Interpreter Scheduling 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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Interpreter Scheduling Setup and Support Guide

Cadence's interpreter scheduling feature allows schedulers and interpreters to work together to schedule interpreters for patients, a service that is often vital in patient care. Interpreter scheduling integrates appointment and interpreter workflows, providing a single, efficient place for scheduling all the patient's needs. You can use interpreter scheduling to schedule on-staff interpreters, interpreters from external agencies, or both.

Across your organization

The Cadence project team is responsible for implementing interpreter scheduling. Members of the Cadence project team need input from:

- Interpreter services department staff, to help design and test workflows.
- Department or clinic managers and schedulers, to design and test workflows that involve department schedulers.

The Cadence project team must work with the Prelude project team to ensure that schedulers and registrars capture information about patients who need interpreters.

In the Foundation System

You can see interpreter scheduling in the Foundation Hosted environment by logging in as the interpreter manager (INTERPMGR) in the EHS Interpreter Sched department.

In the Foundation System, all interpreter scheduling is done from the Interpreter Scheduling work list. This allows on-staff interpreters and community resources to be scheduled from the same place and in the same way.

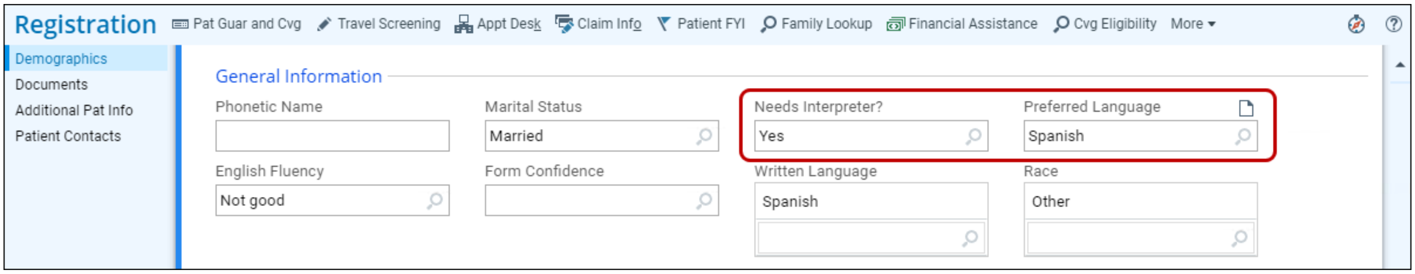
Several reports for the Interpreter Scheduling work list are defined, including reports for interpreter assignment, phone assignment, and a report to identify canceled appointments with interpreters.

How It Works

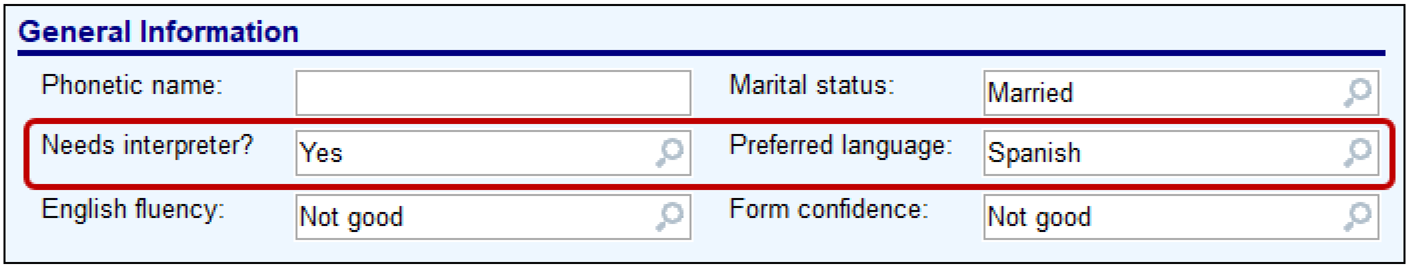
Interpreter scheduling allows you to integrate the scheduling of interpreters into your existing workflows and manage interpreters for appointments after they are scheduled. The best way to understand this feature is to explore some possible workflows.

Flagging Patients Who Need Interpreters

When a new patient visits your organization, the scheduler or registrar fills out demographics information for them. There are two items in patient demographics that the system uses for scheduling interpreters: the Needs interpreter? (I EPT 840) field indicates whether the patient requires an interpreter and the Preferred language (I EPT 155) field specifies the type of interpreter needed. These items are filled in for the patient's first visit, and then they drive interpreter scheduling for that visit and all additional visits. This means that schedulers don't have to worry about setting interpreter needs each time a patient schedules a visit.

