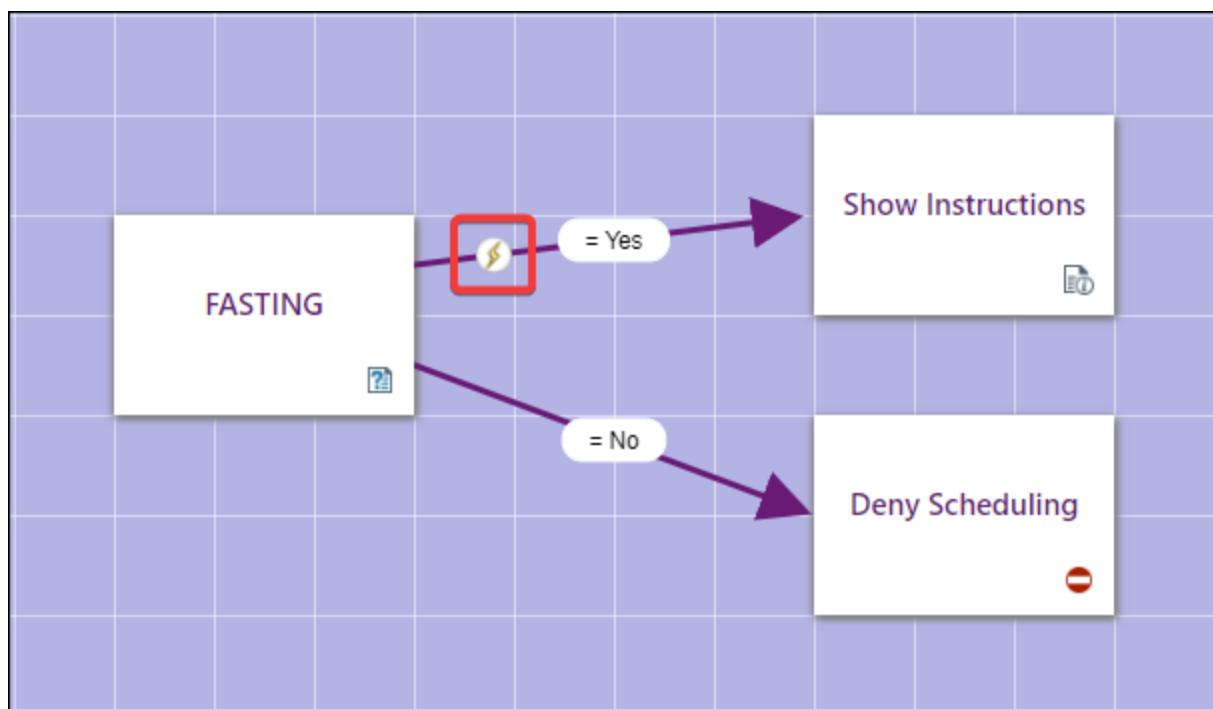
Type  
Default

Use this connection for automated workflows  
The source node can only have one connection for automated workflows.



- For each Question and Questionnaire node, there can be only one connection set for the automated workflow. Each subsequent Question and Questionnaire node must also have a connection set.
- Each Question and Questionnaire node in your automated workflow path must have a connection to another node specified as the automated workflow connection. In the event that your decision tree ends in a Question or Questionnaire node, or you have a Question or Questionnaire node where none of the current connections make sense as the automated workflow connection, we recommend connecting to an empty Show Instructions node.

Icons in the decision tree view help you identify at a glance which connections are used by automated workflow.



# Decision Trees Support: Ongoing Tasks

In this section, we'll cover the tasks that you might need to perform on a regular basis.

## View a Decision Tree

When you want to just view a decision tree and not make any changes to it, you can open a view only activity. This prevents you from locking the decision tree in case someone wants to edit it.

