Appointment Communications Setup and Support Guide

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Your Responsibilities for Safe Use

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

Table of Contents

Appointment Communications Setup and Support Guide 5

Configure Patient Communication Preferences for Appointments 7

Automatically Confirm or Cancel Appointments Based on Patient Responses 8

Appointment Letters 11

Create Content for Appointment Letters 11

Define the Appointment Letters to Print for Different Scheduling Scenarios 12

Limit the Letter Templates Available in a Department 13

Define the Appointment Letter for Manually Printed Reminder Letters 13

Override the Default Cancel Letter for Specific Cancel Reasons 13

Override Appointment Letters by Visit Type 13

Show the Phone Number to Call for Appointment Information and Rescheduling in Appointment Letters 14

Print Appointment Letters in Batch 14

Send Appointment Letters to MyChart or by Email 15

Print Bilingual Appointment Letters 16

Show Patients Customized Instructions for the Highest-Severity Procedure in an Appointment 17

Show Upcoming Preadmissions and Cases in Appointment Letters 18

Prevent Certain Appointments from Appearing in Appointment Letters 19

Patient Appointment Notifications 20

Send Appointment Notifications to Patients by Email 21

Customize the Appointment Notification Email and MyChart Messages Sent to Your Patients 22

Use Hello World Content to Send Appointment Notifications to Patients by Text Message 22

Use SmartText Records to Send Appointment Notifications to Patients by Text Message 26

Block Appointment Notifications to Patients for Certain Appointments 27

Automatically Set Patient Preferences for Notifications 28

Turn Off Certain Patient Appointment Notification Status Settings 29

Remove the Text Message Option for Patient Appointment Notifications 29

Automated Appointment Confirmation 30

Determine Which Appointments Can Be Confirmed, Canceled, and Rescheduled by Text Message 30

Enable Hello World Content for Appointment Confirmation Text Messages 33
Identify the Appointments to Confirm by Text Messages from Hello World 34
Allow Reschedule Prompt After Patients Reply to Cancel Appointment for Two-Way Appointment Confirmation 35
Automatically Search for Appointments and Send Text Messages to Patients 35
Identify the Appointments to Confirm by Automated Phone Call from a Third-Party Vendor 36

Automated Appointment Calling 38

Understand the Automated Appointment Calling Process 40
Automatically Call Patients to Notify Them of Future or Missed Appointments 41
Prevent the System from Automatically Calling an Individual Provider's Patients 46
Translate Appointment Information for Automated Calling Text Messages 46

Quick Reminders and Updates 49

Planning Your Quick Reminders and Updates Implementation 49
Create a Generic Queue to Hold Quick Reminders That Need to Be Sent 54
Allow Users to Send Updates 54
Allow Users to Send Prewritten, Free-Text, or Both Types of Messages in Send Updates 55
Send Quick Reminders and Updates by Email 56
Use Hello World to Send Quick Reminders and Updates by Text Message 58
Use a Third-Party Vendor to Send Quick Reminders and Updates by Text Message 60
Customize the Communication Preferences Activity for Quick Reminders and Updates 64
Show Schedulers Whether a Patient Received a Quick Reminder for an Appointment 64
Show Schedulers and Front Desk Staff Which Patients Already Received an Update 65
Block Certain Patients from Receiving Quick Reminders 65
Change Delivery Types for Quick Reminders and Updates for a Service Area 66
Change the Default Offset Time for Quick Reminders 66

Appointment Reminders 67

Create Appointment Reminder Content 67
Determine the Number of Appointment Reminders to Send 67
Create a Batch Job to Send Appointment Reminders to MyChart 69
Create a Batch Job to Send Appointment Reminders by Email 71
Create a Batch Job to Send Appointment Reminders by Text Message 73
Reach All Your Patients at Once with Appointment Campaigns Bulk Outreach Action Pack 76

Appointment Communications Setup and Support Guide

Communication is key in every relationship, including the relationship between patients and their health care providers. Your organization has multiple options for keeping patients and care teams informed about upcoming and past appointments.