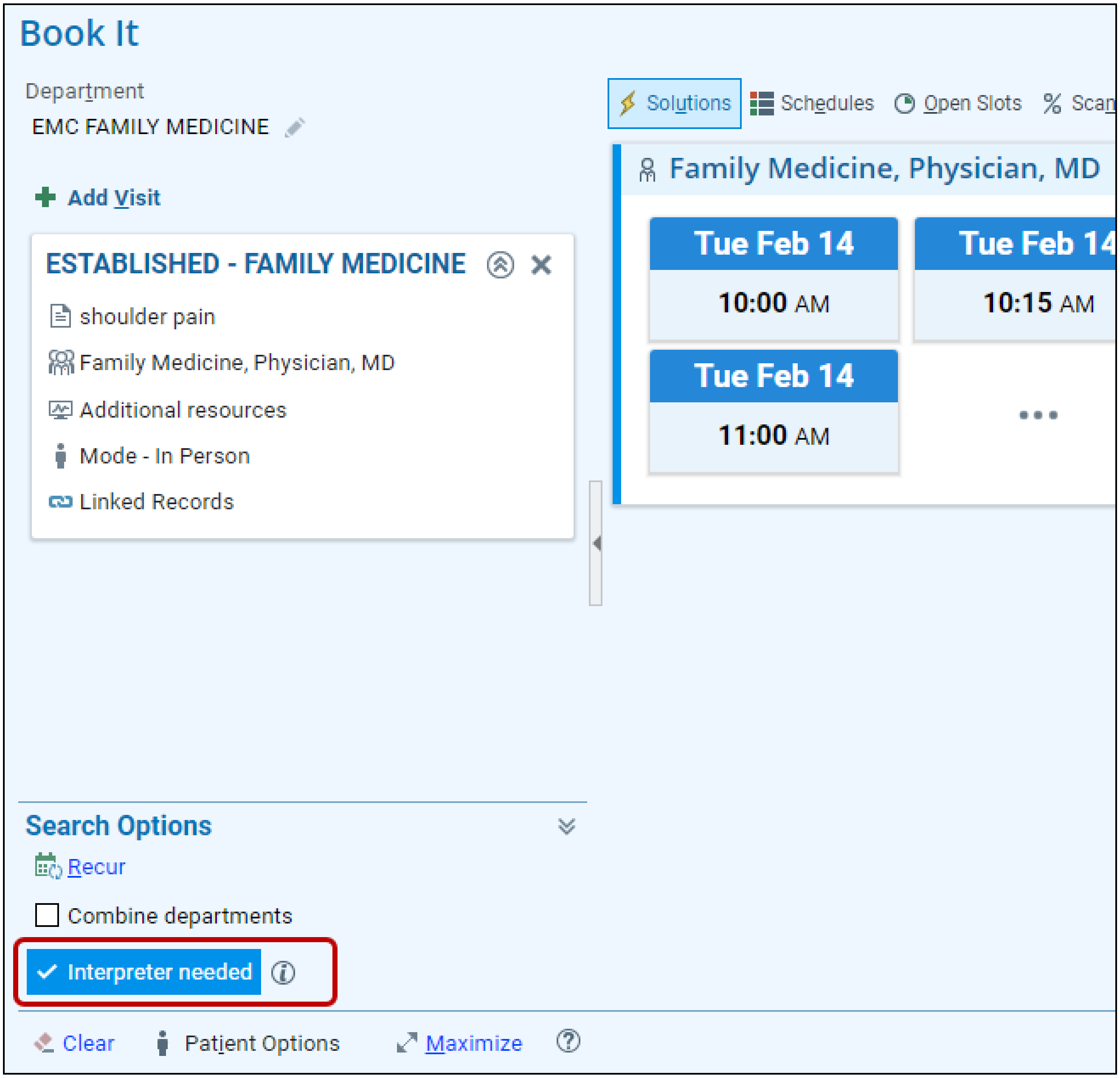


The Needs Interpreter? and Preferred Language fields in navigator-based Registration (available starting in November 2021)

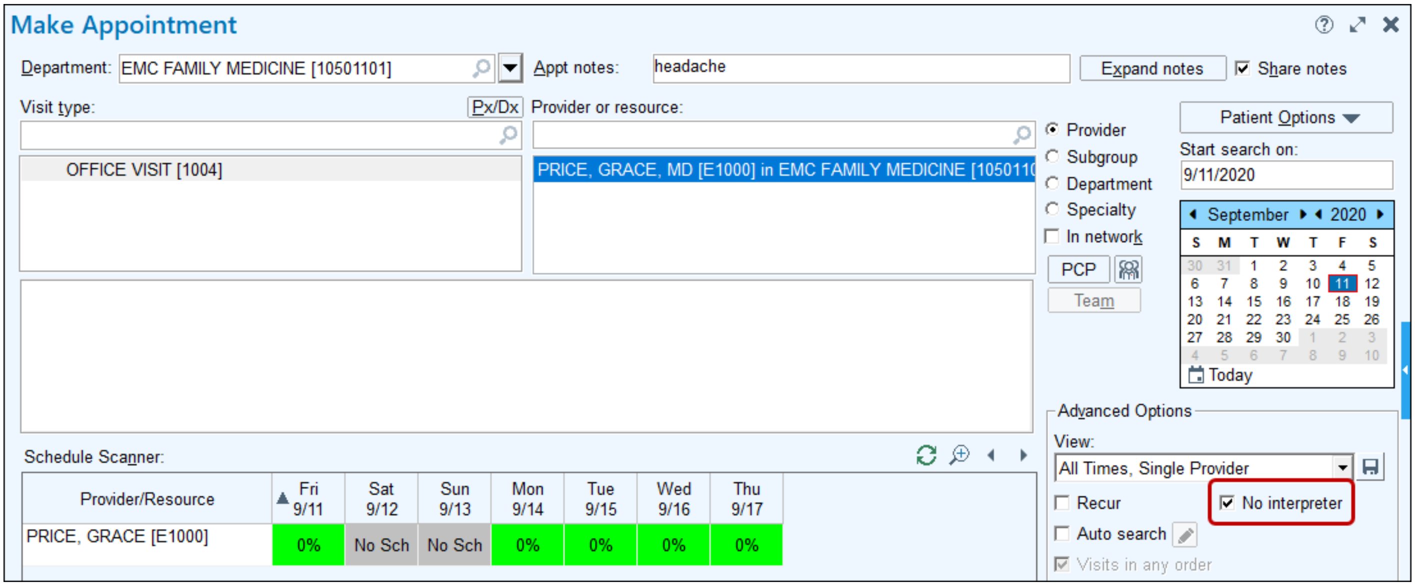


The Needs interpreter? and Preferred language fields in form-based Registration (August 2021 and earlier)

In Book It (available starting in February 2022), schedulers can clear the Interpreter needed checkbox to indication that an interpreter is not needed for a specific appointment even though the patient generally needs one. In Make Appointment (November 2021 and earlier), schedulers can select the No interpreter check box to indicate that an interpreter is not needed. For example, a child's mother usually brings the child to appointments, and the mother needs an interpreter. However, the child's father doesn't need an interpreter. If the scheduler knows that the father will be attending the child's next appointment, they can mark that appointment as not needing an interpreter.