Search:

- Appointment Entry Decision Tree Editor View Only
- Request Entry Decision Tree Editor View Only
- Financial Decision Tree Editor View Only
- Patient Self-Triage Decision Tree View Only

## Edit a Released Decision Tree

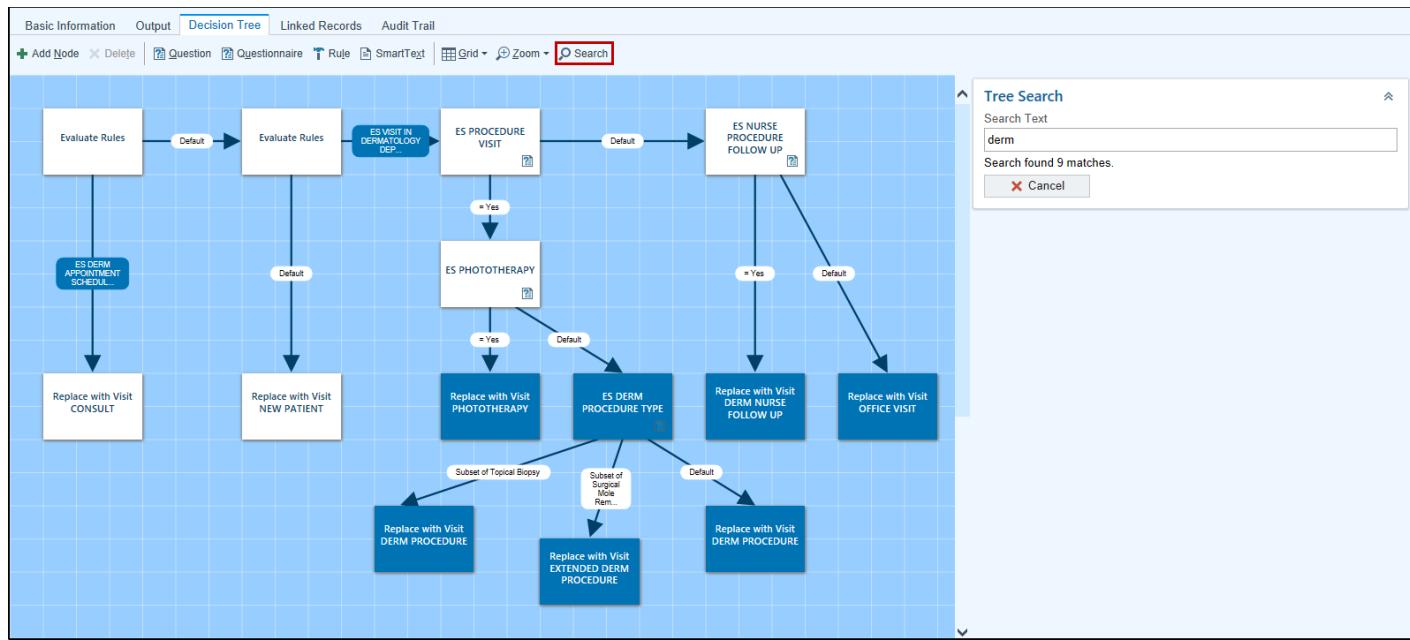
After your decision trees are live in your production system, editing the released contact of a decision tree that has been used to schedule appointments can cause data corruption. We recommend creating a new contact for the decision tree and making your edits on that contact. We recommend creating a new contact for the decision tree in your build environment, making your edits on that contact, testing the contact, and then releasing it and moving it to production.

To do this, click New when you open the decision tree for editing. If you're already in the decision tree editor, select the Basic Information tab, click Switch Contact, and then click New. Click Test Release to allow the contact to be used for testing in your build environment. Then click Release Contact when you're ready to move the contact to production.

## Search Within a Decision Tree

 Starting in May 2023

Maintaining decision trees can be a complex task, especially when the decision tree is large and you need to find every place where a certain provider, visit type, or rule is used to make updates. To find what you need to update quickly, click Search in the toolbar, type in your search text, and have the decision tree find and highlight every node and connection where that text appears. The system even searches within the node or connection to find things like a provider entered in the provider modification table of an Add Visit node.