This document covers the following ways that you can notify patients about their appointments:

- Appointment letters. Send letters to patients by email or to MyChart, allow schedulers to manually print letters, or print letters in batches. You can specify different letter templates to use for different scenarios, such as when a new appointment has been scheduled for the patient or when a patient missed a scheduled appointment and needs to reschedule.
- Appointment notifications. Send emails, MyChart messages, or text messages to patients when appointments have been scheduled, changed, canceled, rescheduled, or missed.
- Automated appointment confirmation. Available starting in February 2023. Use Hello World's SMS gateway to send text messages to patients to remind them of their upcoming appointments and allow them to confirm, cancel, or reschedule their appointments.
- Automated appointment calling. Work with a third-party vendor to call patients about their upcoming or missed appointments. The vendor sends you outcomes of their calls to patients using a web service or in a file that you need to import.
- Quick reminders and updates. These are two separate but related features that share some settings.
    - Quick reminders are short email or text messages that are sent to a patient a few hours before their appointment.
    - Updates are free-text email or text messages that schedulers or front desk staff send to patients to notify them of late cancellations or delays on the part of the clinic or provider.
- Appointment reminders. Send appointment reminder letters to patients in MyChart or by email or text message. Appointment reminder letters are sent once and then optionally again if the appointment is changed.

There are several other ways of communicating with patients about their appointments that aren't covered in this document. Refer to the table below for links to documentation about these features.

