Provider Schedules 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.

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Provider Schedules Setup and Support Guide

Schedules provide the backbone for the appointments schedulers and front desk staff make in Epic. By creating schedules for your providers and resources, you help:

- Providers manage their work life.
- Schedulers make appointments for patients.
- Manage the flow of patients at your organization.

This guide discusses how you can build schedules for your providers and resources, options for designating time for specific purposes (such as a specific visit type), and ways to follow up on your build to assess its success.

When building schedules in Epic, you use several building blocks to make flexible schedules for your providers and resources while making sure they're still easy to maintain.

- Provider and resource (SER) records. Before you can create schedules, you need records in the system to represent the schedulable providers and resources your organization works with. You might need records not only for providers, but for rooms and equipment, for example. Each provider or resource record you create needs at least one associated department for scheduling.
- Patterns. To help you maintain your schedules for groups of providers that share common routines (for example, working Monday through Friday from 8A.M. to 4P.M. with a one hour lunch break), you can use patterns to create models of days and weeks to apply to schedules. These model schedules help automatically regenerate the actual schedules assigned to providers before they run out.
- Templates. In Epic, a template represents the blank schedule of a provider or resource. You can choose to design templates individually or create them from patterns.
- Template defaults, release date, and offset. Before schedulers can make appointments for the providers and resources you've built schedules for, you must set some basic information about how the schedule behaves. For example, you specify how far into the future schedulers can make appointments and how long the typical appointment slot is, among other things.
- Blocks. Oftentimes, departments have set ways of organizing the types of appointments they schedule. For example, a department might reserve several hours in the morning to dedicate to new patient appointments. With blocks, you can reserve time in your schedules for particular appointment types or recurring unavailable time.

For more information about preparing your system for making appointments in Cadence, refer to the following resources:

- Appointment Scheduling Setup and Support Guide
- Provider/Resource (SER) Master File Setup and Support Guide
- Resource Administration and Scheduling Setup and Support Guide
- Visit Types Setup and Support Guide

Across your organization

Cadence uses schedules heavily to allow front desk staff to make appointments for providers and resources. For that reason, many of the settings and features related to building schedules appear in Cadence and the Cadence project team owns the build.

However, OpTime also uses templates to create schedules. When creating schedules for surgeons or other surgical clinicians, work with your OpTime project team.

In the Foundation System

The majority of the provider schedule features discussed in this guide (such as templates, patterns, and blocks) are fully configured in the Foundation System and used by Foundation System providers and resources. Go to the Foundation Hosted environment to see the different schedules Foundation System providers use.

Provider Schedules Strategy

This section provides baseline knowledge and implementation recommendations about building templates for your organization's providers and resources.

Gather Information About Existing Schedules

Use the Specialty Analysis Workbook to gather scheduling information that you'll use later when building the specialty's provider schedules. Each workbook contains questions to help you gather details about your department, such as its providers, visit types, and general scheduling workflows. Fill out one workbook for each specialty that you'll later build provider templates for.

Before you can build provider templates, you need to get an idea of what the providers at your organization actually need out of their schedules. Hold interviews with your organization's department managers as early as possible. Template build affects provider happiness, revenue volume, and patient satisfaction, so be thorough.

Some crucial information to gather for each provider includes:

- Does the provider practice in more than one department?
- Which visit types does the provider use?
- For how long is each visit type scheduled?
- Which visits, if any, must happen on a certain day or at a certain time?
- Which visits, if any, should see the patient within a few days of scheduling the appointment?
- Which visits, if any, currently have a longer lead time than desired?

Discuss Build Strategy with Other Application Teams

Coordinate your template build with the OpTime, Radiant, and Cupid application teams, if you are installing those applications along with Cadence.

Choose Your Scheduling Strategy

Most organizations require a balance between open access scheduling for provider schedules and guardrails, such as blocks with linked visit types, built in to support business requirements.

Open access scheduling means that any visit type can be scheduled at any time. You can configure limits and rules to control how many visit types are seen within a specific time period. Fully open access scheduling can work well in small practices with uneven demand. However, it's hard to manage three or more limiting resources.

This recommended scheduling model requires a balance between reserving time for particular patients and keeping the schedule open enough to satisfy demand and maximize utilization.

A number of tools and functions in Cadence can help you build your templates in accordance with your scheduling model, and meet the needs of your providers and your business:

- Visit types. Visit types represent a category of patient care requests, and their durations drive schedule utilization. Visit type durations should be set as consistent multiples. For example, if the shortest available visit type in a department is 15 minutes long, any other visit type should be 15, 30 or 45 minutes in length. Use standardized blocks and visit types to better report on appointment volume.
- Slot lengths. Together with visit type duration, slot lengths drive schedule utilization. Use standardized slot lengths of the lowest common factor of visit types to prevent unusable gaps in the schedule. In the

example given above the greatest common factor is 15 minutes. Epic recommends standardizing slot lengths at the highest possible service level.

- Session limits. Session limits set the maximum number of a visit type or group of visit types that can be scheduled in a given period of time. Session limits should be configured only on an as needed basis.
- Blocks. Blocks are designed to set aside time slots for specific visit types. Use blocks sparingly to create a more open schedule for improved flexibility to meet demand. As a general rule, block for only visit types that your organization has a business need to block, such as making availability for short-notice visits or due to resource constraints, such as a machine or room with limited availability. Excessive blocking can reduce utilization because of rigid schedules that can't adapt to changing demand for appointments. Blocks must be linked to at least one visit type to allow other system functions to perform properly. Blocks are not meant to be used as visual aids.
- Releasing blocks. The system can be configured to release blocks a certain number of days ahead of a date, which allows for greater flexibility and a better chance that a particular time slot will be scheduled into. For example, if you are saving time for a New Patient visit type, but one isn't scheduled 7 days before a date, you can configure the system to release that block and turn that slot into an open access slot so that other appointments can be scheduled.
- Visit Modes. Visit modes are designed to set aside time for visits that take place in a specific format, such as in person or virtual.
- Releasing visit modes. The system can be configured to release visit modes a certain number of days ahead of a date or to never release visit modes at all which allows for more flexibility in provider's schedules. For example, if you are saving time for a virtual visit, but one isn't scheduled 7 days before a date, you can configure the system to release that visit mode and turn that slot into an open slot so that any visit mode can be scheduled.
- Patterns. Patterns are generic templates that you can apply to one or more providers or resources that have the same schedule.
- Rules. Visit type and provider scheduling rules can ensure that a certain visit type or combination of visit types does not appear repeatedly in a schedule within a short period of time.

Plan Your Scheduling Template Build Approach

When you've completed analysis and identified what Cadence tools you'll use, you're ready to start building templates in Epic. You need to decide whether to use a centralized or decentralized build approach. Select one of the following methods:

Centralized: Project Team or Single Group

Some organizations opt to have the project team or a small set of operation users own template build. The project team conducts department interviews and also builds blocks and visit types, and can also build out provider templates. Project team build ownership is not accounted for in typical Epic project timelines or staffing. Plan carefully if considering this approach. A small, centralized group of operations can also maintain templates for the organization.. Centralized build by a small group also lends itself to a greater depth of knowledge of the software, increased efficiency over time, and schedule standardization across the organization.

Template build in the centralized approach takes longer to complete because it's done by fewer people, but it can overlap with all other Cadence build and testing timelines. With a centralized group creating and maintaining provider templates, it is easy to ensure adherence to template build best practices.

Decentralized: Template Build Workshop

Decentralized build requires operational staff to lead a template build workshop, with the project team to support the effort. In this workshop, designated schedule builders from across your organization are present to learn best practices for schedule building and complete schedule build in the class. This method can facilitate better communication between builders and users and help resolve issues quickly.

Another decentralized option is to schedule time for operations staff to meet with schedule builders individually or in small groups for training and allow them to build schedules independently.

During a template build workshop, you need to make sure that your template builders are trained appropriately, with the proper tools and the correct security.

- Work with your technical team to make sure that users have access to the correct environments for the initial template build workshop.
- Work with your security team to ensure that security build and user provisioning timelines line up with your template build training and build timelines. Users completing template build will likely need access to the production or test environment earlier than other users.
- Work with your training team to ensure that key concepts and strategies for template build are well documented and communicated.

Next, find out the time that your team will require to complete template build. This depends on the number of template builders you have and the number of templates you need to build. Consult with your Epic representative to determine whether you should build all templates in one workshop or have a rolling template build strategy. We recommend holding the template build workshop towards the end of build so that you have time to identify issues during testing and review whether your template strategy makes sense for each department.

Get in touch with the help desk to let them know that they might receive calls during the template build workshop. Make sure the project team is also available for general technical support during this time.

Additionally, make sure to set the expectation that users completing template build will need to stay engaged up to, and throughout, go-live, including taking part in additional refresher workshops. The project team and your Epic representative will be running audits to make sure that templates are built appropriately, and will need help fixing issues that are discovered during these audits. For more information on hosting the template build workshop, refer to the Template Build Workshops training document.

Determine Which Environment to Build Scheduling Templates In

Next, decide which Epic environment users will build templates in.

Depending on the timing of your template build and environment availability, you may have a production (PRD) environment available. If it is available and you are not currently live in the production environment, Epic recommends building templates in production. Otherwise, Epic recommends building templates in the testing (TST) environment, or the proof of concept (POC) environment if TST is not available. Use Cadence's Template Move activity to migrate all template build from POC to TST after you create the latter environment and enable moving templates between the two. Note that provider messages do not move across environments. Any template build you complete in POC before you create TST is copied to TST with the environment copy rather than by means of the Template Move activity.

Add-on organizations should consider building new schedule templates in TST, and plan a cutover strategy for moving them to PRD before appointment conversion.

Develop a Training Plan for Template Builders

As you identify or hire new template builders, you'll need to work with your training team to develop a plan to get them up to speed. Plan for at least four hours of template build training for your builders, and around two hours of practice template build.

Make sure that as build decisions (for example, visit type and block strategy) are made, the decisions are communicated to the training team. Determine who from your site will lead template building workshops before scheduling.

Schedule your template build workshop for late in the build stage. This way, you can be sure that your staff will have the time to dedicate themselves to it and any supporting visit type and block build will be complete. In addition, you can test on real templates and also have time to fix any issues that arise.

Create a template build checklist or other documentation for your end users. The Template 100 and 200 courses from Cadence Training Wheels give you a starting point for developing training materials.

Identify Template Builders and Maintainers

Work with your Epic representative to determine an appropriate number of template builders for your initial build phase. This largely depends on how many departments and providers you need to build templates for, which varies from organization to organization.

Template Build Workshop Details

Before your first template build workshop, verify that all of your template builders have access to the build environment and the appropriate security to build templates in Hyperspace.

Next, identify the people who will be responsible for checking the build to make sure it aligns with your scheduling strategies and your providers' wishes.

We recommend the following for a successful template build workshop:

- Build for departments, providers, visit types, blocks, session limits, and patterns is complete.
- Template builders have clear strategies for common scenarios, such as lunch breaks, meetings, and held and unavailable time.
- Template builders understand the overall strategy and how to translate their providers' schedules into Epic.
- Leadership has signed off on provider template guiding principles, and those guiding principles are part of template builder training.
- A predetermined build checklist to verify departments and providers, visit types, and visit type durations are accurate.
- Application analysts are available for any quick fixes and necessary adjustments.

After you've identified build checkers, given builders the proper security and training, and built the necessary provider and department records, you're ready to hold the template build workshop.

After the workshop is done, obtain sign-off from your clinic managers.

Complete Template Build Audit

Template validation is available within the Edit Template activity for builders to use on a template-by-template basis. For a comprehensive technical audit of many templates at once, contact your Epic Technical Services representative. These audits check for common issues such as split slots, missing blocks, and incorrect visit type build.

Advanced Template Build Strategies

This section covers strategies for a few specific scenarios that require more detailed planning and build. For general template build instructions, refer to the Configuring Scheduling Templates topic. Use the strategies below if the scenarios they address are likely to occur at your organization.

Block Time for Longer Visits

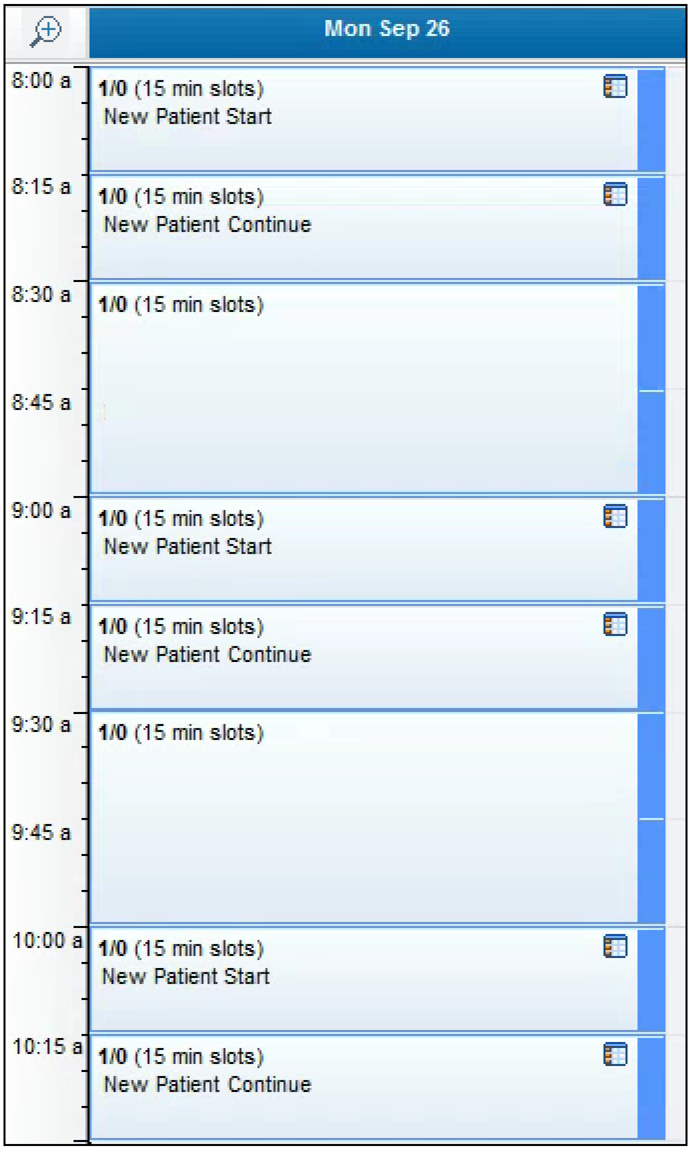
Your organization might need to block time for longer visits. For example, a new patient visit might take 30 minutes when all other visits are only 15 minutes.

Determine whether you want to allow these longer visits to be scheduled in unblocked slots. If you do not want to allow this (for example, because you need the visit to occur at the blocked time due to a limited resource), follow the instructions in the Restrict Time in Schedules for Specific Visit Types Using Blocks topic to determine scheduling overrule options for a visit type block. Set the Overrule for first slot and Overrule for secondary slots fields to No - Matching Blocks Only. Alternatively, if you want to ensure that the visit type can always be scheduled in unblocked time when there are two sequential open, unblocked slots, set these fields to Unblocked-Always Allowed.

If you want schedulers to be able to schedule the visit type into both blocked and unblocked slots, create two blocks for this longer visit: New Patient Start and New Patient Continue. Follow the instructions in the Restrict Time in Schedules for Specific Visit Types Using Blocks topic to create the new blocks and associate them with the visit type. When you associate the blocks with the visit type, enter the following matching logic in the Match on field:

- For the New Patient Start block: First Slot Only
- For the New Patient Continue block: Secondary Slots Only

After you've completed this block setup, build your schedule with slots of the Lowest Common Factor (LCF)—15 minutes. Add the blocks to your schedule. For example, if you want the longer visits to start at 8:00, 9:00, and 10:00 AM, add the New Patient Start block to each of those slots, and add the New Patient Continue block to the 8:15, 9:15, and 10:15 AM slots.



Automatically Change Blocked Time to Optimize Scheduling

Give schedulers more flexibility to make appointments as the window between the scheduling time and appointment time narrows. Changing the restrictions on or releasing blocks can be a good strategy for organizations that want to restrict schedules with blocks and not miss out on appointments. End-of-day processing can automatically change selected block types to unblocked or more permissive slots. This increases the availability of provider schedules even closer to the appointment date. Refer to the Open Schedules by Automatically Changing Blocked Time topic for more information on configuring this function.

Scheduling Lunch and Other Consistent Breaks

Discuss with providers and choose one of the following methods for scheduling lunch or other consistent breaks in a provider's schedule when they cannot be seen.

- Mark the slots as unavailable. Using this method gives more flexibility in provider availability. Additionally, reporting features and utilization statistics remain accurate. However, you cannot build indefinite schedules if there are recurring exceptions due to potential interruptions in memory and performance.
- Configure the slots to have no openings and no overbooks. This method allows for building of indefinite templates and has no negative effects on system performance. Leaving the slots with no openings, however, doesn't give schedulers a good indicator that the provider can't see patients at that time or for

what reason.

- Do not build a schedule during the designated time. This method, which appears gray and without slots, similar to the beginning and ending of a provider's schedule, decreases the likelihood of booking into lunch or other required breaks. This method does allow for indefinite templates. However, this method might skew reporting and is the most restrictive schedule type.

Prevent Two Consults from Occurring Back to Back

There might be some visit types that providers don't want to have scheduled back-to-back, such as consults. You can set scheduling rules in the Visit Type record to prevent two consults from occurring back-to-back. Refer to the Prevent Providers from Having Two Appointments of Certain Visit Types Too Close Together topic for setup instructions.

Prevent Scheduling in a Provider's Template Beyond a Certain Date

To prevent schedulers from making future appointments for a provider who is no longer available for scheduling, you must make the provider inactive for scheduling and change the release date for her schedule. Follow the instructions for preventing scheduling of future appointments in the Prevent the Scheduling of Future Appointments for a Departed Provider topic.

If the department has a release date offset set at the department level, you can override it at the provider level.

Block for Specific Visit Modes

Starting in May 2024

Instead of using blocks to indicate if a provider's time is reserved for in person or virtual visits, template builders can use visit mode settings to indicate which visit mode is allowed in a given slot. You can configure how visit mode options appear in the Edit Template and Edit Pattern activities at the provider, department, and system level. Refer to the Reserving Time in a Provider's Schedule for Visit Modes topic for more information.

Complete Provider Template Testing and Second Audit

Complete iterative testing for your provider templates during the application testing phase in the TST environment. Ideally, your department managers will do this for each department's templates. Depending on your situation, you might find it helpful to break up testing by specialty or department. You might also involve the template builders or clinic managers.

Create a spreadsheet of all your provider and resource schedules and a list of providers and resources per department with their blocks and session limits. Have your designated testers go through each one using the View Schedule activity to make sure it's built correctly.

After you complete iterative testing, update your template build training materials.

Complete Refresher Training

If you held a training period session before the build workshop, you should hold a period of refresher training before your second audit. This helps ensure that your staff retained the skills they need to build your providers' templates and also that any builders who joined your team after the initial training period get the training they need as well.

Schedule a Second Audit

Shortly after refresher training and around one month before appointment conversion, contact an Epic Technical Services representative and schedule a time to conduct a second audit. You should also plan to address any updates made to the legacy system schedules after the initial template build to ensure those changes are reflected in Epic. All managers should have signed off on their schedule build before this time. However, you can use this as a last opportunity to obtain that signoff. This might evolve into another mini workshop for template build review and cleanup.

This effort should occur in your PRD environments. As you did for your first template build workshop, identify your builders and ensure that they have the correct security to access the template build environment.

You should also set a template build freeze date and conduct any additional workshops immediately before that date. This is the date after which providers can no longer make changes to their schedule for a certain period of time. Setting a freeze date ensures that template builders in the clean-up workshop don't need to make schedule updates in multiple environments. Make sure you effectively publicize and communicate the freeze date to staff.

Remember to alert the help desk, so they know that they might receive calls during the workshop. Also ensure that you have Epic and general technical support available.

Provider Schedules Maintenance Considerations

Centralized Maintenance Considerations

Centralized template build typically falls under the project team or a small set of operation users. Benefits of this approach include:

- Standardizing templates is easier.
- Template changes are easier to track.
- Trained project team staff usually have better experience dealing with problems and questions that might come up. They're also the most up-to-date with new tools and recommendations.
- The project team has quicker access to build that might be needed, such as providers, visit types, patterns, session limits, or blocks.

However, there are also some challenges:

- You need clear expectations and a communication path for any requested changes or new providers.
- Providers might have to wait longer before their requested changes are updated in the system.
- Keeping up with template changes takes time away from other tasks the project team might need to complete.

Decentralized Maintenance Considerations

Decentralized template build is generally assigned to someone within each department. Benefits of this approach include:

- Departments have closer access to providers and their needs. They can easily put in requests and expect faster turnaround times for certain types of requests.
- Departments can easily experiment with changes for a day and then change the template back again if desired, ultimately leading to a template matching their needs at a detailed level.
- Template changes are more flexible because departments can add or remove additional slots ad hoc or during seasonal changes.
- Department representatives best understand the specific needs of their area and are likely to be more invested in providing successful scheduling templates.
- It allows for a wider allocation of resources so IT or operational users are able to focus attention elsewhere

Potential challenges include:

- Template changes are not easily tracked when maintained under a decentralized model.
- The users maintaining templates do not have as much practice because template changes do not factor into their daily routine. Thus, knowledge might be outdated.
- The change request process usually takes longer, because some requests still need to go through the project team.
- Compliance with build strategies and guiding principles might be difficult to monitor and enforce.

Provider Schedules Setup: Essentials

In this section, we'll cover everything that you need to do to start using provider schedules. This includes what you need to do to make provider schedules that match our recommendations.

Give Users the Ability to Modify Provider Schedules

Template builders, project team members, department managers, schedulers and front desk staff all need varying degrees of control over provider schedules. For example:

- Primary schedulers might need the ability to edit a slot in a provider's schedule from time to time.
- Template builders need full access so they can manipulate provider schedules and perform their core job.

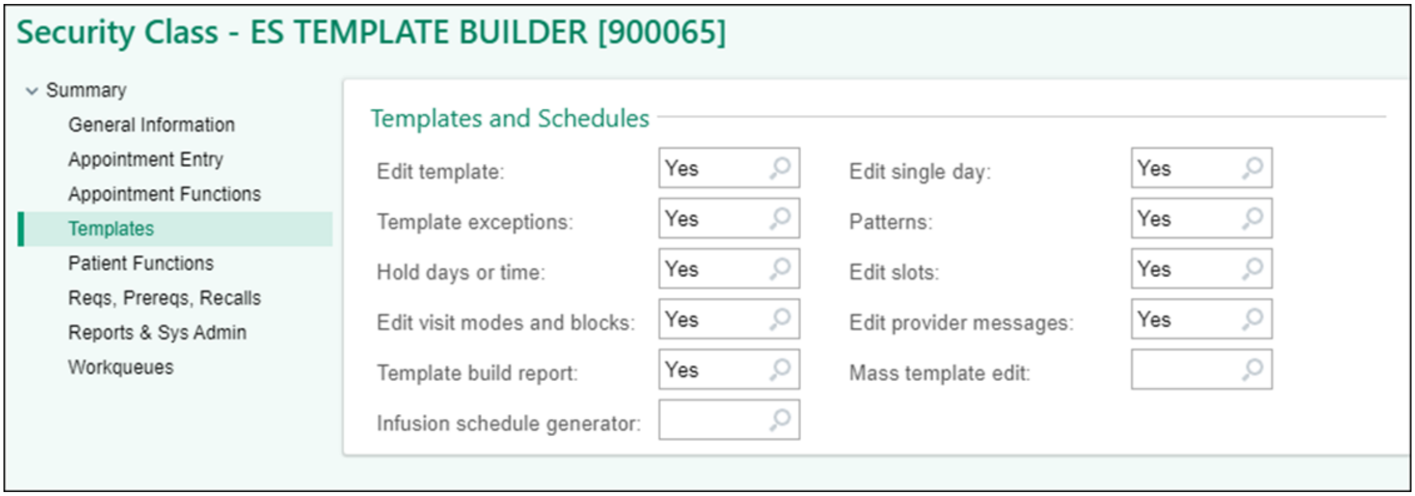
Because template builders and project team members need security to make schedule changes when you're first setting up provider schedules, we recommend that you build their security first.

1. In Hyperspace, open a Cadence security class.
2. On the Templates form, enter Yes to give users with this security classification access to the specified feature.
   Here's a guide you can use to understand what abilities each setting gives your users.

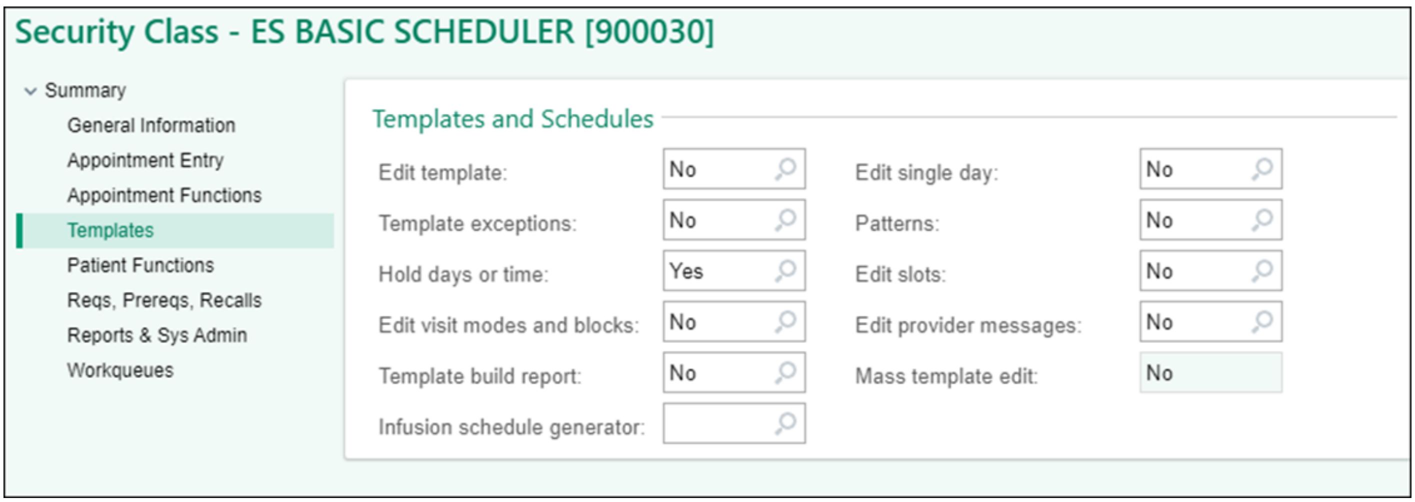
Setting	Description
Edit template	Gives access to features that allow you to modify a scheduling template, such as Edit Template, Delete Template, Copy Template, and Reassign Template.
Edit single day	Gives users the ability to change the configuration of the provider's schedule for one day only.
Template exceptions	Allows you to add exceptions to a provider's routine to his schedule. This security also allows users to edit and remove these exceptions.
Patterns	Gives access to features that allow you to modify patterns, such as Edit Pattern and Provider Pattern.
Hold days or time	Allows users to place days or blocks of time for a particular provider on hold to prevent schedulers from reserving that time.
Edit slots	Allows users to modify a particular window of time in a provider's schedule.
Edit visit modes and blocks (Edit blocks in February 2024 and earlier versions)	Allows users to select a slot in a provider's schedule and change block or visit mode information. Template builders use blocks and visit modes to dedicate set times in a provider's schedule to a specific type of appointment.
Edit provider messages	Allows users to add, edit, and remove messages from provider schedules.
Template build report	Allows users access to the Template Build report to get a quick overview of the templates in the system and how they're configured.
Mass template edit	Allows users to access the Mass Closure activity to quickly add held or unavailable time to provider schedule templates and cancel appointments for unexpected department closures.

The Foundation System uses different schedule-related security based on the tasks users with a given security classification perform. The images below show you how template builders, basic schedulers, front desk workers, and centralized schedulers can interact with provider templates.

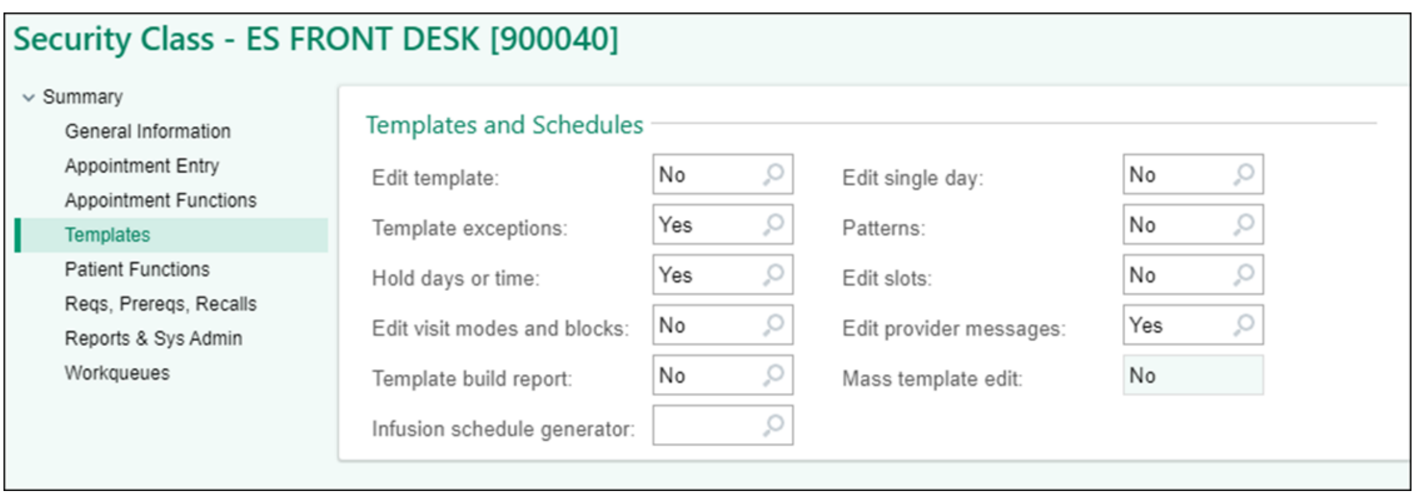
Template Builder

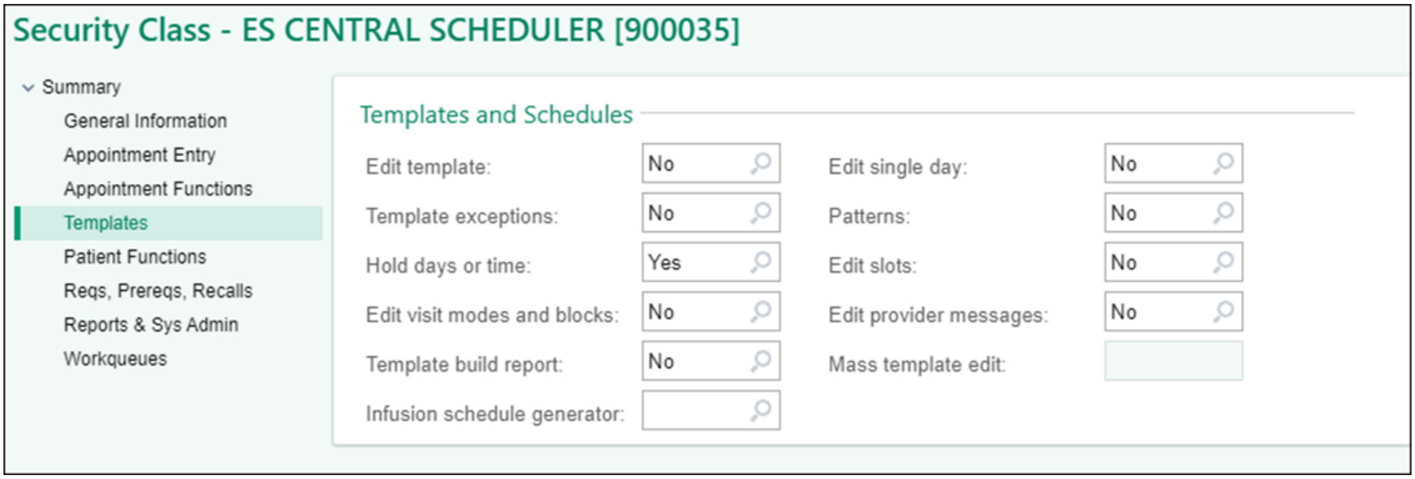


Scheduler



Front Desk User





Make a Provider or Resource Schedulable

Before schedulers can make appointments for any of the providers or resources at your organization, you must make providers and resources schedulable. This task includes:

- Creating the provider or resource record in the Provider/Resource (SER) master file.
- Setting schedule release dates and default behavior for a provider in a given department.
- Assigning a provider a schedule for each department that he works in.

You must complete all of the steps in this section to create viable schedules.

> Understand which records are affected by changes you make to a provider by checking the Linked Records form in the provider editor. This form shows lists of pools, subgroups, decision trees, groupers, arrival locations, specialty restrictions, block overrides, questionnaires, recall templates, prerequisite templates, and one click search algorithms that use a particular provider.

Create a Provider Record

The first step making a provider or resource schedulable in the system is to create a record in the Provider/Resource (SER) master file. This record represents the provider or resource in the system.

Work with your SER coordinator or provider management staff to create a provider record, using one of the following sets of steps:

- Import Provider Information
- Create a Provider Record Manually

When configuring the provider or resource record, there are a few key fields to keep in mind:

Setting	Description
Ref Src Type	If you're creating a provider record, enter Provider. If you're creating a resource record, enter Non Referral Source so that schedulers can't select the resource as a referring provider.
Status	Enter Active to indicate that the provider record can be used in the system.
Scheduling Type	If you're creating a provider record, enter Person. If you're creating a resource record, enter Resource.
Departments	Enter all departments where schedulers can make appointments with this provider. For each department you add, enter Active in the Scheduling column so that you can create schedules for the provider in that department.

Set Template and Release Date Defaults

After you've created a provider or resource record, you must define some basic behavior for the schedule that you will create, such as:

- How far into the future schedulers can make appointments for the provider.
- How long normal appointments are in the provider's schedule.
- Whether the provider allows overbook appointments.
- Whether the provider uses department visit type limits.

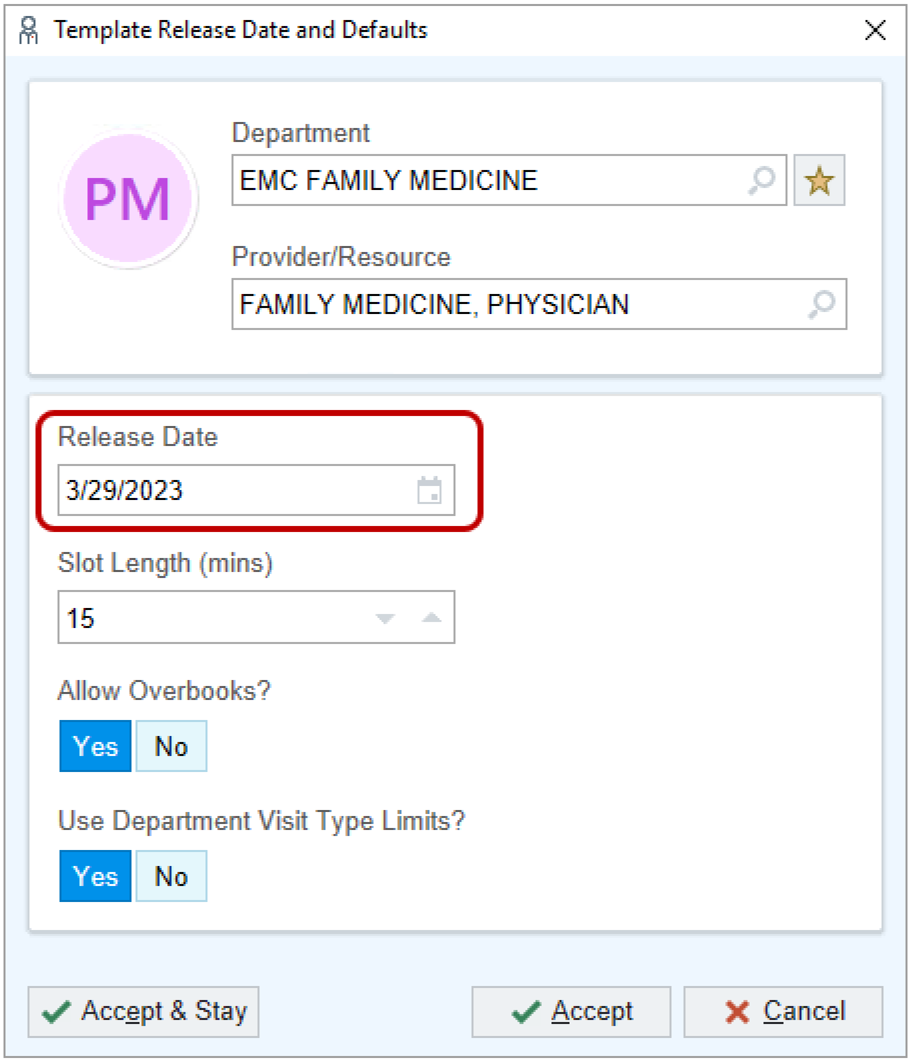
To set basic schedule behavior for a single provider or resource:

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Templates > Rel Date/Defaults. A window appears for you to select a provider.
2. Enter the name of a provider and a department where she works.
   You can set release dates and defaults differently for each department that the provider works in.
3. On the Template Release Date and Defaults window, enter the following information:

Field	Description
Release date	Enter the date beyond which schedulers can't make appointments for this provider.
Default length	Enter the length of time in minutes that the provider wants to make the typical slot length in her schedule.
Allow overbooks?	Set this field to Yes if schedulers can place appointments in a schedule slot with no regular appointment slots left. Set this field to No if the provider doesn't want to allow such overbooks.
Use department visit type limits?	Set this field to Yes if you want the provider to use the visit type limits configured for the department. Set this field to No if you don't want the provider to use visit type limits. If the provider already has visit type limits set, this field appears as read-only.

For example, the family medicine physician in the Foundation System has the following release date and defaults when he works in the EMC Family Practice department. The slots in his schedule are 15 minutes long, he allows schedulers to overbook, and he uses the visit type limits defined for EMC Family Practice.

In this example, during or before March of 2023, a template builder must update this provider's release date so that schedulers can continue to make appointments for him in EMC Family Practice.



Specify a Schedule Template for the Provider

Cadence gives you a great deal of flexibility when building a provider template. For instance, you can create a template for an individual date, day of the week, weekly cycle, or on a monthly cycle.

For step-by-step instructions on creating schedules, refer to the Configuring Scheduling Templates and Configuring Scheduling Patterns topics.

Reserving and Restricting Time in a Provider's Schedule for Specific Appointments Using Blocks

Dr. Allen requests that all of his new patient visits get scheduled from 8 AM to 11 AM every morning. How do you make sure that schedulers know Dr. Allen's preference?

Blocks can help you reserve time in a provider's schedule for a particular type of appointment or patient and aid schedulers in selecting appropriate slots for certain visit types or patients. Think of blocks as a scheduling preference; how rigid this preference is for schedulers depends on how you associate blocks with visit types, the restrictions you place on schedulers' security, and any scheduling restrictions you set for specific blocks. You can also configure a block so that any unused time slots change to another block or unblocked slots a certain amount of time before the schedule date.