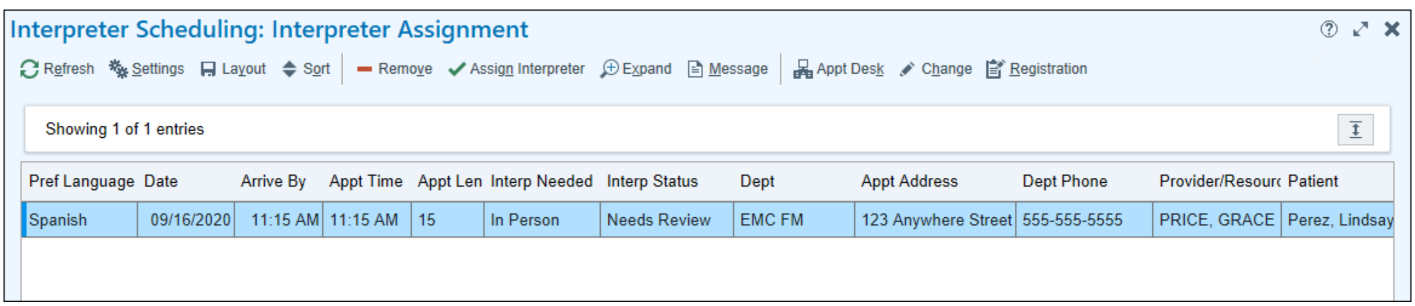
The Interpreter needed checkbox in Book It (available starting in February 2022)



The No interpreter checkbox in Make Appointment (November 2021 and earlier)

Scheduling Interpreters After Appointments Are Made

Many organizations have varying interpreter needs. You might have on-staff interpreters for languages commonly spoken in your community but hire interpreters from an outside agency for less common languages. The Interpreter Scheduling work list is the one-stop shop for scheduling and monitoring both of these types of interpreters.



From this work list, schedulers identify the appointments for which they need to schedule interpreters.

- Starting in November 2020, schedulers click Assign Interpreter to assign an internal or external interpreter.
- In August 2020 and earlier, there are separate Add Interpreter and Assign Interpreter buttons:
  - To schedule an on-staff interpreter, schedulers click Add Interpreter, search for interpreters in certain departments or centers, and then select an available interpreter for the appointment.
  - To schedule an interpreter from an outside agency, schedulers click Assign Interpreter to tag an appointment with a specific vendor, so your organization can send the agency a list of appointments that need an interpreter assigned. Schedulers use the same activity to schedule in-person or phone interpreters.

From the report, schedulers can also remove the need for an interpreter, modify appointment lengths, and cancel and reschedule interpreters. The report allows for all of these interpreter-related tasks so schedulers always know where to go, no matter what interpreter-related task they need to complete. If Interpreter Needed? (I EPT 840) is set to Yes, and you're not using automatic interpreter assignment, the appointment is flagged and the patient's encounter appears in the Interpreter Scheduling Worklist.

Automatically Scheduling Interpreters with Appointments

If your organization schedules only on-staff interpreters and you don't have an interpreter services department, you can choose to have the system automatically schedule an interpreter when an appointment is scheduled. Using the interpreter information entered in the patient's demographics, the system searches for and schedules the interpreter behind the scenes while the scheduler is making the appointment. If the clinician is set up to interpret for the patient's language, the appointment provider could be scheduled as the interpreter for the appointment.

After the interpreter is scheduled, the system sets the interpreter assignment status of the appointment to Assigned and the interpreter appears on the Appointment Review window with the appointment provider, where the scheduler can confirm the interpreter with the patient.

If the system can't find an interpreter for the appointment, a window appears to alert the scheduler that an interpreter was not assigned. The system sets the interpreter assignment status to Needs Review, so the interpreter can be assigned later from the Interpreter Scheduling work list.

Note that automatic scheduling has limitations with advanced visit types, pools, and panels. For more information, refer to the Automatically Schedule Interpreters for Appointments topic.

Available Epic Resources

This document provides guidance for implementing interpreter scheduling and step-by-step instructions for setting up the feature. You might also want to check out these other documents related to interpreter scheduling.

Plan and Test

- Cadence Workflow Diagrams and Scripts. Provides testing scripts for various Cadence workflows, including interpreter scheduling, to provide you with a starting point as you plan your testing. The scripts are based on the Foundation System so you might need to customize them if your workflows are significantly different.

Train

To help train your users, we have created several quick start guides:

- Interpreter Scheduler - Schedule Interpreters
- Interpreter Scheduler - Cancel or Change Interpreters
- Interpreter Scheduler - Find Patients
- Interpreter Scheduler - View and Update Provider Schedules

Interpreter Scheduling: Strategy

This section outlines the decisions that you need to make to implement interpreter scheduling. Work with your interpreter scheduling staff, department or clinic managers, and scheduling representatives to design and test the workflows that involve department schedulers. Keep in mind that your interpreter scheduling staff might have existing workflows that you need to accommodate. For example, they might need to communicate certain appointment details to a third-party interpreter agency on a specific schedule.

Decide Whether Epic's Interpreter Scheduling Is a Good Fit for Your Organization

Scheduling interpreters in Epic has a number of benefits.