## Copy and Paste Nodes and Connections

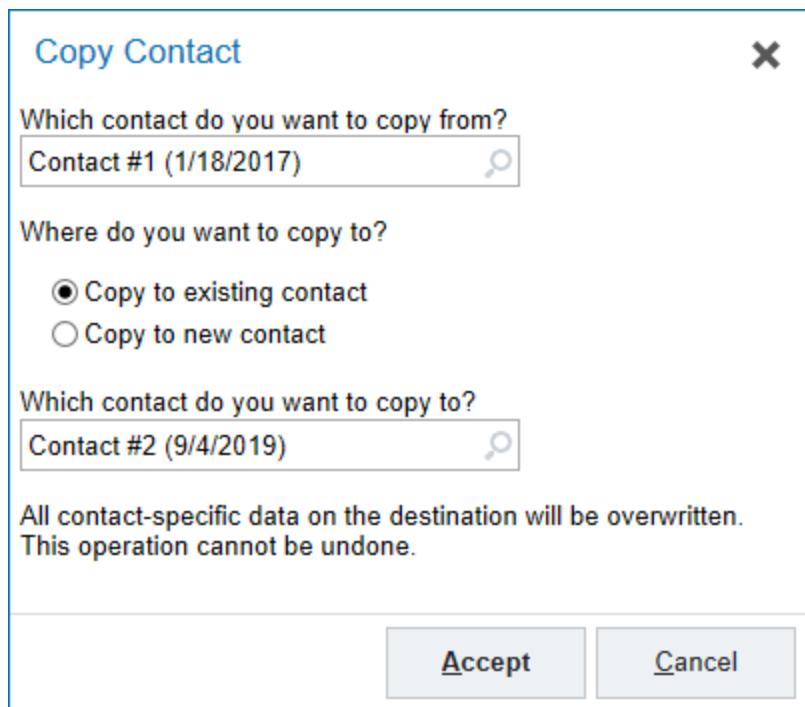
🕒 Starting in November 2023

When you need to create multiple nodes or sections that are the same or similar, use the copy and paste functionality to copy elements of one decision tree either elsewhere within the same tree, or into a different tree of the same type. You can do so using the toolbar buttons, the right-click options, or **Ctrl+C** and **Ctrl+V**.

## Copy a Decision Tree Contact to a New or Existing Contact

When you're working in the decision tree editor, you can choose to create a new contact. Click **Copy Contact** and choose one of the following options:

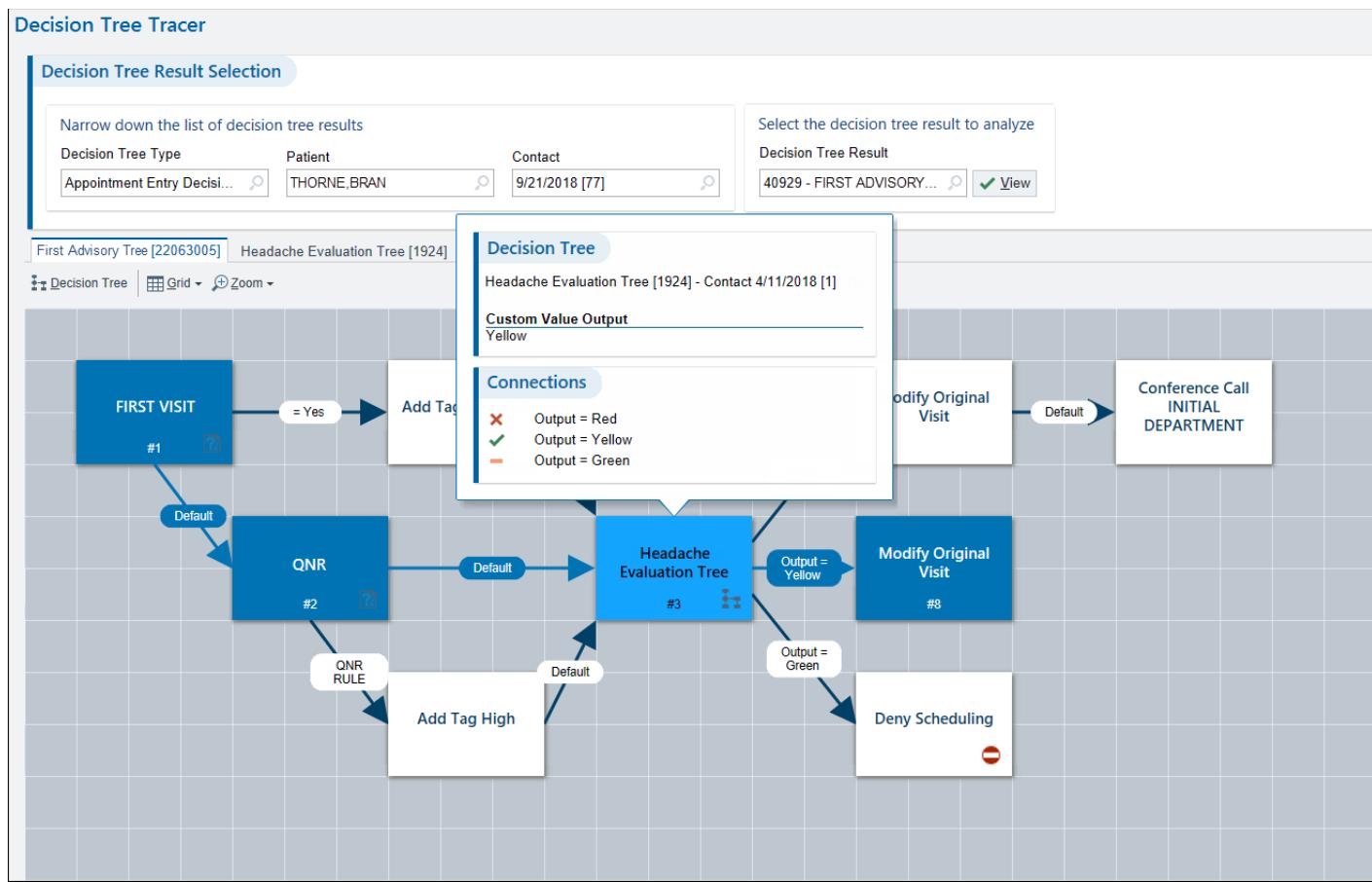
- Copy to existing contact. Allows you to overwrite an existing contact with the contents of another contact. This can be helpful when you're working on updating a decision tree but things get messy and you want to start over with a fresh copy of an existing contact.
- Copy to new contact. Allows you to copy the contents of an existing contact to a new contact.