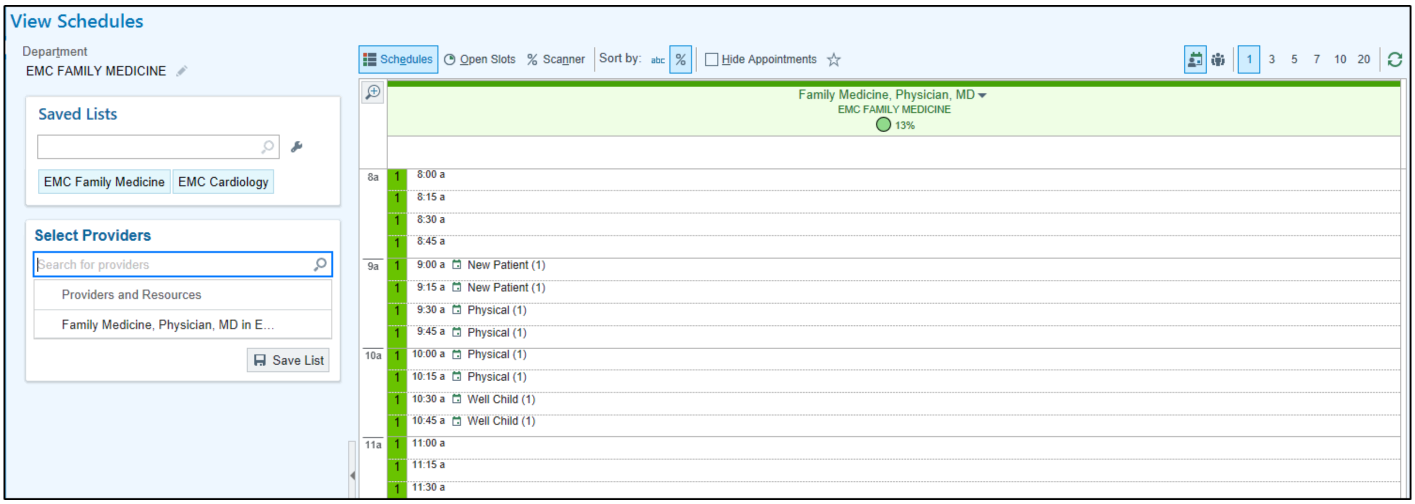
Reserve Time in a Schedule Using Blocks

Sometimes providers prefer to structure their schedules so that certain types of appointments fall at specific times during the day. For example, Dr. Allen prefers having new patient or physical appointments from 9 AM to 11 AM and leaving his afternoons open.

Using blocks, you can indicate such preferences on a provider's schedule so that schedulers know where to place appointments.

You can also configure a block so that any unused time slots change to another block or unblocked slots a certain amount of time before the schedule date. Using the example above, when you set Dr. Allen's New Patients block, you can decide that any blocks of this type with unscheduled time slots change to same day blocks on the current day. If the New Patients block appears on Dr. Allen's schedule for Tuesday, schedulers can schedule appointments for new patients into this block through Monday, and on Tuesday, any unused New Patient slots open up for same day appointments.

The family medicine physician (FAMMD) in the Foundation System uses blocks in his schedule to group new patient, physical, and well child appointments in the morning.



Considerations

Before creating blocks for all of your providers, determine if the specific time slots matter. For example, does the physician want a new patient appointment from 9 AM-10 AM and another from 10 AM-11 AM, or does he just want two same day appointments at some point over the course of the morning?

If you find that the provider just wants a certain number of a specific appointment (such as a same day appointment) anywhere in a given time range on his schedule, you might consider using a visit type limit rather than a block.

For more information about visit type limits, refer to the Limit the Number of Certain Appointments During a Given Time Period section of this guide.

Before you begin using provider schedules, decide on a scheduling philosophy for your organization. Refer to the Scheduling for Maximum Resource Utilization topic for more information on scheduling philosophies.

You can set blocks for providers, departments, and visit types. You can also set a block for provider and visit type combinations. You can use the following activities to set blocks for individual records:

- Department edit
- Provider edit

- Visit type edit
- Cadence System Definitions

The Block Database Editor gives you the most flexibility to set blocks for multiple records at a time. You might prefer to update blocks using this activity when you know you need to apply a block to many providers or departments, or if you want to see all of the records using a block.

Create a Custom Block

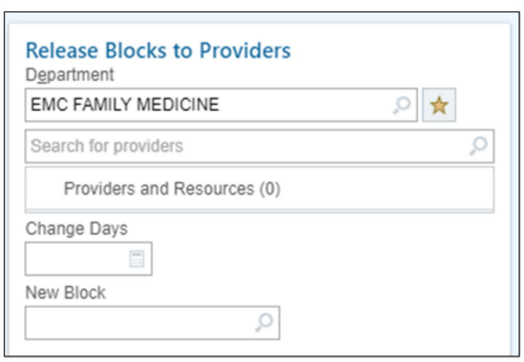
Create your blocks as values in the Blocks (I SER 60) category list. For more information about working with category lists, refer to the Modify a Category List's Values topic.

The Foundation System includes several blocks such as:

- New Patient
- Same Day
- Well Child
- Procedure
- Physical
- Pre-Op
- Post-Op

Allow a Provider to Use a Block

1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.
4. Click Add in the Provider section of the Release tab. The Release Blocks to Providers window appears. Starting in May 2024, the window appears in the sidebar.

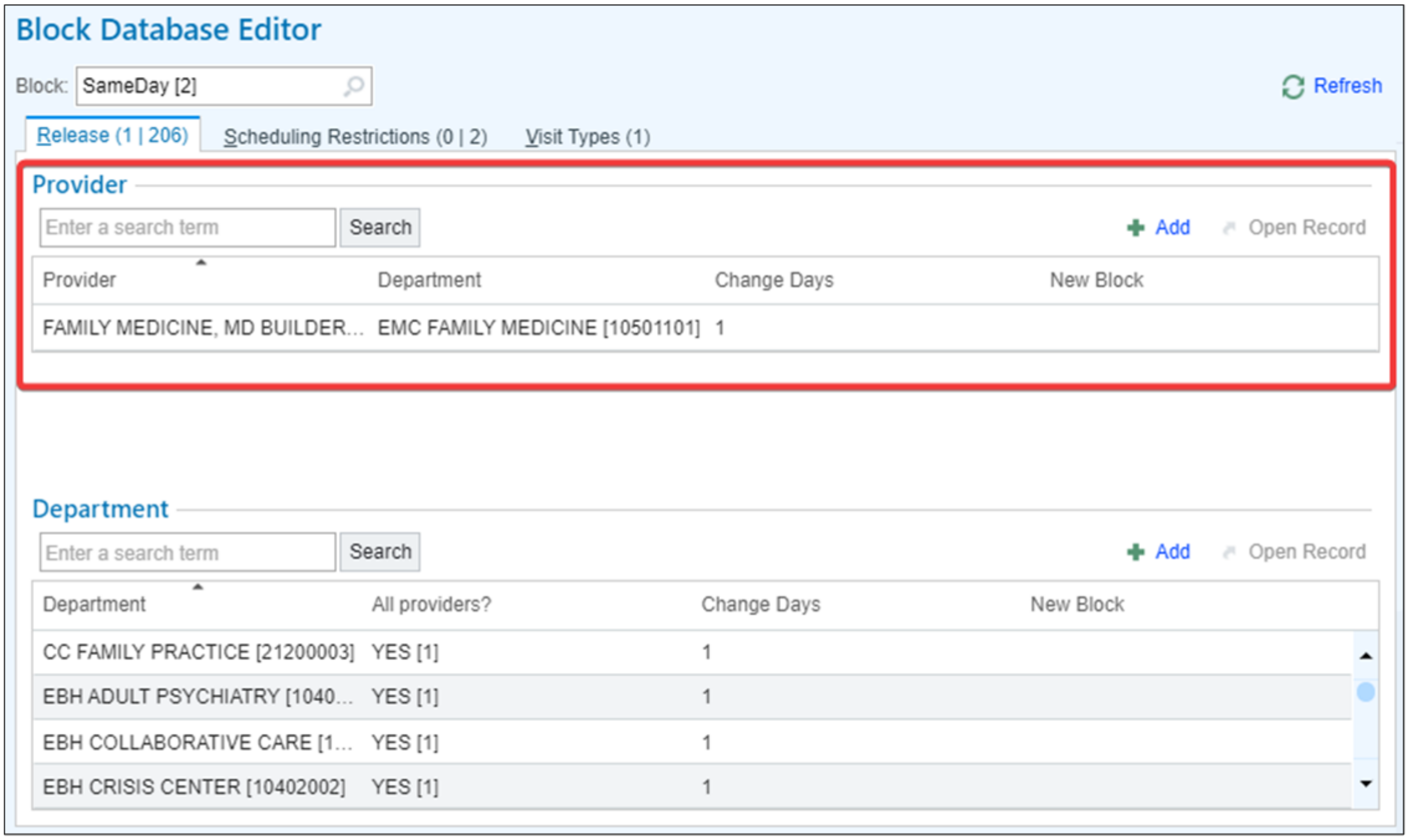


5. In the Department field, enter the provider's department. The department you're logged into appears in this field by default.
6. In the Provider field, enter the provider's name or record ID. You can list a provider for multiple departments and multiple providers from multiple departments here. This creates a row in the Provider table for each provider and department combination.
7. Use the Change days and New block fields, to have the system change unused slots in this block to a

different block a certain number of days before the day that a given block appears on the schedule. Leave the New block field blank to specify that unused slots revert to normal time slots.
For example, enter 2 in the Change days field and leave the New block field empty to specify that any blocks of this type with open slots two days before the schedule date revert to normal slots in the schedule.

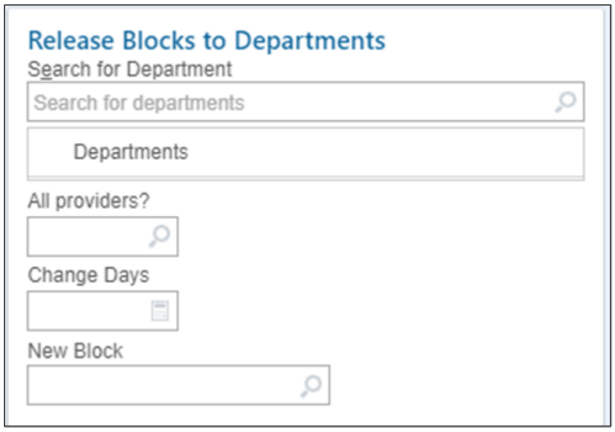
8. Click Accept. The rows you created appear in the Provider table with each provider-department combination you specified.

The Foundation System uses the Same Day block for the providers in the image below.



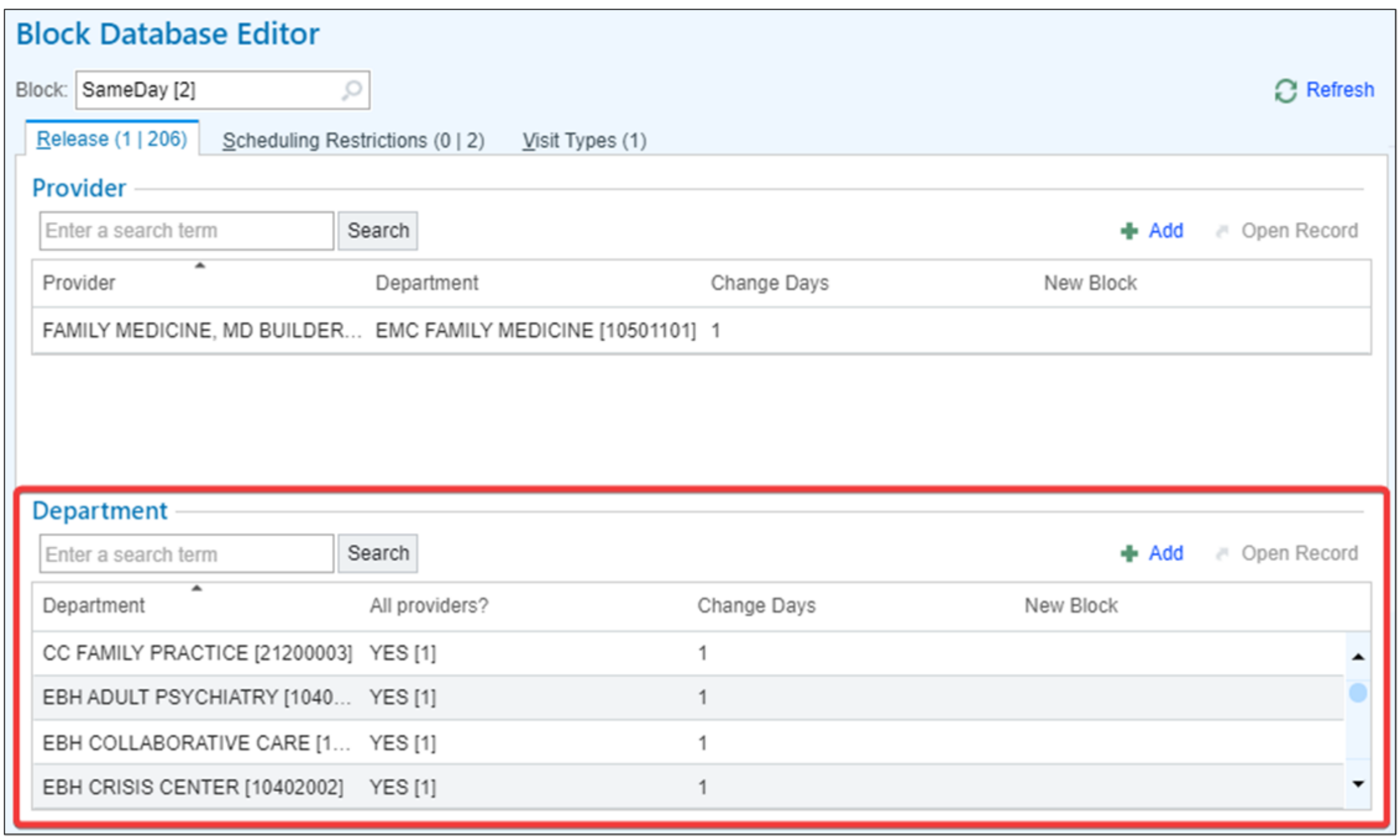
Allow All Providers in a Department to Use a Block

1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.
4. Click Add in the Departments section of the Release of Blocks tab. The Release Blocks to Departments window appears. Starting in May 2024, the window appears in the sidebar.



5. Enter the department in the Department field.
6. In the All Providers? field, enter Yes.
7. Use the Change days and New block fields, to have the system change unused slots in this block to a different block a certain number of days before the day that a given block appears on the schedule. Leave the New block field blank to specify that unused slots revert to normal time slots.
   For example, enter 2 in the Change days field and leave the New block field empty to specify that any blocks of this type with open slots two days before the schedule date revert to normal slots in the schedule.
8. Click Accept. A new row appears in the Department table.

The Foundation System uses the Same Day block for the departments in the image below.



Determine Block Scheduling Behavior for a Department

Use these steps if you don't want to release a block for all providers in a department, but you do want to apply certain block scheduling behavior to all providers in the department who use the block. For example, you might want to make sure that all Physical blocks in your department revert to normal time slots on the current day of the block, but only a handful of the providers in your department use Physical blocks.

1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block with which you want to work.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.
4. Click Add in the Department section of the Release of Blocks tab. The Release Blocks to Departments window appears. Starting in May 2024, the window appears in the sidebar.
5. Enter the department.
6. In the All Providers? field, enter No.
7. Use the Change days and New block fields to have the system change unused slots in this block to a different block a certain number of days before the day that a given block appears on the schedule. Leave the New block field blank to specify that unused slots revert to normal time slots.
   For example, enter 2 in the Change days field and leave the New block field empty to specify that any blocks of this type with open slots two days before the schedule date revert to normal slots in the schedule.
8. Click Accept. A new row appears in the Department table.

Add a Block to a Provider's Schedule

The final step in using scheduling blocks is to associate a block with particular time slots in a provider's schedule. Unless you complete this step, you won't see your blocks appear in any provider schedules.

For step-by-step instructions on linking blocks with times in a provider's schedule, see one of the following sections of this guide:

- Configuring Scheduling Templates
- Configuring Scheduling Patterns

Restrict Time in Schedules for Specific Visit Types Using Blocks

When you associate a block with a visit type, you not only reserve time in a provider's schedule for a specific type of appointment, but you also restrict the scheduling of that appointment type to the blocked off slot. If, for instance, a provider strongly prefers to perform a certain procedure at a particular time, blocks offer a simple solution. You can create blocks for any visits that you want to restrict to a specific time in a provider's schedule.

For example, you want to reserve time for physical appointments in a provider's schedule, so you associate your Physical visit type with your Physical block. After you make that change, the system directs schedulers to make physical appointments in one of the designated physical slots in the schedule.

Blocks are also valuable tools for preventing certain visit types from being scheduled on short notice and for saving room for same day appointments. You can also use tags to restrict certain blocks to patients who have a tag set by an appointment entry or request entry decision tree.

Cadence respects provider-level blocks that haven't been defined for the entire visit type during manual scheduling. This allows you to create one visit type for use by all providers and add provider-level blocks for only the providers who need them instead of creating duplicate visit types with and without blocks.

Create a Custom Block

Create your blocks as values in the Blocks (I SER 60) category list. For more information about working with category lists, refer to the Modify a Category List's Values topic.

The Foundation System includes several blocks such as:

- New Patient
- Same Day
- Well Child
- Procedure
- Physical
- Pre-Op
- Post-Op

Create a Custom Tag for a Block

Use tags to restrict certain blocks to patients who have a tag set by an appointment entry or request entry decision tree. For example, you might use blocks to define the priority of when patients should be seen for a visit type and build an appointment entry decision tree to set a tag for a patient's priority based on rules or answers to questions in the decision tree. In your visit type records, you map which tags are allowed to be scheduled in which blocks, such as only urgent patients being allowed to schedule into the high priority block.

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. This tag is used by decision tree 1170000006-ES Priority Patient Tag, and is based on the patient having a Priority status specified in the Patient type(s) field in Registration.

Create your tags as values in the Request Tags (I ORD 67320) category list. For more information about working with category lists, refer to the Modify a Category List's Values topic.

For more information about creating an appointment entry or request entry decision tree that sets your tags for qualifying patients, refer to the Create a Decision Tree topic.

Associate a Block with a Visit Type

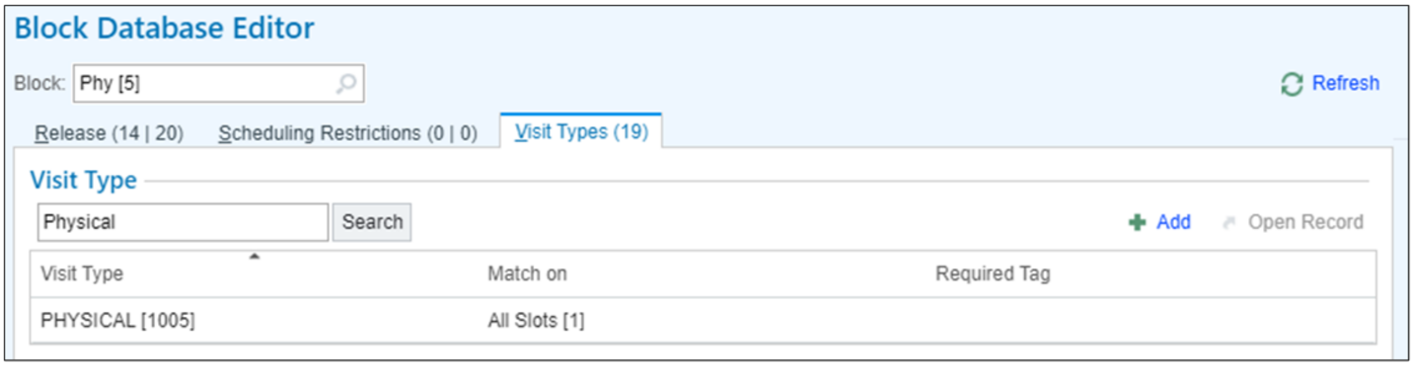
1. In Hyperspace, open the Block Database Editor (search: Blocks).
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records checkbox to show protected records in the editor. You cannot edit protected records.
4. Select the Visit Types tab.
5. Click Add. The Add Block Visit Types window appears. Starting in May 2024, the window appears in the sidebar.
6. Enter the visit types you want to associate with the current block.
7. In the Match on field, specify the matching logic for this visit type block.
    - Enter All Slots to specify that when scheduling this visit type into this block, the scheduler must place the entire visit type into blocked time slots.
    - Enter First Slot Only to specify that when scheduling this visit type into this block, if the appointment length is greater than the length of a time slot in the provider's schedule, the first time

slot of the appointment must be blocked.

   - Enter Secondary Slots Only to specify that when scheduling this visit type into this block, if the appointment length is greater than the length of a time slot in the provider's schedule, any slot except the first time slot of the appointment must be blocked.

8. In the Tag field, specify the tag a patient must have in order to be scheduled into this block.
9. Click Accept. A new row appears in the Visit Type table for each visit type you entered.

The Foundation System associates the Physical block with the Physical visit type. When a scheduler makes an appointment using the Physical visit type, she must schedule the entire appointment into slots on the provider's schedule that are blocked off for physical appointments.

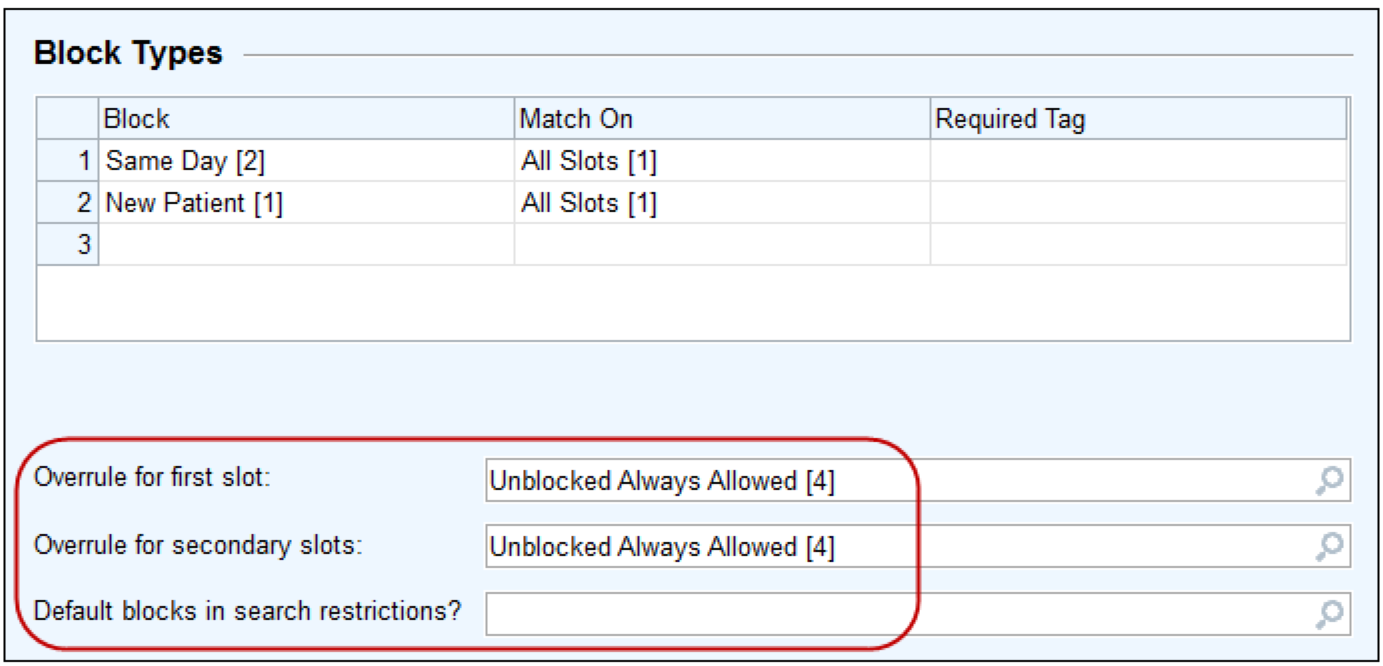


Determine Scheduling Overrule Options for a Visit Type Block

In the visit type, you determine when the user or the Auto Scheduler can put the visit type in a slot that doesn't contain a block. This is known as overruling the block.

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Visit type and open your visit type record.
2. Select the Blocks form.
3. In the Overrule for first slot (I PRC 5015) field, determine whether schedulers can overrule block restrictions for this visit type during manual scheduling or if the Auto Scheduler doesn't find matching slots. This setting applies only to the first slot used for the appointment. If you leave this setting blank, the system uses the settings in the Overrule for Secondary Slots. Select from the following options:
   - 1-Yes - Overrule To Any Block. The Auto Scheduler searches for slots associated with the block on the first two passes, and expands its search to unblocked slots and other blocks during the overrule passes if no solution is found for the first two passes. During manual scheduling, schedulers may only schedule into slots associated with the block, unless they have Block Overrule security.
   - 2-No - Matching Blocks Only. The Auto Scheduler limits its search to slots associated with the block only. The associated blocks appear when schedulers click the gears button in the Schedules view in Book It. During manual scheduling, schedulers can schedule only into slots associated with the block, unless they have Block Overrule security.
   - 3-Unblocked Allowed On Overrule. The Auto Scheduler searches for slots associated with the block. If no solutions are found it expands the search to only unblocked slots. During manual scheduling, schedulers may only schedule into slots associated with that block or unblocked slots, unless they have Block Overrule security.
   - 4-Unblocked Always Allowed. The Auto Scheduler uses unblocked slots with slots containing a matching block during all scheduling passes. During manual scheduling, schedulers may only schedule into slots that have the blocks or are unblocked unless they have Block Overrule Security.

4. In the Overrule for secondary slots (I PRC 5010) field, determine whether block restrictions can be overruled during manual scheduling or when the Auto Scheduler does not find matching slots. This setting applies only to the secondary slots use for the appointment (slots other than the first). If you leave this field blank, the system uses No - matching Blocks Only by default. Select from the following options:
    - 1-Yes - Overrule To Any Block. The Auto Scheduler searches for slots associated with the block on the first two passes, and expands its search to unblocked slots and other blocks during the overrule passes if no solution is found for the first two passes. During manual scheduling, schedulers may only schedule into slots associated with the block, unless they have Block Overrule security.
    - 2-No - Matching Blocks Only. The Auto Scheduler limits its search to slots associated with the block only. The associated blocks appear when schedulers click the gears button in the Schedules view in Book It. During manual scheduling, schedulers can schedule only into slots associated with the block, unless they have Block Overrule security.
    - 3-Unblocked Allowed On Overrule. The Auto Scheduler searches for slots associated with the block. If no solutions are found it expands the search to only unblocked slots. During manual scheduling, schedulers may only schedule into slots associated with that block or unblocked slots, unless they have Block Overrule security.
    - 4-Unblocked Always Allowed. The Auto Scheduler uses unblocked slots with slots containing a matching block during all scheduling passes. During manual scheduling, schedulers may only schedule into slots that have the blocks or are unblocked unless they have Block Overrule Security.
5. In the Default blocks in search restrictions? (I PRC 5011) field, enter 1-Yes if you want to use blocks by default in manual searches when a scheduler enters this visit type. If you leave this field blank, the default value is 2-No, and the system uses the settings from the Overrule for first slot and Overrule for secondary slots fields.


Block Types

	Block	Match On	Required Tag
1	Same Day [2]	All Slots [1]	
2	New Patient [1]	All Slots [1]	
3			

Overrule for first slot: Unblocked Always Allowed [4]

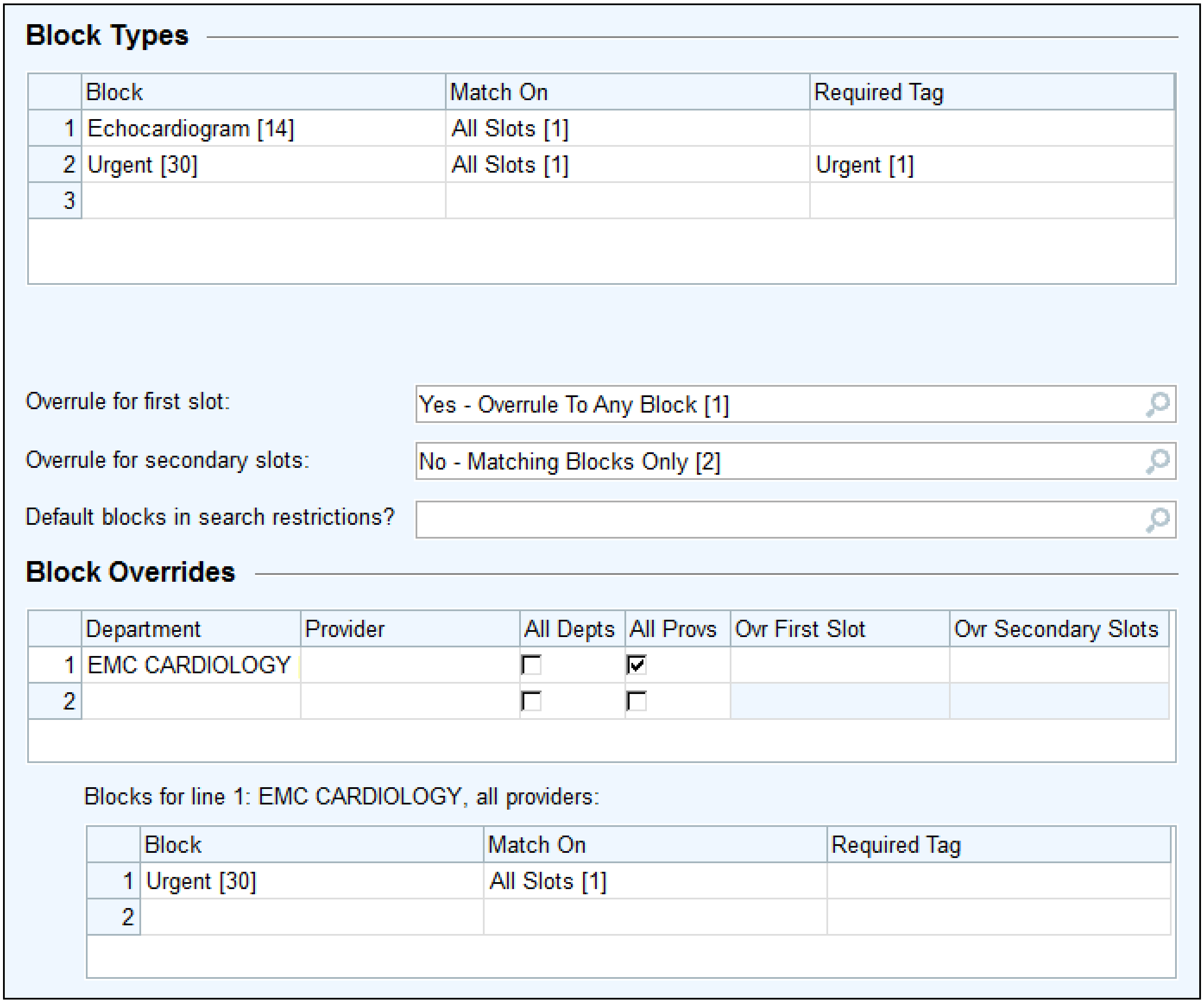
Overrule for secondary slots: Unblocked Always Allowed [4]

Default blocks in search restrictions?

Create Visit Type Block Exceptions for Departments

1. Select the Blocks form in the Hyperspace visit type editor.
2. Under the Provider Level Blocks heading, enter the department or departments that need block exceptions for this visit type.
3. Select the All Provs check box if the exception should apply to all providers in the department.

4. In the Block Types table, enter the blocks to use for this visit type in the selected department as well as the matching logic for the block and any tags the patient must have.
5. In the Ovr First Slot and Ovr Secondary Slots, determine scheduling override behavior for the department block exception. Refer to the previous task for more information about the options.



Block Types

	Block	Match On	Required Tag
1	Echocardiogram [14]	All Slots [1]	
2	Urgent [30]	All Slots [1]	Urgent [1]
3			

Overrule for first slot: Yes - Overrule To Any Block [1]

Overrule for secondary slots: No - Matching Blocks Only [2]

Default blocks in search restrictions?

Block Overrides

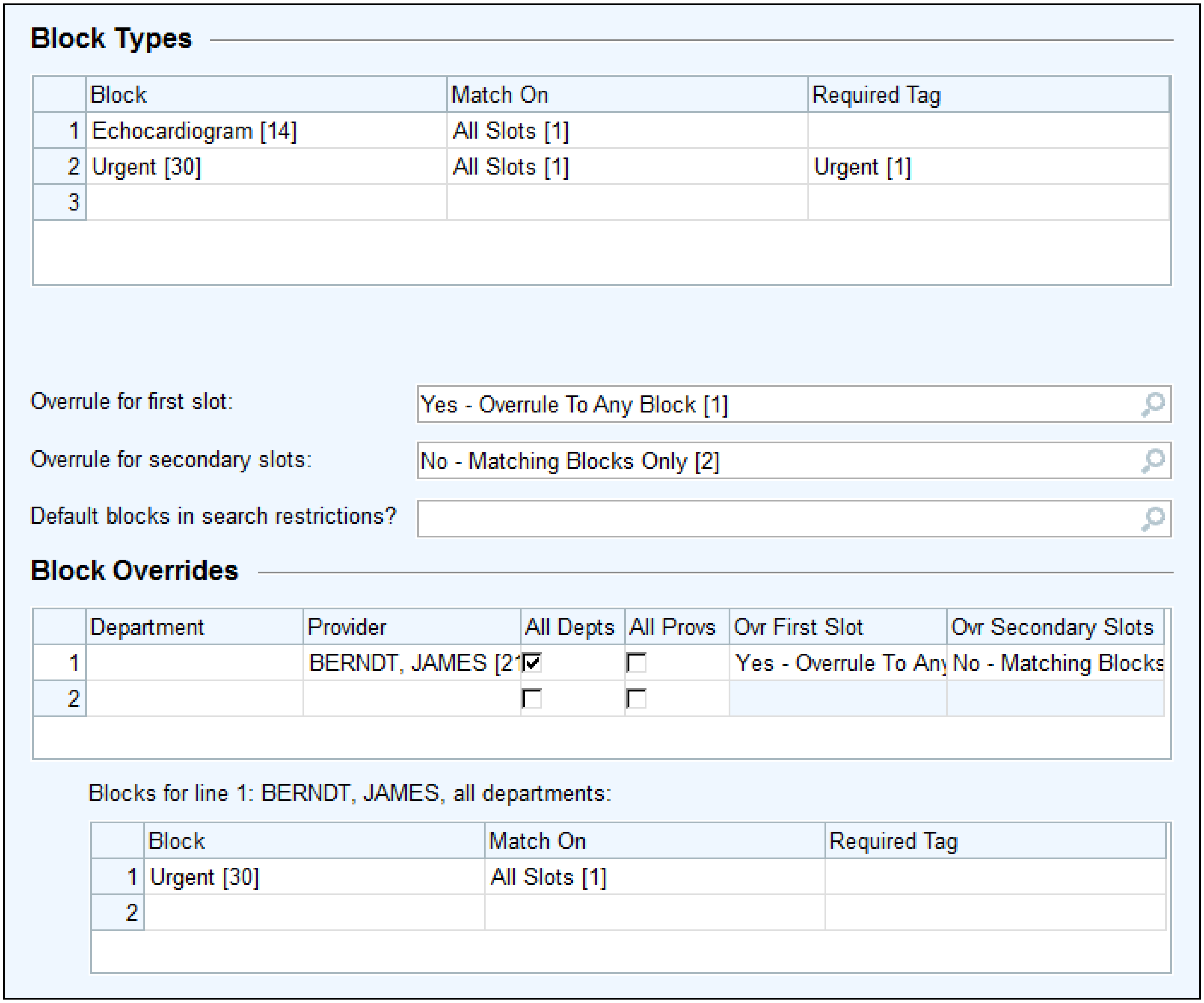
	Department	Provider	All Depts	All Provs	Ovr First Slot	Ovr Secondary Slots
1	EMC CARDIOLOGY		☐	☑		
2			☐	☐		

Blocks for line 1: EMC CARDIOLOGY, all providers:

	Block	Match On	Required Tag
1	Urgent [30]	All Slots [1]	
2			

Create Visit Type Block Exceptions for Providers

1. Select the Blocks form in the Hyperspace visit type editor.
2. Under the Provider Level Blocks heading, enter the providers that need block exceptions for this visit type in the Provider column. If this block exception applies to the provider only in certain departments, enter the departments in the Department column.
3. Select the All Depts check box if the exception should apply to all the provider's schedulable departments.
4. In the Ovr First Slot and Ovr Secondary Slots, determine scheduling override behavior for the provider block exception. Refer to the previous task for more information about the options.
5. In the Block table below, enter the blocks to use for this visit type for the selected provider as well as the matching logic for the block and any tags the patient must have.



Add a Block to a Provider's Schedule

The final step in using scheduling blocks is to associate a block with particular time slots in a provider's schedule. Unless you complete this step, you won't see your blocks appear in any provider schedules.

For step-by-step instructions on linking blocks with times in a provider's schedule, see one of the following sections of this guide:

- Configuring Scheduling Templates
- Configuring Scheduling Patterns

Restrict Time for Specific Patients Using Patient Blocks

Using patient level blocks, you can indicate to your schedulers when they should schedule appointments for certain patients, or prevent schedulers from making appointments for certain patients at certain times. For example, a provider who sees admitted, or inpatient, patients as well as outpatient patients might want to block off time in her schedule for her inpatient patients.

You can create patient blocks based on ADT status, patient type, or a custom category.

Create a Custom Patient-Level Block

Add values to the Blocks (I SER 60) category list. Make sure to designate the block type as a patient-level block

Refer to the Modify a Category List's Values topic in your online documentation for additional information on creating category lists.

The Foundation System has one patient-level block: Inpatient.

Associate Blocks with Types of Patients

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Blocks form.
3. In the Patient Blocks table, select the block type to define in the Block Type (I SDF 10750) field.
4. In the Classification (I SDF 10751) field, select how you want to define the patients whom schedulers can place into slots with the block. Choose from these three options:
   - ADT Status: Defines patients based on their inpatient or outpatient status at the time of the appointment.
   - Patient Type: Defines patient based on the patient's type, set in the patient's demographics.
   - Custom: Defines patients based on a custom extension record of type AS Patient Level Block Custom Check [10007].
5. In the Matching Logic (I SDF 10752) field, select the option used to match the patient to the block. The options available in this field depend on what you selected in the Classification field.
   - For example, if you selected ADT Status, your options in the Matching Logic field are Inpatient and Outpatient.
6. In the Warn Type (I SDF 10753) field, determine if a scheduler can overrule the patient-level block when scheduling a patient who doesn't match the block.
   - Select Warn, Allow Overrule if you want to warn the scheduler but then allow him to schedule the appointment.
   - Select Check Block Overrule Security if you want to allow the scheduler to make the appointment only if he has block overrule security.
   - Select Do Not Allow Overrule if you never want the scheduler to make the appointment, even if he has block overrule security.

Determine Block Preference for Visit Type and Patient Level Blocks

You can use both visit type and patient level blocks in the same slot. To schedule into a slot that has both patient level and visit type blocks, the appointment must either match both block types or the scheduler must have block overrule security to overrule both block types. When both types of blocks match, you determine the block used for scheduling purposes.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Blocks form.
3. In the Prefer patient or visit type blocks when both match (I SDF 10755) field, select which block type to use when the appointment matches both patient and visit type level blocks.

Add a Block to a Provider's Schedule

The final step in using scheduling blocks is to associate a block with particular time slots in a provider's schedule. Unless you complete this step, you won't see your blocks appear in any provider schedules.