- You can schedule on-staff interpreters and community resources in the same system where appointments are scheduled, reducing the chance of overlooking an appointment that needs an interpreter.
- The system automatically captures appointments involving patients that require interpreter services.
- Your interpreter services department can assign staff and view demand across your entire organization from a centralized location.
- On-staff interpreters have schedules in the system like clinicians, which means interpreters better know their schedules and are more likely to attend appointments.
- Front desk staff see which interpreters have been assigned to upcoming appointments, so they know which interpreter to expect for the appointment and can communicate that information to patients. On-staff interpreters appear as additional providers for the appointment on the Appointment Desk and Department Appointments Report (DAR). You can also add column 11701133-ES Appt Interpreter Name to the DAR to show the name of both on-staff interpreters and community resources in a single column.

Interpreter scheduling also has limitations. It works best for organizations that have a centralized department that schedules interpreters for appointments across the organization. While you can adapt interpreter scheduling workflows to support a more decentralized model, the module provides less support for these approaches. In addition, interpreter scheduling does not:

- Schedule interpreters for admissions or appointments not scheduled in Cadence, such as surgeries scheduled in OpTime.
- Automatically account for travel time between locations.
- Automatically account for the need for interpreter services before and after the scheduled appointment time.
- Electronically communicate with agency vendors.
- Identify parents or guardians of patients who might need interpreters.
- Document the time when an interpreter starts or ends their services, or if they did not show up for the appointment. However, you can use appointment events to document this information if needed. Refer to the Create and Track Events for Appointments topic for additional information about appointment events.

Consider these benefits and limitations and work with your Epic representatives to determine whether interpreter scheduling is a good fit for your organization. If your organization currently uses a third-party interpreter scheduling system and you are happy with it, you might choose to continue to use that system instead of switching these workflows into Epic.

Evaluate Your Organization's Interpreter Needs

Before you finalize your interpreter scheduling workflows, you need to review your organization's interpreter needs.

Do You Use On-Site Interpreters, Third-Party Interpreters, or Both?

Interpreter scheduling supports on-site interpreters employed by your organization, community resources that you contract with, or a mixture of both.

If you have on-site interpreters, we recommend creating provider (SER) records for these resources so specific interpreters can be assigned to appointments. This approach allows the interpreters to see their schedules in Epic, which can make it easier for them to be in the right place at the right time. For additional information about setting up your on-site interpreters, refer to the Set Up On-Staff Interpreters topic.

If you use third-party interpreters, you need to set up a process for notifying these resources about their appointments because interpreter scheduling can't electronically send interpreter information to community resources. You might use the Interpreter Scheduling work list to identify these appointments, then print the report and fax it to your agency.

Do You Use Phone Interpreters?

If your organization uses interpreters who provider services over the phone, consider the type of appointment and whether a phone interpreter can serve the patient's needs, or if the appointment always needs an in-person interpreter. Short, simple appointments might be able to use a phone interpreter, which often cost less than an in-person interpreter.

You might want to set a default interpreter type of In Person for all appointments scheduled at your organization, and then mark certain visit types as allowing phone interpreters. For additional information about configuring interpreter types, refer to the Determine the Type of Interpreter Needed for a Given Visit Type topic.

Some patients want to ensure that an in-person interpreter is available for specific appointments, instead of relying on a phone interpreter.

- If your organization uses on-site interpreters, scheduling staff can check the interpreters' schedules in the system or call the interpreter scheduling department to verify availability.
- If you use community resources that can't be checked in real time, you might need to design a workflow for following up with these patients if the agency determines that no in-person interpreter is available at the scheduled time.

Can Clinicians Also Serve as Interpreters?

If some clinicians at your organization are bilingual, they might be able to be the interpreter for their own appointments, or even for other clinicians' appointments. Consider your organization's policies or state policies when making this decision and involve clinicians in the discussion. Some clinicians might not want to interpret for others' appointments, but can interpret for their own. For additional information about setting up clinicians as interpreters, refer to the Allow Providers to Interpret for Themselves topic.

Decide How to Schedule Interpreters

After you have determined the types of interpreters that you'll use, you can define your workflows for scheduling and canceling interpreters.

Decide Who Will Schedule Interpreters

Evaluate whether your organization will use a centralized or decentralized model for interpreter scheduling.

Centralizing interpreter scheduling in an interpreter services department has several advantages:

- Fewer staff need training on centralized interpreter scheduling workflows.
- Centralizing the workflow makes it easy to set up the Interpreter Scheduling work lists.
- Experienced interpreter schedulers can distribute work evenly across interpreters and account for travel time between locations or other needs.
- Dedicated interpreter scheduling staff who monitor the work lists regularly can respond promptly to canceled or rescheduled appointments, making efficient use of your on-site interpreters and community resources.

However, there are also some disadvantages to a centralized workflow:

- Because appointment schedulers will typically schedule the interpreter some time after the appointment is scheduled, schedulers can't assure the patient that an in-person interpreter will be available for the appointment or tell the patient who will be interpreting for the appointment.
- Because they're not directly in contact with people in the departments, it is more difficult for a centralized interpreter schedulers to accommodate patient or provider preferences when assigning interpreters.

Work with your Epic representative to design a workflow that will work for your organization. It is possible to use a combined workflow, where a centralized department manages most interpreter scheduling needs but interpreters are scheduled in a decentralized manner for certain departments or scenarios.