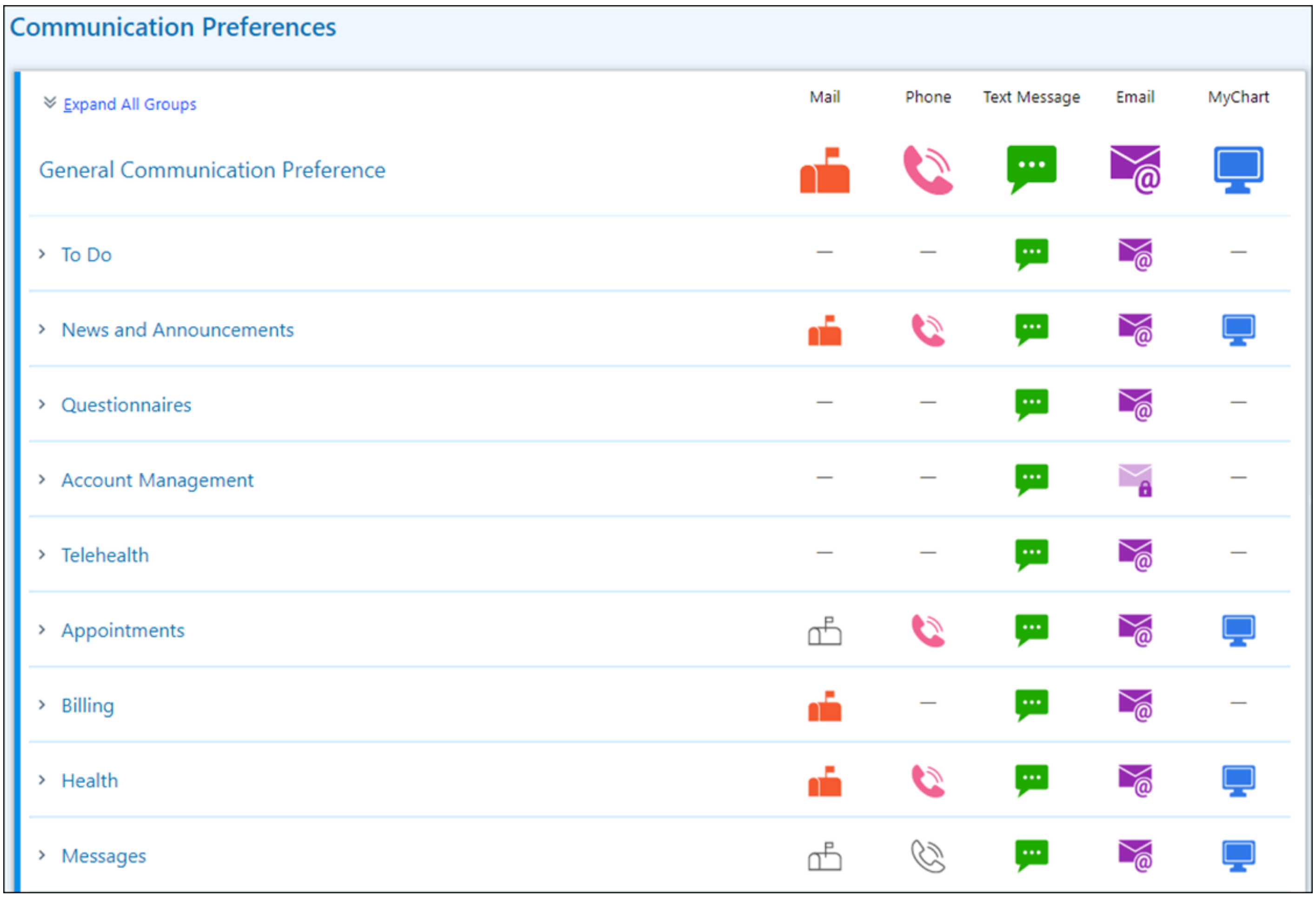
Feature	Documentation
Event-triggered patient messages. Send email or text messages to patients based on an event that occurs. For example, retail clinics that see patients on a first come, first serve basis might set up messages to be sent to the next patient on the list when a clinician starts the visit for the patient ahead of them.	Notify Waiting Patients When You Are Ready to See Them
Fast Pass. Notify patients who are on the wait list that an appointment has opened up.	Notify Patients When There Is a Wait List Offer
Scheduling tickets. Notify patients who have a new scheduling ticket that they need to make an appointment for.	Notify Patients When a New Scheduling Ticket Is Available
Patient arrival with Hello Patient. Reduce contact with patients when they arrive for their appointments by sending them text messages.	Use Text Messages with Hello Patient to Reduce Contact During Patient Arrival
Patient visit guide. When patients are coming in for a set of appointments, you can send them a packet of information in advance that includes letters, attachments, instructions, and an itinerary.	Patient Visit Guide Setup and Support Guide
Appointment request reminders. Send reminders by mail, email, MyChart, or automated phone call or text message for patients to schedule their appointment requests.	Remind Patients to Schedule Appointment Requests
Recall notifications. Send notifications by mail, email, MyChart, or automated phone call or text message for patients to schedule their recalls.	Contact Patients About Recalls Using Automated Calling
Generic appointment looper batch job. To send appointment communications for purposes other than those described in this document or this table, you can run a batch job on a set of appointments and print letters or send email, MyChart, or text messages.	Batch Scheduler template 80-Cadence Generic Appt Looper
Mass Closure. Send updates to patients or notify them that their appointments were canceled when you close the entire department.	Enable Hello World Content for Mass Closure SMS
Appointment Bulk Outreach. Send bulk outreach messages automatically with a Reporting Workbench action pack.	Reach All Your Patients at Once with Appointment Campaigns Bulk Outreach Action Pack

Configure Patient Communication Preferences for Appointments

You can determine which methods of communication a user can choose from when recording a patient's preferred method of communication for their appointments. You can also set default values for these preferences and allow patients to opt in or opt out of receiving text messages.

Schedulers and front desk staff can indicate a patient's preferred methods of communication in the Communication Preferences activity, which is accessible from the Appointment Desk by clicking Patient Options > Comm Prefs:

For additional information about using and configuring the Communication Preferences activity, refer to the Patient Communication Preferences Setup and Support Guide.



Automatically Confirm or Cancel Appointments Based on Patient Responses

This topic applies differently depending on your method of asking patients to confirm their appointments and your version. By default, the system doesn't automatically confirm or cancel an appointment based on a patient's response in the workflows described in the table below. There are settings at the system and department level that you need to enable. The Foundation System has these settings enabled, so they might already be enabled in your system.