For step-by-step instructions on linking blocks with times in a provider's schedule, refer to the following topics in this guide:

- Configuring Scheduling Templates
- Configuring Scheduling Patterns

Restrict Scheduling Based on Blocks

For certain types of blocks, you might want to control how schedulers can interact with schedule slots that use the block. Say a particular department requires that all appointments scheduled into procedure blocks appear on the schedule one day before the appointment date so that staff members have time to prepare. You can use block scheduling restrictions to make this possible.

Using the Block Scheduling Restrictions tab of the Block Database Editor, you can control:

- How far in advance schedulers need to make appointments for a particular block.
- How far into the future schedulers can make appointments for a particular block.
- Who can schedule appointments that go against the restrictions you set.

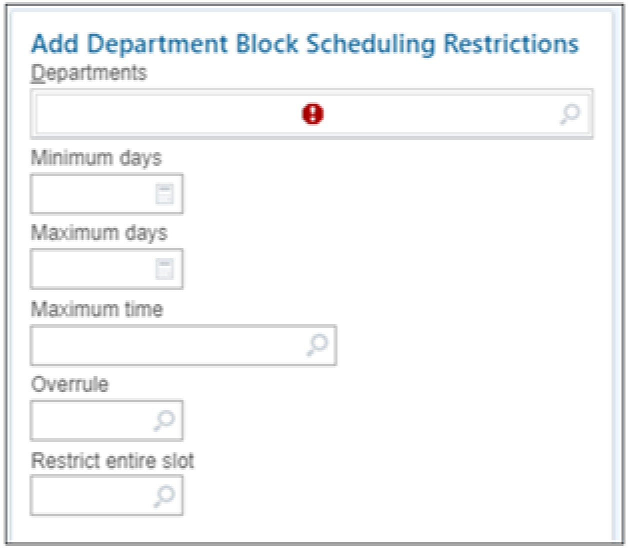
Prerequisites
Before you can set block scheduling restrictions, you must release blocks to providers or departments. Refer to the Reserve Time in a Schedule Using Blocks section to set this up.

You can enforce scheduling restrictions for a particular block on a provider level or for a whole department. Which option you use depends on how the particular providers want their schedules configured. When possible, we recommend configuring at the department level to reduce build complexity.

When using multiple blocks in a single slot, the Restrict Entire Slot (I SER 285) field determines whether the block restriction is enforced for the entire slot or only the specified block. Entering No or leaving the field empty allows users to schedule into other blocks in the slot that are not restricted. Entering Yes prevents users from scheduling into any slots that contain the restricted block. The Restrict Entire Slot field is available starting in August 2023, in May 2023 with special update E10504220, and in February 2023 with special update E10410175.

Restrict Block Scheduling for a Department

1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.
4. Select the Block Scheduling Restrictions tab and locate the Department section.
5. Click Add. The Add Block Scheduling Restrictions window appears. Starting in May 2024, the window appears in the sidebar.

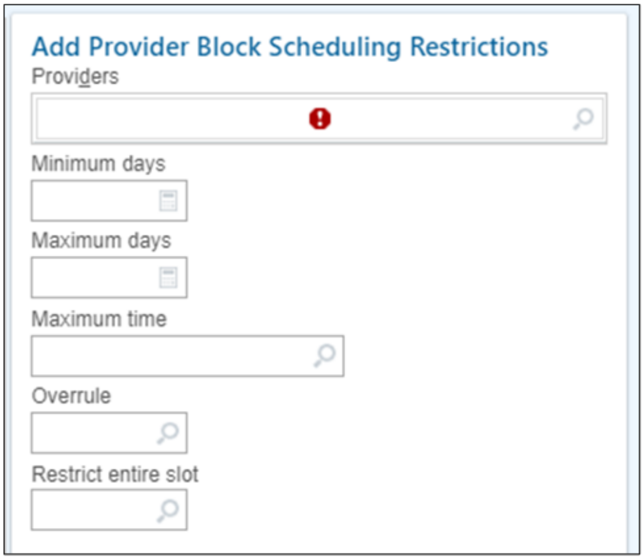


6. In the Departments field, enter the department's name or record ID.
   You can add multiple departments to this list to apply the same block scheduling restriction for all of them. This creates a row in the Department table for each department.
7. To specify that schedulers must add an appointment to a blocked time slot a certain number of days in advance, enter the number of days in the Minimum days field.
   For example, to specify that schedulers must make physical appointments two days in advance, enter 2.
8. To prevent schedulers from adding an appointment to a blocked time slot that's too far in the future, enter the maximum number of days into the future that schedulers can make appointments in time slots that use this block. Starting in August 2023, in May 2023 with special update E10504220, and in February 2023 with special update E10410175, you can also specify a corresponding time of day for the maximum day. With this setting, the blocked slot is available for scheduling at that specific time of day on the day it opens up. For example, to prevent schedulers from making appointments in same day slots until the day before the slot at 4:00 PM, enter 1 for Maximum days and 4 PM for Maximum time.
9. In the Overrule field, indicate whether schedulers can disregard these scheduling restrictions. Enter Yes to specify that users receive a warning but can continue. Enter No to enforce your scheduling restrictions.
10. Starting in August 2023, in May 2023 with special update E10504220, and in February 2023 with special update E10410175, the Restrict Entire Slot field determines whether the block restriction is enforced for the entire slot or only the specified block. Enter No to allow users to schedule into other blocks in the slot that are not restricted or enter Yes to prevent users from scheduling into any slots that contain the restricted block.
11. Click Accept.

Restrict Block Scheduling for a Provider

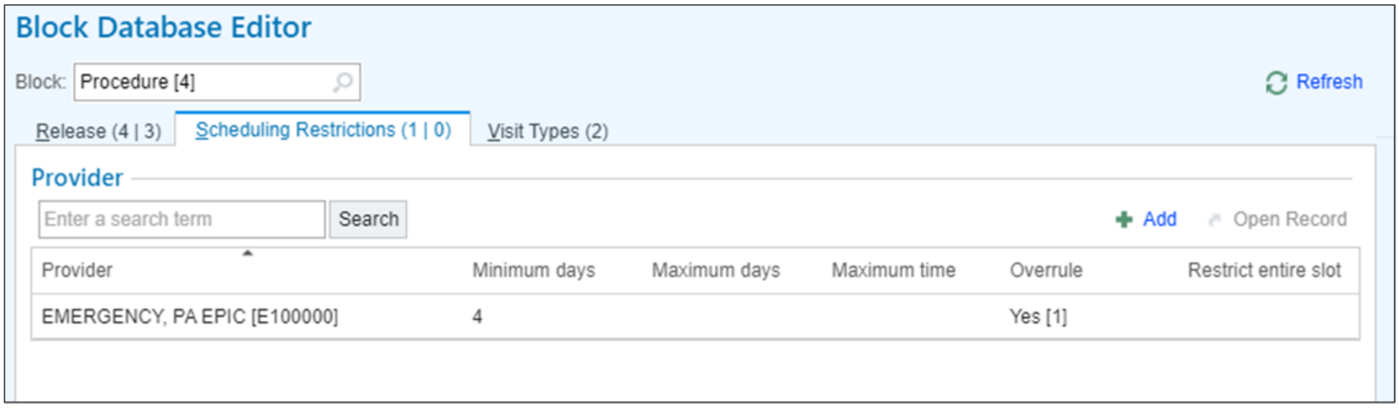
1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.
4. Select the Block Scheduling Restrictions tab and locate the Provider section.
5. Click Add. The Add Block Scheduling Restrictions window appears. Starting in May 2024, the window

appears in the sidebar.



6. In the Provider field, enter the provider's name or record ID.
   You can add multiple providers to this list to quickly apply the same block scheduling restriction for all of them. Each provider appears on a separate row in the Provider table.
7. To specify that schedulers must add an appointment to a blocked time slot a certain number of days in advance, enter the number of days in the Minimum days field.
   For example, to specify that schedulers must make physical appointments two days in advance, enter 2.
8. To prevent schedulers from adding an appointment to a blocked time slot that's too far in the future, enter the maximum number of days into the future that schedulers can make appointments in time slots that use this block. Starting in August 2023, in May 2023 with special update E10504220, and in February 2023 with special update E10410175, you can also specify a corresponding time of day for the maximum day. With this setting, the blocked slot is available for scheduling at that specific time of day on the day it opens up.
   For example, to prevent schedulers from making appointments in same day slots until the day before the slot at 4:00 PM, enter 1 for Maximum days and 4 PM for Maximum time.
9. In the Overrule field, indicate whether schedulers can disregard these scheduling restrictions. Enter Yes to specify that users receive a warning but can continue. Enter No to enforce your scheduling restrictions.
10. Starting in August 2023, in May 2023 with special update E10504220, and in February 2023 with special update E10410175, the Restrict Entire Slot field determines whether the block restriction is enforced for the entire slot or only the specified block. Enter No to allow users to schedule into other blocks in the slot that are not restricted or enter Yes to prevent users from scheduling into any slots that contain the restricted block.
11. Click Accept.

In the Foundation System, schedulers must add appointments to time slots reserved for procedures 4 days in advance of the appointment date for emergency physician assistants. Schedulers can get around these restrictions when necessary and schedule closer to the current date.



Open Schedules by Automatically Changing Blocked Time

You might want to give schedulers more flexibility to make appointments as the window between the scheduling time and appointment time narrows.

Consider the following example. A regular patient with your clinic calls in to make an appointment two months from now. You want your schedule to prevent front desk staff from making the patient's office visit appointment during time reserved for new patient appointments. However, if the same patient calls in to make an office visit for the next day, you might not care about reserving time for new patient appointments if those slots haven't already filled up.

To start releasing blocks and slots, you need to complete the following tasks:

1. Define the earliest time to release blocks and slots for your facility and override that time for departments as needed.
2. If needed, exclude holidays, Saturdays, and Sundays when the system counts change days for releasing blocks and slots.
3. Set up release of blocks settings for departments and providers.
4. Set up release of slots settings for departments and providers.
5. If you want to release blocks more frequently than once a day, you can set up a batch job. Otherwise, Cadence End of Day processing automatically runs each night and releases blocks when it runs.

Define the Earliest Time to Release Blocks and Slots for Your Facility

The Earliest time for time release of blocks and slots (I SDF 8160 and I DEP 169) and public/private slots (I SDF 8129) settings are used by the batch to determine the start date for calculating when to release blocks and slots. Epic recommends setting the system-level settings to 9:00 P.M. and running the system-level batch jobs at 9:01 P.M. That allows the system to count today when determining how far out to release blocks and slots. If today is Tuesday and you configured unused physical blocks to be released two days out, the system releases unused physical blocks for Thursday. If the batch is run before the time in these settings, the system calculates the date to release blocks and slots from yesterday's date. In the previous example, the system releases unused physical blocks for Wednesday.

Follow these steps to set the earliest time to release blocks and slots for your facility:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Go to the Templates > General form.
3. In the Earliest time for time release of blocks and slots field, enter the time the facility-level batch uses to determine the start date for calculating which blocks and slots to release.

4. Go to the Templates > Slots form.
5. In the Earliest time for time release of public/private slots field, enter the time the facility-level batch uses to determine the start date for calculating the release of public/private slots.

Override the Earliest Time to Release Blocks and Slots for a Department

You can override the system setting for the earliest time to release blocks and slots for a department, for example, if you want to release blocks for your pediatrics department at 2:00 P.M. so parents can schedule next-day appointments for their children.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open the department you want to edit.
2. Go to the Templates > Release Settings form.
3. In the Earliest time for time release of blocks and slots field, enter the same time your time release batch is scheduled to run for the department. For example, if your batch runs at 2:00 P.M., enter 2:00 P.M. in this field.

Exclude Holidays, Saturdays, and Sundays from Release of Blocks and Slots Change Days Calculation

By default, the system includes holidays, Saturdays, and Sundays when counting how many days to release blocks and slots for a department. You can choose to not include these days if it makes sense for a department. For example, when a block is set to release two days before the appointment date and Include Sunday? is set to No, when the batch runs on Sunday the batch extends the number of days to release blocks by one to not include Sunday and release Wednesday's blocks instead of Tuesday's blocks.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open the department you want to edit.
2. Go to the Templates > Release Settings form.
3. Enter No in the Include holidays?, Include Saturday?, or Include Sunday? fields as needed for the department. When the batch runs on or over one of these days, the systems adds one day to the change days for release of blocks and slots.

Release Blocks for a Department or Provider

To edit release of blocks settings for a department:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open the department for which you want to configure reserved time to expire.
2. Go to the Templates > Release Settings form.
3. Enter the number of days before a given date to change block reservations in the Change Days field for the block.
4. Leave the New Block field blank to indicate that the system should convert the blocks to unreserved time.

To edit release of blocks settings for a provider:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Provider and open the provider for whom for which you want to configure reserved time to expire.
2. On the Blocks form, enter the number of days before a given date to change block reservations in the Change Days field for the block.
3. Leave the New Block field blank to indicate that the system should convert the blocks to unreserved time.

Provider Blocks

	Block	Related Department	Change Days	New Block
1	New Patient	EMC FAMILY MEDICINE [10501101]		
2	Same Day	EMC FAMILY MEDICINE [10501101]		
3	Well Child	EMC FAMILY MEDICINE [10501101]		
4	Physical	EMC FAMILY MEDICINE [10501101]		
5				

Release Slots for a Department or Provider

You can also use time release functionality to split single slots into multiple shorter slots. In both the Provider (SER) master file and Department (DEP) master file, you can define the type of open slot that you want to split into additional slots based on the original length of the slot, a block in the slot, or the number of regular or overbook openings. When splitting slots through time release functionality, you can specify that the slots be created with a certain length and have a certain number of regular or overbook openings.

The only slots that can be split during this process are those that have at least one regular opening, do not have an appointment scheduled in them, and have not changed in length since the template was filed. For example, imagine you filed a template that consisted of 30 minute slots. Later, you scheduled a 15 minute appointment into one of the 30 minute slots, thus creating a 15 minute slot. The 15 minute slot cannot be split by release of slots, regardless of how many regular openings remain, or whether there are appointments scheduled in the slot. However, imagine you originally built a template that contained 40 minute slots. Later, the provider formally requested that only 20 minute slots be used in the template. By changing the slot lengths in the Edit Template activity and filing the template, the new 20 minute slots can be split during Release of Slots, provided they have at least one regular opening, no appointments, and meet the criteria you specify in the Provider or Department master files.

When you cancel appointments that had previously split an original slot, the original slot may be split if it meets the criteria you specify, has at least one regular opening, and does not have any other appointments. For example, if you scheduled a 30 minute appointment into a 60 minute slot and later cancel the 30 minute appointment, the 60 minute slot can be split by End of Day Processing if it meets the criteria in the Provider or Department master files.

To edit release of slots settings for a department:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open the department for which you want to split slots.
2. Go to the Templates > Release Settings form.
3. Configure the Release of Slots settings to define the slots you want to change and how and when you want to change them. In the Change From section, use the Length field to specify the slot length that you want to split. Use the Days field to enter the number of days into the future the system should look for matching slots. Optionally use the Block, Open, or Overbook fields to further specify the type of slot that you want to split. In the Change To section, use the Length field to specify the new slot length to be used when split. Optionally use the Open and Overbook fields, in conjunction with a modifier, to further specify the type of slot to be used after the original slot has been split.

Release of Slots

Change From					Change To				
Length	Block	Open	Overbook	Days	Length	Modifier	Open	Modifier	Overbook
30				2	15				

To edit release of slots settings for a provider:

1. In Cadence Text, go to Cadence Management > Provider and open the provider for whom you want to split slots.
2. On the Block Scheduling Restrictions screen, configure the Release of Slots settings to define the slots you want to change and how and when you want to change them. In the Change From section, set the related department. Set the length to specify the slot length that you want to split. Use the Days field to enter the number of days into the future the system should look for matching slots. Optionally use the Block, Open, or Overbook fields to further specify the type of slot that you want to split. In the Change To section, use the Length field to specify the new slot length to be used when split. Optionally use the Open and Overbook fields, in conjunction with a modifier, to further specify the type of slot to be used after the original slot has been split.

Create a Batch to Release Blocks and Slots for Your Facility

Batch jobs based on Batch Scheduler template 4-Time Release of Blocks and Slots change or remove blocks from a provider's template, split slots based on department and provider settings, and release public/private slots. We recommend setting the Earliest time for time release of blocks and slots (I SDF 8160) and the Earliest time for time release of public/private slots (I SDF 8129) to 9:00 P.M. for your facility and setting up the batch jobs for both to run at 9:01 P.M . Follow the steps below to set up the batch jobs.

1. In Cadence Text, go to Utility Menu > Batch Jobs > Job Enter/Edit and create a job based on template 4.
2. Define a batch and run for the job to start at 9:01 P.M. For additional information about creating Batch Scheduler jobs, batches, and runs, refer to the Batch Scheduler Setup and Support Guide.

Create a Batch to Release Blocks and Slots for a Department

You can optionally create a batch job to run at a different time for a department, for example, if you want to release blocks for your pediatrics department at 2:00 P.M. so parents can schedule next-day appointments for their children.

1. In Cadence Text, go to Utility Menu > Batch Jobs > Job Enter/Edit and create a job based on template 4.
2. Enter the departments for which this batch job applies in the Department mnemonic.
3. Define a batch and run for the job to start at a different time from the facility, such as 2:00 P.M. For additional information about creating Batch Scheduler jobs, batches, and runs, refer to the Batch Scheduler Setup and Support Guide.

Reserve Time in a Provider's Schedule for Visit Modes

Starting in May 2024

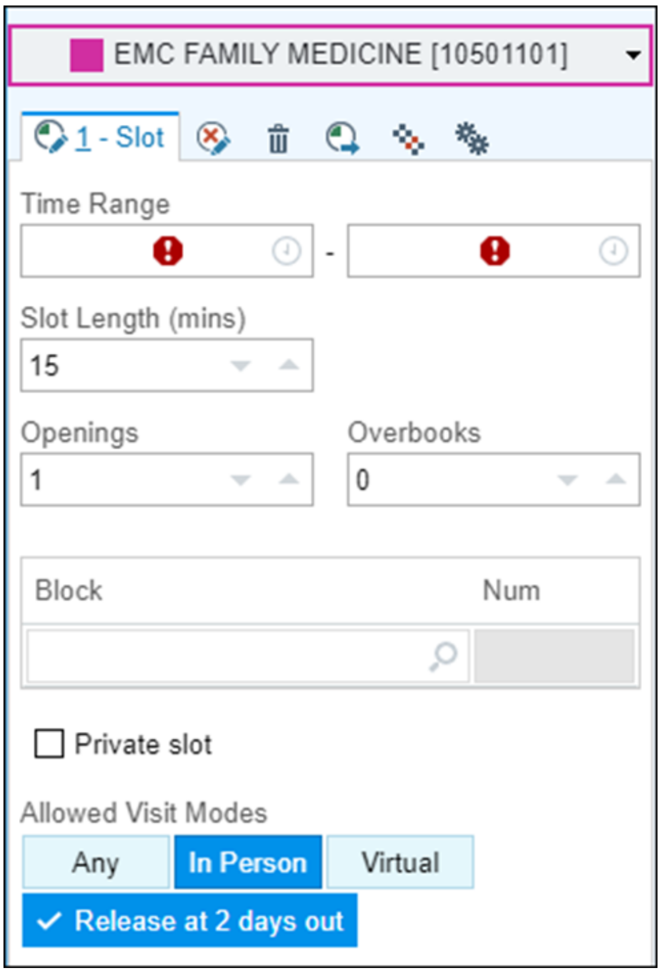
You can use visit modes to directly drive what parts of a provider's schedule are available for in person or virtual visits. Instead of using blocks to indicate if a provider's time is reserved for in person or virtual (video or telephone) visits, template builders can indicate directly in the provider's template what visit modes are available in a slot. This allows your organization to use blocks for other purposes, such as reserving time for new patient visits or physicals, instead of having a provider's schedule be cluttered with a bunch of blocks denoting visit mode.

In the Edit Template and Edit Pattern activities, template builders can select a value in the Allowed Visit Modes field to assign a particular visit mode to a slot or make it available for all visit modes. They can also choose to release the visit mode at a certain point so that it can be selected only a certain number of days out from the slot date. For example, template builders can configure a slot to allow in person or virtual appointments up until two days out from the slot date, at which point only virtual visits are allowed.

To create a template for a provider with visit modes specified in certain slots, a template builder completes the following steps:

1. Open the Edit Template activity and choose a provider.
2. Create or edit a slot and specify the time range for the slot, slot length, number of openings, and relevant blocks in the Slot toolbox.
3. Choose one of the visit modes from the list in the Allowed Visit Modes section.
4. If the visit mode is configured at the provider, department, or system level to be released at a certain point in time, you can select the Release at… checkbox.
5. Apply the slots.

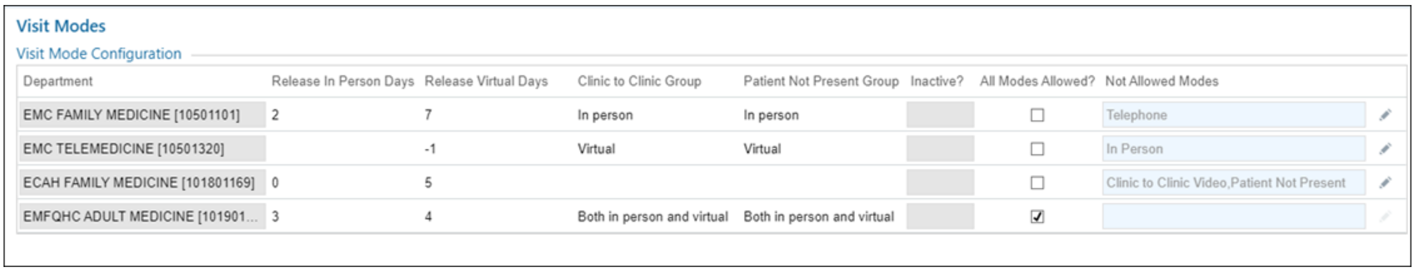
Additionally, you can follow the steps above in the Edit Pattern activity to create daily or weekly patterns with visit mode restrictions, and then you can apply the patterns to specific providers in Edit Template.



Edit Visit Mode Settings for a Provider

In the Provider Edit activity (Epic button > Admin > Schedule Admin > Master File Edit > Provider), go to the Scheduling> Visit Modes form. To configure visit mode behavior at the provider level, enter values in the following settings as necessary:

- If a provider uses all visit modes, you can check the All Modes Allowed? (I SER 14206) checkbox.
- If a provider does not use specific visit modes, you can specify the modes not allowed by the provider in the Not Allowed Modes (I SER 14205) section. Providers must have at least one allowed mode.
- You can choose the number of days in the future that in person or virtual slots are released (turned into time without a visit mode) for the provider in each department with the Release In Person Days (I SER 14201) and Release Virtual Days (I SER 14202) fields. If these settings are set to 0, visit mode restrictions are removed at the beginning of each day so that schedulers can schedule for the provider in the department using any visit mode. If these settings are set to -1, visit mode restrictions are never released and slots with a visit mode can never be scheduled into with a different visit mode.
- In the Clinic to Clinic Group (I SER 14203) and Patient Not Present Group (I SER 14204) fields, you can choose if visit modes of Clinic to Clinic Video and Patient Not Present are considered to be in person visits, virtual visits, or both.



Visit Modes

Visit Mode Configuration

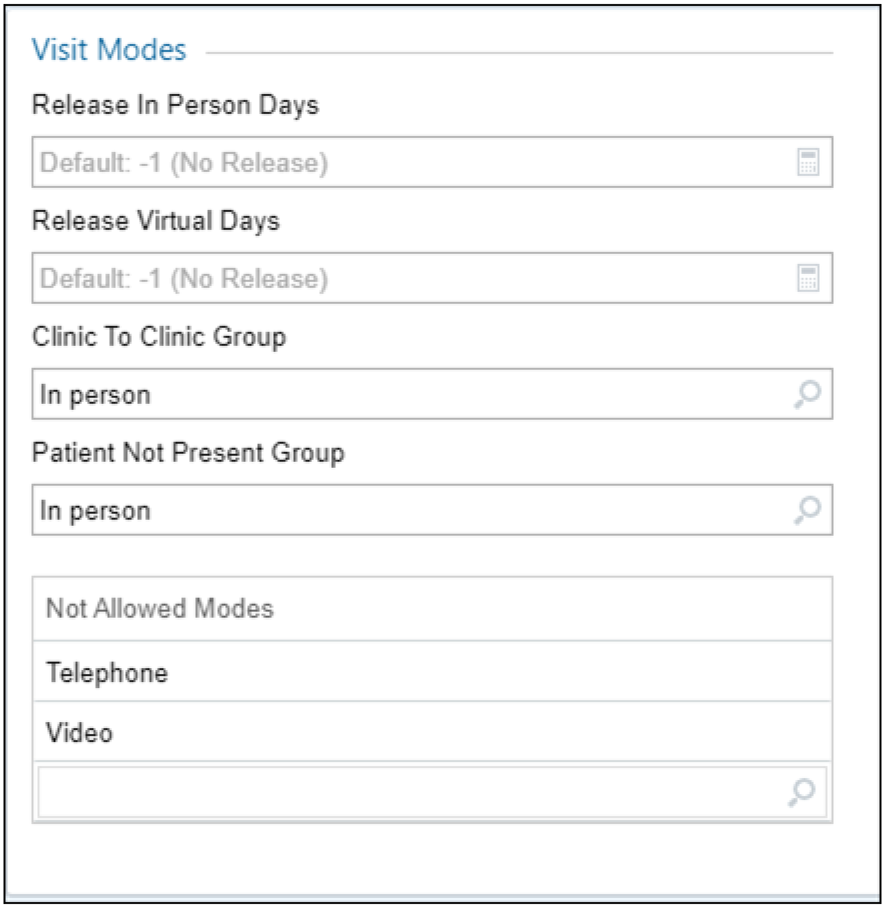
Department	Release In Person Days	Release Virtual Days	Clinic to Clinic Group	Patient Not Present Group	Inactive?	All Modes Allowed?	Not Allowed Modes
EMC FAMILY MEDICINE [10501101]	2	7	In person	In person		☐	Telephone
EMC TELEMEDICINE [10501320]		-1	Virtual	Virtual		☐	In Person
ECAH FAMILY MEDICINE [101801169]	0	5				☐	Clinic to Clinic Video,Patient Not Present
EMFQHC ADULT MEDICINE [101901...	3	4	Both in person and virtual	Both in person and virtual		☑	

Edit Visit Mode Settings for a Department

In the Department Edit activity (Epic button > Admin > Schedule Admin > Master File Edit > Department), there is a new Visit Modes form under the Templates grouper. To configure visit mode behavior at the department level, enter values in the following settings as necessary:

- Make changes to the Release In Person Days (I DEP 3540) and Release Virtual Days (I DEP 3541) fields.
- Adjust the Clinic to Clinic Group (I DEP 3542) and Patient Not Present Group (I DEP 3543) fields.
- Specify any visit modes that are not allowed in the department with the Not Allowed Modes (I DEP 3544) field.

These settings function the same as their equivalents at the provider level.

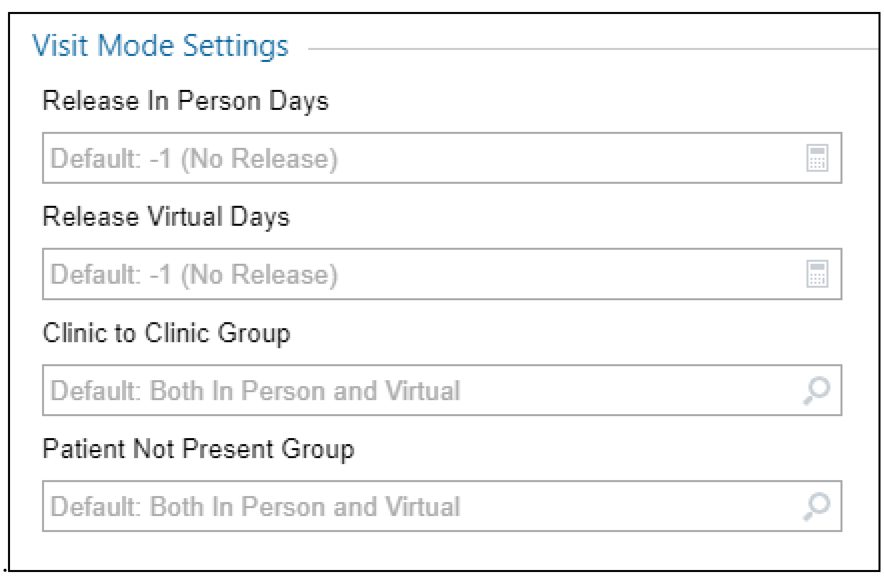


Edit Visit Mode Settings at the System Level

Some visit mode settings can be configured at the system level. These settings are located on the Telehealth form of Cadence System Definitions (Epic button > Admin > Schedule Admin > Cadence System Definitions). To configure visit mode behavior at the system level, enter values in the following settings as necessary:

- Make changes to the Release In Person Days (I SDF 12280) and Release Virtual Days (I SDF 12281) fields.
- Adjust the Clinic to Clinic Group (I SDF 12282) and Patient Not Present Group (I SDF 12283) fields.

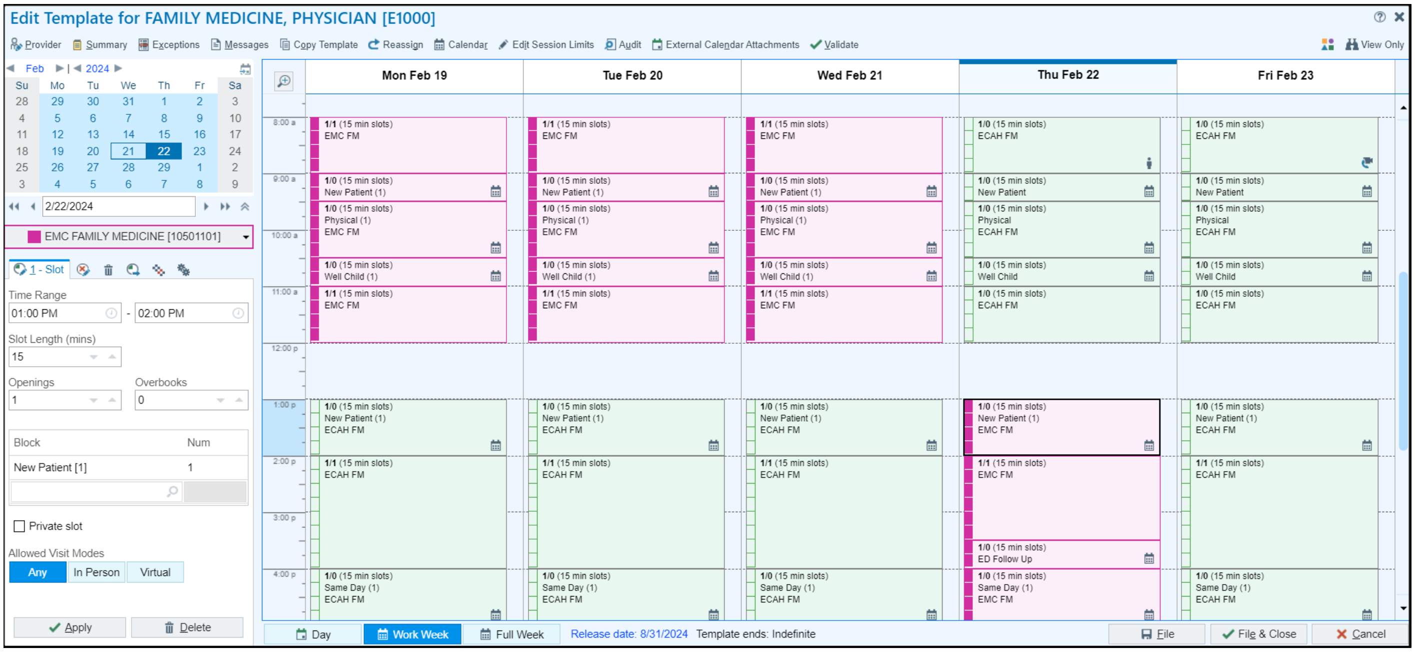
These settings function the same as their equivalents at the provider level.



Configure Scheduling Templates

All provider and resource schedules need a basic framework that tells schedulers when they can make appointments, which time slots are available, and how many appointments they can make for the same provider concurrently. The template provides such a framework and links together other schedule-related build.

The Edit Template activity allows you to build and edit template for a provider's schedules. You can edit and view multiple department schedules in the same activity.



Considerations

When creating provider schedules, you can choose to create a template by itself or create a template from a pattern. The following section deals with creating a template by itself. Using a standalone template is a good option for:

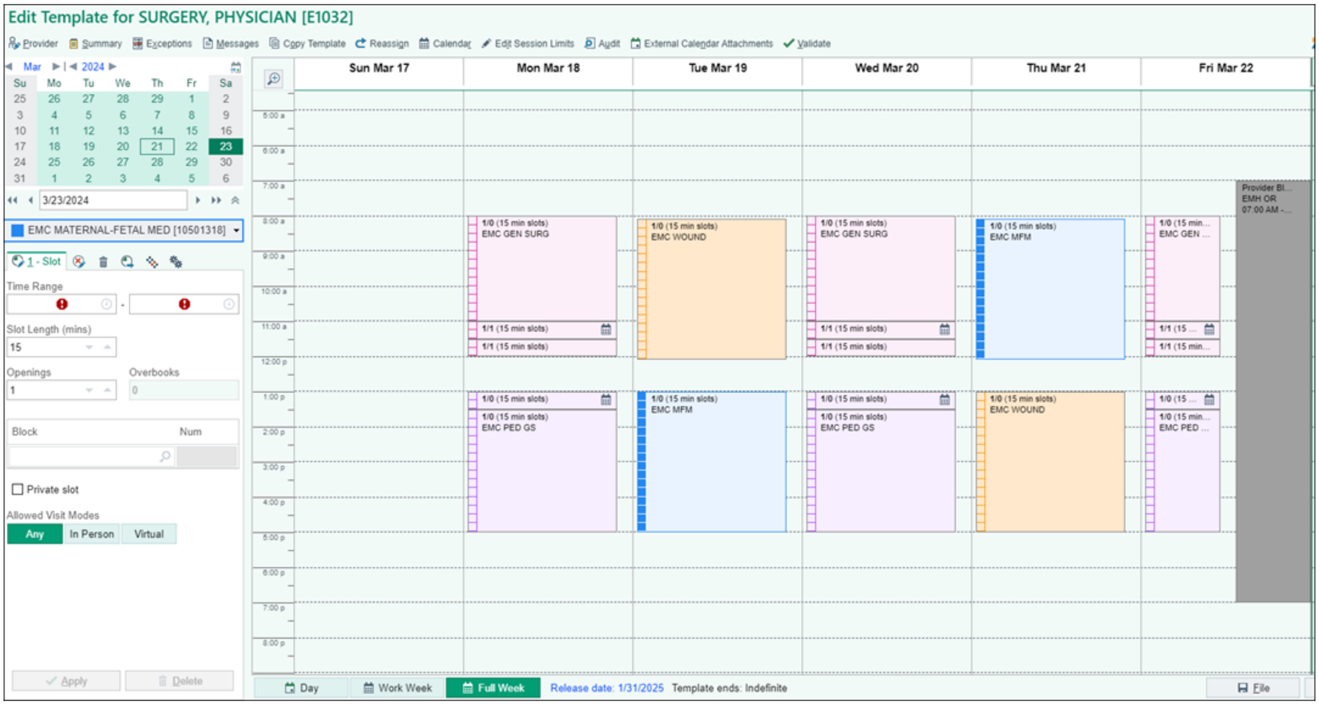
- Providers with highly customized or variable schedules. For example, if the provider doesn't have a regular schedule or if a provider needs frequent updates to his schedule.
- Providers with unique schedules that don't repeat predictably.

When using standalone templates to create provider schedules, know that:

- Templates do not auto-extend, meaning that you must rebuild them when they run out. To avoid this, you might decide to either use the indefinite end date check box while creating the template or you might set the end date very far into the future to ensure that the template won't need to be rebuilt anytime soon. Note that the indefinite end date option isn't available if you have recurring exceptions.
- Epic doesn't recommend that you build templates with recurring exceptions (such as time for lunch) because this can decrease system performance. If you want to build recurring unavailable time into a provider's schedule, use an unavailable block. If you have recurring exceptions in the template, you can't set an indefinite end date for the template.
- If the provider's schedule changes after the template is created, you can edit the template to make changes.

Considerations

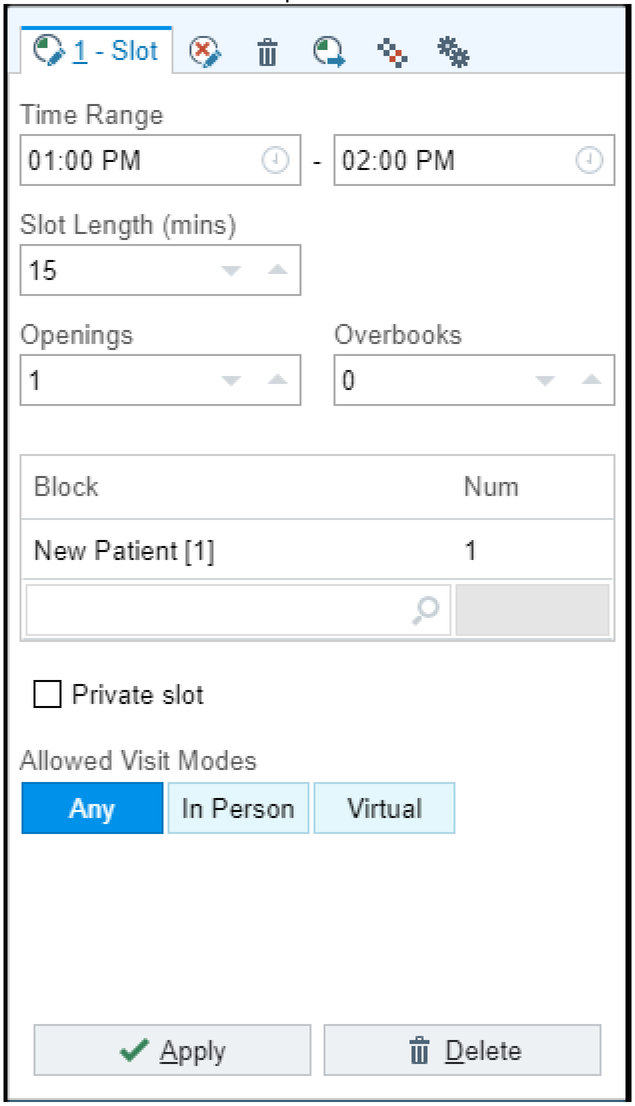
Also, if your organization uses OpTime, you can see any blocks in OpTime templates in the Edit Template activity. This allows you to see any time reserved for surgeries so you can make sure your appointment schedules don't incorrectly overlap. When the Show room blocks check box is selected, blocks from a room's OpTime template appear in the activity in solid grey and show the block name, the location, and the start and end times. You can also see this information in the tooltip. Room blocks do not appear if they are scheduled to be released. Refer to the Set Up Scheduling Templates for Staff and Resources topic for more information about OpTime templates.