Decide Whether to Schedule Interpreters Automatically

If your organization schedules only on-staff interpreters or you don't have interpreter-specific schedulers, automatic scheduling of interpreters might be an option for you. Automatic scheduling of interpreters can be a quick and easy way to schedule the interpreter at the time of appointment entry. However, this way of scheduling interpreters does have limitations with advanced visit types, pools, and panels, and if your organization decides to use this functionality, you should perform thorough testing to ensure it works for your scheduling model. Automatic scheduling might also not be a good fit if your organization's interpreters need to block off travel time between appointments.

For additional information, refer to the Automatically Schedule Interpreters for Appointments topic.

Decide on a Workflow for Canceled or Rescheduled Appointments

You need to determine a workflow for canceled or rescheduled appointments so interpreters don't go to departments and find they are no longer needed, and rescheduled appointments have interpreters assigned who are available at the new time. This workflow can also prevent your organization from being needlessly charged for a community resource.

Note that when an appointment is canceled, the interpreter status remains Assigned. Many organizations configure the Interpreter Scheduling work list so the Interpreter Status column is next to an Appointment Status column. This way, schedulers can easily see appointments that have been canceled or rescheduled.

Decide on a Workflow for Same-Day or Short-Notice Appointments

Define a workflow for short-notice interpreter requests, such as same-day appointments. You might consider configuring the Interpreter Scheduling work list so those same day interpreter requests stand out from the other requests, or having the appointment scheduler contact the interpreter scheduler by phone, email, or In Basket.

Decide How to Handle Interpreters for Minor Patients

Because Cadence identifies interpreters for the patient, not the guardian, pediatric departments might need to find a way to identify appointments where the parent or guardian requires an interpreter and the patient does not. Some organizations have had success using guarantor-specific language items and Prelude workqueues to identify these appointments and schedule interpreters. Other organizations use questionnaires at the time of scheduling to collect this information, or mark the patient record as needing an interpreter, knowing that the patient is not coming in alone.

Interpreter Scheduling Setup: Essentials

In this section, we'll cover everything that you need to do in order to start using interpreter scheduling at your organization. This includes what you need to do to make interpreter scheduling available to your users and how to configure it to match Epic's recommendations.

Enable Interpreter Scheduling in Your System

Before you start scheduling interpreters, you need to enable the system to track and manage the interpreter information. You do this by turning on a background queue for interpreter scheduling. You only need to do this once, when you first start using interpreter scheduling.

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

First, create a queue definition:

1. Open Clinical Administration > Management Options > Utilities >Generic Queuing Menu.
2. Follow the path Manage Queue Definitions > Enter/Edit Queue Definitions and enter ESINTRP and create a queue definition.
3. On the Definition Information screen, enter the following information:
   - Template: 1000
   - Descriptor: ESINTRP
4. In February 2020 and earlier versions:
   a. Press PAGE DOWN twice.
   b. In the Machine List field, enter the server that corresponds to the environment in which you are working. Press SHIFT+F5 in this field to view all available options. If you have any doubt, contact your Epic representative and mention SLG 1428745.
   c. (Epic 2015 and earlier versions) In the Logical Directory field, enter EMP.

Next, activate the queue:

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

Finally, start the queue:

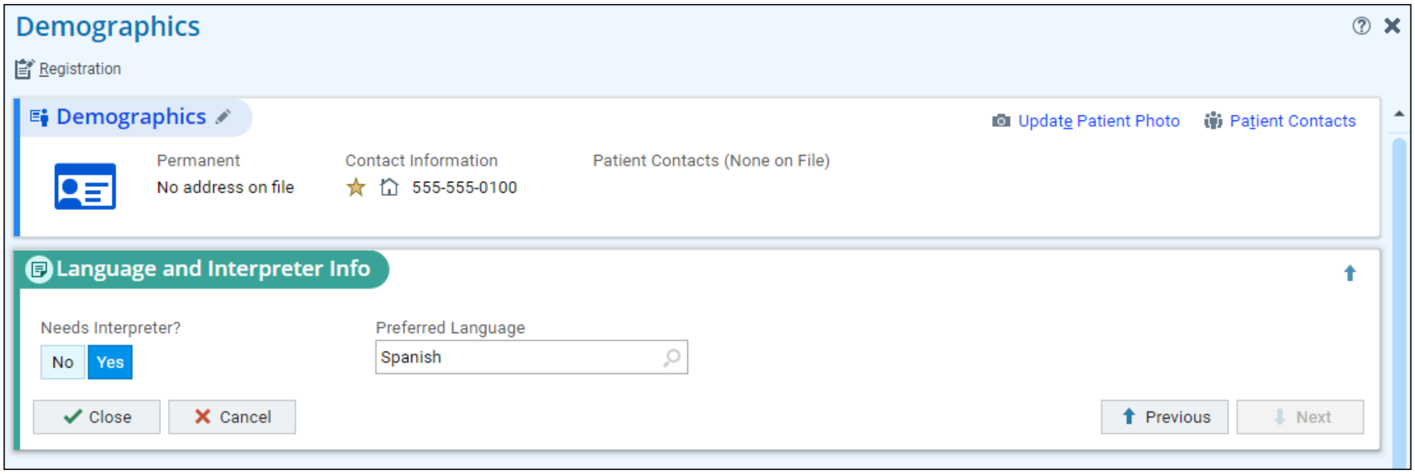
1. From the Generic Queuing menu, select Status of All Queues.
2. On the Status of All Queues screen, page down until you find the ESINTRP entry.
3. Highlight the queue and press S to start the queue.
4. To confirm that the queue is running, the Running Daemons column should equal 1 for each queue.

Ensure a Record of Patients' Languages and Interpreting

Needs

Interpreter scheduling relies on knowing which patients need interpreters and for what languages. Your Cadence and Prelude project teams should work together to ensure that this information is consistently collected prior to scheduling.