Method	Version	Settings Used
Confirm by responding to a text message from Hello World	August 2023 and later May 2023 with special update E10504906 February 2023 with special update E10410713	None - all future appointments are confirmed
Confirm by responding to a text message from Hello World	May 2023 without special update E10504906 February 2023 without special update E10410713	Cadence settings described in this topic
Cancel by responding to a text message from Hello World	August 2023 and later May 2023 with special update E10504906 February 2023 with special update E10410713	MyChart settings described in the Let Patients Cancel Appointments Directly topic
Cancel by responding to a text message from Hello World	May 2023 without special update E10504906 February 2023 without special update E10410713	Cadence settings described in this topic
Cancel or confirm by responding to a phone call or text message from a third-party automated calling vendor	All versions	Cadence settings described in this topic

Automatically Confirm Appointments

The system can automatically confirm an appointment when a patient responds in the following ways:

- For Hello World, the patient responds with CONF or 1.
- For third-party automated calling, the patient indicates to the third-party vendor that they want to confirm their appointment. The file that you import from the vendor sets the Phone Reminder Status (I EPT 7920) item to Confirmed, or any of the statuses you entered in the Status to Confirm mnemonic for your batch

job based on template 93-Automatic Notices Appointment Import.

To enable automatic confirmation for these workflows:

1. In Hyperspace, open Cadence System Definitions or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Communications > Appt Confirmation form.
3. In the Confirm appts upon success? (I SDF 8524 or I DEP 654) field, enter Yes.

Automatically Cancel Appointments

The system can automatically cancel an appointment when a patient responds in the following ways:

- For Hello World, the patient responds with CANC or 2. Applies only in May 2023 without special update E10504906 and February 2023 without special update E10410713. To enable automatic cancellation for this workflow, refer to the Let Patients Cancel Appointments Directly topic.
- For third-party automated calling, the patient indicates to the third-party vendor that they want to cancel their appointment. The file that you import from the vendor sets the Phone Reminder Status (I EPT 7920) item to Wants to Cancel, or any of the statuses you entered in the Status to Cancel mnemonic for your batch job based on template 93-Automatic Notices Appointment Import. To enable automatic cancellation for this workflow:
    a. In Hyperspace, open Cadence System Definitions or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
    b. Select the Communications > Appt Confirmation form.
    c. In the Cancel appts upon cancel request? (I SDF 8526 or I DEP 656) field, enter Yes.
    d. In the Cancel reason (I SDF 8527 or I DEP 657) field, enter a cancel reason. If you don't, the system cannot cancel appointments.

Additional Statuses from the Web Service to Automatically Confirm or Cancel

Starting in February 2021

If you're using third-party automated calling and you're using the PatientAutomatedAppointmentConfirmationResponse web service instead of a batch job to import responses from the vendor, you can specify additional Phone Reminder Status (I EPT 7920) values that get set by the web service that should automatically confirm or cancel an appointment.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions)
2. Select the Workflow Definitions > Web Services form.
3. In the Additional Statuses Considered for Confirming Appointments (I SDF 8533) field, enter statuses that are considered as confirmed.
4. In the Additional Status Considered for Cancelling Appointments (I SDF 8534) field, enter statuses that are considered as canceled.

Appointment Letters

You can set up different letters to send to patients depending on the type of appointment action. For example, the letter you send when a patient schedules an appointment can be different from the letter they receive when they cancel an appointment. Both of these letters are different from an appointment reminder that schedulers or front desk staff hand to a patient after they schedule an appointment while checking out at your clinic.

To set up appointment letters in Cadence, you need to create the content for the letters in SmartText or report (LRP) records and define which templates to use at the system or department levels.

You can automatically print appointment letters using a batch job, or you can send appointment letters to patients by email or to MyChart.

Create Content for Appointment Letters

You specify the content for your appointment letters in SmartText or report (LRP) records. For each appointment letter you create, you also need to create a value for it in the Appointment Letter (I DEP 140) category list. This category value is used when you set up default appointment letters in your system or department settings and is also used by schedulers or front desk staff when the choose a letter to print manually.