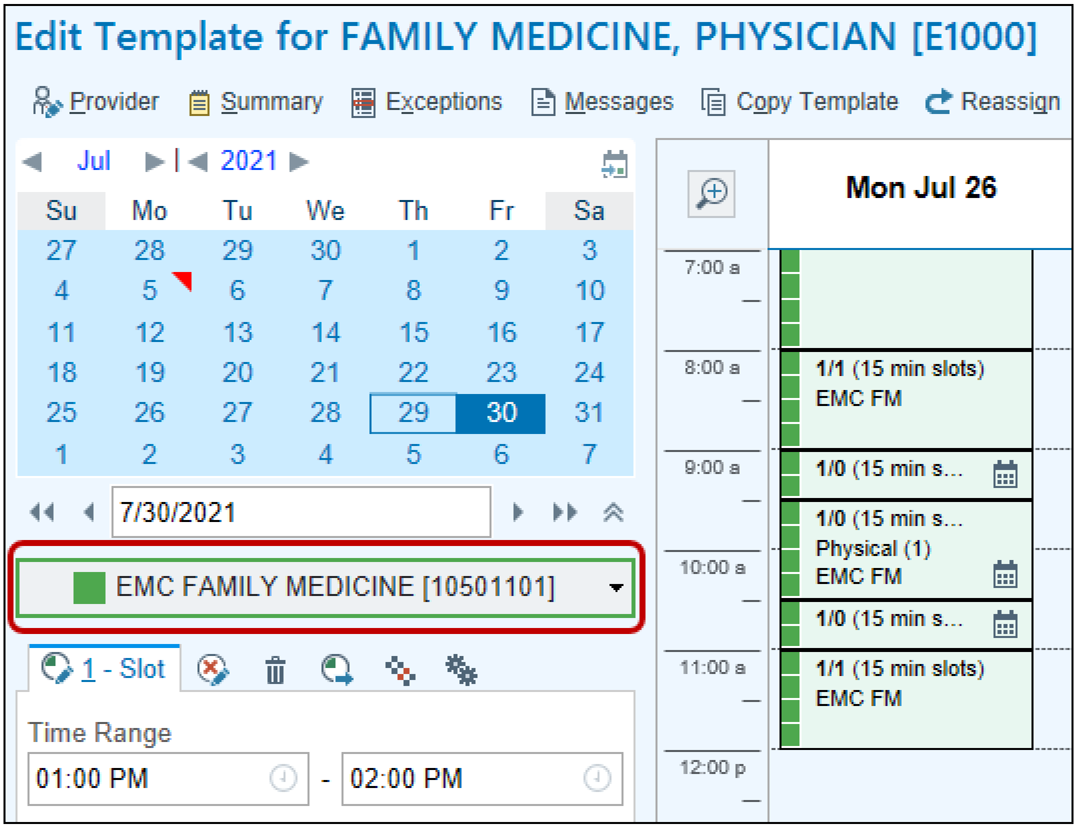
Create Slots in a Template

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Edit Template.
2. On the Provider/Resource Select window, enter the provider for whom you want to define a template.
3. At the top of the Define Template activity, select the department you want to create slots for.
4. Select the day you want to add slots to. You can select the day by:
   - Clicking the specific date in the calendar.
   - Using the arrows in the upper right corner of the activity.
   - Typing the date on the Edit Slots tab.
5. In the toolbox, select the Edit Slots button, press Alt+Shift+1.
6. In the Edit Slots tools, define the details of the slots.
   - Enter the length of the slots.
   - Enter the number of openings and overbooks.
   - Select blocks for the slots.
   - If this is a private slot, select the Private slot check box.
   - Starting in May 2024, if you have visit types with multiple schedulable visit modes, select Any, In

Person, or Virtual in the Allowed Visit Modes section and click Apply. If a release date is set up for the visit mode at the provider, department, or system level, you can select it using the checkbox below the visit mode options.



7. On the calendar, draw your slots on the scheduling by clicking the start time for the slots and then dragging the mouse cursor to the end of the slot times.
   - Be careful when clicking the start time for the slot. The system starts the slot exactly where you click on the schedule. For example, if you want a slot to start at 8:00 a.m. but click slightly below 8:00 a.m., the system starts the slots slightly after 8:00 a.m., like at 8:15 a.m. After clicking and dragging to create slots, you should refer to the Edit Slots tool to make sure you created the slots correctly.
8. Repeat steps 4 through 7 as needed to create the schedule. If you need to create slots for a different department, select the department at the top of the activity or in the Edit Slots tab.



9. When you are done, click File and Close to save your changes and close the activity.

If you prefer not to use the mouse to click and drag slots, you can define the start and end times in the Edit Slots tools, then click Apply to add the slots to the display. You need to click File and Close to save your changes to the template.

Filter Unavailable Reasons by Provider Type

Starting in August 2024

Minimize unavailable time reasons being used for inapplicable provider types by restricting unavailable reasons to specific provider types. Provider type filtering can also help reporting data be more accurate. You can restrict unavailable time reasons in the following ways:

- Unavailable time reasons that are set to Provider Only are only applicable to provider records where Type of Staff/Resource (I SER 30) is set to 1-Person.
- Unavailable time reasons that are set to Resource Only are only applicable to provider records where Type of Staff/Resource (I SER 30) is set to 2-Resource.
- Unavailable time reasons that are set to Both Providers and Resources are applicable to provider records where Type of Staff/Resource (I SER 30) is set to either 1-Person or 2-Resource.

By default, all unavailable reasons are set to Both Providers and Resources.

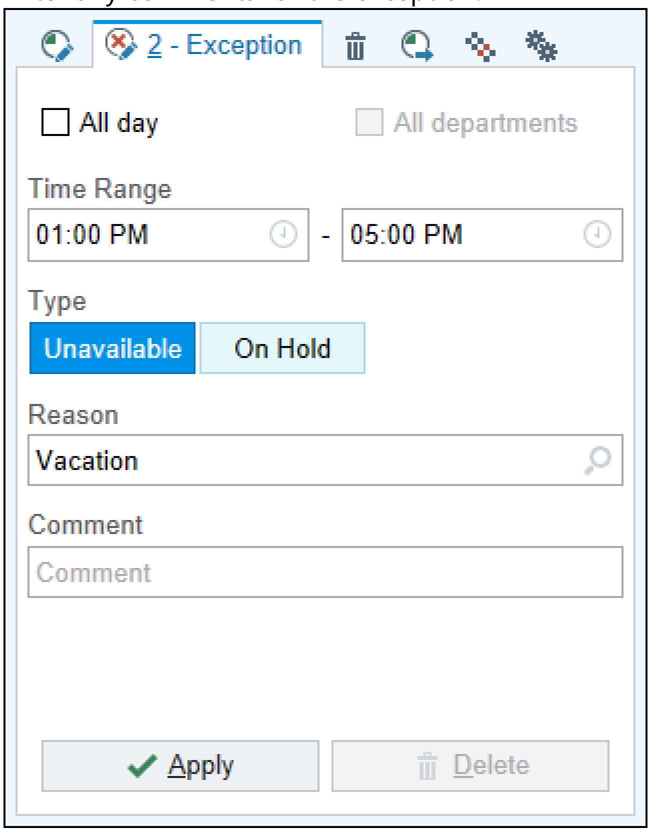
To specify which provider types should be associated with each unavailable time reason:

1. In Cadence System Definitions, navigate to the Templates > Unavailable Reasons form.
2. In the Allowed Provider Type (I SDF 1901) field for the desired unavailable time reason, select which provider type you want the unavailable reason to be associated with.

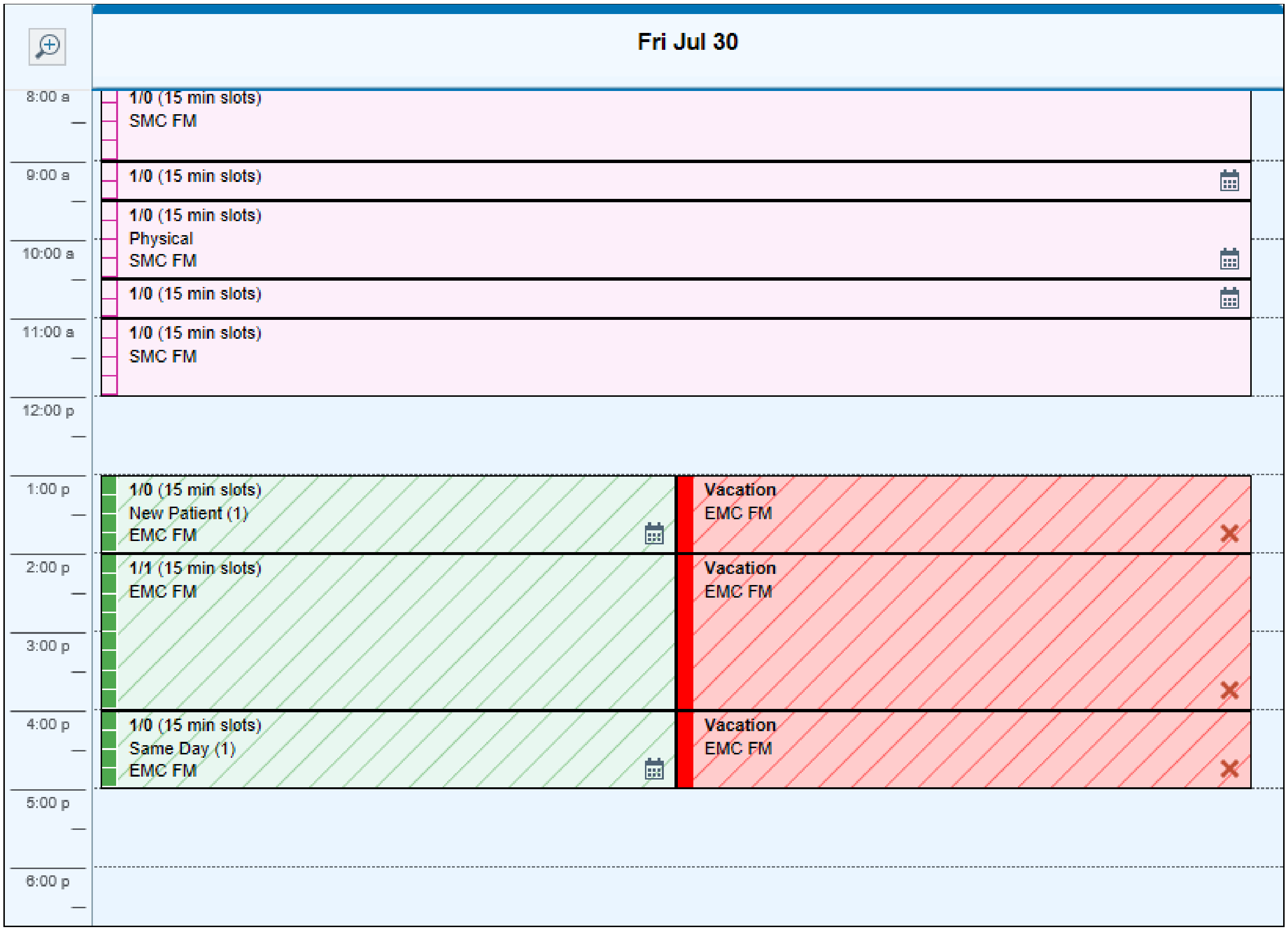
Set Exceptions in the Template

Before you add an exception to the template, you must create slots for the place in the template where the exceptions will go.

1. In the Edit Template activity, create some slots in the template.
2. Select the Exceptions button, press Alt+Shift+2.
3. Select the date and department template you want to edit.
4. Define the exception.
   - Choose if the exception is time unavailable or time on hold.
   - Select the reason for the exception.
   - Enter any comments for the exception.



5. On the calendar, draw your exception on the scheduling by clicking the start time for the exception and then dragging the mouse cursor to the end of the exception times.
   - Make sure to click and drag outside any existing slots to add exceptions to those slots.
   - If you try to add exceptions to a date without slots, the system asks if you want to create the slots and the exception, only the slots, or go back to define your exception.
6. Repeat steps 3 through 5 as needed to add exceptions to the template.



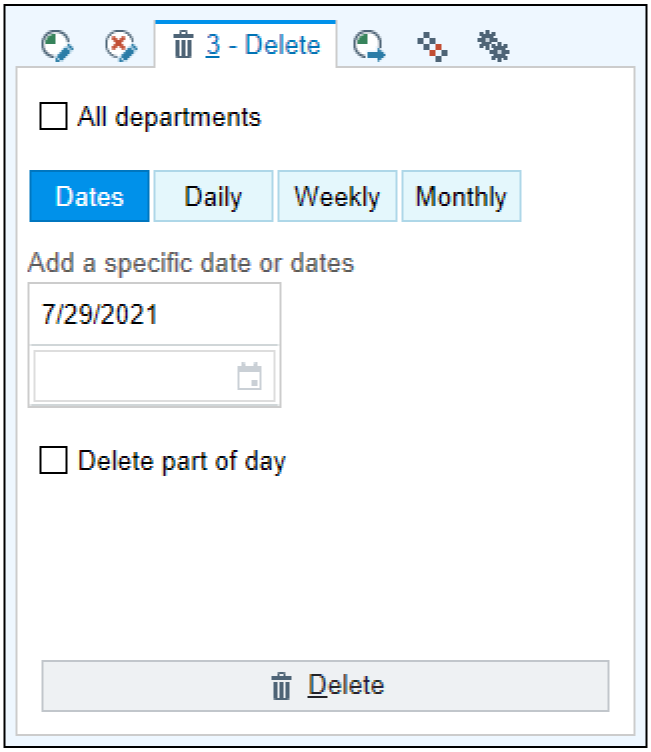
7. When you are done, click File and Close to save your changes and close the activity.

If you prefer not to use the mouse to click and drag exceptions, or if you need to add an exception for a whole day, you can define the start and end times in the Exceptions tools, and then click Apply to add the exceptions to the display. You need to click File and Close to save your changes to the template.

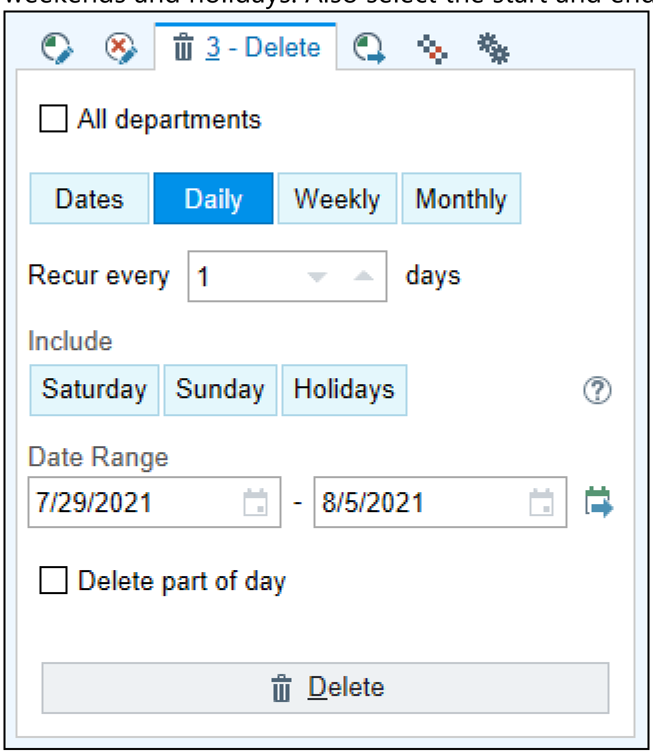
Delete Slots

If you need to remove time from a provider or resource's schedule, you can delete slots from the template.

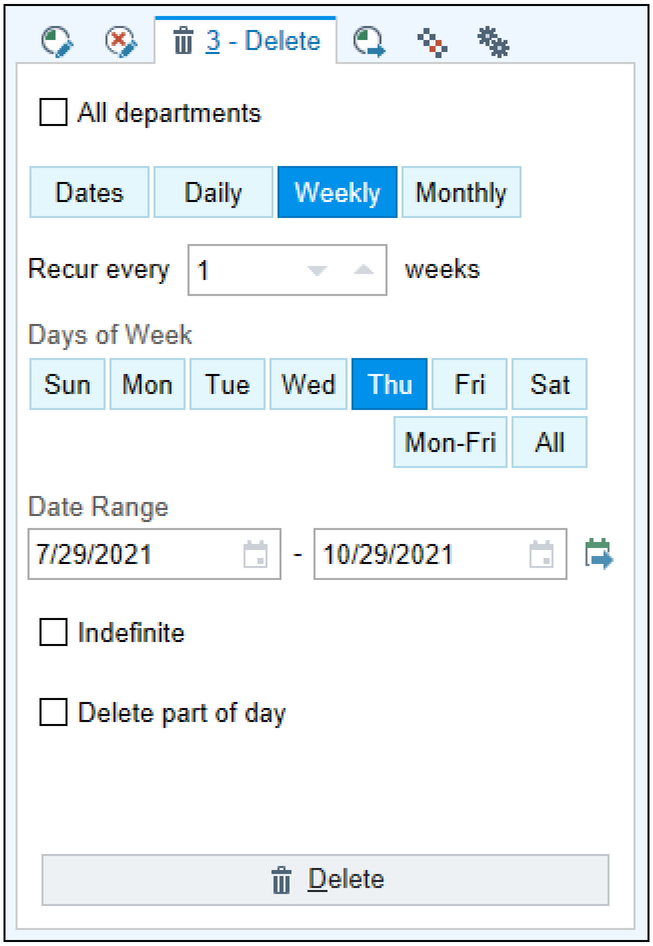
1. Select the Delete Slots tab in the toolbox, or press Alt+Shift+3.
2. Select the department template you want to edit.
3. Select the date you want to delete from the schedule. You can either delete the whole day or specify a time range to remove part of the day.
4. Define how often you want the recurrence to be removed from the template. Choose from specific date, daily, weekly, or monthly.
   - If you choose Dates, then select the specific dates to which you want to remove the template.



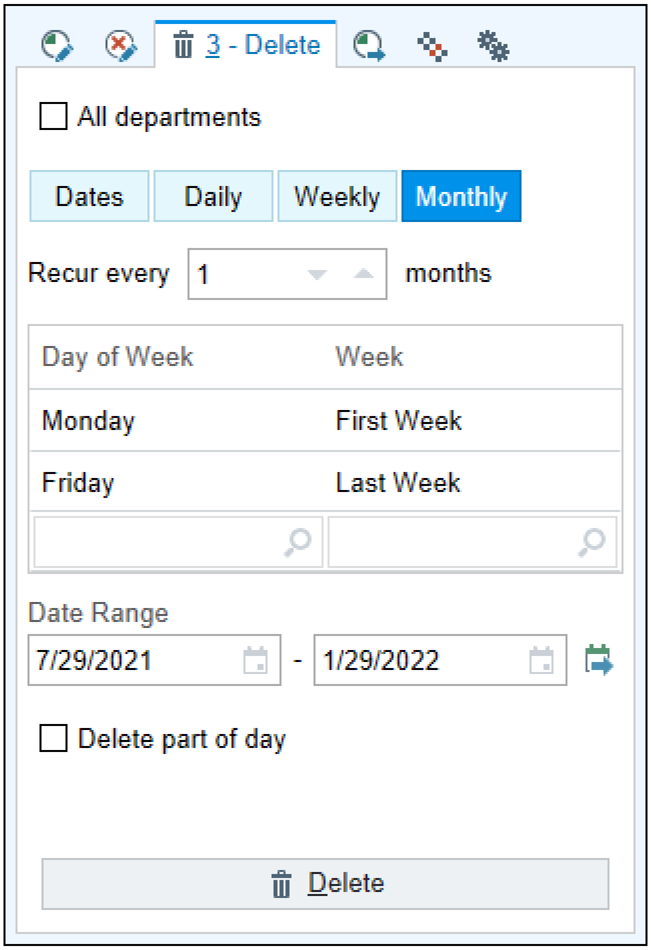
- If you choose Daily, select how often you want to remove the slots, and if you want to include weekends and holidays. Also select the start and end dates for the recurrence.



- If you choose Weekly, select how often you want to delete the slots and the days of the week to which you want to apply the recurrence. Also select the start and end dates for the recurrence and if you want to apply the recurrence to the template indefinitely.



- If you choose Monthly, select how often you want to remove the slots. Then select the days of the week and weeks of the month to which you want to apply the recurrence. Also select the start and end dates for the recurrence.

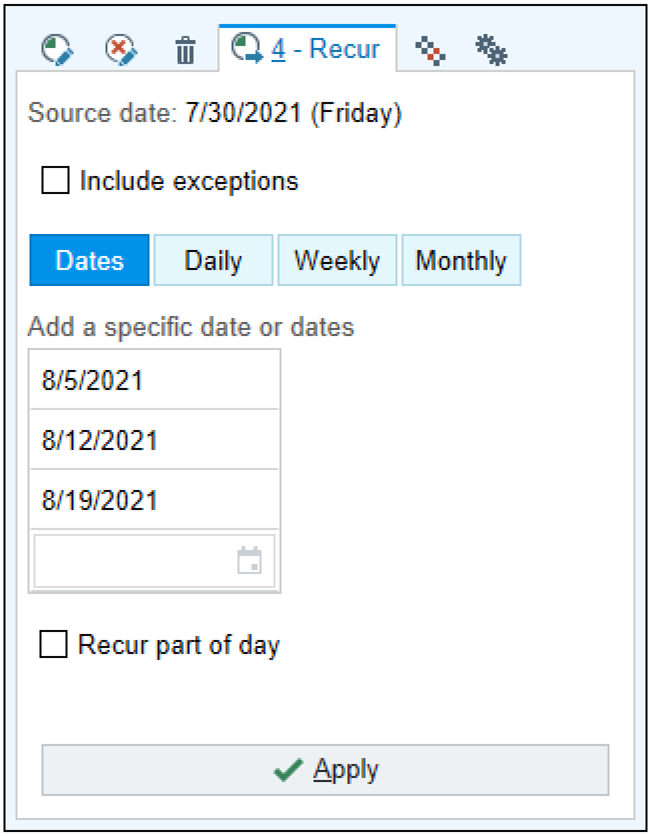


5. Click Apply. The system deletes the recurrence to the template.
6. When you are done, click File and Close to save your changes and close the activity.

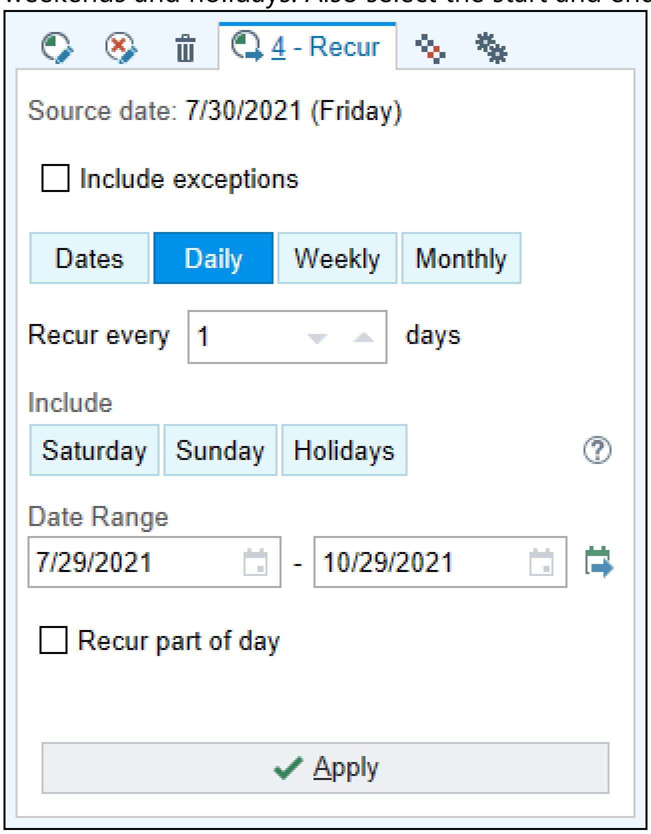
Create Recurring Slots

If the provider or resource has a repeating daily schedule, you can create recurring slots on the template.

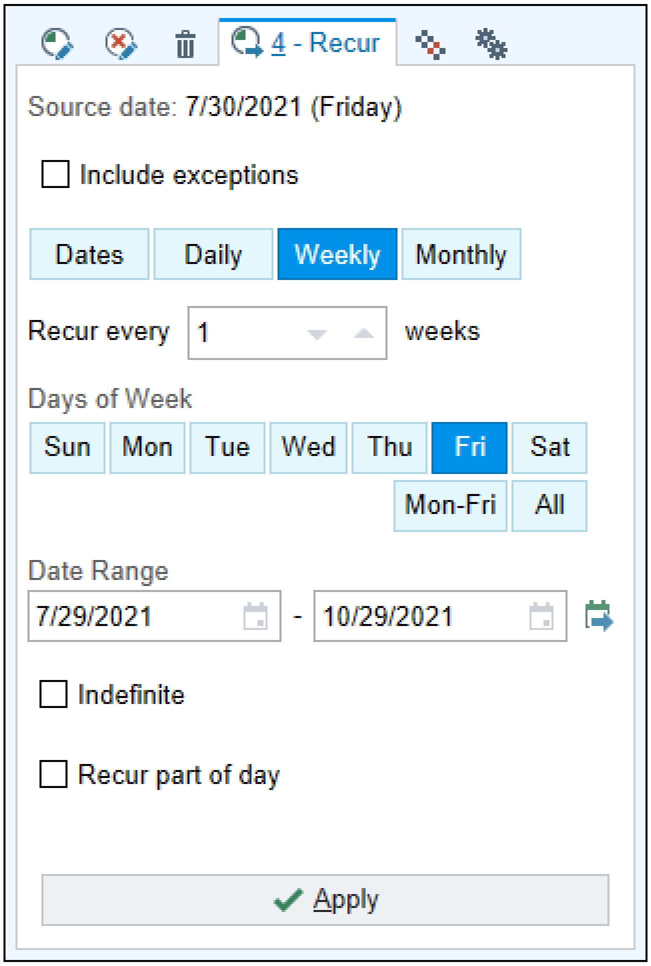
1. In the Edit Template activity, create some slots in the template.
2. Select the Recur Slots tab in the toolbox, press Alt+Shift+4.
3. Select the department template you want to edit.
4. Select the source date in the template. This is the date you want to repeat in the schedule.
5. Determine if you want to recur the entire day or part of the day. You can specify a time range by selecting the Recur part of day checkbox.
6. Determine if you want to include unavailable time in the recurring slots.
7. Define how often you want the recurrence to occur in the template. Choose from specific date, daily, weekly, or monthly.
   - If you choose Dates, then select the specific dates to which you want to apply the recurrence.



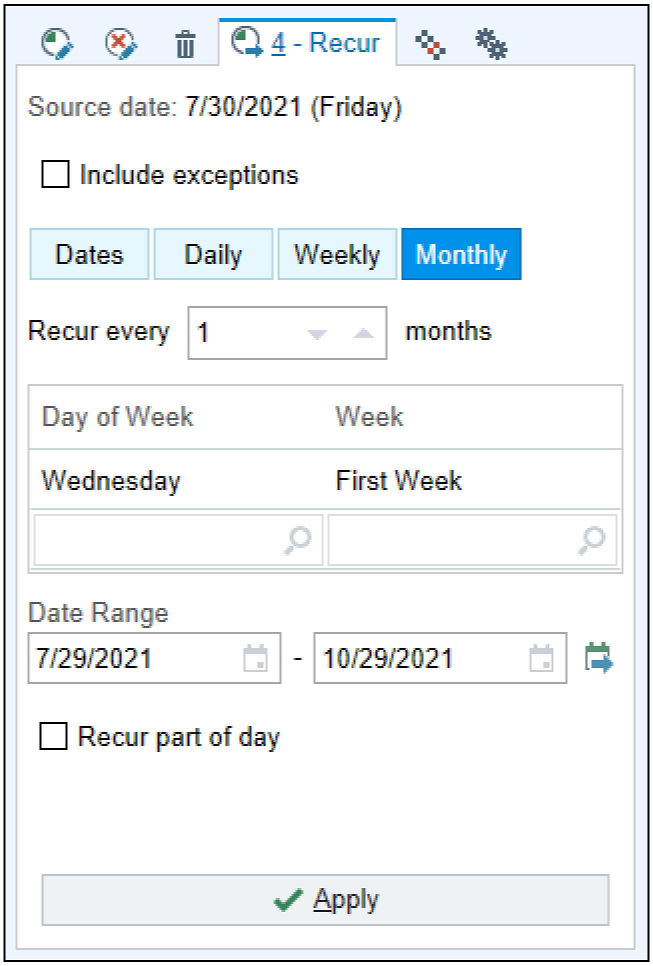
- If you choose Daily, select how often you want to recur the slots, and if you want to include weekends and holidays. Also select the start and end dates for the recurrence.



- If you choose Weekly, select how often you want to recur the slots and the days of the week to which you want to apply the recurrence. Also select the start and end dates for the recurrence and if you want to apply the recurrence to the template indefinitely.



- If you choose Monthly, select how often you want to recur the slots. Then select the days of the week and weeks of the month to which you want to apply the recurrence. Also select the start and end dates for the recurrence.

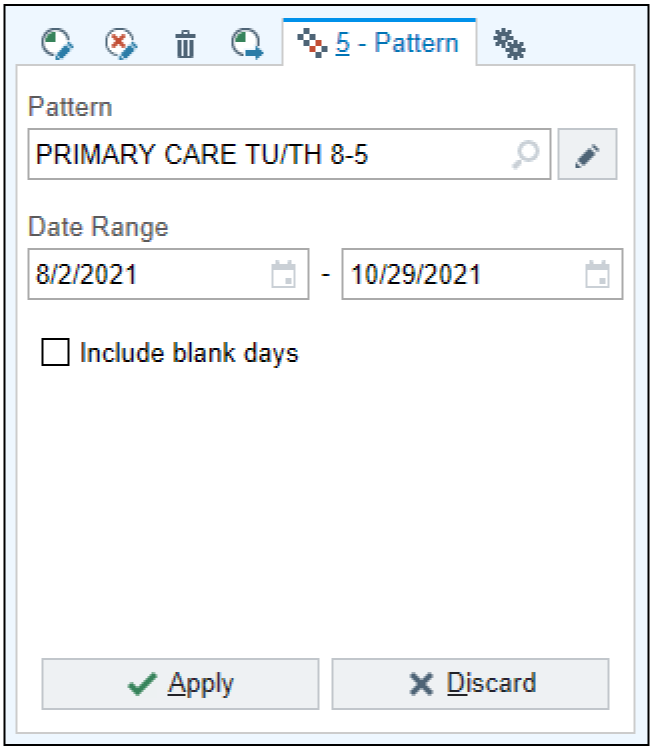


8. Click Apply. The system applies the recurrence to the template.
9. When you are done, click File and Close to save your changes and close the activity.

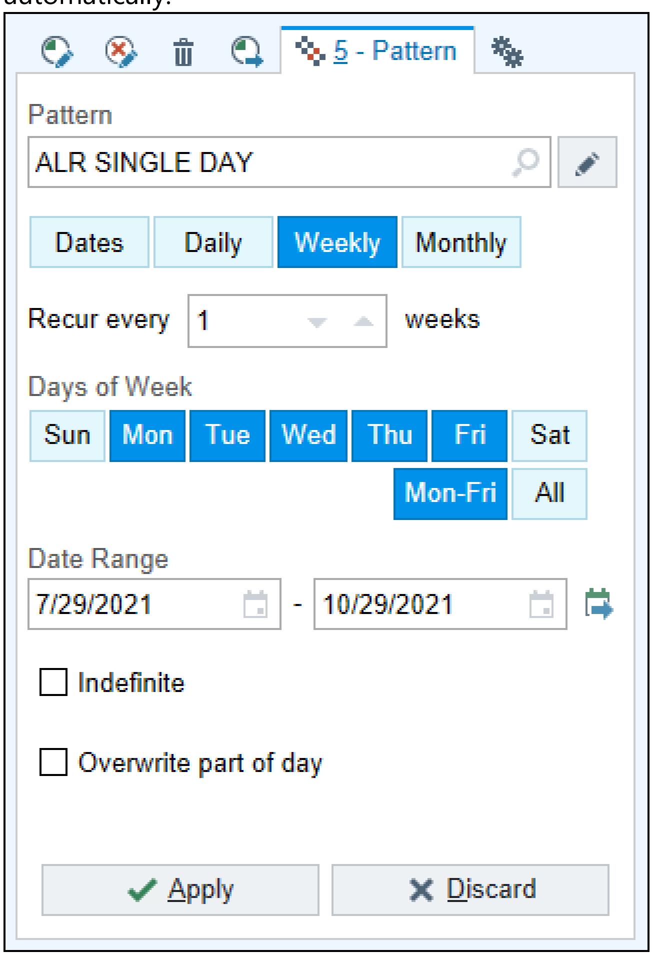
Copy a Pattern into the Template

You need to create the pattern before you can apply it to a template. Refer to the Configuring Scheduling Patterns topic for more information on creating patterns.

1. In the Edit Template activity, select the Apply Pattern tab, press Alt+Shift+F5.
2. Select the pattern you want to apply to the template.
3. Determine if you want to include any blank days in the pattern.
4. Select the department schedule to which you want to apply the pattern.
5. Choose when the pattern should apply to the template:
   - For a weekly pattern, select a start and end date.

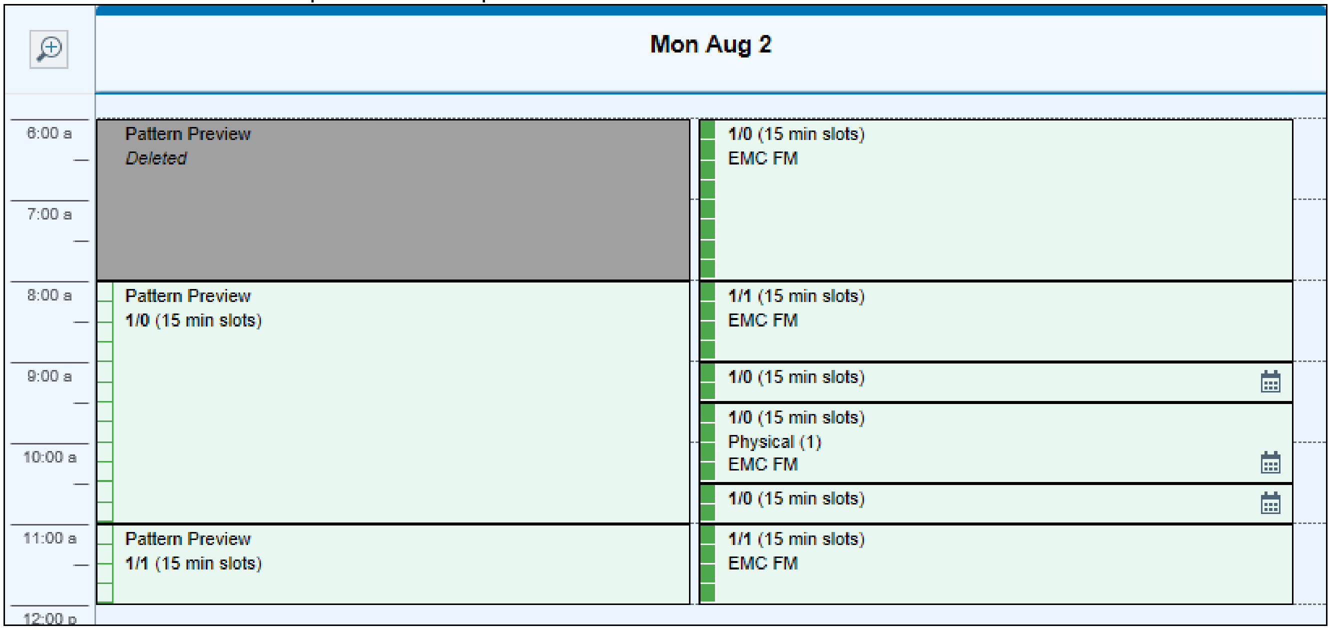


- For a single day pattern, select a start date. If the pattern should apply to only a portion of the day, the Overwrite entire day checkbox is cleared and the Start time and End time fields are filled in automatically.



6. At this point, the system tentatively applies the pattern in the template, so you can compare the changes

between the current template and the pattern.



7. Click Apply to apply the pattern to the template, or click Discard if you want to undo the pattern application.
8. When you are done, click File & Close to save your changes and close the activity.

Set Provider and Resource Templates to Extend

During end-of-day processing, you can have the system automatically release more template for your schedules. This feature is known as the release date offset and helps you give schedulers more dates to work with as the number of future dates for which schedule exists goes down. The release date offset can be defined at the system, department, and provider levels.

You can think of the release date as the paperclip in a scheduling book. The paper clip holds together months too far into the future for schedulers to use when making appointments. The offset moves this paper clip back every day, giving schedulers enough future dates to use when scheduling while still preventing scheduling too far into the future. For example, if you set the release date offset to 9 and the timeframe to Monthly, all affected providers and resources have 9 months of schedule made available for scheduling when they come close to the end of their schedule. You can define an initial release date for a provider in the Edit Template activity on the Settings tab. As time moves on the release date offset will then automatically move that date further into the future according to your settings. For more information, refer to the Make a Provider or Resource Schedulable topic.

For more information about configuring Cadence end-of-day processing, see the End of Day Setup and Support Guide.

You can choose to set release date offsets at the system, department, or the provider level, depending on the needs of your organization.

To make build easier, you might choose to set the release date offset at the system level and override it at the department and provider level when particular departments or providers want a different amount of schedule to be available.

Extend All Schedules for Your Organization

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Templates > General form.

3. In the Release date offset (I SDF 8150) field, enter the number of units of time, such as 9, to extend all schedules at your organization.
4. In the Release date offset timeframe (I SDF 8021) field, enter the unit of time, such as Monthly, to use when extending the schedules.

Extend All Schedules in a Department

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the General > Dept Type/Offsets form.
3. In the Release date offset (I DEP 190) field, enter the number of units of time, such as 9, to extend the schedules in this department.
4. In the Release date offset timeframe (I DEP 191) field, enter the unit of time, such as Monthly, to use when extending schedules.

Extend Schedules for a Provider

To extend all of a provider's schedules in the same way:

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Templates > Edit Provider and open a provider record.
2. Select the Release Date Offsets form.
3. In the Default release date offset (I SER 150) field, enter the number of units of time, such as 9, to make available.
4. In the Default release date timeframe (I SER 151) field, enter the units of time, such as Monthly.

To extend specific schedules for a provider:

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Templates > Edit Provider and open a provider record.
2. Select the Release Date Offsets form.
3. In the Department (I SER 155) column, enter the department in which the provider uses the schedule that you want to extend.
4. In the Offset (I SER 156) column, enter the number of units of time, such as 9, to add to the provider's available schedule. The number you enter here works with the time frame you specify in the next column.
5. In the Timeframe (I SER 157) column, enter the units of time, such as Monthly.

Configure Scheduling Patterns

Like templates, patterns provide another way of creating the basic structure for a provider's schedule. Patterns help you quickly create schedule templates for providers with predictable workdays.

With patterns, you can easily populate provider templates with slot and block information over a given date range. You can also use patterns to automatically extend provider templates after they have been copied from a pattern. This feature of patterns eliminates the need to manually rebuild templates every so often.

The Foundation System includes a number of patterns that you can use out of the box or as starting points for your own patterns. For example, the Foundation System includes the following patterns:

- Primary Care M-F 8-5
- General 24HR

- General M-F 8-8
- HOD M-F 8-5
- Specialty MWF AM

Considerations

Before creating templates or patterns, we recommend you consider the type of schedule you want to create and then determine whether the standalone template or a pattern and template method works best.

We recommend that you consider using a pattern to create your schedule template for providers with:

- Generic, static schedules.
- Repetitive schedules.
- The same schedules as multiple other providers or resources. If a provider's schedule can be shared among a group of providers (or more likely, among resources), creating a pattern is often the best option. Patterns can reduce the amount of build needed and make these schedules simpler to maintain.