In this example from the Foundation System, the Demographics activity that patient access staff open from the Appointment Desk contains the Language and Interpreter Info navigator section:



Add the Needs interpreter? and Preferred language Fields to Registration and Scheduling Workflows

To add the Needs interpreter? (I EPT 840) and Preferred language (I EPT 155) fields to your scheduling and registration workflows, update the Demographics navigator section to include those items as additional items. Refer to the Collect Additional Patient Items as Demographics for instructions on how to add those items.

Set Up On-Staff Interpreters

On-staff interpreters can be scheduled like any other provider or resource at your organization. The following tasks describe how to set up your system so that your organization's on-staff interpreters can be scheduled.

Create an Interpreter Scheduling Department

If your organization has its own interpreter services department, we recommend that you build an interpreter services department in the system. Using an interpreter services department can simplify interpreter scheduling by allowing schedulers to schedule on-staff interpreters through a single department while also allowing on-staff interpreters to schedule appointments for themselves.

Considerations
If you are creating an interpreter scheduling department, don't forget to account for visit types when setting up your department. If you restrict visit types by department, the interpreter scheduling department might need to be added so that schedulers in these departments can edit the appointment. Refer to the Decide Who Can Schedule the Visit Type topic for more information on restricting visit types.

Build a department record for interpreter services as you would build any other department record. Refer to department 10000010-EHS Interpreter Sched in the Foundation System as an example.

Create Provider Records for On-Staff Interpreters

By creating provider records for on-staff interpreters, users can schedule them as they would schedule any other providers.

Prerequisites
Create an Interpreter Scheduling Department

Considerations

You have two options for representing on-staff interpreters in your system:

- Create provider records for each interpreter: Schedulers might prefer to schedule with a specific person rather than a generic provider. If you want interpreters to be able to view their schedules in Hyperspace, you will need to create user records. Creating provider records for interpreters does not add a lot of work if you are already creating user records for them.
- Create general provider records for interpreter languages: Each provider record would indicate a language spoken by an interpreter (for example, Spanish Interpreter 1, Spanish Interpreter 2, Hmong Interpreter 1, etc.). You would manage your interpreters by assigning a general provider record to each of them. If you have a lot of turnover among your interpreter staff, this option might save you some maintenance. However, this option also requires additional effort to ensure schedulers and interpreters know which generic record applies to each actual interpreter.

Also, don't forget to account for visit types when creating your interpreters. If you restrict visit types by department and providers, your interpreters might need to be added to these visit types so that schedulers in these departments can edit the appointment. Refer to the Decide Who Can Schedule the Visit Type topic for more information on restricting visit types.

Creating provider records for interpreters is similar to creating any other provider, with the additional step of indicating the languages that the interpreter is qualified to interpret.

Perform General Provider Setup for Interpreters

The following steps highlight the recommended provider setup for interpreters whether you create records for individual interpreters or create general provider records for them. For general information about creating providers and setting them up for scheduling, refer to the Provider/Resource (SER) Master File Setup and Support Guide topics.

1. In Hyperspace, create a provider record (search: Provider).
2. Select the Demographics form and complete the following fields:
   - Referral Source Type (I SER 45). Enter 3-Non Referral Source. This indicates that the interpreter should not be available as a referring provider.
   - Status (I SER 35). Enter Active or leave the field blank to indicate that appointments can be scheduled with the interpreter.
3. Select the Scheduling > Departments form and complete the following fields:
   - Scheduling type (I SER 30). Enter Person.
   - Departments (I SER 40). Enter the departments in which the provider can be scheduled. For example, enter your organization's interpreter scheduling department.
   - For Scheduling (I SER 41). Enter Active.

Indicate Interpreters' Languages

1. In Hyperspace, edit the interpreter's provider record (search: Provider).
2. Select the Scheduling > Languages form and complete the following fields:
   - Languages spoken (I SER 1350). Enter the languages spoken by the interpreter.
   - Languages that the provider can interpret for herself (I SER 1351). Enter the languages for which the provider can serve as an interpreter. Starting in November 2024, providers can always interpret the system common language for themselves, even if it is not set in this list. Refer to the Define Common Languages for All Providers for Scheduling Purposes topic for more information on the system common language.

Organize On-Staff Interpreters into Pools

Pools help you define a group of providers who are routinely scheduled for certain types of visits. For interpreter scheduling, you can use pools to organize interpreters by language and center and by language and department.

Create Pools of Interpreters for Each Language

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Pools.
2. Select the Create tab of the Pool Select window, enter a name for your interpreter pool, and click Accept.
3. On the General form:
   a. Enter Specific Providers in the Search Type field.
   b. Enter your interpreter scheduling department in the Department field.
   c. In the Provider/Resource field, enter the provider records for the interpreters that will comprise this pool.
4. Repeat these steps for each language for which you have on-staff interpreters.

Associate Interpreter Pools with Their Supported Languages

After you've created your interpreter pools, you must associate them with the languages they support and the centers or departments in which they can be scheduled. These associations determine which departments, centers, and pools appear for an appointment in the Add Interpreter activity.

To associate pools with centers:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Interpreters form.
3. Complete the Interpreter Pools table:
   - Starting in May 2024:
     - Click the add button to the right of the Interpreter Pools table.
     - Fill out the fields beneath the table:
       - In the Language (I SDF 10840) field, enter the language that a pool can interpret for.
       - In the Center (I SDF 10842) field, enter the center where the pool can be scheduled. Or, leave the Center column blank to indicate that the pool can be scheduled in all centers.
       - In the Pool (I SDF 10841) field, enter the pool of interpreters who can interpret this language.
   - In February 2024 and prior versions:

   - In the Language (I SDF 10840) column, enter the language that a pool can interpret for.
   - In the Center (I SDF 10842) column, enter the center where the pool can be scheduled. Or, leave the Center column blank to indicate that the pool can be scheduled in all centers.
   - In the Pool (I SDF 10841) column, enter the pool of interpreters who can interpret this language.
4. Repeat steps 3 for each language with a corresponding interpreter pool.