## View the Decision Making Path for a Decision Tree

If you want to see how a decision tree evaluated a particular contact to reach its result, you can open the result in the Decision Tree Tracer (search: Decision Tree Tracer). Here, the decision making path for that result is highlighted and numbered, and clicking any node or connection in that path provides additional details about how connections were evaluated based on data from the contact. Note that decision trees of type 45-Book Anywhere Decision Tree aren't available in this feature.

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## Test Drive a Decision Tree

➡️ Starting in May 2025

If you need to test your Appointment Entry or Request Entry decision trees to validate that changes or build are behaving as expected, you can do so directly in the decision tree editor on the Test Drive tab.

For Appointment Entry trees, you'll need to enter a patient and visit type for the tree to use. Then you can decide whether to start the tree from visit type entry, from a request, in which case you need to enter an order record, or from a referral, in which case you need to enter a referral record. Simply click Start Test and the decision tree runs just like it would during actual scheduling, allowing you to quickly validate if the path and outcomes you expect to occur do actually occur. For silent trees, after you click the Start Test button, the Results section appears immediately since there are no questions to answer.

## Appointment Entry Decision Tree Editor - ES INFUSION TREATMENT VISIT [1170000015]

Basic Information Output Decision Tree **Test Drive** Linked Records Audit Trail

### Context

Patient

Cadence, Alex

Original Visit Type

ONCOLOGY TX - TREATMENT PLAN

Scheduling Source

App Mode

Visit Type Entry Request Scheduling Referral Scheduling

▶ Start Test ■ Stop Test ↺ Restart Test

### Test Run

Will the patient have an active port at the time of this appointment?

Yes **No**

No 

Will the patient have labs drawn as part of this visit?

Yes **No**

Yes 

### Results - Continue Scheduling

Modify Visit: ONCOLOGY TX - TREATMENT PLAN

Change Length

Add 15 minutes.

Add 15 minutes.

Show Path

Stop Test

A completed test drive of an Appointment Entry decision tree

For request entry trees, the only required information needed to run a test is a request (ORD) record. You can optionally enter a patient if you want to filter the options in the request field.

## Request Entry Decision Tree Editor - HEADACHE SCORING [1170000013]

Basic Information Indications Output Decision Tree **Test Drive** Linked Records Audit Trail

### Context

Patient

CADENCE,ALEX

Request

Ambulatory referral to Neurology

▶ Start Test

■ Stop Test

◀ Restart Test

### Test Run

On a scale of 1 to 10 (10 being the most severe), how would you rate your headaches on average?

10



How frequently do you experience headaches?