When using patterns to create provider schedules, know that:

- You can set patterns to auto-extend so that you won't need to rebuild the schedule (unless it drastically changes). This feature of patterns reduces the manual work for areas that have very consistent schedules.
- If the provider's schedule changes after the pattern is applied and the template is created, you might need to make changes to the pattern as well as the template. Whether you update the template or both the template and pattern depends on when the change needs to take effect:
  - If the change isn't permanent and ends before the release date, the user can simply edit the template.
  - If the change is needed before the pattern is set to auto-extend or if the change is needed past the release date, the user needs to edit both the template and the pattern. By changing the template, you update the current schedule. By changing the pattern, you ensure that when the pattern auto-extends, the change will appear going forward.
- If you include exceptions in the pattern (such as lunch), the exceptions appear in the provider's schedule anytime the template is extended by the pattern.

When using a pattern to create a schedule, you must create the pattern and then apply the pattern to a template.

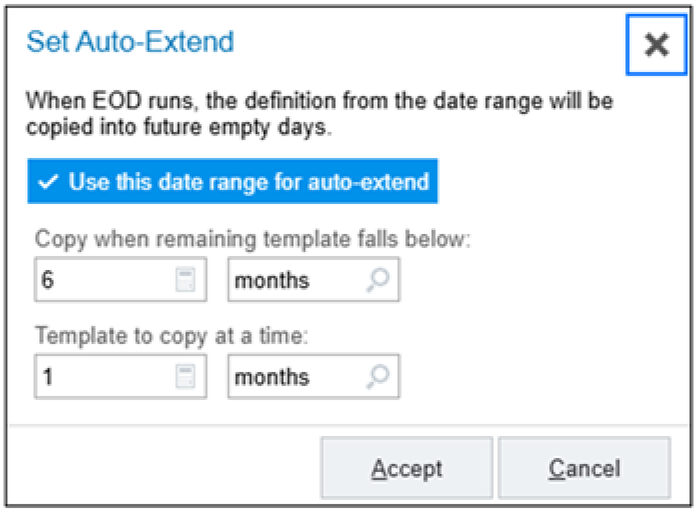
Create a Pattern

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Edit Pattern.
2. On the Select Pattern window, choose a Pattern type (either Single-day or Weekly) and click Create New Pattern.
3. Name your pattern in a descriptive way.
4. If you are creating a Weekly pattern, in the Week field, enter the week you want to edit. Use the Days of the week check boxes to select the days of the week for which you want to specify a schedule. If you know that the days specified need to be the same as an existing day or week, you can enter that into the Copy from fields.
5. If you are creating a Single-day pattern, a summary appears.

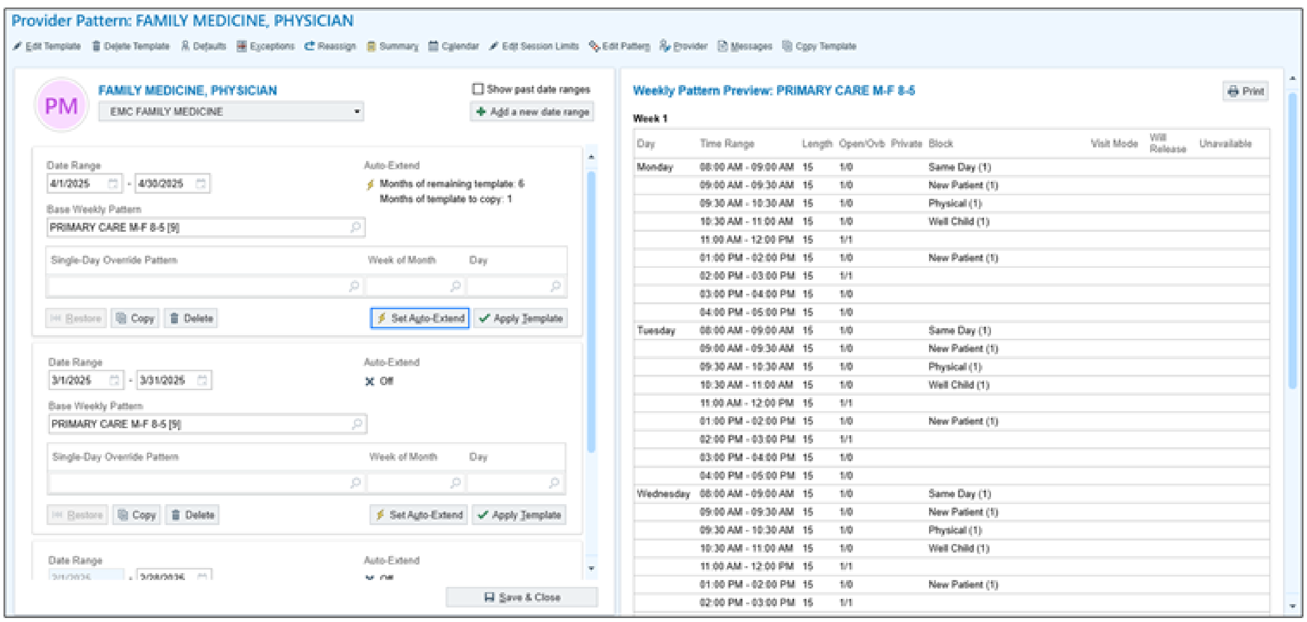
6. Click Edit Pattern.
7. If you are creating a weekly pattern, optionally use the Work Week and Full Week buttons at the bottom left to respectively hide or show weekends. Available starting in August 2023, in May 2023 with special update C10504397, and February 2023 with special update C10410320.
8. Enter information for a time range:
   - Enter the start time and end time in the corresponding fields.
   - Enter a slot length in the Slot length field. For example, if you specify a start time of 8:00 AM, an end time of 10:00 AM, and a slot length of 15, there will be eight slots consisting of 15 minutes built into the pattern.
   - Enter the number of regular opening available per slot in the #Open field.
   - Enter the number of overbooks available per slot in the #Overbook field.
   - Enter as many types of blocks as you need for the slots that you are creating. Enter the name of the block in the Block column and indicate how many blocks should be available for each time slot in the Number column.
9. To set time unavailable, enter an unavailable reason in the Unavailable reason field. Click the Comment button to enter a comment for the unavailable time.
10. The Public slot check box is selected by default, meaning that any scheduler can book appointments into the available openings. If you clear this check box, the slot is Private and schedulers must have the correct security to schedule appointments.
11. Click Apply Changes to add the information you just specified. The new slots and slot information appear.
12. Repeat steps 5-10 to add additional time ranges to the pattern.
13. If you are creating a single-day pattern and want it to apply to only a portion of the day, enter start and end times in the Effective times fields. For example, say that you want to create a different AM schedule for a certain department on Tuesdays and Thursdays. You can create a pattern with an effective start time of 8 AM and an effective end time of 12 PM. When you apply this pattern to an existing template, it overwrites the pattern on that template only from 8 AM to 12 PM rather than overwriting the entire pattern on that template.
14. After you have finished editing the pattern, click File Pattern to file the changes to the pattern. At this point you can select other days to edit.

Apply a Pattern to a Template

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Provider Pattern.
2. Select a provider and department where you want to create a schedule.
3. Click Add to create a date range for which the pattern applies to your template.
4. Click Set Auto-Extend to have the template you're configuring automatically extend based on the patterns you're using to create it.
5. On the window that appears, select the Use this date range as the default check box.
6. Specify how much template to release when a provider approaches the end of the currently released template and click Accept.



7. Select the patterns you want to use. You can specify a base weekly pattern and configure any exceptions in the table using single-day patterns for particular days.
   Review the pattern and template structure by looking at the reports included in the activity. These reports help you preview the provider's schedule while you're still working on it.
8. Click Apply Template to apply the patterns to the provider's schedule.



Review a Provider's Schedule

After you've finished building a provider's schedule, you can review it in Hyperspace to verify it appears the way you expected.

Prerequisites
Before you can view a provider's schedule, you must have completed all other setup tasks in the Provider Schedules Setup: Essentials section.

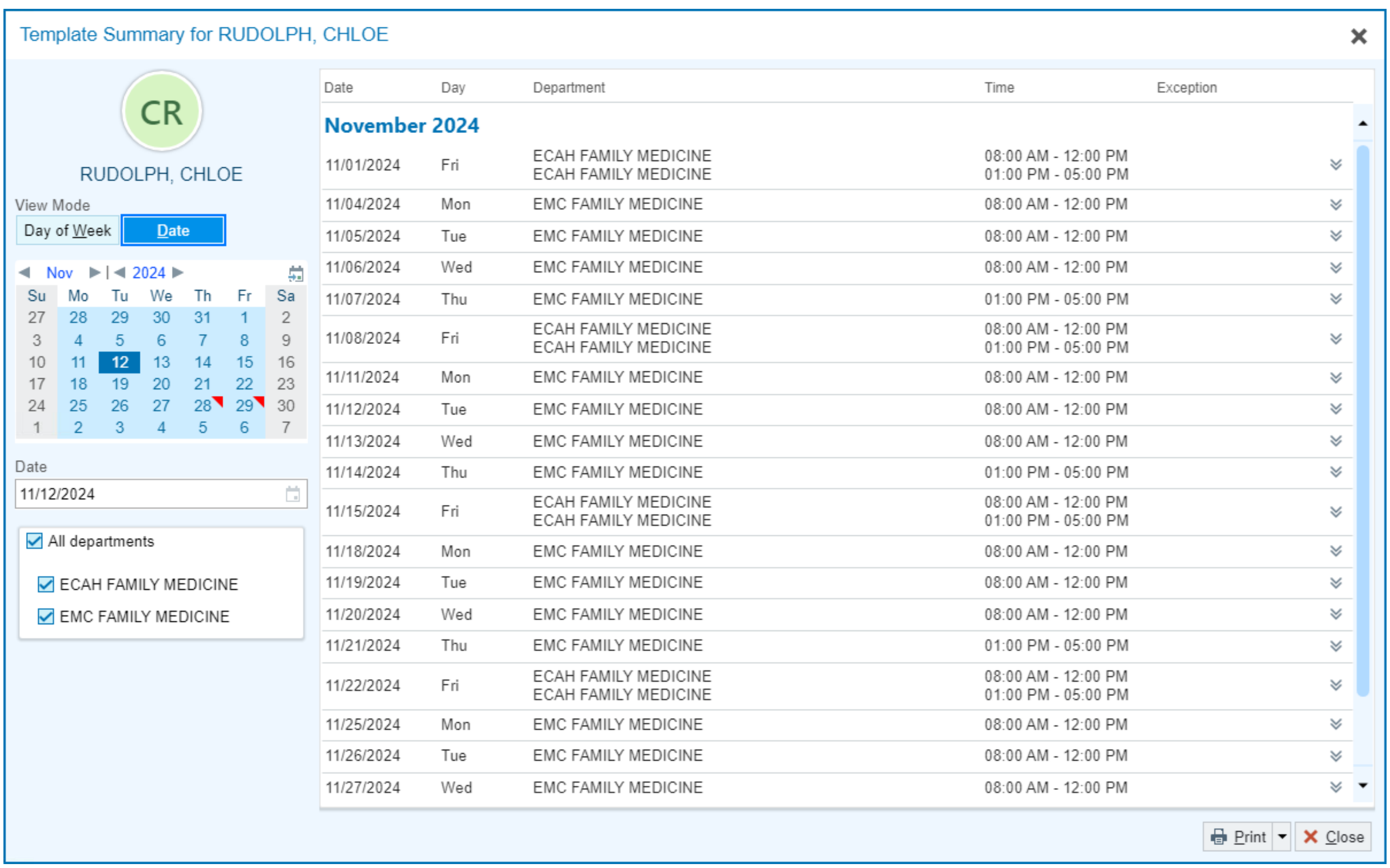
You have several options for viewing the provider's schedule. Though you can use any of these options to review a schedule, you might choose one over the other depending on what you're trying to achieve.

Option	Use When...
Template Summary	Reviewing your template build
View Schedules	Determining what schedulers see when adding appointments to the schedules you create
Provider Calendar	Quickly checking a provider's schedule for high-level trends

Review the Provider's Template

The Template Summary activity gives you a clear picture of how the template that a provider uses appears. It is a good spot for reviewing your work after template build.

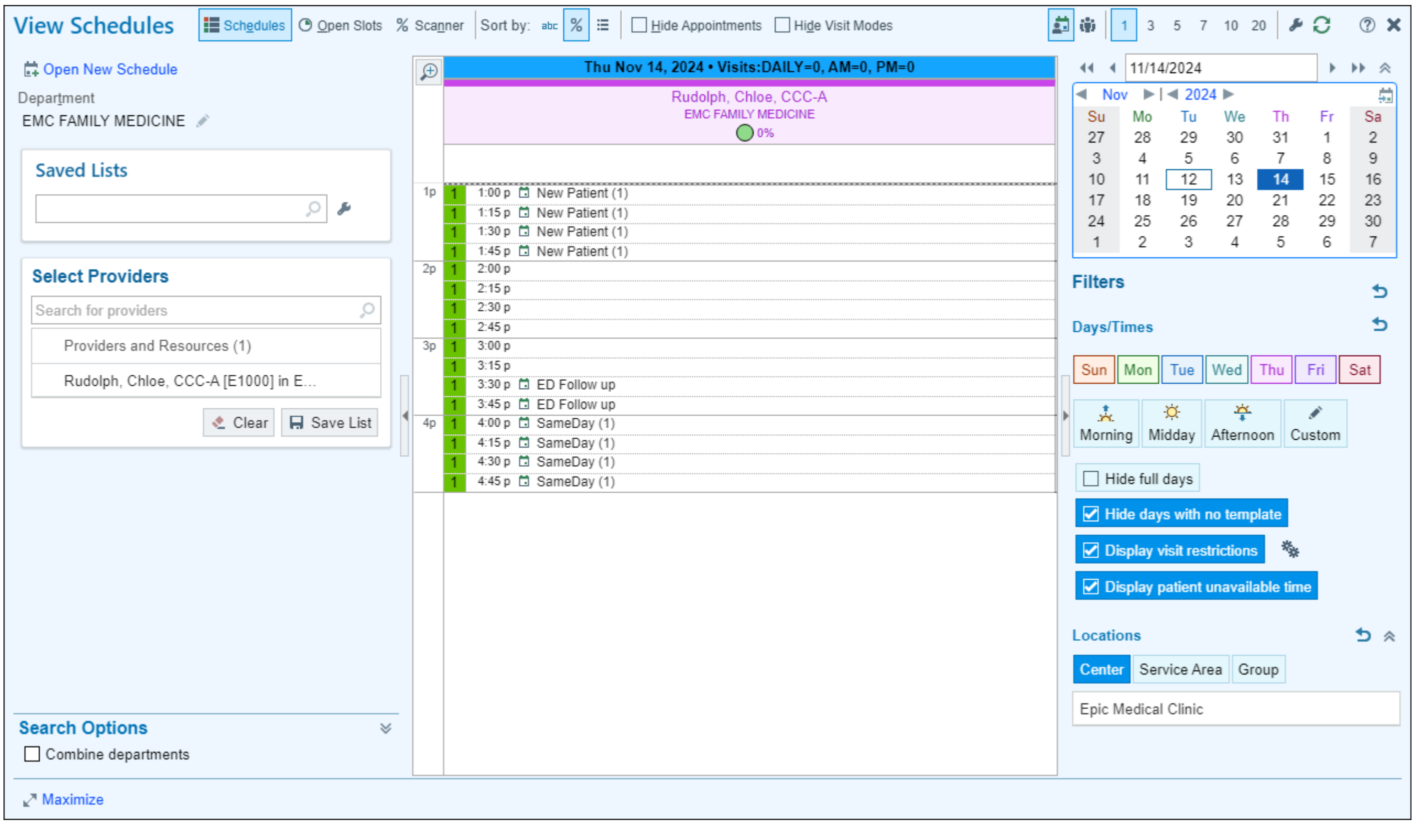
1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Templates > Template Summary and select the provider for which you want to review the template.
2. Modify the view as necessary.
   - To see the template by day of week, select Day of Week. This shows the recurring template by day of week.
   - To see an entire calendar month, select the Date button.
   - To see a single date, select Date and enter the date to view in the calendar control. The selected date's row is highlighted.
3. Restrict the template that appears to the one from a single department or view the template for all departments at once by adjusting the department checkboxes.



See the Provider's Schedule

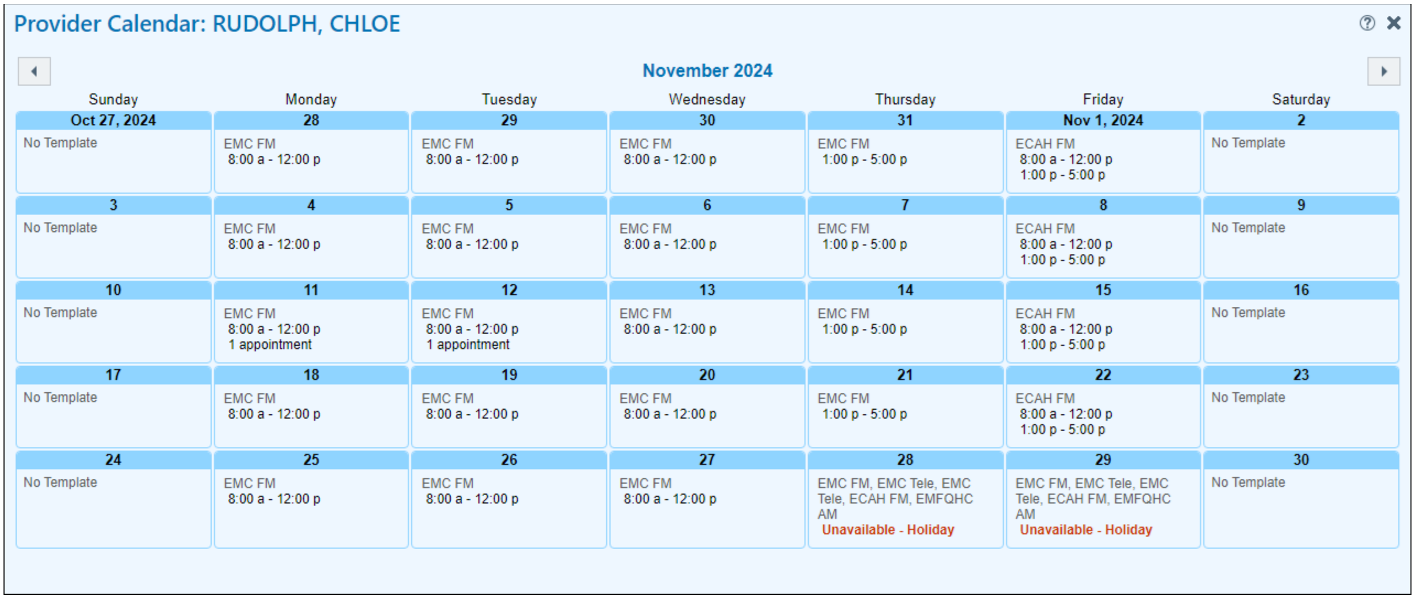
The View Schedules activity helps you get a real-world picture of what your build looks like. If you want to know what a scheduler sees when making appointments using the schedule you created for a provider, this activity is the best place to go.

1. In Hyperspace, follow the path Epic button > Scheduling > View Schedules.
2. In the left pane, select the provider whose schedule you want to review and the department where that schedule exists.
3. In the right pane, select a date in the calendar for which you want to view the schedule. By default, today's date is selected.
4. Select the way you want the schedule to appear using the options in the upper right portion of the middle pane.



See the Provider's Schedule in Calendar View

If you'd rather see a calendar view of the provider's schedule, you can go to Hyperspace > Epic button > Scheduling > Provider Calendar.



Move Provider Schedule Templates Between Environments

If you create templates in your testing environment, you can move them into your production environment using the Move Template activity. Moving a template means taking a template from one environment and copying it to another.

You can also move OpTime templates with OpTime's Move Template activity. For information about using the Move Template activity for OpTime, refer to the Set Up Scheduling Templates for Staff and Resources topic.

Prerequisites

Sending templates across environments can cause an increase in performance traffic so we recommend using it during off hours to reduce the impact. We also recommend you prepare your target environment to receive the templates by synchronizing your provider (SER) records first and making sure applicable template settings, such as release date and offset, are set in your system definitions and department records.

You must be following our recommendations to use CIDs with your provider (SER) records and to use Data Courier or a Content Management ticket in order to send provider (SER) records between environments. If you aren't following these recommendations, the activity won't be able to match the templates to provider (SER) records in the target environment.

Starting in May 2024, you need to set a background user for Cadence to use Move Template. Background users are set in Client Systems Text > Epic System Definitions > Communications > Security > Background User Setup > Application Setup > Cadence. To configure a new background user, refer to the Background Users topic.

Considerations

When moving templates between environments, know that:

- Category list values for blocks in the source and destination environments must match each other. For example, if a Consult block is value 100 in the category list for the Blocks item (I SER 60) in the source environment, it must also be value 100 in the Blocks category list in the destination environment.
- Any appointments already scheduled in the destination environment remain scheduled. If, after the move, the scheduled appointments don't fall within the template time or fall in time unavailable, they automatically appear on the Reschedule work list for schedulers to adjust accordingly.
- You can use the Move Template activity to move templates to environments that are on a version up to four versions earlier than the version you're moving templates from. For example, in a May 2024 environment, you can move templates to environments that are on February 2024, November 2023, August 2023, or May 2023. You cannot move templates to environments that are on a later version.
- In February 2024 and earlier versions, the client on which you use the Move Template activity must have access to your production, test, and build environments and not have any new client SUs that require a matching server update that is not yet installed in the production environment. Therefore, using your standard SU testing client for this activity is not recommended as it will sometimes have SU dependency errors that prevent the client from connecting to production. Instead, you need a client install that either has the current production SU package or an older client SU state that has the client updates related to the Move Template activity with the ability to connect to the production, build and test environments. This can be done by creating a special Citrix client configured in this way or you can install the client locally for just the limited group of users who need to use the Move Template activity. You would not need to update that client until a major or minor version upgrade is performed on your system.

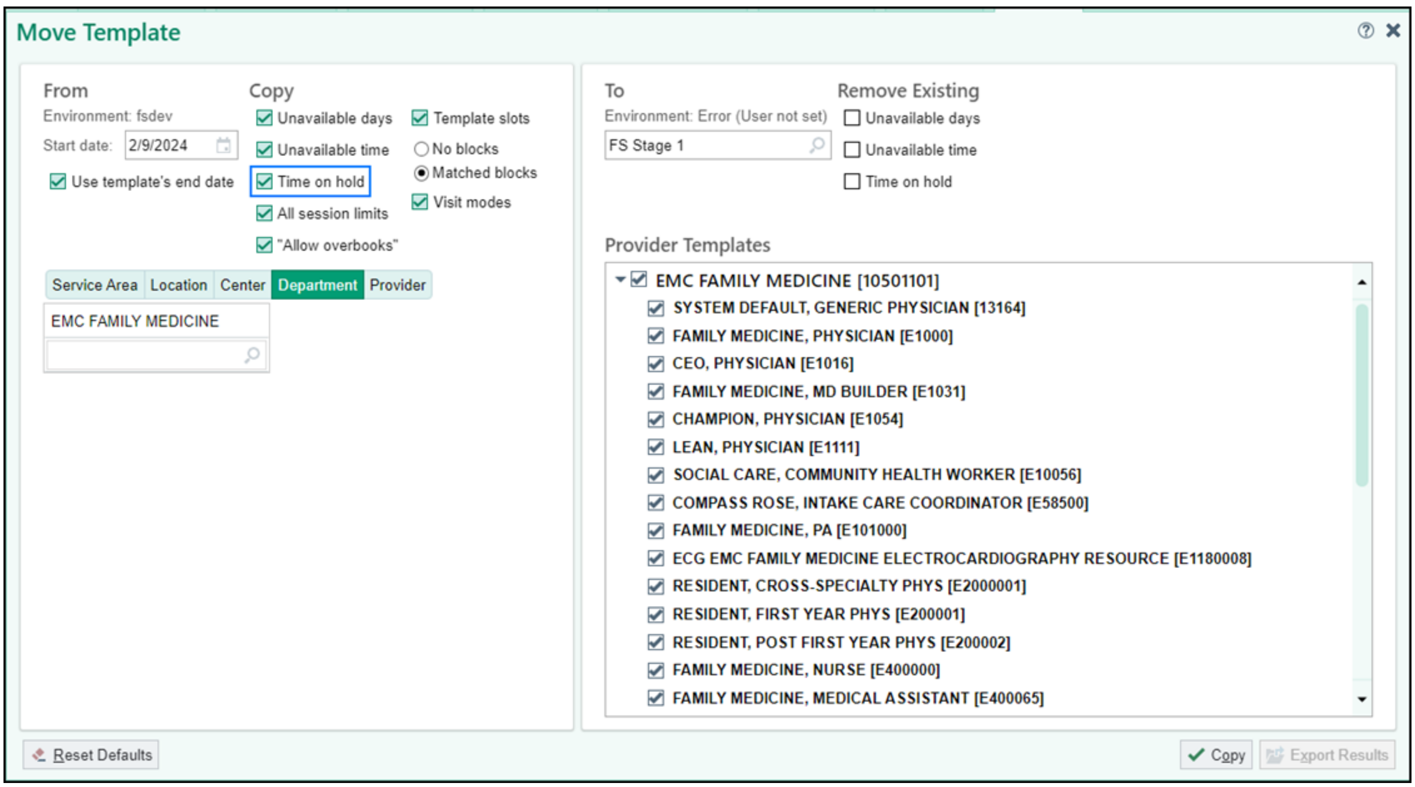
Move Templates

Use these instructions for moving templates.

1. In Hyperspace, go to Epic button > Scheduling > Templates > Move Template.
2. In the Move From section, enter the date for which you want to start copying in the Start date field.
3. Enter the last date from which you want to copy in the End date field. If you want to copy all the way through the last date in your selected template, select the "Use template's end date" check box.
4. Select the facility level that you want to use to group your templates and then enter the record from which you want to select templates. Choose from service area, location, center, department, or provider.
5. In the Move To section, select your target environment. In February 2024 and earlier versions, click Log In to log in to a target environment.
6. In February 2024 and earlier versions continue logging into the environment with the following steps:
   - Select your target environment and click Connect.
   - The Log In window appears. Enter your user ID and password.
   - The window closes and the Log In button changes to a Log Out button.
7. In the Move To section, templates for all providers are selected to move by default. Clear the check boxes for any templates that you don't want to move.
8. In the Copy section (the Options section in February 2024 and earlier versions)

   - Starting in May 2024:
     - Select or clear the Copy existing check boxes to copy or remove held time, unavailable time, and days off.
     - Select the Copy template with check box and choose Matched blocks or No blocks to determine how blocked slots are copied.
     - Select the Visit modes check box to copy visit modes.
     - Select the Copy blank days check box to copy days that do not have a template.
     - Select the Copy "Allow overbooks" check box to copy the Allow overbooks? setting.
     - Select the Copy all session limits check box to copy the provider's session limits.
   - In February 2024 and earlier versions:
     - Select or clear the Copy and Remove existing check boxes to copy or remove held time, unavailable time, and days off.
     - Select the Copy template with Template slots check box and choose Matched blocks or No blocks to determine how blocked slots are copied.
     - Select the Copy blank days check box to copy days that do not have a template.
     - Select the Copy "Allow overbooks" check box to copy the Allow overbooks? setting.
     - Select the Copy All session limits check box to copy the provider's session limits.

9. Click Copy to move the template from your current environment to the target environment.



Account for Holidays in Your Schedules

Certain departments or areas in your organization might not be open on specific holidays. To account for this in your schedules, you can use the holidays feature in Cadence to quickly mark the holiday as a day off for multiple providers and resources at once.

Considerations
We recommend setting up holidays only for outpatient clinics. In inpatient settings, holidays don't usually affect provider schedules in a uniform way because hospitals remain open during these times. Also, if you use Chart Tracking, the holiday settings you configure at the system or department level can affect how charts are pulled. Work with your Chart Tracking project team to validate the holiday settings you choose. Note that you can't use Data Courier or Content Management to move holiday settings to other environments. You should create department records in your POC environment as usual, and the department records are updated with the holidays that are applied by default when the end-of-day batch process to update department records runs. If you don't want to wait for the process to run, you can list the holiday records in the department record manually.

Before providers and resources can use any holidays in their schedules, you must:

- Set up your system or departments to use holidays by configuring basic holiday behavior at the system or department level, and
- Create holiday records.

After you complete these two steps, Cadence applies the holiday to the template after end-of-day processing runs for the departments you modified.

To help maintain your schedules, you can choose to set up a batch job that automatically releases holidays and unavailable days from schedules a certain number of days in advance. You can also soft-delete holiday records that are no longer needed so that they are removed from your departments and provider schedules.

Configure System-Level Holiday Settings

1. In Hyperspace, open Cadence System Definitions.
2. Select the Templates > General form.
3. In the Number of days to set holidays (I SDF 10902) field, enter the number of days into the future that you want to apply holidays to your templates. In the Foundation System, we entered 730 days.
4. In the If holiday falls on Saturday (I SDF 10903) field, choose the action to take if the holiday falls on a Saturday. In the Foundation System, we selected Previous working day.
5. In the If holiday falls on Sunday (I SDF 10904) field, choose the action to take if the holiday falls on a Sunday. In the Foundation System, we selected Next working day.
6. In the Update holidays through imports and interfaces? (I SDF 10905) field, choose whether interfaces and imports update the holidays in your system. In the Foundation System, we entered Yes.

   Note that starting in May 2025, if multiple holidays fall on subsequent weekend days and I SDF 10903 and 10904 are both set to either Previous working day or Next working day, both holidays would move to its own day. For example, if Christmas is on a Saturday and Boxing Day is on a Sunday and I SDF 10903 and 10904 are both set to Next working day, Christmas would be moved to Monday and Boxing Day would be moved to Tuesday. In February 2025 and prior, both holidays would be on Monday.

Define Holidays and Apply Them to Departments

1. In Hyperspace, create or modify a holiday (EHO) record (search: Holiday). The Foundation System uses the following holidays: Christmas, Fourth of July, Labor Day, Memorial Day, New Year's Day, and Thanksgiving. If you want to apply one of these holidays to your template, go to the Foundation Hosted environment to see how the holiday record is configured.
2. On the General Settings form, select the holiday type to define when the holiday occurs during the year.
   - Individual Dates. Use this option to enter specific dates that the holiday occurs. Use this option for holidays that change dates, for example, a holiday such as Ramadan that is based on the lunar cycle.
   - Date and Month. Use this option for holidays that always occur on a specific date in a month, such as Christmas occurring on December 25.
   - Day and Month. Use this option for holidays that always occur on the same day of the month, such as Thanksgiving occurring on the fourth Thursday in November.
   - Extensions. For holidays that don't occur on a fixed date or time during the month, you can use extensions to calculate when certain holidays occur. What you enter here depends on what version you're using.
     - Starting in February 2023, select one of the following released extensions or a custom extension:
       - E0000000001348DC8659C2CF3BAB3D563-St. Brigid’s Day (available starting in August 2024)
       - E00000000000899CD801C6498C8386E38-Mardi Gras
       - E00000000008998B801C6498C8386E38-Good Friday
       - E000000000141554A801C6498C8386E38-Easter Saturday (available starting in August 2023)
       - E000000000000D5FF3ECDB4E07A4F7D0F-Easter
       - E00000000000897F6801C6498C8386E38-Easter Monday
       - E00000000008993E801C6498C8386E38-Easter Tuesday
       - E00000000000898D2801C6498C8386E38-Day After Thanksgiving
     - In November 2022 and earlier versions, enter:
       - Mardi Gras: MardiGras^S2HOLIDAY2
       - Good Friday: GoodFriday^S2HOLIDAY2
       - Easter: Easter^EGDEHO2
       - Easter Monday: DayAfterEaster^S2HOLIDAY2
       - Easter Tuesday: EasterTuesday^S2HOLIDAY2
       - Day After Thanksgiving: DayAfterTHG^S2HOLIDAY2
3. If your organization uses Tapestry AP Claims and the holiday isn’t a holiday your organization observes, select the This holiday is external only (I EHO 190) check box. This keeps the holiday from being applied to your departments but allows it to still be used in your bank records. Refer to the Bank Reconciliation topic for more information.
4. By default, new holiday records are applied to all department records, including department records you create after you create the holiday record. If a holiday record shouldn't apply to new and existing department records, select the Do not apply to departments by default (I EHO 400) check box. If you clear

the check box for an existing holiday record, the setting applies only to new department records that you create after clearing the check box.

5. By default, holidays are not counted toward metric collections or Tapestry AP Claims interest calculations. You can override this behavior in the Next Business Day Settings section. Before configuring this table, work with your CRM, Referrals, and Tapestry teams to determine the correct build.
   - In the Used By (I EHO 300) field, enter the context in which this holiday should not be counted toward calculations.
   - If you entered AP Claims - Interest Period Calculations, you have the option to always subtract the length of this holiday from interest calculations, even if the holiday falls on a weekend. To use this logic, set the Move Holiday (I EHO 310) field to Yes. The default setting is No.
6. Select the Department master file (Epic button > Admin > Master File Edit > Department).
7. Open the department record in which you want to use the holiday record you created.
8. Go to the Templates > Holidays form.
9. Enter each department to which the holiday applies. Choose whether the holiday record applies to providers and resources by selecting the Inactive button so that it turns Active.
10. Enter the number of days into the future that you want to apply holidays to your templates (I DEP 580).
11. Choose the action to take if the holiday falls on a Sunday (I DEP 581).
12. Choose the action to take if the holiday falls on a Saturday (I DEP 582).
13. Click Accept.

    Note that starting in May 2025, if multiple holidays fall on subsequent weekend days and I DEP 581 and 582 are both set to either Previous working day or Next working day, both holidays would move to its own day. For example, if Christmas is on a Saturday and Boxing Day is on a Sunday and I DEP 581 and 582 are both set to Next working day, Christmas would be moved to Monday and Boxing Day would be moved to Tuesday. In February 2025 and prior, both holidays would be on Monday.

Release Unavailable Time in Schedules for Inpatient Appointments on Holidays

To save time when adjusting provider schedules, you can use Batch Scheduler template 82-Cadence Release Unavailable Days, to create a batch job that automatically releases holidays or other unavailable time from particular schedules. This can be useful if, for example, a hospital outpatient department sets its modalities, such as sonogram or MRI machines, as unavailable during holidays so that outpatients cannot be scheduled during that time. If that time must be made available for same-day appointments for inpatients or ED patients, you can set this batch job to do so automatically.

Before you run this batch, you must enter a value in the Remove unavailable days (I SER 46) column in the Departments form of each relevant provider record. This item determines the number of days ahead of time that an unavailable day can be released. We recommend it be set to 1, which leaves holidays unavailable for advance scheduling but available for same-day appointments when the template is opened on the released holiday. By default, the days the batch job releases are scheduled holidays.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Provider, and edit a provider or resource's record.
2. Select the Departments form.
3. For the department in which you want the batch job to remove unavailable time, enter in the Remove unavailable days (I SER 46) column the number of days ahead you want to clear unavailable time from. We recommend you enter 1, which leaves holidays unavailable for advance scheduling, but available for same-

day appointments when the template is opened on the released holiday.

4. In Cadence text or Radiant text, go to Batch Jobs > Job Enter/Edit and create a job based on template 82-Cadence Release Unavailable Days. There are two mnemonics for this template:
   - Location. Optional. When this mnemonic is left blank, the batch job releases the specified number of days for all departments in which providers have a value set in the Remove unavailable days (I SER 46) field. You can also limit the scope of the batch job by entering a revenue location. While we expect the default value to be the best choice in most circumstances, entering locations is useful if, for example, you want to set multiple batches to run at different times for different locations that have different time zones.
   - Reason. Optional. When this mnemonic is left blank, the batch job uses the unavailable reason entered in the Default unavailable time reason for holiday unavailable (I SDF 8427) field on the Template and Exceptions form in Cadence System Definitions. If you want to release different unavailable days from the default holidays, such as days set as unavailable for planned maintenance, you can enter another value from the Reason for non worked time (I SER 90) category list.
5. Add the job that you created to a batch. Refer to the Define a Batch for more information.
6. Add the batch to a run or schedule a new run for the batch. Refer to the Define and Submit a Run for more information.

Soft-Delete Holiday Records

If you created a holiday record that no longer applies to your organization, you can soft-delete it in Chronicles. When you do this, the holiday is removed from any departments and provider schedules it was applied to. Any unavailable time with a reason of Holiday on the same date as the holiday record that you soft-delete is also removed from provider schedules.

1. In Chronicles, access the Holiday (EHO) master file.
2. Go to Delete Data > Record Soft Deletion.
3. Enter the holiday records you want to soft-delete.
4. Enter Yes to confirm you want to soft-delete the records. It might take a few minutes for the system to finish soft-deleting the holiday because it needs to remove it from all departments and provider schedules it was applied to.

Provider Schedules Setup: Bells & Whistles

In this section, we'll show you more configuration options for provider schedules. These options are not currently built in the Foundation System, but they might be appropriate alternatives to the Foundation System build or useful in specific scenarios. They also allow for further configuration of the behavior and appearance of provider schedules.

Limit the Number of Certain Appointments During a Given Time Period

Visit type limits control how many visit types can be scheduled for a certain time of day or ranges of dates, which are referred to as sessions. These limits can help you structure provider schedules.

Considerations

Before creating visit type limits for all of your providers, determine if the specific time slots matter. For example, does the physician want a new patient appointment from 9A.M.-10A.M. and another from 10A.M.-11A.M., or does he just want two same day appointments at some point over the course of the morning?

If you find that the provider does want appointments of a specific type to fall at particular times in his schedule, consider using a block rather than a visit type limit.

For more information about scheduling blocks, refer to the Reserve Time in a Schedule Using Blocks topic in your online documentation.

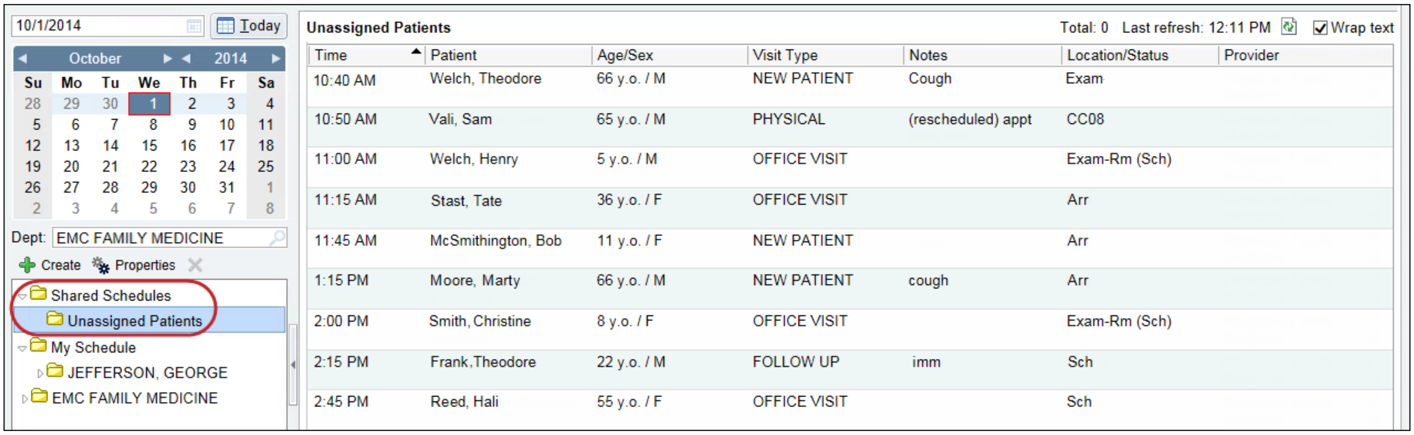
For step-by-step instructions to set up visit type limits, refer to the Limit the Number of Visit Types for a Given Time Period with Session Limits section of the Visit Types Setup and Support Guide.