To associate pools with departments:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Interpreters form. In August 2018 and earlier, select the Interpreter Scheduling form.
3. Complete the Interpreter Pools table:
   - In the Language (I DEP 1540) column, enter the language that a pool can interpret for in this department.
   - In the Pool (I DEP 1541) column, enter the pool of interpreters who can interpret this language in this department.

Allow Providers to Interpret for Themselves

Some of your providers might be multilingual. To prevent schedulers from adding an interpreter to those appointments, you can indicate which languages providers can interpret for themselves.

Considerations
Epic recommends that you identify the providers who are legally allowed to interpret for themselves and willing to do so.

1. In Hyperspace, edit the provider's record (search: Provider).
2. Select the Scheduling > Languages form.
3. In the Languages spoken (I SER 1350) field, enter the languages spoken by the provider.
4. In the Languages that the provider can interpret for him/herself (I SER 1351) field, enter the languages that the provider can interpret for their appointments.
5. In the Can he/she interpret these languages for other providers? (I SER 1352) field, enter Yes to indicate that the provider can interpret the specified languages for others. The default value is No.

Make Schedules for On-Staff Interpreters

You must maintain on-staff interpreters' templates as you would for any other provider in your organization.

For additional information about creating providers' templates, refer to the Configuring Scheduling Templates topic.

Create a List of Your External Interpreter Resources

The external interpreter agencies or community resources that your organization works with are represented by a category list. This allows schedulers to indicate which agency has been assigned so that a scheduler can notify any given agency of upcoming appointments needing their interpreters.

To represent the outside interpreter agencies with which your organization works, create a value for them in the Interpreter Vendor (I EPT 7960) category list. Refer to the Modify a Category List's Values topic for additional information.

Allow the Scheduling of Interpreters

Complete the following tasks to allow on-staff interpreters to be scheduled, whether it's by clinic schedulers or central schedulers.

Give Users Security for the Interpreter Scheduling Work List

1. In Hyperspace, edit a Cadence security class (search: Cadence Security).
2. Select the Reports/System Admin form.
3. Enter Yes in the Interpreter report (I ECL 5190) field.

Set Up Interpreter Scheduling Work Lists

The Interpreter Scheduling work list is the central location from which users can schedule in-house and external interpreters. Depending on your workflows, you can configure specific report settings for the work list or you can let each scheduler configure his own reports. As with other reports, you can set up specific report configurations for departments or users, add columns to the report, or customize the appearance of the report.

As you can see with the following Foundation System report settings, you can configure different versions of the Interpreter Scheduling report to accommodate different points in the interpreter scheduling workflow:

- Interpreter Assignment: Schedulers can use this report to see appointments within the next two weeks that need interpreters. This report can serve as schedulers' hub for scheduling on-staff and external interpreters.
- Phone Assignment: Schedulers can use this report to see the appointments for which a phone interpreter is needed. For example, your organization might use phone interpreters instead of in-person interpreters for certain visit types or for short appointments.
- Cancel Interpreters: This report displays canceled appointments for which interpreters are assigned. Schedulers can use this report to notify schedulers that they're no longer needed.
- Scheduled Interpreters for Upcoming Appointments: Schedulers can use this report to view the interpreters scheduled for appointments in the next two weeks.
- Today's Interpreters Report: Schedulers can use this report to see the current day's scheduled interpreters.

Give Schedulers Cadence Security for the Interpreter Services Department

Because on-staff interpreters are scheduled in a joint manner with providers, users without scheduling security for your interpreter services department cannot check in, check out, or change the appointment in their specific department.

Therefore, depending on your security setup, you might need to give users scheduling security for your interpreter services department.

Interpreter Scheduling Setup: Bells & Whistles

In this section, we'll show you more configuration options for interpreter scheduling. 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 the feature.

Automatically Schedule Interpreters for Appointments

If your organization schedules only on-staff interpreters or if you don't have interpreter-specific schedulers, automatic interpreter scheduling might be an option. Automatic interpreter scheduling can be a quick and easy way to schedule interpreters - across your organization or in certain departments.

Automatically scheduling interpreters saves time for the department scheduler, who can focus on scheduling the appointment instead of finding an interpreter to match the appointment. Using the interpreter information entered in the patient's demographics, the system searches for and schedules the interpreter while the scheduler is making the appointment. If the clinician is set up to interpret for the patient's language, the appointment provider could be scheduled as the interpreter for the appointment.

After the interpreter is scheduled, the system sets the interpreter assignment status of the appointment to Assigned and the interpreter appears on the Appointment Review window with the appointment provider. This indicates that the interpreter is scheduled for the appointment and gives the scheduler the opportunity to confirm the interpreter with the patient.

If the system can't find an interpreter for the appointment, a window appears to alert the scheduler that an interpreter was not assigned. The system sets the interpreter assignment status to Needs Review, so the interpreter can be assigned later from the Interpreter Scheduling work list.

Considerations

Note that automatically scheduling interpreters has limitations with advanced visit types, pools, and panels. For example, interpreters cannot be automatically scheduled for advanced visit types that have multiple pools in different departments. Also, an interpreter is not automatically scheduled if a patient's appointment spans multiple departments because the system does not know from which interpreter pool to select the interpreter, given that different interpreter pools can be set up per appointment department.