Daily

Monthly

Weekly

Yearly

What triggers cause or worsen your headaches?

✓ Light

✓ Noise

Smells

Other

Light



Noise



### Results

No results to apply.

>Show Path

■ Stop Test

A completed test drive of a Request Entry decision tree

## Mark a Decision Tree As Reviewed

If your organization has a process for regularly reviewing the content of your decision trees to make sure it is current, you can keep track of when the decision tree was last reviewed in Hyperspace. After a user has reviewed the decision tree, they click the Mark as Reviewed button on the Basic Information tab of the decision tree editor. This information is stored in the following items:

- Decision Tree - Last Reviewed - User (I LQF 605)
- Decision Tree - Last Reviewed - Date (I LQF 606)

Appointment Entry Decision Tree Editor - ES DERM VISIT TYPE SELECTION [1170000001] ? X

- [Basic Information](#)
- [Output Value](#)
- [Decision Tree](#)
- [Linked Records](#)
- [Audit Trail](#)

**Record Information**

Contact #1: 11/21/2016 - Released

Name:  
ES DERM VISIT TYPE SELECTION

Synonyms:  
Dermatology

**Review Information**

Owners:  
CADENCE, ADMINISTRATOR [ESADM]

Last reviewed by CADENCE, ADMINISTRATOR [ESADM] on  
11/28/2016

## View the Records That Are Linked to a Decision Tree

Select the Linked Records tab in the decision tree editor to view a list of records that reference the decision tree. Click a link to edit the record.

Appointment Entry Decision Tree Editor - ES DERM VISIT TYPE SELECTION [1170000001]

- [Basic Information](#)
- [Output](#)
- [Decision Tree](#)
- [Linked Records](#)
- [Audit Trail](#)

**Visit Types**

Schedulers will see this decision tree when scheduling the following visit types:

[DERM DECISION SUPPORT \[1041\]](#)

Use the Rule Usage report (search: Rule Usage) to see when a rule is being used in a node or connection in a decision tree.

Rule Usage ? X

**Rule Usage for ES DERM APPOINTMENT SCHEDULED ORDER OR REFERRAL [691081]** Number of uses found: 1

**Forms [LQF]**

Record Name	Base ID	Record ID	Item [Item Number]	Contact Date [DAT]	Record Status
ES DERM VISIT TYPE SELECTION		1170000001	DECISION TREE - CONNECTION RULE [1525]	11/22/2016 [57287]	Active

[Search details \(click to view\)](#) ▼

## View the Audit Trail for Changes Made to a Decision Tree

Select the Audit Trail tab in the decision tree editor to view a list of all the changes made to the decision tree. The system records the following changes:

- New Contact. The user created a new contact for the decision tree.
- Tree Structure. The user made changes to the nodes or connections in the decision tree.

- Released. The user released the contact they were editing.

Appointment Entry Decision Tree Editor - ORTHO DECISION TREE [5671001]				
User	Contact	Date and Time	Change Summary	Comment
CADENCE...	1 - 10/4/2016	10/4/2016 2:46 PM	Tree Structure	
CADENCE...	1 - 10/4/2016	10/4/2016 2:45 PM	Tree Structure	
CADENCE...	1 - 10/4/2016	10/4/2016 2:37 PM	Released	
CADENCE...	1 - 10/4/2016	10/4/2016 2:36 PM	Tree Structure	
CADENCE...	1 - 10/4/2016	10/4/2016 2:30 PM	New Contact	

## Find Decision Tree Rules and Questionnaires That Contain Certain Question Records

If you modify order-specific question (LQL) records, like those described in the [Use Certain Conditions to Determine How a Question Appears](#) topic, and those questions are used to drive decision tree-based scheduling, you can use the Question Usage in Rules utility to quickly find all decision tree rules and questionnaires that use the question record. With this information, you can update the rules and questionnaires as necessary to reflect the changes to the order-specific questions, ensuring that your schedulers continue to receive the appropriate scheduling suggestions.

You can access the utility by going to Cadence Text > Utility Menu > Question Usage in Rules. You can specify one or multiple question records in the utility. The utility returns the rule records that contain the question record, and whether the rule is used in a questionnaire (LQF) record. Note that if the rule has a context of Questionnaire, it isn't included in the utility's results because those types of rules aren't used in decision trees.

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