Use a Shared Schedule to Facilitate a Walk-In Patient Workflow

With the shared schedule in the Multiple Provider Schedule, organizations that serve large numbers of walk-in patients, such as retail clinics or emergency departments, can more smoothly manage patients and present clinicians with a less cluttered schedule workspace.

The shared schedule serves as a work list that shows only patients waiting to be seen. It's designed to make workflows more efficient at organizations such as retail clinics where staff add walk-in patients to the schedule in the order they arrive and assign them to a generic provider until they can be seen by the next available clinician.

When you configure the shared schedule for a clinician, it serves as his default schedule. When a clinician is available to see the patient, he assigns himself to the patient's encounter by clicking the Change Prov button, and the appointment drops off the shared schedule. If the clinician needs to access the encounter later, he can do so from his personal schedule view in My Schedule.



You specify the shared schedule that appears in the Multiple Provider Schedule in a user's profile. Currently, you can configure only one shared schedule to appear.

When a clinician opens the Multiple Provider Schedule, the schedule listed on the Shared Schedule screen in his profile appears under the Shared Schedules folder in the Multiple Provider Schedule activity. The shared schedule appears as the default schedule each time the clinician opens the activity unless he has marked another schedule in the folder tree as his default schedule.

After the shared schedule appears in their workspaces, users can configure settings for a shared schedule similarly to how they can customize schedules in the My Schedule folder, changing the columns in view and rearranging the order in which columns appear. However, they can't modify the providers whose schedules appear in this view or delete the shared schedule.

Prerequisites

These instructions assume you've already configured provider schedules in your system and have already created a schedulable generic user. For information on how to configure provider schedules in your system, refer to the Provider Schedules Setup and Support Guide. If you've already configured schedules for providers at your organization and need instructions about creating a schedulable generic user, refer to the following topics:

- Use a Generic Record to Manage Providers Not Yet in the System
- Make a Provider or Resource Schedulable
- Using Generic SER Records

To show a shared schedule with appointments assigned to a generic provider:

1. In Clinical Administration, open the user's profile and select Schedule, Chart Request.
2. On the Shared Schedule screen, enter 1-Generic Providers in Login Department in the Schedule Type column. This schedule type includes all providers with the Is Generic? (I SER 13) field set to Yes and that are active for scheduling in the current login department.
3. In the Display Name column, enter the title you want to appear on the schedule in Hyperspace.

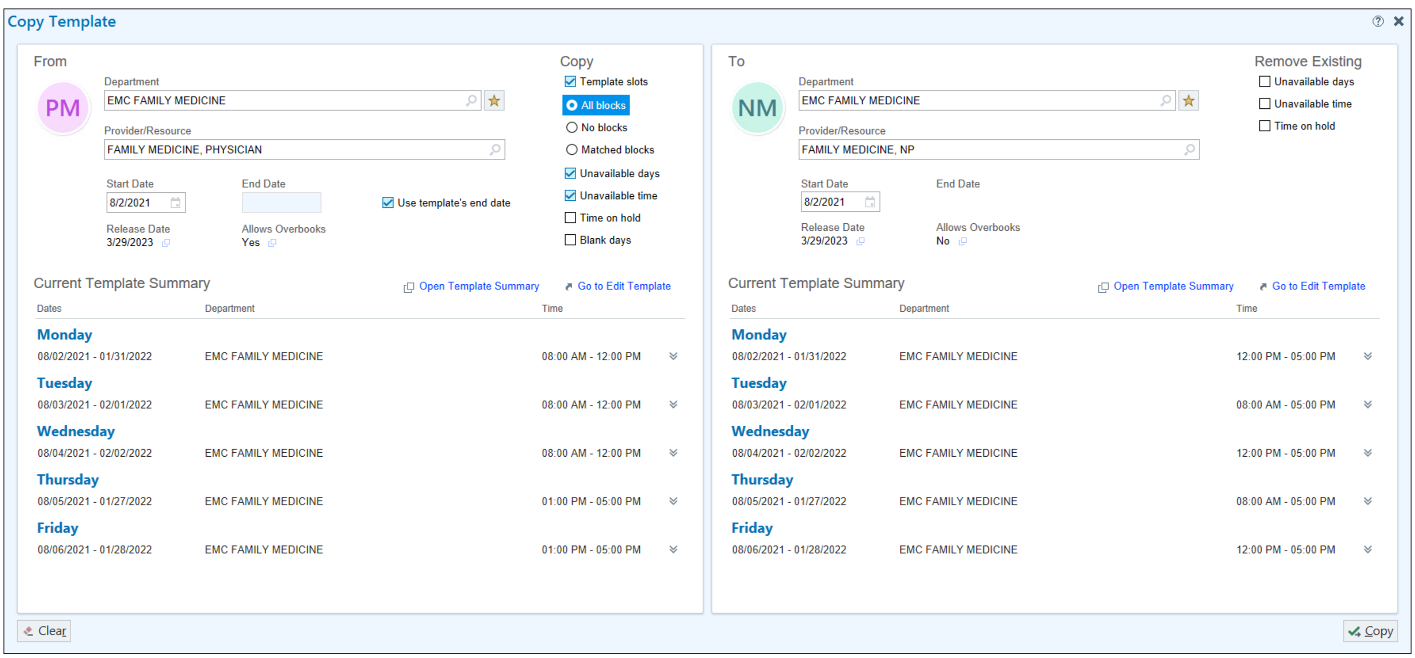
Copy One Provider's Schedule Template to Another Provider

Sometimes one provider has the same schedule needs as another provider. If you've already created a template for one of the providers, you can quickly copy that template to a different provider.

You can copy a whole template from one provider to another, or you can copy a single day from one provider to another.

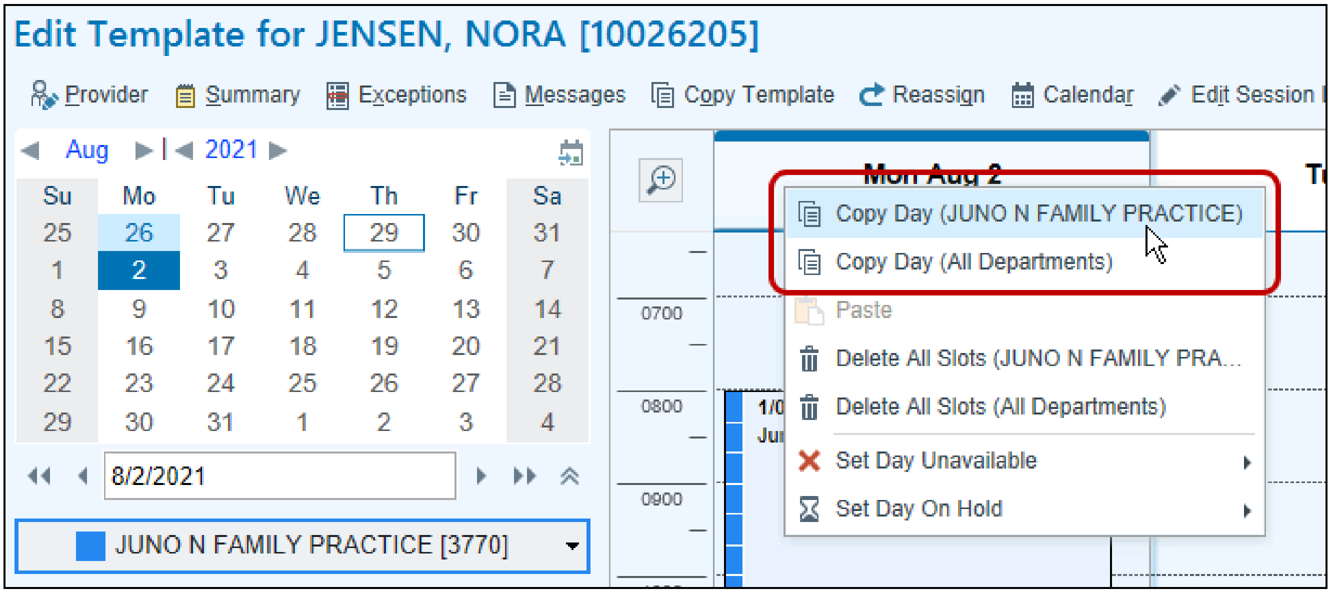
Copy a Whole Template

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Copy Template.
2. In the From section, enter information about the template that you want to apply to another provider. The start and end dates you specify here determine how much of the template to copy over. The release date that is specified is the date beyond which schedulers cannot make appointments for the provider. If you select the Use template's end date checkbox, you copy everything on the template from the start date you specify onward.
    - For time on hold, unavailable time, and days off, you can choose to copy the values from the template.
    - You can specify which blocks get copied with the template: all blocks, matched blocks, or no blocks.
    - If the template contains blank days, you can choose to copy those as well.
3. In the To section, enter information about the provider to which you want to copy the template. You can select features of the template you want to overwrite on the target provider’s existing template.
    - For time on hold, unavailable time, and days off, you can choose to remove the existing values when copying the template.
4. Click Copy.

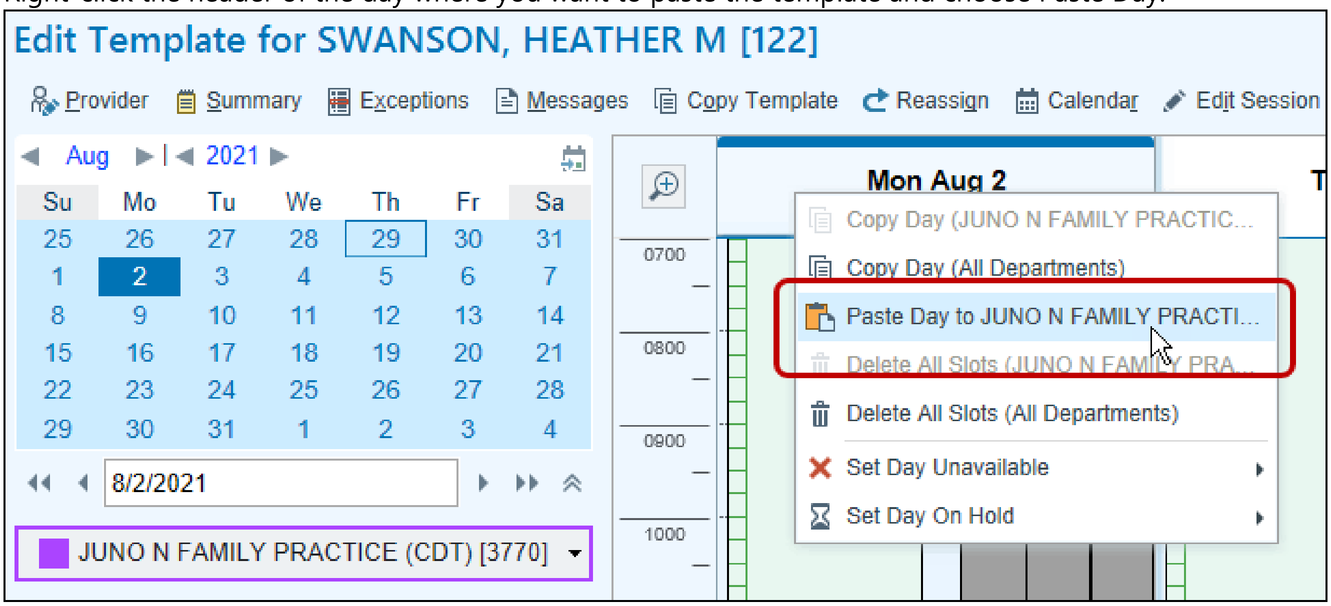


Copy a Single Day

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Edit Template.
2. Open the template for the provider from which you want to copy a day.
3. Right-click the header of the day you want to copy and choose Copy Day. You can choose to copy the provider's schedule in a single department or all departments.



4. Open the Edit Template activity for the provider and department where you want to paste the template day.
5. Right-click the header of the day where you want to paste the template and choose Paste Day.



Enable a Provider's Schedule to Automatically Extend Beyond the Template End

If you need to manage templates in dynamic departments, you might choose to extend release dates past the end of a provider's template based on the release date offset. This automatic extending ensures that users with appropriate security can make appointments with the provider even if the provider doesn't have a template. When Cadence End of Day Processing runs, it can extend release dates past the end of a template, based on the release date offset. For example, let's say a provider has a release date offset of six months. His release date is set for the end of this six months and his template ends then too. You can automatically extend the release date so that the six-month offset is always available, despite there not being a template beyond the six months.

Here are some examples when you might want to automatically extend a release date beyond a template:

- If you have an unpredictable rotation of clinicians in urgent care departments and those clinicians don't always have templates built in the department, you can use the automatic extending at the department level to ensure that staff with overrule security can still schedule with those clinicians when they work in urgent care.

- If you have a residency program in which residents float to many departments in a short amount of time and might not have templates built in all those departments, you can use the automatic extending for the resident to ensure that staff with overrule security can schedule appointments no matter what department they are in this month.

You don't need to extend the release date beyond the template to allow users to select a provider in the Change Provider action on the Schedule activity in EpicCare Ambulatory and the Perform action in the Ultrasounds navigator section in Stork.

You can set this auto-extending at the following three levels:

- Provider-department combination
- Provider
- Department

The system looks at the settings in this order until it finds a setting to use.

Extend Schedule for All Providers in a Department

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the General > Dept Type/Offsets form.
3. In the Extend offset past template? (I DEP 192) field, enter Yes.

Extend Schedule for a Provider or Provider-Department Combination

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Edit Provider and open a provider record.
2. Select the Release Date Offsets form.
3. If you want to extend the release date for all of this provider's templates, in the Extend offset past template? (I SER 158) field, enter Yes.
4. If you want to extend the release date in only some of the provider's departments, use the Department Specific Release Date Offsets table. Enter Yes in the Unlimited Offset? (I SER 159) column for the departments where you want the provider's release date to extend beyond the template end. You can use the department-specific settings in the provider's record to override the provider-level settings. For example, if you want to extend the release date in only the urgent care department for the provider, enter No in the Extend offset past template? field and then enter a row for urgent care in the offsets table with Yes in the Unlimited Offset? column.

Create a Schedule That Mimics Another Schedule

If your organization has many residents or emphasizes teaching, you might have a number of providers who shadow other providers. For example:

- A resident in a teaching hospital might shadow an attending physician for part of the day.
- You always need a chemotherapy chair when a scheduler makes an appointment with an oncology nurse.
- Dr. Clark is replacing Dr. Smith and wants to shadow him for a month before Dr. Smith leaves your organization.

You can make sure that you account for situations like this in your schedule build by using the shadow joint feature. With this feature, schedulers only need to make an appointment with the provider being shadowed and the appointment automatically appears on the shadowing provider's schedule as well.

Considerations

When working with the shadow joint feature, consider the following:

- You only have access to the shadow joint feature when editing provider templates in Cadence Text.
- You can use the shadow joint feature with multiple providers (for example, if several residents shadow the same provider).
- The shadow joint feature isn't visit type-specific. This means that you can't vary when the system adds resources or shadowing providers to an appointment based on the type of appointment it is. For visit type-specific scheduling, refer to the Visit Types Setup and Support Guide.

To configure the shadow joint feature, you must complete both of the setup steps in this section.

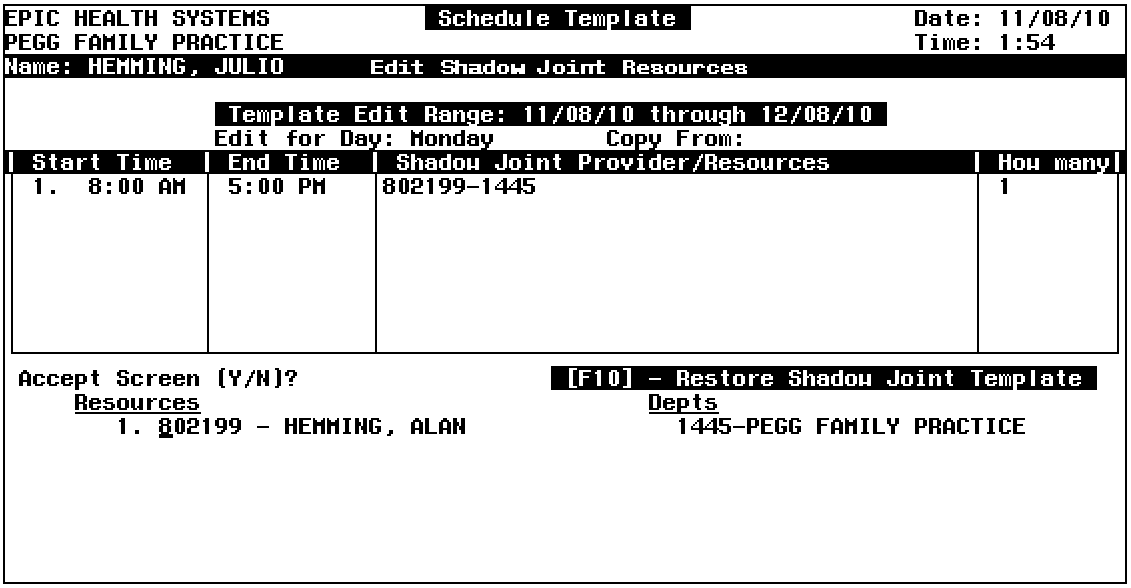
Enable the Shadow Joint Feature

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. Enter Yes in the following fields:
    - Use shadow resources? (I SDF 8117)
    - Shadows on joint appts? (I SDF 10770)
4. Open Department Edit and enter your department. Select General > Dept Type/Offsets form.
5. Enter Yes in Use shadow joint? (I DEP 5600).

Configure Schedules for Other Providers or Resources to Mimic the Current Provider's Schedule

1. In Cadence Text, follow the path Template Processing > Schedule Template and select the provider being shadowed.
    - For example, in a resident situation, open the provider the residents are following here.
    - In a resource situation, select the provider for which a resource should always be scheduled.
2. Select Enter Shadow Joint Resources.
3. Enter the time frame for which residents or other shadowing providers/resources follow the current provider.
    - For example, if the residents only follow the provider for the next three months, you can specify an End date of m+3.
    - If you always want a resource to be scheduled with a particular provider, you can type "indefinitely" at the End date prompt.
4. Select the day of the week for which the current provider is shadowed.
    - If the provider is shadowed every day, you must edit each day of the provider's template individually.
    - For example, if the provider's template is the same for Monday and Tuesday, you can enter Tuesday in the Edit for Day field and Monday in the Copy From field as a shortcut.

5. Enter the time range for which the shadow applies, who the shadowing provider or resource is, and the shadow's associated department.
6. In the How many field, specify how many shadows the provider can have for any one appointment.
7. Enter Yes to accept your changes on the screen.



Alter the Appearance of the Block Database Editor

February 2024 and Earlier

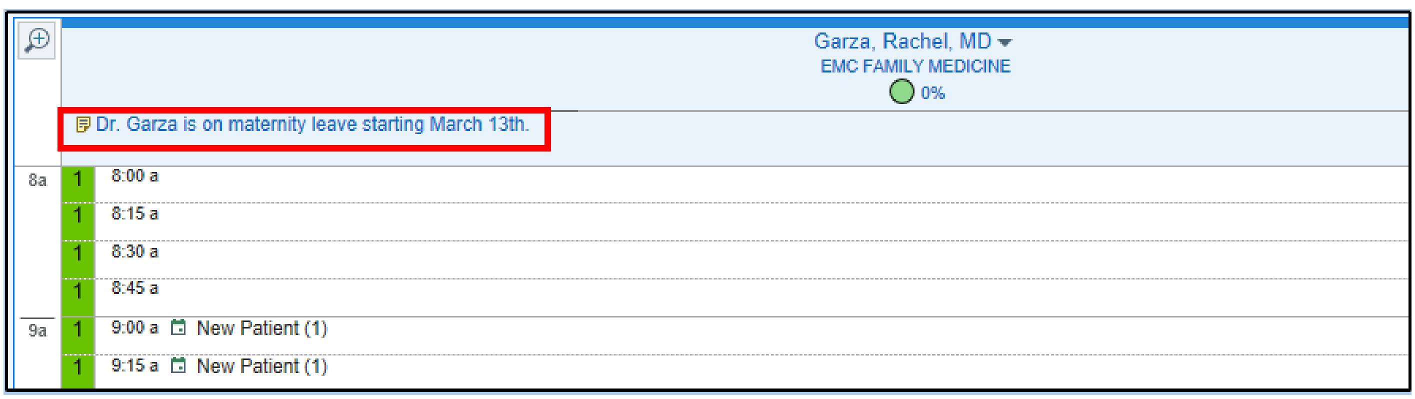
To show more or less information in the Block Database Editor, you can configure the tables that appear by creating a saved report setting in the Report Builder from the corresponding report template for the table.

1. In Hyperspace, open the Report Builder (search: Report Builder).
2. Enter the ID of the report template that corresponds with the table in the Block Database Editor that you want to modify. Use the table below as a guide to determine which report template to modify.
3. Modify the table as necessary.
   - On the Criteria tab, you can add default sorting to the report.
   - On the Display tab, you can control which columns appear.
   - On the Appearance tab, you can change the font, colors, and appearance of the report.
4. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
5. On the Reports > Plug-Ins form, enter your custom report in the appropriate field (based on where you want it to appear in the Block Database Editor).

Table (Tab)	Report Template	System Definitions Field
Provider (Release of Blocks tab)	53-ES Block Database Editor Provider Release of Blocks	Block editor provider release (I SDF 4015)
Department (Release of Blocks tab)	54-ES Block Database Editor Department Release of Blocks	Block editor department release (I SDF 4016)
Provider (Block Scheduling Restrictions tab)	55-ES Block Database Editor Provider Block Scheduling Restrictions	Block editor provider restrictions (I SDF 4017)
Department (Block Scheduling Restrictions tab)	56-ES Block Database Editor Department Block Scheduling Restrictions	Block editor department restriction (I SDF 4018)
Visit Type (Visit Types tab)	57-ES Block Database Editor Visit Type Block Types	Block editor visit types (I SDF 4019)

Show Provider Messages to Schedulers

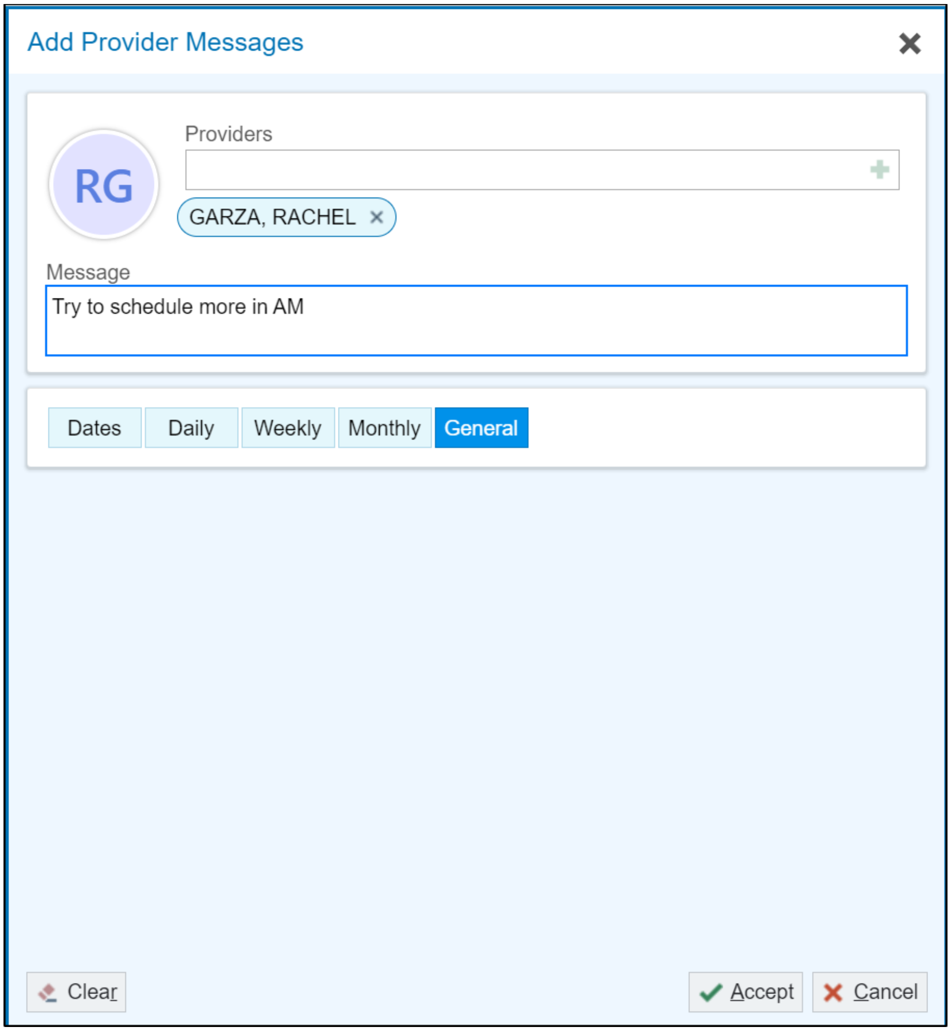
You, and template builders at your organization, can optionally choose to include messages on the provider schedules you create to notify schedulers of particular provider requests you haven't captured elsewhere in your build. For example, if a provider needs to leave a little early, you can add a message to the schedule so front desk staff know not to make appointments after he plans to leave. Using the Provider Messages activity, you can manage the messages you add to a particular provider's schedule in one central location.



Create a General Message

For scheduling tips or general provider scheduling preferences that apply to all dates in the schedule, you can use a general message.

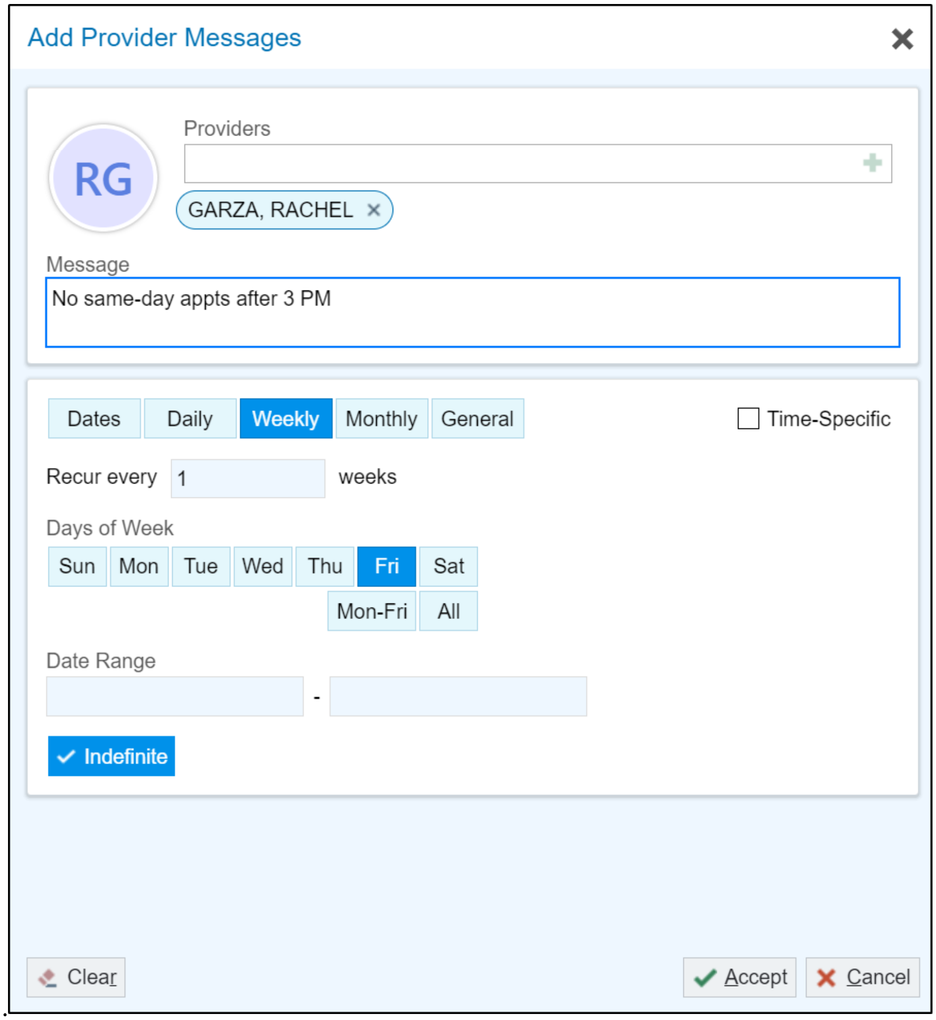
1. In Hyperspace, go to Epic button > Scheduling > Templates > Provider Messages.
2. Select the department where the schedule you want to edit exists and the provider who uses that schedule.
3. Click Add.
4. Select General message.
5. Enter the message you want to appear at the top of each day in the schedule and click Accept.



Create a Weekly Message

When you want a message to appear on the schedule only for selected days of the week every week, you can create a weekly message. For example, if a provider prefers to have fewer appointments on Friday afternoons, you can create a daily message that applies only to Fridays to let schedulers know.

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Provider Messages.
2. Select the department where the schedule you want to edit exists and the provider who uses that schedule.
3. Click Add.
4. Select Weekly message.
5. Enter the message you want to appear to schedulers.
6. Leave the No time check box selected to have your message appear at the beginning of the day and apply to the entire day rather than a specific time range.
   If you wanted the message to appear at a particular time slot in the schedule, you could clear this check box and enter that time here.
7. Select the appropriate check boxes for the days of the week to which your message applies.
8. Click Accept

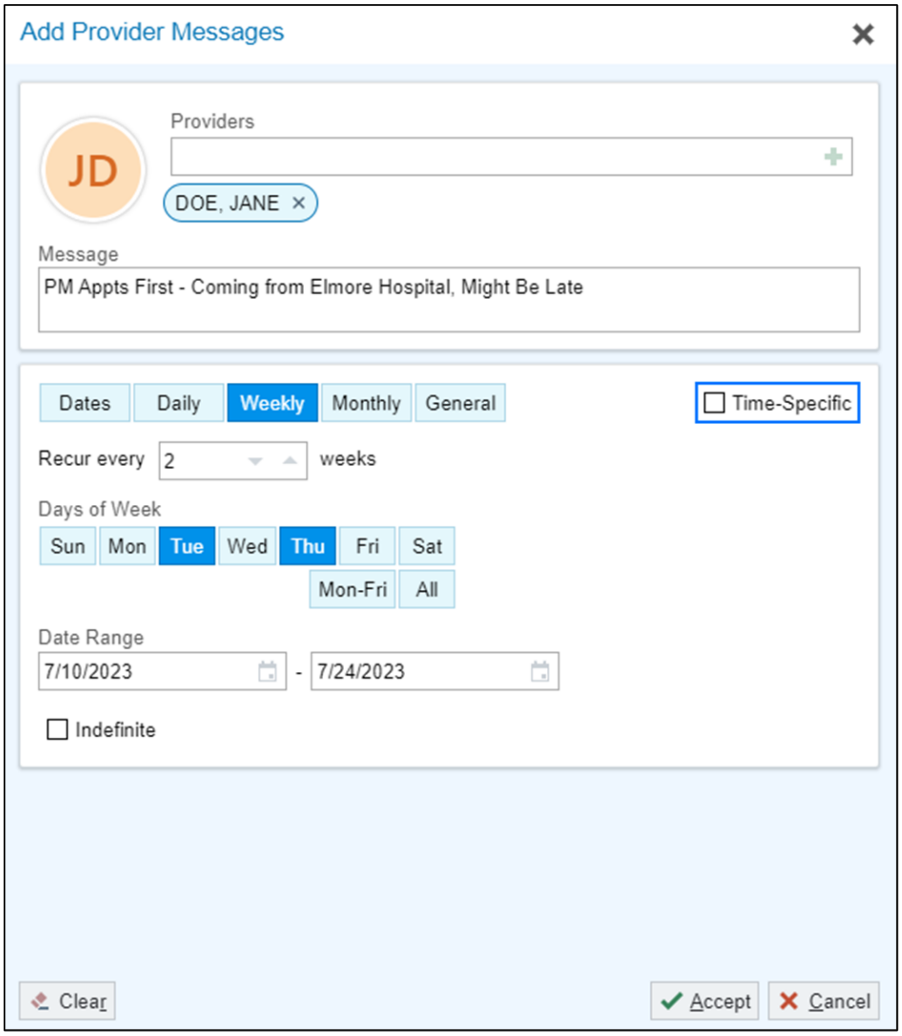


Create a Message by Date

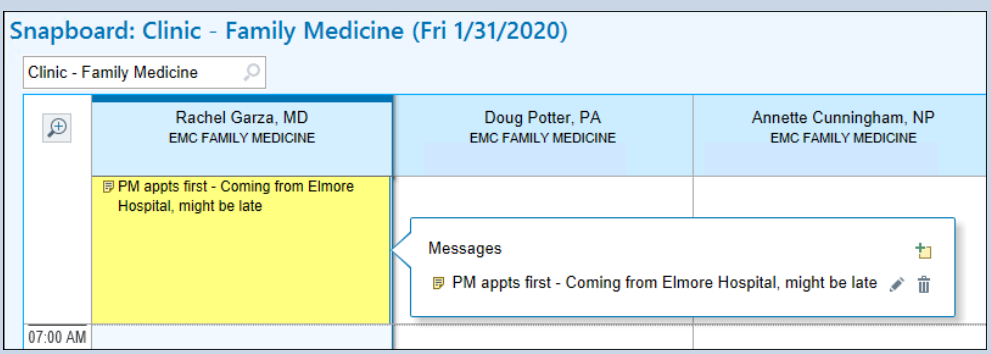
When you want a message to appear on the schedule for specific days and weeks of the month, you can create a message by date. This message type allows you to specify a date range for which your message applies. For example, if a provider might be a little late due to traffic on Tuesdays and Thursdays every other week for the next month because she's working a shift at the local hospital, you can leave a reminder for schedulers to avoid making appointments at the start of her shift as a courtesy.

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Provider Messages.
2. Select the department where the schedule you want to edit exists and the provider who uses that schedule.
3. Click Add.
4. Select Message by date.
5. Enter the message you want to appear to schedulers.
6. Leave the No time check box selected to have the message appear at the top of the daily schedule. If you want to see the message at a particular time slot in the schedule, clear the check box and select the time.
7. In the Recurrence section, specify how often the message appears in the provider's schedule.
   In this example, the message appears on Tuesdays and Thursdays every other week.
8. Enter the date range to which the message applies. For example, if you only want the message to appear on the days you selected for the next month, enter an end date of m+1.

9. Click Accept.



You can add, edit, and delete date-specific provider messages from the Snapboard. Click the messages area for a provider to bring up the Messages bubble.



Limit Schedule and Template Access for Certain Providers to Certain Schedulers

Some providers and departments might want to limit the number of users who are able to schedule appointments and edit templates. You can specify security classifications within provider records so that only users with the allowed classifications are able to schedule appointments or edit templates. These users must also have the correct security to access the Appointment Entry and Edit Template activities. The security classifications must be assigned to each user at the department level.

You must set the Use provider-level security (I DEP 590) field and the OR Department (I DEP 90) field to Yes in order to use this functionality in a department. Because this might affect performance, this setting should only be turned on if you're setting up provider-level security for that department.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and select your department.
2. On the Scheduling > General form, make sure the Use provider-level security (I DEP 590) field is set to Yes. Click Accept.
3. Go to Epic button > Scheduling > Templates > Provider and select a provider.
4. On the Departments form, click the department for which you turned on the provider-level security. Two lists appear below the first table.
5. Enter the Cadence security classifications of users who are allowed to schedule appointments with and edit templates for this provider in the Provider schedule (I SER 1155) and Provider template (I SER 1156) lists. Click Accept.
6. Log out of Hyperspace in order for these changes to take effect.

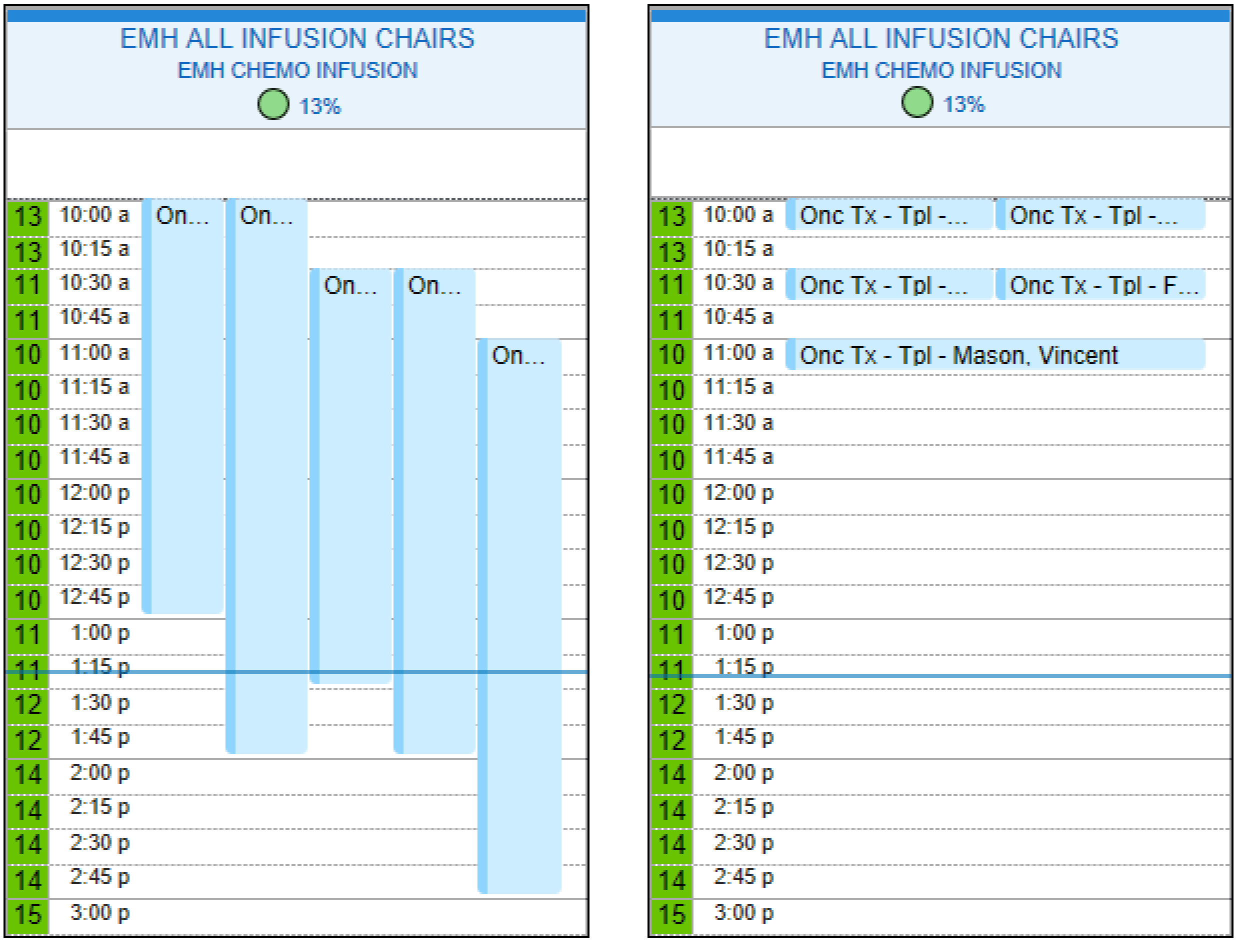
Collapse Appointment Lengths for Providers or Resources with Many Openings per Slot

Starting in November 2022

May 2022 by SU E10215131, E10215125, and C10215125-Hyperspace

Some providers or resources might have many openings per slot, and the appointments that are scheduled into those slots might vary in length. This is most likely to occur if you schedule appointments with separate providers or resources, such as infusion chairs, in a third-party system and use an interface to assign those appointments to one placeholder provider or resource in Epic. That can cause appointments in the web-based Snapboard, the Schedules view in Book It, the web-based View Schedules activity, and the web-based Move Provider Appts activity to be very narrow and unreadable. To avoid this, you can configure the provider or resource's record to collapse the length of the appointment so that it appears in only the first slot for the appointment. For example, if an appointment is scheduled from 8:00 AM to 11:00 AM, the appointment appears in the 8:00 AM slot instead of spanning slots from 8:00 AM to 11:00 AM. This helps schedulers focus on how many appointments are starting at a given time.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Provider and open a provider or resource record.
2. Select the Scheduling > Additional Info form.
3. Enter Yes in the Collapse appt length in schedules view? (I SER 14060) field.