If your organization decides to use this functionality, you should perform thorough testing to ensure it is functioning as desired given your visit type build.

1. In Hyperspace, open Cadence System Definitions or your department record. Note that, while the system looks to the appointment department to determine the interpreter pool to use, it looks to the user's login department when determining if automatic scheduling is enabled.
   - To open Cadence System Definitions, search for Cadence System Definitions.
   - To open a department record, go to Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Select the Scheduling > Interpreters form.
3. Enter Yes in the Attempt to automatically schedule interpreters during appointment entry? (I SDF 10830 or I DEP 1530) field.

Turn Off Internal or External Interpreter Scheduling

If your organization works only with in-house interpreters or only with external translation services, you can prevent scheduler confusion by turning off the options for the type of interpreter scheduling that you don't use.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Interpreters form.
3. To turn off internal interpreter scheduling, enter No in the Enable internal interpreter assignment? (I SDF 10832) field. This hides the internal interpreter scheduling options in the Assign Interpreter window. In August 2020 and earlier, this setting is labeled Enable the add interpreter activity? and when set to No it hides the Add Interpreter button in the Interpreter Scheduling work list.
4. To turn off external interpreter scheduling, enter No in the Enable external interpreter assignment? (I SDF 10833) field. This hides the external interpreter scheduling options in the Assign Interpreter window. In August 2020 and earlier, this setting is labeled Enable the assign interpreter activity? (I SDF 10833) field and when set to No it hides the Assign Interpreter button on the Interpreter Scheduling work list.

Determine the Type of Interpreter Needed for a Given Visit Type

You can configure visit types to be scheduled with a certain type of interpreter. For example, an immunization might need only a phone or video interpreter, while an office visit or consult might require an in-person interpreter. Other types of visits might not need an interpreter at all.

The interpreter type needed for a given appointment appears on the Interpreter Scheduling work list, so schedulers using this report can see what type of interpreter is needed for the appointment.

Associate an Interpreter Type with a Visit Type

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Visit Type. Enter a visit type.
2. In the General form's Interpreter type needed (I PRC 1010) field, enter In Person, Phone, Video, or None. Starting in August 2024, this interpreter type will default into the Assign Interpreter activity for external interpreters.

Indicate the Default Interpreter Type

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Go to the Scheduling > Interpreters form.
3. In the Default to this interpreter type when the visit type doesn't specify (I SDF 10831) field, enter In Person, Phone, Video, or None.
    - None. An interpreter is never scheduled, even if the patient would normally require one. Appointments made are not flagged as needing an interpreter, do not appear on the Interpreter Scheduling work list, and the system never attempts to automatically schedule an interpreter.
    - In Person. An interpreter is required and should be physically present during the appointment. If configured, the system attempts to automatically schedule an interpreter into the appointment using an appropriate interpreter pool. If not configured, or if the system cannot find an appropriate interpreter, the appointment is flagged for review and immediately appears on the Interpreter Scheduling work list. The Foundation System's default interpreter type is In Person.
    - Phone. An interpreter is required but doesn't need to be physically present for the appointment and so may interpret remotely by phone. The system never tries to automatically schedule an interpreter but any appointments made will be flagged for review and appear immediately on the Interpreter Scheduling work list.
    - Video. An interpreter is required but doesn't need to be physically present for the appointment and so may interpret remotely by video conference. The system never tries to automatically schedule an interpreter but any appointments made will be flagged for review and appear immediately on the Interpreter Scheduling work list.

Configure How Often the Interpreter Scheduling Report Automatically Refreshes

Starting in Epic 2018

You can configure how often the Interpreter Scheduling report automatically refreshes, whether lengthening the interval, shortening the interval, or disabling the ability to refresh automatically. This control is consistent with the control you have over other reports such as the Department Appointments report.

The default behavior is for the report to refresh automatically every 10 minutes.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Interpreters form.
3. In the Number of minutes to refresh (I SDF 10835) field, enter the number of minutes that should elapse between each automatic refresh of the Interpreter Scheduling report. If you want to disable automatic refreshing, enter 0.

Interpreter Scheduling: Ongoing Tasks

This section describes the maintenance-related tasks you need to do in order to keep interpreter scheduling running smoothly.

Monitor Work List Usage Trends

Clinic managers can monitor work list usage from Radar dashboards to make sure schedulers are using these tools and follow up with those who aren't. They can also see trends over time to determine whether their efforts increased use of the work lists.

You can use dashboard components to show the number of entries on reports for the following work lists:

- Confirm work list
- Follow-up work list
- Interpreter Scheduling work list
- Recalls work list
- Reschedule work list
- Wait List

Prerequisites
You need to be using Radar with Cadence to see information on work list usage.

There are three setup steps to see work list information on dashboards:

1. Link Follow-up work lists to departments so the batch job knows what department to use when collecting the report data. If you are not reporting on Follow-up work list usage trends, you can skip this step.
2. Define a batch job to collect the data from work lists.
3. Add dashboard components to dashboards so managers can see work list data.

Define a Batch Job to Collect Work List Data

Set up a batch job based on batch template 170-ES Work List Summary to collect work list information. Make sure to run this batch job on a recurrence, based on how you want to view changed information in the components. We recommend you run this batch job daily.

For additional information on setting up batch jobs, refer to the Batch Scheduler Setup: Essentials topic.

Add the Dashboard Component to Dashboards

Add dashboard component 55010-ES Work List Summary to your reporting dashboards.

For information on setting up dashboards, including how to configure and add the new components to a dashboard, refer to the Radar Setup and Support Guide.

Remember to remind dashboard users that they need to select the public reports they want to view in their individual dashboards before they can see work list data in the components.