The same resource without (left) and with (right) the Collapse appt length in schedules view? (I SER 14060) item set to Yes

Accurately Report on the Utilization of 24-Hour Templates

Starting in May 2024

February 2024 by SU E10805983 and C10805983

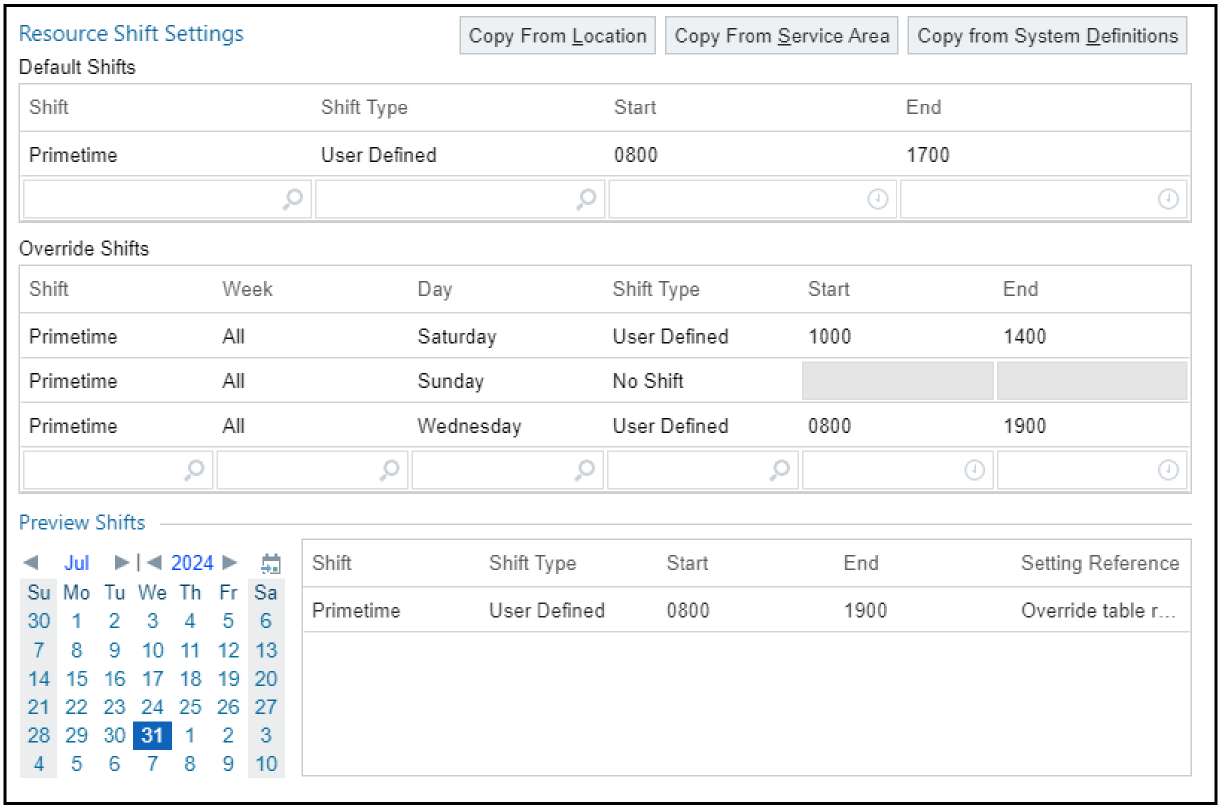
For departments that use 24-hour templates, it can be difficult to get an accurate understanding of schedule utilization. To more accurately report on utilization, consider setting up primetime shifts. Primetime shifts allow for more accurate utilization reporting by looking only at the utilization within the “primetime shift” time frame you specify. For example, a radiology department that sees both inpatient and outpatient visits may want to report on only the utilization when the department is open for outpatient scheduling. After your primetime shifts are set, you can use the Outpatient Specialty Supply and Demand dashboard to track your primetime schedule utilization.

To set primetime shifts for a department,

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open the department you want to update.
2. Select the Schedules > Resources form.
3. Enter Primetime in the Default Shift (I DEP 1880) field and set the default Start and End times for the

primetime shift.

4. You can choose to set Override Shifts for specific days of the week if the schedule changes throughout the week.



Primetime shifts set from 8 am to 5 pm, with overrides set for Saturdays, Sundays, and Wednesdays

Provider Schedules Support: Ongoing Tasks

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

Extend a Schedule for Multiple Providers at Once

Occasionally, you need to update release dates for several providers at once (for example, if a new hospital is opening or a clinic is closing). You can do this in Cadence Text using the Set Multiple Release Dates utility.

1. In Cadence Text, follow the path Utility Menu > Set Multiple Release Dates.
2. At the Providers or Departments prompt:
   - Type Providers to move release dates back for several, individual providers.
   - Type Departments to move release dates back for an entire department or departments.
3. At the Move release dates back prompt, enter Yes to update release dates for all providers that qualify, regardless of their current release date. Enter No if you don't want to change release dates for providers with release dates beyond the date you enter in the next step.
4. Enter the new release date.
5. Enter Yes at the Change Release Dates prompt and press ENTER. The utility runs and adjusts the release dates accordingly.

Editing Templates and Patterns

Schedules are dynamic representations of peoples' day-to-day lives. So, chances are, after you've created your schedules, you'll have to update them periodically.

When updating a provider's schedule, determine how far into the future the schedule change applies. If the change only affects the section of schedule that's currently released for schedulers to use, you only need to update the template. However, if your change needs to carry further into the future, you must also update any related pattern the provider's template uses.

Modify a Provider Schedule Template

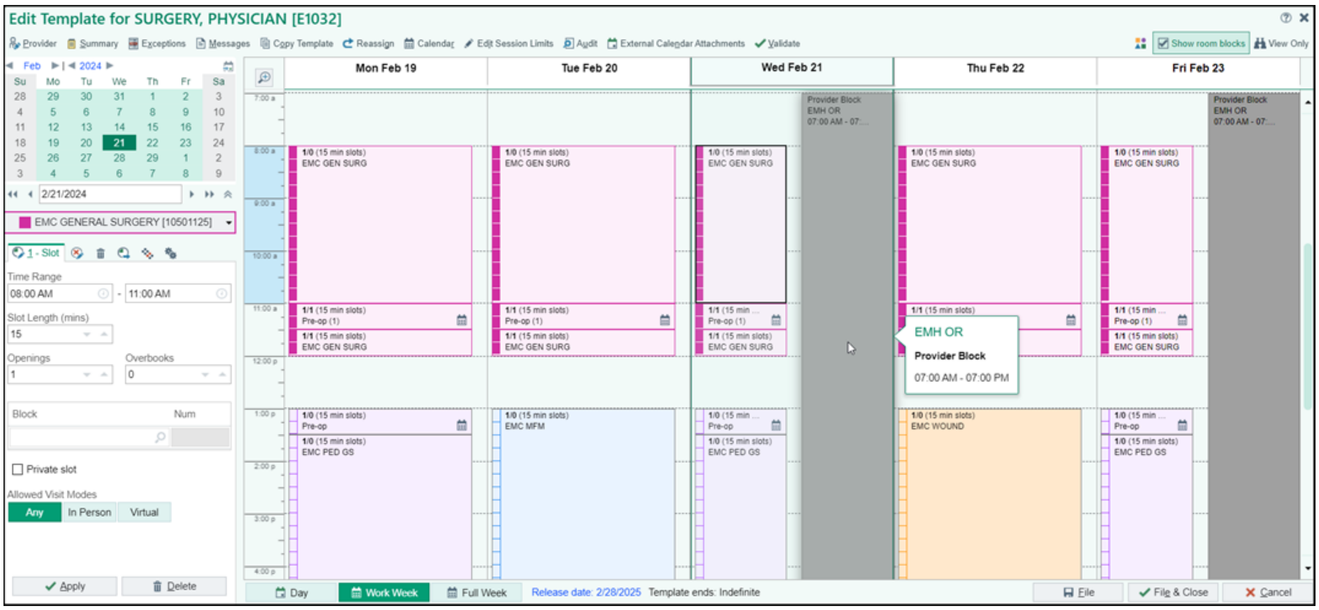
Because providers can regularly change their routines and availabilities, you can easily edit a template after you've created it.

Considerations

If you're modifying a template that was created from a pattern, you must also update the pattern to carry your changes forward when the system automatically extends the template.

Also, if your organization uses OpTime, you can see any blocks in OpTime templates in the Edit Template activity. This allows you to see any time reserved for surgeries so you can make sure your appointment schedules don't incorrectly overlap. Blocks from OpTime template appear in the activity in solid grey and show the block name, the location, and the start and end times at the start of the block. You can also see this information in the tooltip.

Refer to the Set Up Scheduling Templates for Staff and Resources topic for more information on OpTime templates.



1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Templates > Edit Template.
2. Select the provider for whom you want to edit templates.
3. Make changes to the template as necessary:
   - To delete slots: Select the slot and clicking Delete on the Edit Slots tools, select Delete from the right-click menu, or press DELETE on your keyboard.
   - To move slots: Drag and drop them into the appropriate place.
   - To adjust the size of a time range: Select the slot, hovering over the edge of the range on the calendar view with your mouse until the arrows appear, and then drag the edge up or down.
   - To divide a time range: Click the range and enter a different start or end time on the Edit Slots tools. For example, if you have 8:10 through 12:10 designated as a section for 15 minute slots with one opening and zero overbooks, and you want to instead divide 8:10 through 9:10 into 15 minute slots with two openings and one overbook, you can select the time range on the template and then change the end time to 9:10. Then click Apply. This divides the original time range into two ranges, one from 8:10 through 9:10 and another from 9:10 through 12:10.
   - To designate the slots in a time range as private or public: Select the time range, select or clear the Private slot checkbox on the Edit Slots tools, and click Apply.

  - To add or blocks to the slots in a time range: Select the range, add or remove a Block in the blocks table, and click Apply. You can also add or remove a block from the right-click menu.
  - To change the length of slots, number of openings, or number of overbooks: Select the time range, modify these values in the Edits Slots tools, and click Apply.
  - To change open slots to held time or unavailable time: Right-click a set of slots and choose Set Time Available or Set Time On Hold. You must select a reason.
  - Starting in May 2024, to change the visit mode allowed for the slot: Select the time range, select Any, In Person, or Virtual and click Apply. If a release date is set up for the visit mode at the provider, department, or system level, you can select it using the checkbox below the visit mode options.
4. When you're finished, click File to save your changes to the template. If the system finds appointments that exist outside the new template time range or that don't conform to the new appointment length, you see a warning and the appointments are retained as-is. These appointments appear on the Reschedule Appointments work list.

Modify a Provider's Long-Term Schedule

When you want changes to a provider's schedule to carry forward long-term, you must update the pattern used to create the provider's template. For example, if a provider won't be working Fridays in your department anymore because he sees patients at the local hospital that day, you can delete his schedule for Fridays in the pattern that creates his template.

Depending on the type of pattern the provider uses, you can use one or both of these sets of steps to update his schedule.

Edit a Single Day Pattern

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Templates > Edit Pattern.
2. Choose the Single-day pattern option and select the pattern you want to edit.
3. Enter the time range you want to change and update the behavior of that section of the schedule using the other fields available.
   - Limit the appointments that schedulers can make in the time range by specifying a block.
   - Make the time unavailable by adding an unavailable reason.
   - Delete the time you specified from the provider's schedule by clicking Delete Slots.
4. Click File Pattern to save your changes.

Edit a Weekly Pattern

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Templates > Edit Pattern.
2. Choose the Weekly pattern option and select the pattern you want to edit.
3. Enter section of the pattern you want to edit.
   For example, you might choose to edit the pattern for Monday in a single-week pattern to change a provider's schedule for every Monday.
   Remember to review which providers use the template before making changes. The edits you make eventually get applied to all of the schedules for the providers listed.
4. If you want to delete the schedule for the days you selected, click Delete Day(s).
   Remember that, if the pattern contains fewer weeks than are in a month, your changes apply to multiple weeks.

5. Otherwise, enter the time range you want to change and update the behavior of that section of the schedule using the other fields available.
   - Limit the appointments that schedulers can make in the time range by specifying a block.
   - Make the time unavailable by adding an unavailable reason.
   - Delete the time you specified from the provider's schedule by clicking Delete Slots.
6. Click File Pattern to save your changes.

Extend a Provider's Schedule

If certain providers or resources don't use patterns to automatically extend their schedules, you must manually extend their schedules when the amount you initially released runs out.

Considerations
You might not need to complete this task for all providers who don't use patterns. If a provider's template uses the Indefinite end date check box, you can skip these steps.

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Edit Template.
2. Click the Settings button, or press Alt+6.
3. Enter a release date far enough in future that the provider's schedule won't run out again soon.
4. Follow the steps in the Configuring Scheduling Templates topic to configure the provider's template again.

Reassign a Provider Schedule Template to Another Provider

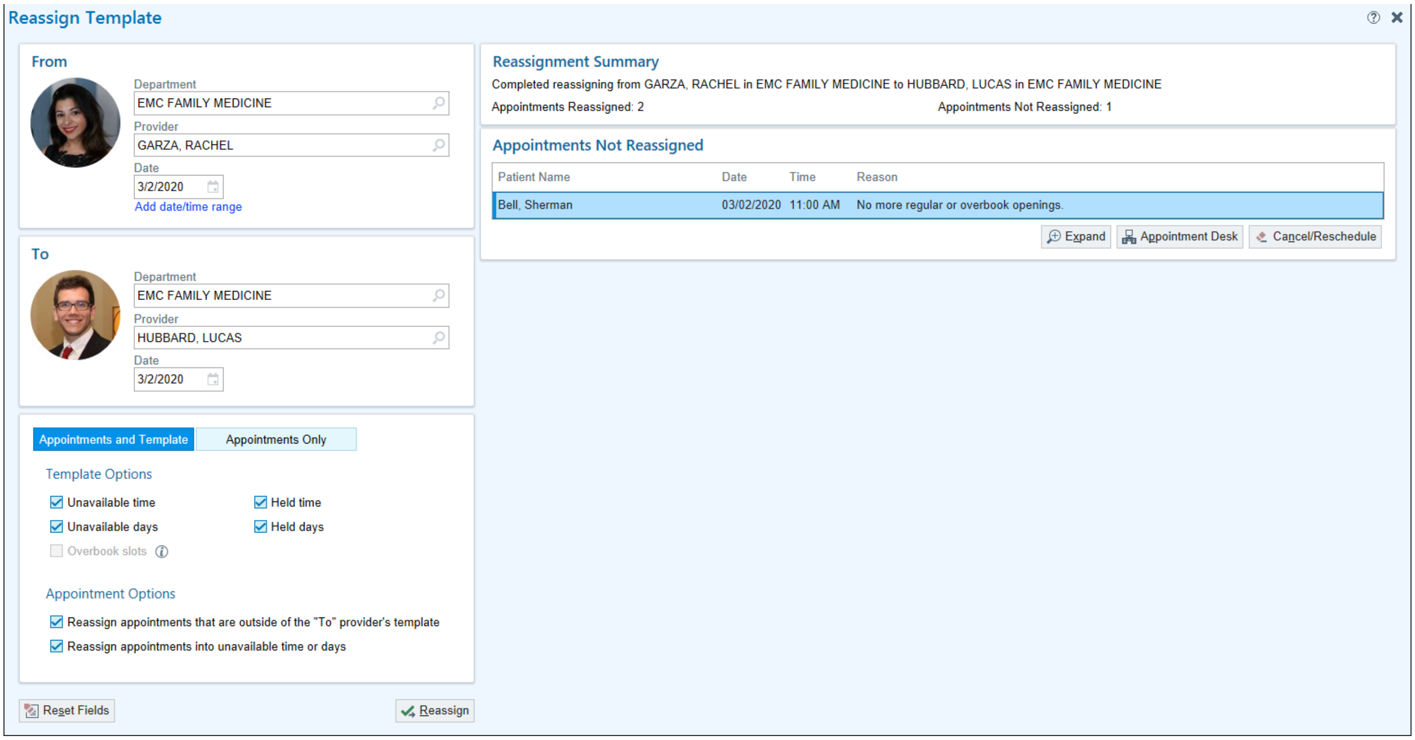
If one provider's schedule should actually belong to another provider, you can use the Reassign Template activity to move the schedule. This feature is especially helpful if:

- One provider takes over for another provider, or takes over part of another provider's schedule.
- You accidentally assigned a template to the wrong provider.

Considerations

- You can only reassign a template to a different provider if that provider doesn't already have a template set up for the dates to which you are reassigning. If the provider already has a template, then only the appointments get reassigned.
- We recommend that you view a provider's template using View Schedules before attempting to reassign a template to make sure that the appointments can be reassigned properly.
- You can reassign a template to the same provider for a different day. For example, if you needed to move a provider's schedule from Monday to Tuesday, you could do that using reassign template.
- You can assign a schedule to multiple providers. You might want to do this if one provider can't accept all of the appointments from the original provider's template. To do this, start with the first provider. Any appointments that fit into his schedule are moved. You can then choose the reassign option again and proceed with the next provider. You can repeat this process until all of the original provider's appointments have been reassigned.
- You can only reassign blocks if both providers use them.
- Only users with template access security can reassign schedules.

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Reassign Template.
2. In the From section, enter the provider or resource from which to move the template and appointments along with the date range from the original provider's schedule that you want to reassign.
3. In the To section, enter the provider or resource to which you want to move the template and appointments along with the date range to which the moved schedule applies.
4. In the next section, choose whether you want to reassign appointments and template or only appointments.
    - The following options are available for reassigning template:
        - Unavailable time
        - Held time
        - Unavailable days
        - Held days
        - Overbook slots
    - The following options are available for reassigning appointments:
        - Reassign appointments that are outside of the "To" provider's template
        - Reassign appointments into unavailable time or days
5. If you're reassigning only appointments, you can enter a list of visit types to limit the appointments that get reassigned.
6. Click Reassign. You receive warnings about any conflicts and appointments that the system couldn't move appear in the Appointments Not Reassigned section of the activity for you to manually resolve. You might also see warnings that you can choose to override.
    - Use the Expand button to view more information about the appointments in this list.
    - Use the Appointment Desk button to open the patient's Appointment Desk.
    - Use the Cancel/Reschedule button to manually move the appointment.



Delete Provider Schedule Templates

If a provider leaves your organization or you have templates that were created in error, you can delete them (in whole or in part) using the Delete Template activity in Hyperspace. If you need to delete a large number of templates that you created for testing before go live, you can use the Delete Provider Templates utility in Cadence Text.

> **!** The Delete Template activity and the Delete Provider Templates utility delete templates for all days you select, including days that have scheduled appointments. You are warned when you do this. If you continue to delete the template, the appointments automatically appear on the Reschedule Appointments work list for schedulers to address.

Delete a Template for an Individual Provider

The Delete Template activity allows you to delete a provider's template for individual dates or you can specify a daily, weekly, or monthly recurrence to delete. For example, if you want to delete only specific dates for a provider, choose the individual dates method. If you want to delete the entire template, choose the weekly method instead.

1. In Hyperspace, open the Delete Template activity (search: Delete Template).
2. Select the department and provider that you want to delete a template for.
3. Select the recurrence of template dates you want to delete.
    - Individual dates. Enter the individual dates to delete.
    - Daily. Enter a daily recurrence to delete, such as every 3 days. Choose whether to include Saturdays, Sundays, and holidays in the recurrence.
    - Weekly. Enter a weekly recurrence to delete, such as every 4 weeks. Choose which days of the week to delete.

   - Monthly. Enter a monthly recurrence to delete, such as every 3 months. Choose which days of the week and weeks of the month to delete.
4. Enter a start and end date for deleting the template. Select the Indefinite end date check box to delete all of the template after the start date using the recurrence you specified in step 3.
5. Click Accept.

Delete Templates for Multiple Providers

The Delete Provider Templates utility in Cadence Text is intended to be used to delete test template data for multiple providers before you build the real templates for go-live. The utility allows you to delete templates for all departments and providers or for a subset of departments and providers. To run the utility, go to Cadence Text > Template Processing > Delete Provider Templates and follow the prompts on the screen.

Note that you cannot run the utility for days that have already gone through end-of-day processing. If you need to delete templates on such days, contact your Epic representative.

Edit Blocked Time in Schedules

As you audit your initial build and periodically as departments and providers change their schedule needs, you'll have to update blocks.

Just as when you create blocks, you can edit them for a given provider, department, or visit type.

Edit Blocks for a Provider

1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.
4. On the Release tab, locate the Provider section. Select the provider you want to edit in the table.
   You can select multiple providers by holding down CTRL and clicking each provider's row.
5. Starting in May 2024, the Release Blocks to Providers window opens in the sidebar automatically when you select records to edit. In February 2024 and earlier, click Edit. The Edit Provider Release of Blocks window appears.
6. Starting in May 2024, select the Change values checkbox for each field you want to edit then use the fields to make your changes. In February 2024 and earlier, clear the Keep existing check box for each field you want to edit, then use the fields to make your changes.
7. Click Accept to save.

Edit Blocks for a Department

1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.

4. On the Release tab, locate the Department section. Select the department you want to edit in the table.
   You can select multiple departments by holding down CTRL and clicking each department's row.
5. Starting in May 2024, the Release Blocks to Departments window opens in the sidebar automatically when you select records to edit. In February 2024 and earlier, click Edit. The Edit Department Release of Blocks window appears.
6. Starting in May 2024, select the Change values checkbox for each field you want to edit then use the fields to make your changes. In February 2024 and earlier, clear the Keep existing check box for each field you want to edit, then use the fields to make your changes.
7. Click Accept to save.

Edit Blocks for a Visit Type

1. In Hyperspace, open the Block Database Editor.
   - Search: Blocks
   - Path: Epic button > Admin > Schedule Admin > Master File Edit > Blocks
2. In the Block field, enter the block you want to work with.
3. If your environment is enabled for EMFI, select the Include protected records check box to show protected records in the editor. You cannot edit protected records.
4. Select the Visit Types tab. Select the visit type you want to edit in the Visit Type table.
   You can select multiple visit types by holding down CTRL and clicking each visit type's row.
5. Click Edit.
6. In the Match on field, specify the matching logic for this visit type block.
   - Enter All Slots to specify that when scheduling this visit type into this block, the scheduler must place the entire visit type into blocked time slots.
   - Enter First Slots Only to specify that when scheduling this visit type into this block, if the appointment length is greater than the length of a time slot in the provider's schedule, the first time slot of the appointment must be blocked.
   - Enter Secondary Slot Only to specify that when scheduling this visit type into this block, if the appointment length is greater than the length of a time slot in the provider's schedule, any slot except the first time slot of the appointment must be blocked.
7. Click Accept to save.

Release Reserved Times for All Provider Schedules in a Department

Under certain conditions, a department might want to release the block reservations in all of the schedules used by its providers and resources to allow for greater schedule utilization. For example, if a department sees an influx of a particular kind of appointment and doesn't have enough regular slots in the schedule to accommodate the volume of appointments, you can run a utility to remove the blocks from your schedule earlier than you configured to happen.

Considerations
During the Time Release of Blocks and Slots nightly processing, Cadence automatically releases blocks. You only need to run this utility if you want to release the blocks before the system automatically releases them.

1. In Cadence Text, log in to the department for which you want to release block reservations.
2. Go to Utilities > Time Release of Blocks and Slots.
3. At the prompt, enter Yes to run the utility. The utility identifies all unused blocked slots for the providers and resources in the current department and removes the block restriction. When identifying unused blocked slots, this utility references the department then system level settings to verify what to release. You can see the effects of running this utility immediately by viewing a provider's schedule in Hyperspace.

Manage Template Exceptions

When temporary changes in a provider's schedule occur, you don't always need to modify his template to see them reflected in your schedules. Instead, you can create template exceptions for specific periods of time (including days or portions of days). You can add two main different types of exceptions to schedules:

- Time unavailable. This type of exception indicates that the provider or resource isn't available. For example, if a resource won't be available due to maintenance, you can mark that time as unavailable so schedulers know not to make appointments with it.
- Time on hold. This type of exception indicates that a provider might not be available. For example, if a provider might go on vacation for a week, you can mark that time as held in his schedule to indicate to schedulers that they should find a better time.

Add an Exception to a Provider's Usual Schedule

Occasionally, providers or resources become unavailable on days they'd normally be available for scheduling. For example, a provider might have a series of meetings they're attending for the next month that takes them out of the office in the mornings or a resource might be due for scheduled maintenance on a particular day.

You can let schedulers know about unavailable time by marking it on schedules. Unlike updating a template or pattern, these exceptions represent temporary changes to a provider's routine.

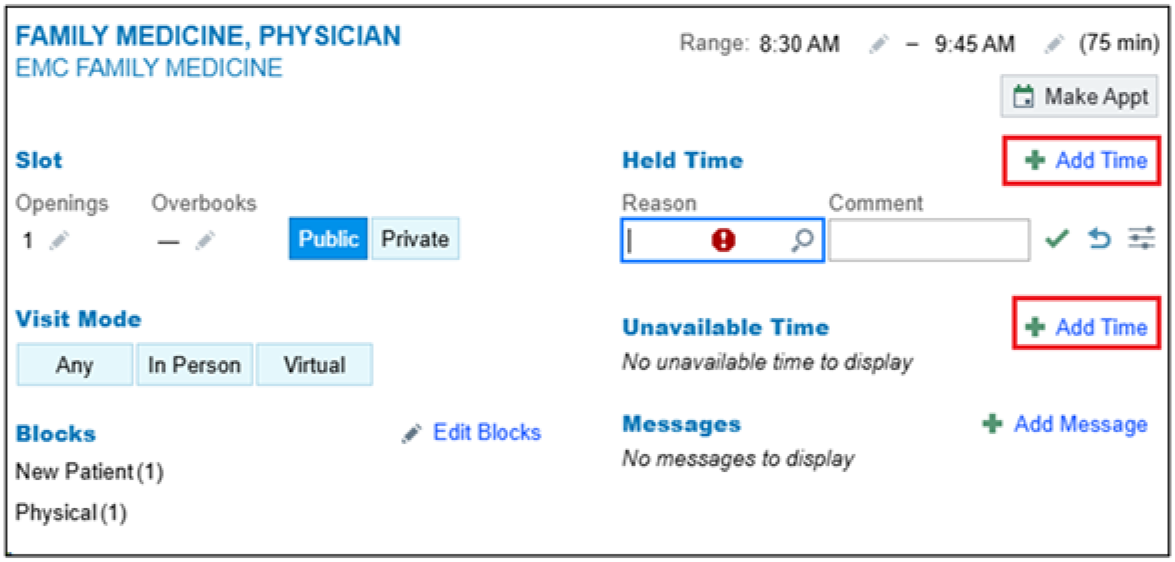
By marking time unavailable or time on hold, you can indicate to schedulers when a provider won't be available.

You can choose to document an exception to a provider's routine from:

- The Template Exceptions activity.
- Directly from their schedule.
- The Snapboard.

Add an Exception Directly from a Provider's Schedule

1. In Hyperspace, follow the path Epic button > Scheduling > View Schedules.
2. Enter department where the schedule you want to edit exists and the provider who uses it.
3. If your exception only applies to portion of the day, click and drag your mouse pointer to select multiple slots in the schedule.
4. Right-click and add Held or Unavailable time in the flyout, including a reason for the exception.



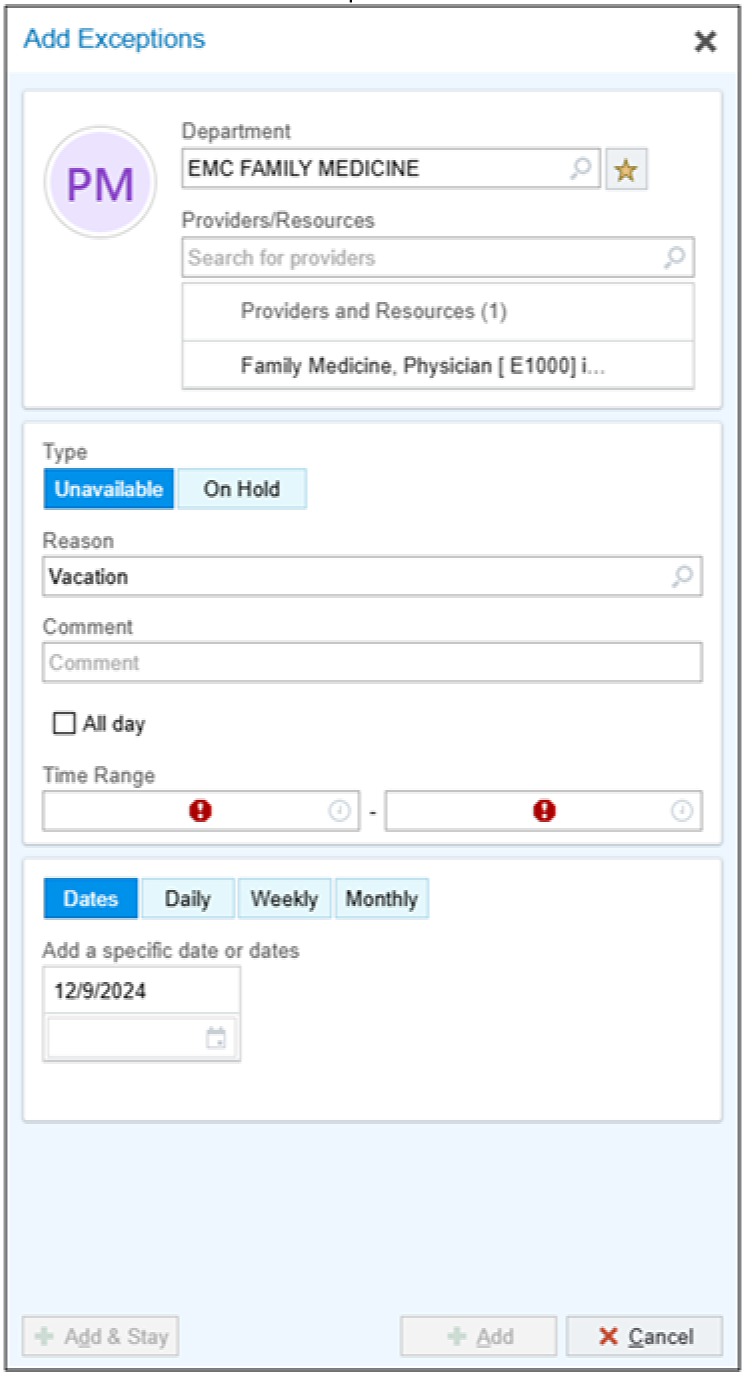
5. Exit the flyout to save your changes. The exception you created appears on the provider's calendar for schedulers to see when they make appointments.
6. You can also set an exception for an entire day by right-clicking on the header for the schedule day and selecting Add Template Exceptions. Refer to the below section on how to add exceptions from that activity.

Add an Exception from the Template Exceptions Activity

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Template Exceptions.
   If you're already in the View Schedules activity, you can click the Add Template Exceptions button to open this activity directly.
2. Select the department where the provider has a schedule you want to edit and enter the provider's name.
3. Choose to add either hold time or unavailable time.
   Note that schedulers with override hold security can still schedule into hold time. If you're creating an exception for an event that might not take place (such as a possible vacation), using hold time can still allow schedulers to make emergency appointments if needed.
4. Select a reason and comment for the exception.
5. Select All day to apply the exception to the entire day, or specify a specific time range for the exception.
6. In the bottom section, specify how frequently this exception takes place:
   - Dates. The exception applies only to specific dates (for example, the provider has a one-time meeting on 11/11/2018 from 4 PM to 5 PM).
   - Daily. The exception applies to a number of days of the week (for example, every other day for the next month the provider wants to reserve time from 4 PM to 5 PM to address a backlog of patient messages after their vacation).
   - Weekly. The exception applies to a number of days of the week (for example, the provider is taking every Friday for the next month off as vacation or the provider has a recurring meeting the first Monday of every third week).
   - Monthly. The exception applies to certain days of specific weeks (for example, the provider comes in late the first Wednesday of the first week of every other month because they come to the clinic directly from rounds at the hospital).
7. If you chose to apply the exception to more than just individual dates, specify the date range to which your

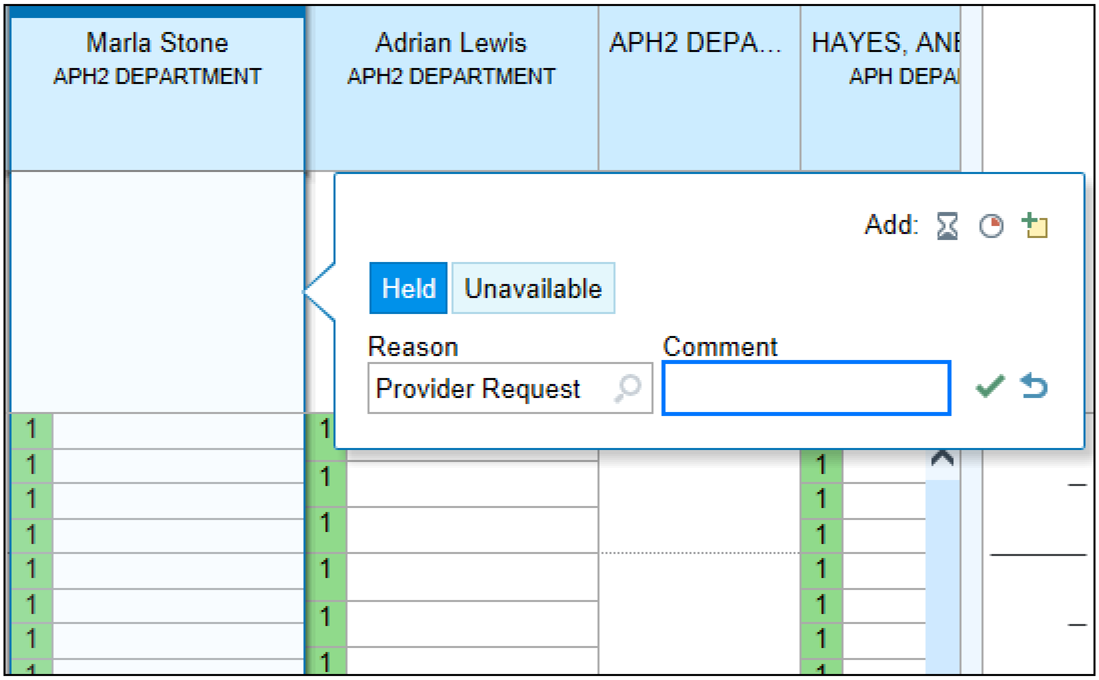
exception applies.

8. Click Add to create the exception.



Add an Exception from the Snapboard

1. In the Snapboard, locate the schedule column of the provider for whom you want to add an exception.
2. Click within the box that appears below the provider's name in the header of the schedule column (or to the right of the provider's name in horizontal view). The provider bubble appears.
3. Click the hourglass icon to add hold time or the clock icon to add unavailable time.
4. Add a reason and free text comment in the fields that appear.
5. Click the check mark icon to apply the exception.



Delete an Exception to a Provider's Usual Schedule

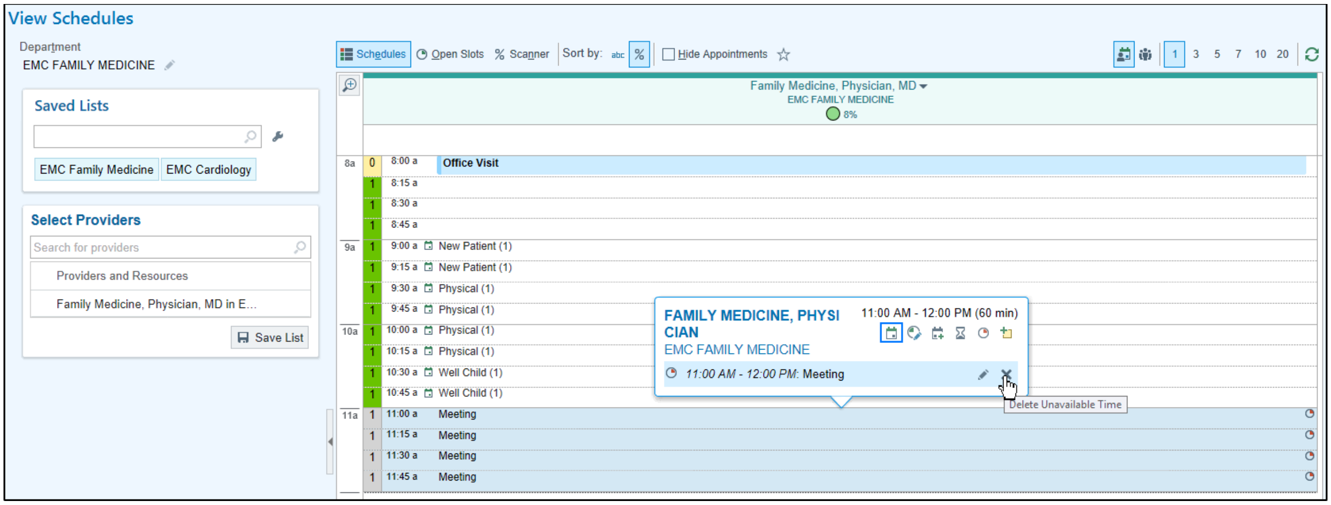
After you create an exception for a provider's schedule, you can delete it. For example, if a provider asked you to hold some time for a potential vacation that ended up not happening, you can remove it from the schedule. By removing these unavailable times, you allow schedulers to freely add appointments to these times.

You can delete exceptions in the following places:

- View Schedules activity
- Template Exceptions activity
- Template Exceptions report
- Snapboard

Delete an Exception from the View Schedules Activity

1. In Hyperspace, follow the path Epic button > Scheduling > View Schedules.
2. In the left pane, enter the department where the schedule you want to edit exists and the provider who uses it.
3. Select the date that has the exception you want to delete using the calendar in the right pane.
4. Select the portion of the day affected by the exception (for example, if the time from 11 AM to 12 PM appears on hold, select all slots in that time range by holding the Ctrl key, selecting the 11 AM slot, then dragging to the 11:45 AM slot).
5. The edit hover bubble appears. Click the X on the row of the exception you would like to delete.



6. Once you click away from the hover bubble, you can see the exception no longer appears on the provider's schedule.

Delete Exceptions from the Template Exceptions Activity

You can choose to delete a single exception or a range of exceptions from the Template Exceptions activity.

To delete a single exception:

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Template Exceptions.
2. Select the department where the provider has a schedule you want to edit and enter the provider's name.
3. Select the specific exception from the list that you want to delete and click Delete.
4. Click Yes to confirm your deletion.

To delete range of exceptions:

1. In Hyperspace, follow the path Epic button > Schedules > Templates > Template Exceptions.
2. Select the department where the provider has a schedule you want to edit and enter the provider's name.
3. Click Delete Many.
4. Specify type of exception to delete and when it occurs.
5. Click Accept and verify your deletion.

Delete Exceptions from the Template Exceptions Report

1. In Hyperspace, open the Template Exceptions report (search: Template Exceptions Report).
2. Modify the settings if needed and run the report.
3. From the report results, you can delete individual exceptions or recurring exceptions:
   - Select individual exceptions to delete and click Delete Selected. Use the Shift and Ctrl keys to select multiple exceptions.
   - Select an exception and click Delete Recurring to delete all instances of a recurring selection.

Delete Exceptions from the Snapboard

1. In the Snapboard, existing exceptions appear in the box below the provider's name in the header of the schedule column (or to the right of the provider's name in horizontal view). When you click in this box, the provider bubble appears.
2. The exception appears in its own row within the provider bubble, with pencil and X icons to the right of its

name. Click the X icon.

3. The name of the exception is now struck through, and an Undo icon appears. Click outside of the provider bubble to confirm your deletion.

Edit an Existing Exception to a Provider's Usual Schedule

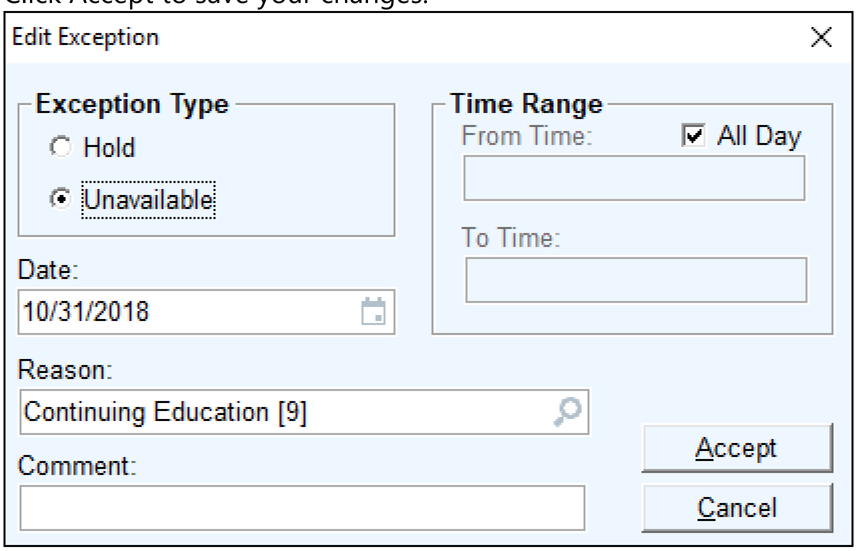
Meetings get moved and, sometimes, vacations get delayed. You can account for these changes in unavailable or held time by editing your exceptions.

You can edit exceptions in the following places:

- Template Exceptions activity
- Snapboard

Edit Exceptions from the Template Exceptions Activity

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Template Exceptions.
2. Select the department where the provider has a schedule you want to edit and enter the provider's name.
3. Select the exception that you want to modify from the list.
4. Click Edit.
5. Modify the exception as necessary. You can even change the date or type of exception in addition to adjusting the time range.
6. Click Accept to save your changes.



Edit Exceptions from the Snapboard

1. In the Snapboard, an existing exception appears in the box below the provider's name in the header of a schedule column (or to the right of the provider's name in horizontal view). When you click in this box, the provider bubble appears.
2. The exception appears in its own row within the provider bubble, with pencil and X icons to the right of its name. Click the pencil icon.
3. Modify the exception as necessary. Click the check mark icon to save your changes.

Move Provider Appointments

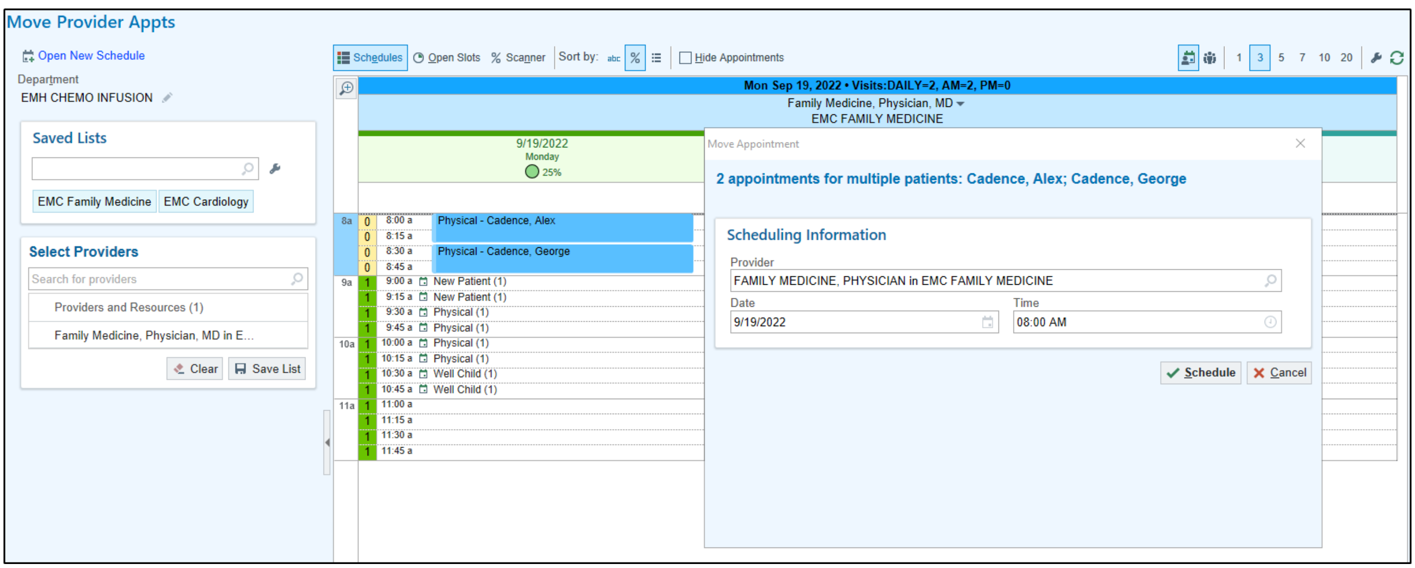
Based on changes to a provider's regular schedule or temporary unavailable time, you might need to rearrange a provider's appointments. Using the Move Provider Appointments activity, you can move individual appointments or clear appointments for entire days of a provider's calendar.

This section covers several different ways you can move provider appointments.

When working with appointments in the Move Provider Appointments activity, you can choose to move appointments by dragging and dropping them or by right-clicking an appointment to open the menu, selecting cut, then right-clicking the destination slot and selecting paste to move it. You can use whichever method works best for you.

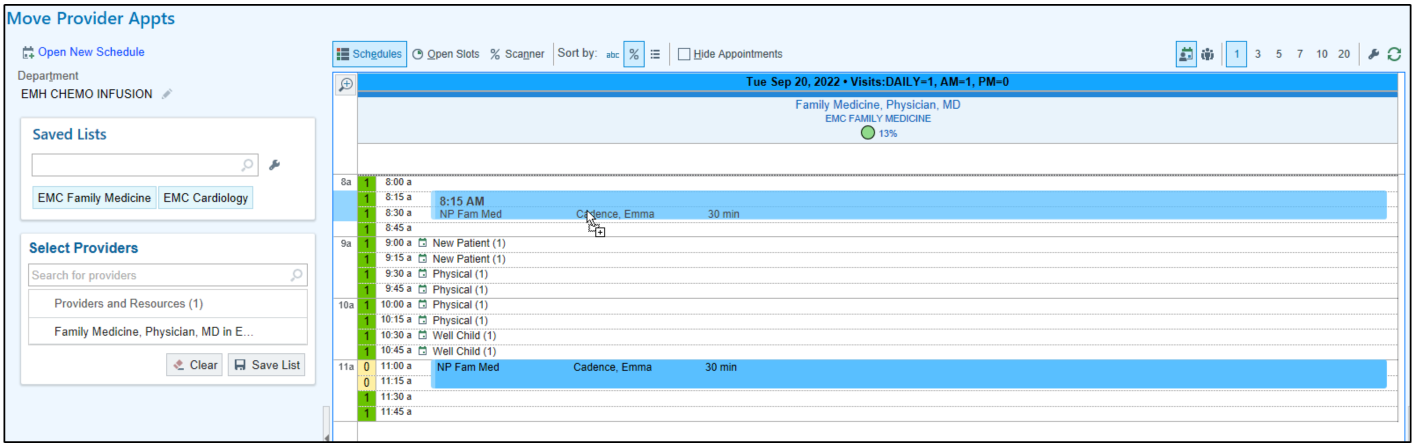
Move Multiple Appointments at Once

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Move Provider Appts.
2. In the left pane, select the provider whose schedule you want to update and the department where that schedule exists.
3. Use the calendar in the right pane to select a date from which you want to move appointments.
4. Hold down the Ctrl button and use your mouse to click all of the appointments for a day you want to clear.
5. The appointments you're preparing to move appear highlighted and a bubble appears telling you how many appointments you have selected.
6. Click the Move button on the bubble or just drag and drop the appointments to the date and time on the provider's schedule to which you want to move the appointments you've selected.
7. You might receive block warnings if you attempt to schedule into time reserved for a particular type of appointment, but if you have security to schedule into blocked time, the appointments still move as you indicated.



Move a Single Appointment

1. In Hyperspace, follow the path Epic button > Scheduling > Templates > Move Provider Appts.
2. In the left pane, select the provider whose schedule you want to update and the department where that schedule exists.
3. Use the calendar in the right pane to select a date from which you want to move appointments.
4. Click a single appointment that you want to move and hold down mouse key.
5. Drag the appointment to a slot in the schedule where you want to move it and release the mouse key.



Gauge the Effectiveness of Your Schedules

After you've created schedules and front desk staff have been using them for a while, you can review appointment statistics and scheduling data to see if tweaking your build might result in more efficient schedule utilization.

For example, if schedulers don't appear to use the time blocked off for a particular visit type, you might consider removing the restriction to allow other appointments to move into those time slots.

We recommend that you run the following reports on a regular basis to verify your schedule build. For more information about these reports, refer to the Report Repository.

- ES Provider Utilization Health Report Template
- ES Schedule Utilization (With Exclusion)

Starting in May 2023, you can also run the Provider Utilization Toolkit utility to get more in-depth information on your provider's schedule utilization that is not provided by the reports below, while also including the information from the reports below in one file. This includes things like the most common reasons for unused minutes on the schedule, visit types linked to blocks on a schedule, as well as separate columns for both slots and minutes that go unused.

In the Provider Utilization Toolkit utility, you'll find the following customization options. The menu in the utility also explains each option as you select them.

- Date Range: The time frame used to narrow your results.
- Utilization Thresholds: The percentage of utilized time on Provider schedules; providers with schedules above or below the entered percentages appear on the 'Excluded Providers' tab of the report.
- Service Areas: The service areas you would like to include in the report.
- Facility Settings submenu options:
    - Go-Live Date: Specify your Cadence go-live date, and prevent appointments scheduled prior to this date from inclusion.
    - Dept Specialties: Filter the providers in the report by specialty.
    - Departments: Filter the providers in the report by department.
- Provider Settings submenu options
    - Use Standard Exclusion: Determines whether or not the report respects Utilization Override (I SER 14020), which determines whether a Provider is always included in the report regardless of other

criteria set during configuration.

  - Resource Types to Include: Filter providers by whether they are marked as Person or Resource in Scheduling Type (I SER 30), with an option for including both types.
  - Provider Types: Filter providers based on Provider Type (I SER 1040), with options to include or exclude specific types.
  - Include Generic Providers: Determines whether or not the report includes providers with I SER 13 set to Yes.
  - Include Results for Excluded Providers: Determines whether providers that will appear on the Excluded Providers tab of the report will have results calculated and returned. Excluded Providers, for this setting, includes those excluded based on provider type, resource type, generic provider, system calculated ^SCHED exclusion reasons, I SER 14020 utility override or a lack of template capacity. Note that this setting can dramatically increase the run time of the report.
- Miscellaneous Settings
  - Late Cancel Threshold: Determine what counts as the late-cancel period regarding appointments.
  - Unavailable Reason to Report On: Select a specific unavailable reason to return statistics for.
  - Include Held Time Comments: Include free text comments for held slots in the report, which may potentially include PHI. If including Held Time Comments, save the report to a secure location.
  - DEP Report Grouper to Include: Allows for the inclusion of a department (DEP) report grouper as an output column in the report, for identification or filtering purposes.

To run the utility, from Cadence Text, go to Report Menu > Provider Utilization Toolkit

1. In Cadence Text, go to Report Menu > Provider Utilization Toolkit
2. From the main menu, select your desired Date Range and Utilization Thresholds
3. For Email, enter the email address that will receive a notification when the report has finished compiling.
4. For File Path, enter the destination you would like the report file to save to. The ideal file type for the output is an XML file.
5. In the Facility Settings submenu you can restrict results based on your organization's Go-Live date, departments, or department specialties.
6. In the Provider Settings submenu you can restrict results based on Provider and Resource type, and can choose whether generic providers are included or whether excluded providers have full results displayed.
7. In the Miscellaneous Settings submenu you can restrict and modify results based on late cancellations, specify an unavailable time/day reason to return statistics on, choose whether comments regarding held time are included, and choose whether or not to use department (DEP) report groupers.

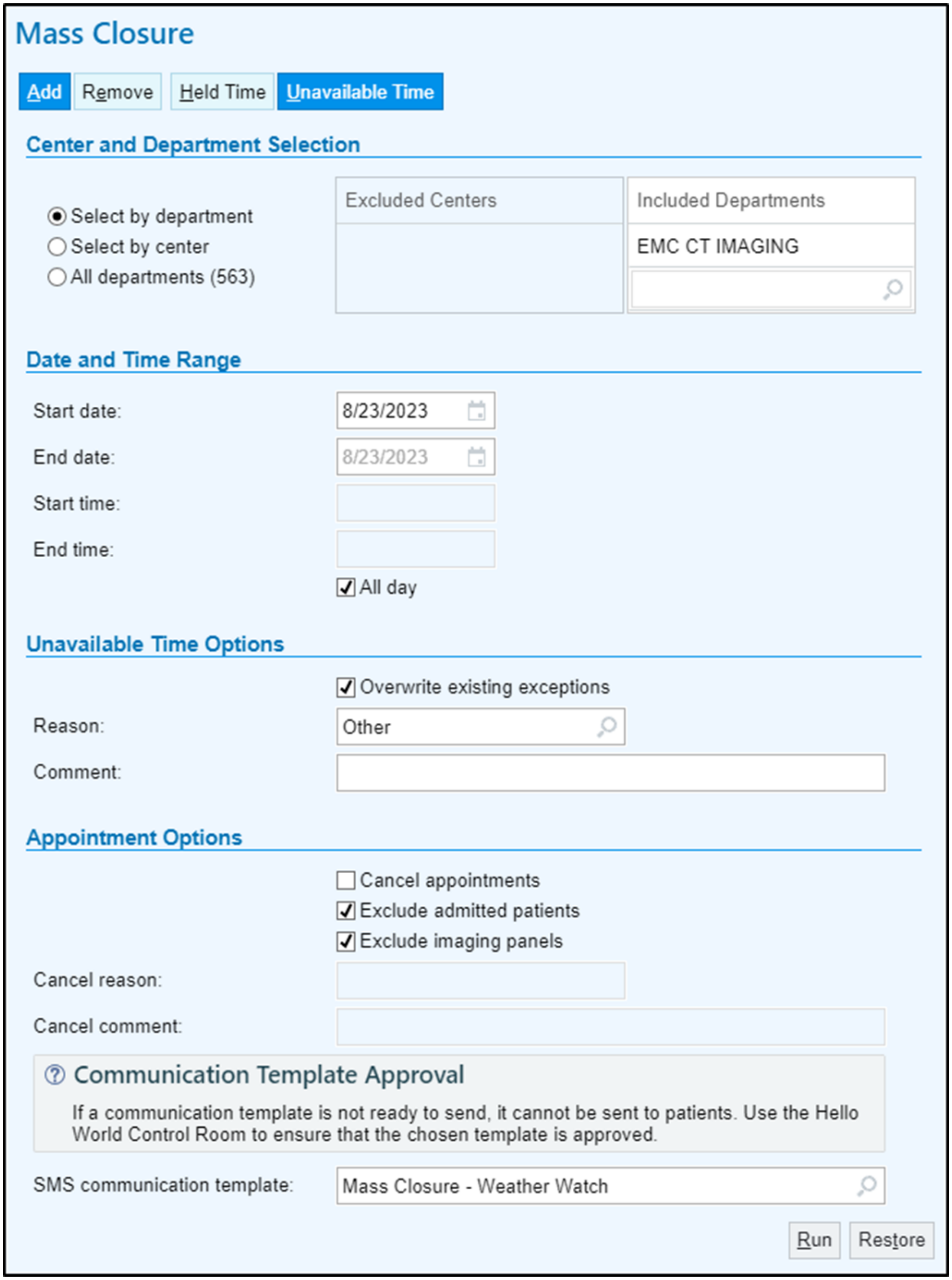
After choosing Continue you are notified of any required fields that are missing, and if there are no warnings, the report runs as a background process. After the report has completed, you receive an email and can open the file at the destination you entered at the File Path prompt. The information can be analyzed directly in the output file or, to help with presentability and filtering, can be placed into the Provider Utilization Toolkit Template which provides a high-level summary of provider utilization and causes of unused time. The report returns results for unused time, the number of appointments scheduled, the amount of appointment openings that go unused, and various other statistics. Starting in May 2024, use this version of the Provider Utilization Toolkit Template to account for visit modes that are in the provider’s template and use this version of the Provider Utilization Toolkit Template for February 2024 and earlier. For more information about how to use this template, refer to the Provider Utilization Toolkit Template Usage Guide.

Modify Provider Templates and Cancel Appointments for Unexpected Department Closures

It's easy to take care of your schedules when departments at your organization need to close unexpectedly due to weather, facility issues, or any other reason. The Mass Closure activity allows you to make the following changes for centers and departments:

- Add held or unavailable time to provider schedule templates for a time range on a specified date, an entire day, or a date range. This ensures that new appointments aren't scheduled when the center or department is closed.
- Cancel appointments that were scheduled in that time range or on that date.
- Starting in November 2023, send text messages about clinic updates and closures to patients who have appointments in the specified time range.

You can run the Follow-Up work list to find the canceled appointments and follow up with patients to reschedule. You can run the Reschedule Appointments work list to find appointments that are still scheduled after you added unavailable time.



Allow Users to Access the Mass Closure Activity

A user must have the Edit template (I ECL 5070) security point and the Mass template edit (I ECL 5086) security point set to Yes in their Cadence security class to access the Mass Closure activity. They must also have the following Cadence security points set to Yes in the departments in which the Mass Closure activity is taking action:

- Hold days or time (I ECL 5135). Allows the user to add held time to the schedule.
- Template exceptions (I ECL 5075). Allows the user to mark time unavailable.

- Cancel (I ECL 5068). Allows the user to cancel appointments.

When a user doesn't have the proper security for a department, the activity skips the action and shows a list of the actions that weren't completed so they can be followed up on manually.

Refer to the Give Users the Ability to Modify Provider Schedules topic for information about editing Cadence security classes.

Add Held or Unavailable Time and Cancel Appointments for Centers or Departments

You can use the Mass Closure activity to add held or unavailable time to all provider schedule templates in selected centers and departments for a given date and time range. You can also cancel appointments that are scheduled in the held or unavailable time you're adding.

1. In Hyperspace, open the Mass Closure activity (search: Mass Closure).
2. If it's not already selected, click the Add button to make sure you're adding held or unavailable time and not removing it.
3. Click the Held Time or Unavailable Time button depending on whether you want to put slots on hold or add unavailable time.
4. Select the centers or departments in which you want to modify provider schedule templates.
5. Select the date range or time range for which you want to modify provider schedule templates.
6. Select the Overwrite existing exceptions check box if you want to replace held or unavailable time on providers' schedules with the held or unavailable time you're adding from the Mass Closure activity.
7. Enter the reason you are putting time on hold or making time unavailable.
8. Select the Cancel appointments check box if you want to cancel appointments that are scheduled in the time you are modifying. This check box is unavailable if you're adding held or unavailable time to multiple days.
    a. Select the Exclude admitted patients check box if you don't want to cancel appointments for patients who are currently admitted.
    b. Select the Exclude imaging panels check box if you don't want to cancel appointments for imaging panels.
    c. Enter the reason you are canceling appointments.
9. Click Run. The system modifies the affected templates and cancels appointments. When this process is complete, a report appears to show you what was done. The report also shows you any templates that weren't modified and any appointments that weren't canceled along with the reasons why.

Remove Held or Unavailable Time for Centers or Departments

When you're ready to reopen the affected centers and departments, you can use the Mass Closure activity to remove the held or unavailable time from provider schedule templates.

1. In Hyperspace, open the Mass Closure activity (search: Mass Closure).
2. Click the Remove button to make sure you're removing held or unavailable time and not adding it.
3. Click the Held Time or Unavailable Time button depending on whether you want to release slots on hold or remove unavailable time.
4. Select the centers or departments in which you want to modify provider schedule templates.

5. Select the date range or time range for which you want to modify provider schedule templates.
6. Enter the held time or unavailable reason you want to remove.
7. Click Run. The system modifies the affected templates. When this process is complete, a report appears to show you what was done. The report also shows you any templates that weren't modified along with the reasons why.

Enable Hello World Content for Mass Closure SMS

Starting in November 2023

In the Mass Closure activity, you have the option to send text messages to patient to give them more information about closures in the affected departments. After you hit Run, approved content that you specify in the Communication Topic field is sent to patients with appointments in the selected departments and time frame, in August 2024 and earlier, the field is named SMS Communication Template. Patients must have the text message option enabled for the Clinic Announcements communication concept, 28505-Cadence Updates Preference, in the Communication Preferences activity to receive these types of messages. If you choose to cancel appointments, patients receive your selected content instead of the typical appointment canceled SMS notification. If you choose to exclude admitted patients or patients with imaging panels, those patients do not receive any text messages. There are a few released communication templates that you can use as a starting point:

- Template 60080- Mass Closure - Weather Watch
- Template 60081- Mass Closure - Weather Closure
- Template 60082- Mass Closure - Department Closure

Review the released content with stakeholders at your organization and determine whether any changes are needed. Whether you use the content as released or need to make changes to it, you need to create overrides of the communication templates and have the records approved by your Hello World team.

You can also choose to create your own base communication templates for other situations. Communication templates must have a workflow type of 60079 - Mass Closure to be selected in the Mass Closure activity. For more information about creating custom communication templates, refer to the Create Base Communication Templates topic.

Like released content, you must create and approve overrides of your custom communication templates for the messages to be sent successfully. Because this approval process can be time consuming, ensure you have created communication templates for all situations you anticipate ahead of time so messages are available to send when a department needs to close. Any department selected in the Mass Closure activity must have approved content for messages to be sent for that department. Content approved at the facility level can be used across multiple service areas and departments, so we recommend approving overrides at the facility level for easier build and maintenance. For more information about creating and approving this content, refer to the Create Override Communication Templates topic.

Starting May 2024, if you use Hello World SMS gateway to send text messages, mass closure notifications can be sent to a proxy if the proxy's communication preferences are turned on for Clinic Announcements.

Release Blocks in Bulk

The Set Blocks in Departments utility lets you release any number of blocks to any number of departments, all at once, instead of needing to release them all manually.

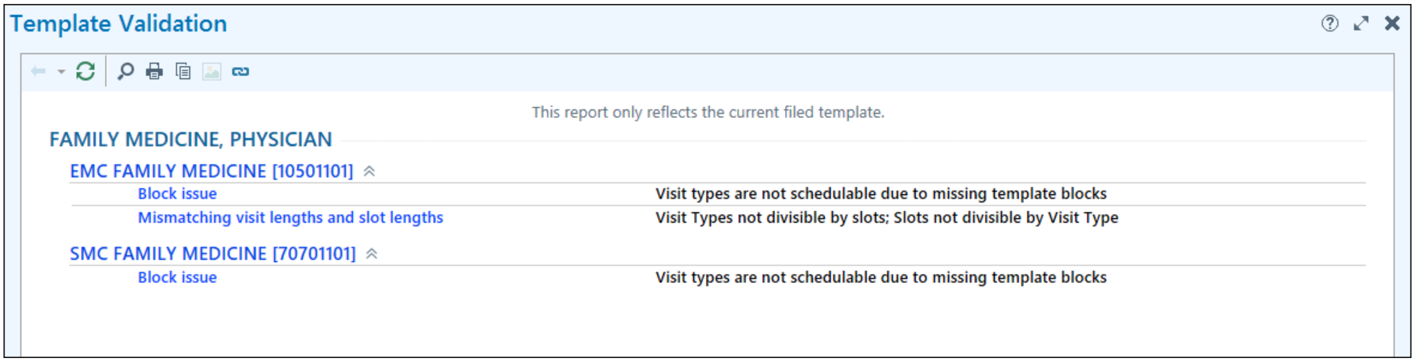
There are several scenarios where this utility is useful, such as when you're building a new department and want to release all blocks to it.

If you want to run the utility, go to Cadence text.

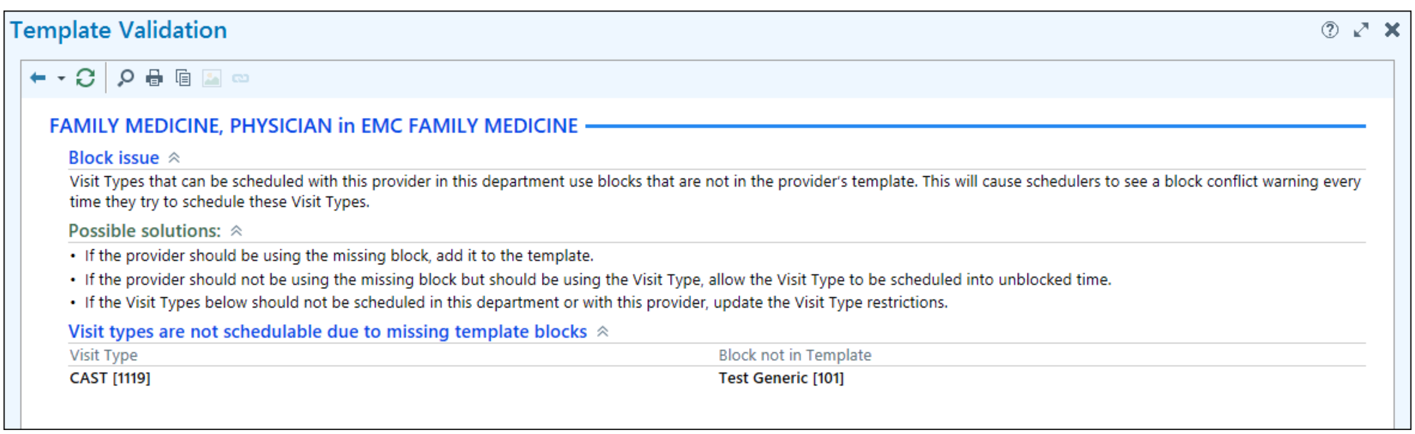
1. Enter d ^S at the prompt.
2. Select 4 (Utility Menu).
3. Select 10 (Set Blocks in Department)

Run Validation Checks on Provider Schedules

You can run validation checks on a template to check your work for common errors.



1. In either the Edit Template activity or in a Template Build report, click Validate.
2. In the Template Validation report, click on any item that appears to see more details, including common solutions. Validation messages appear for:
   - No release date or release date set in the past
   - Inappropriate slot lengths, including mismatches between slot lengths and visit type lengths
   - Block issues, including missing template blocks and blocks that don't match visit types
   - Missing templates
   - MyChart scheduling is not enabled



Rebuild Schedule Utilization Metric Data

You can use the Rebuild Utilization Metrics utility to backfill or update data in schedule utilization metrics, such as those described in the Schedule Utilization report topic. This option might be useful in the following situations:

- You recently began using schedule utilization metrics in a Radar dashboard and want to backfill data from the past several months for those metrics.

- You found and corrected some corrupt schedule data and want to rebuild the schedule utilization metrics you use to reflect the corrected data.

To run the utility:

1. In Cadence Text, go to Utility Menu > Rebuild Metrics > Rebuild Utilization Metrics
2. At the prompt, choose whether you want to rebuild all metrics, specific metrics, or only metrics in a department grouper.
3. At the Start date and End date prompts, enter the date range for which you want to rebuild data in the dashboard.
4. At the Rebuild metrics prompt, enter Yes.

Override the System's Evaluation for Whether a Provider Should Be Excluded from Utilization Metrics

Outliers in schedule and provider utilization data can make the metrics that appear in executive dashboards unreliable. For example, a provider's schedule might not represent the expected utilization or their entire schedule isn't intended to be used for seeing patients. To avoid this, scheduled task 63043-ES Utilization Exclusion Task runs weekly to evaluate which provider and department combinations should be included in utilization metrics 42590-ES Schedule Utilization (With Exclusion) and 42591-ES Provider Utilization (With Exclusion). For every provider and department combination, the scheduled task looks back over the past three months and excludes a combination from utilization reporting if it meets any one of the following conditions:

- The Is generic? (I SER 13) item is set to Yes
- The provider's scheduling template for the department is an OpTime template
- The provider's schedule utilization for the department is below 35 percent or above 200 percent

If the first date in a provider's scheduling template for Cadence is within the last two weeks, the scheduled task skips the provider and evaluates it the next time it runs. After the scheduled task evaluates a provider's record, it does not evaluate it again for another three months.

The results of the scheduled task are visible in the provider's record in Hyperspace in the Exclusion Logic column on the Scheduling > Departments form. You can also choose to override the scheduled task's result by completing the following steps:

1. In Hyperspace, open a provider's record (search: Provider).
2. Select the Scheduling > Departments form.
3. In the Exclude from Utilization (I SER 14020) column, enter Yes to exclude the provider from utilization metrics or enter No to include them. Leave the column blank or enter Default to use the system's evaluation to determine whether the provider is excluded from utilization metrics.

Provider Schedules Support: Common Issues

In this section, we'll cover some common issues that you might encounter, along with possible solutions for addressing the issue.

The Auto Scheduler can't find an appointment because there are "no matching blocks for this visit type."

Solution

Review your block build. If you've added too many blocks to a provider's schedule, it can become hard for schedulers to find open slots for appointments. See the Restrict Scheduling Based on Blocks topic in your online documentation for more information about using restrictions with blocks.

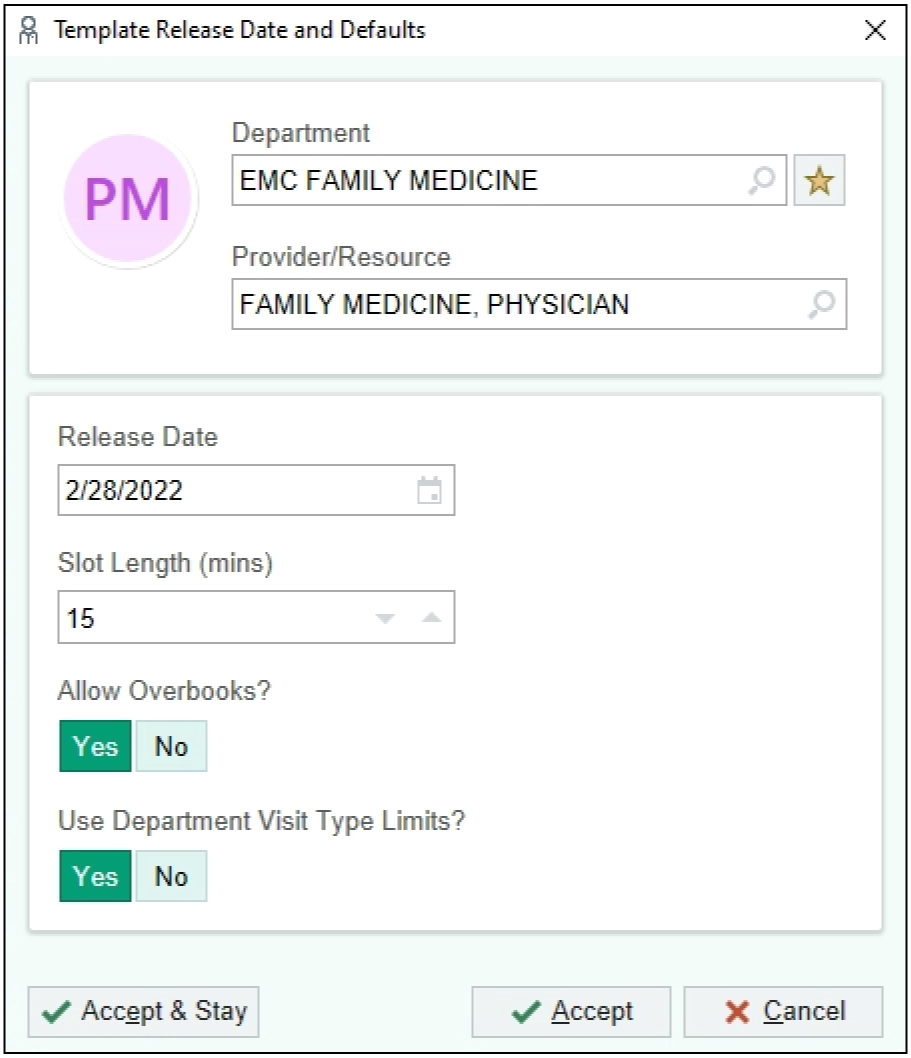
Certain providers' schedules aren't showing up when schedulers go to make appointments.

Solution

Verify that you set a release date default for the provider's template. Without a release date default, no schedule appears for the provider.

In Hyperspace, follow the path Epic button > Scheduling > Templates > Rel Date/Defaults and select the department and provider combination the scheduler needs for the appointment.

For more information about setting the fields on this window, refer to the Make a Provider or Resource Schedulable topic.



If you still don't see a schedule, verify that you've specified a template for the provider (Epic button > Scheduling > Templates > Edit Template).

I updated a provider's template and now my changes are gone.

Solution

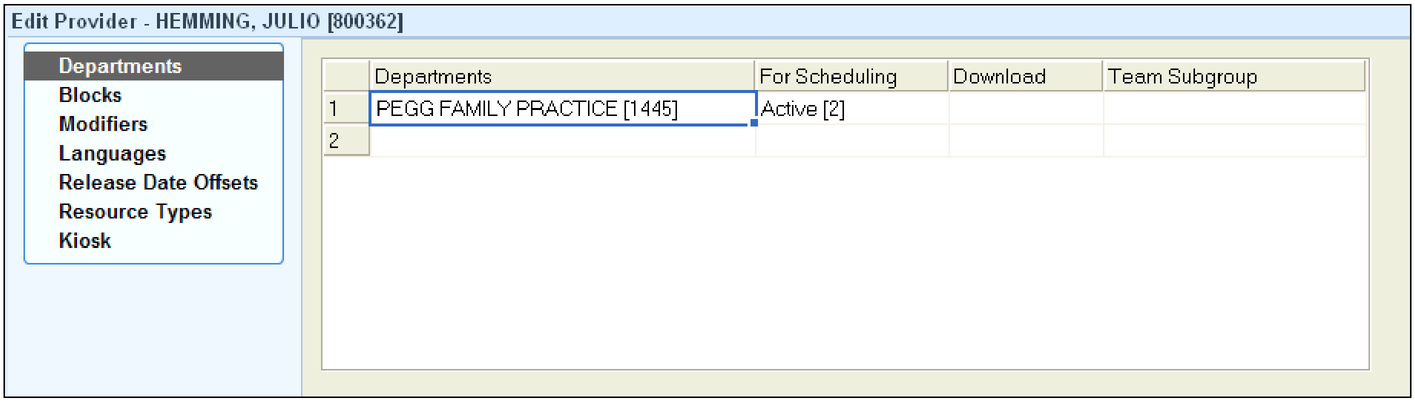
If you want the changes you make to a provider's template to carry forward as additional template is released, you must also make your changes to the pattern the provider uses.

If your changes have already been overwritten, you must make your changes in both the provider's template and the pattern he uses.

I can't select the provider I'm looking for when I go to create a template.

Solution

Before you can create a template for a provider, you must specify an associated scheduling department in the provider's SER record. Open the provider's record and verify that you entered a department (Hyperspace > Epic button > Admin > Schedule Admin > Master File Edit > Edit Provider > Departments form).

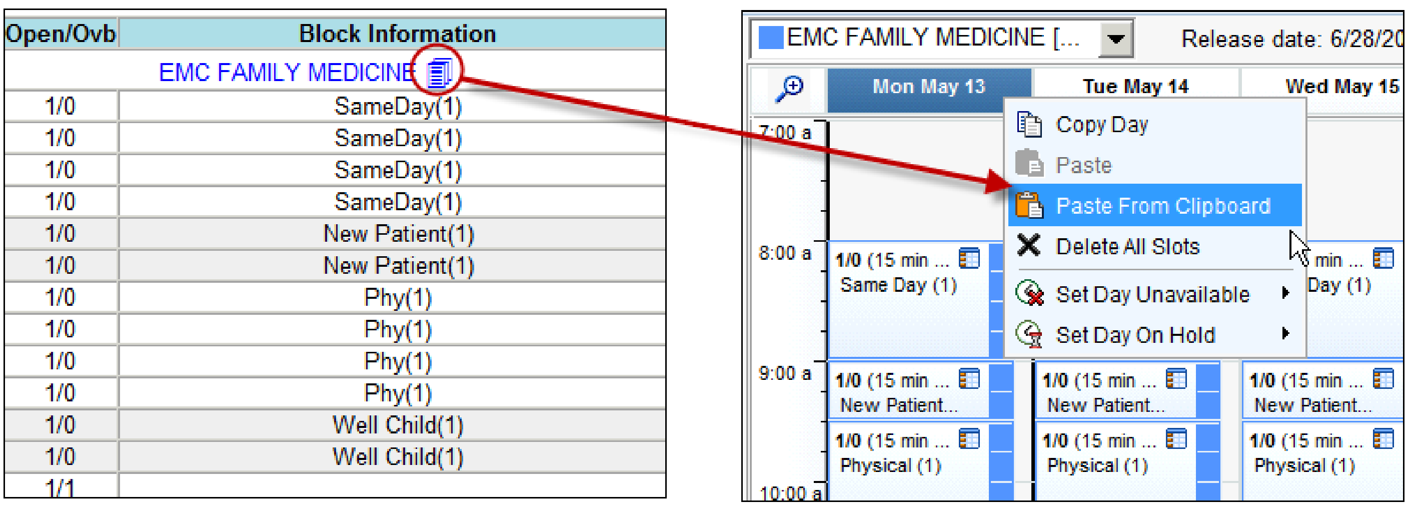


I accidentally changed a provider's template. How can I get the original template back?

Solution

From the Template Audit trail, you can select the correct day and copy the day to the clipboard using the blue paper icon next to the date. Then, in the Edit Template activity, you can right-click on the date header to paste the correct day from the clipboard into the template editor.

Note that you can do this copy-to-clipboard method only for a single day at a time. You can paste the single date multiple times in the Edit Template activity.



I need to make my modalities available on days that were set as unavailable, and it's time-consuming to edit each schedule

Solution

This is a situation you might encounter if you want to keep your modalities unavailable for outpatient appointments on holidays, but need to be able to schedule same-day inpatient and ED patient appointments on those days. You can set a Batch Scheduler job, 82-Cadence Release Unavailable Days, to release this time the night before so you do not need to do so manually.

Refer to the Release Unavailable Time in Schedules for Inpatient Appointments on Holidays topic for more information and full setup steps.