Considerations
When you create patient letters, it's important to address the patient respectfully and consider health literacy to make sure that your content can be understood by all patients, regardless of background. For tips on writing with health literacy in mind, refer to the Patient Health Literacy Checklist. Epic's recommends using the patient name documented in the preferred name field for patient-facing documentation. If your organization follows these guidelines, you can use SmartLinks, such as 880-PREFNAME, to add the patient's name to letters. For more information about Epic options related to a patient's sex, gender, and names, refer to the Sex, Gender, and Names Setup and Support Guide.

Create Appointment Letter Content Using SmartText or Reports

You can create your appointment letter content using SmartText records or report (LRP) records.

To create SmartText letters:

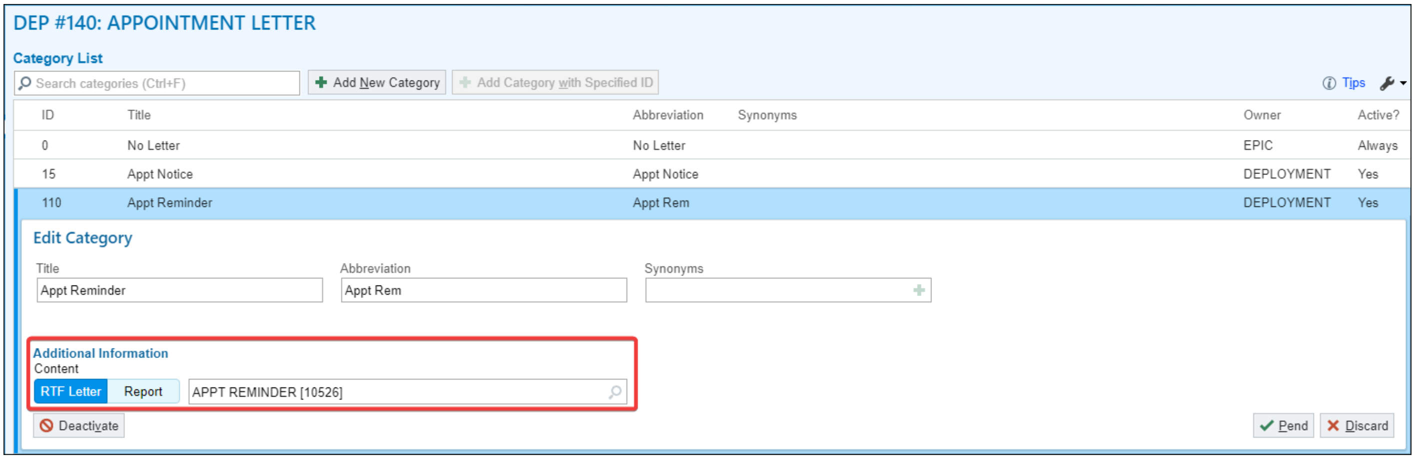
1. In Hyperspace, go to Epic button > Admin > Schedule Admin > RTF Template Editors > Letters.
2. Create a letter template and add your content to it. Refer to the Create and Edit a SmartText topic for more information.

We've released the following reports that you can use to send letters for certain scenarios:

- 62006-ES Bilingual Appt Letter RTL
- 69046-Img Appointments Without Orders

Add Values to the Appointment Letter Category List

You can make letter templates and reports available for selection by creating a value for the template or report in the Appointment Letter (I DEP 140) category list. In the Content field, choose RTF Letter or Report and enter the letter template or report you want to make available for selection in Cadence. For more information about editing category lists, refer to the Modify a Category List's Values topic.



Define the Appointment Letters to Print for Different Scheduling Scenarios

You can set up letters at the system or department level. To save time and maintenance, you might want to set defaults at the system level and then add department exceptions as needed.

Select Letter Templates at the System Level

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Letters form.
3. Select the letter template from the Appointment Letter (I DEP 140) category list for each letter type you want to send to patients.
   - Appt letter (I SDF 8040)
   - Result letter (I SDF 8043)
   - Follow up letter (I SDF 8038)
   - Reschedule letter (I SDF 8045)
   - No show letter (I SDF 8036)
   - Appt notice (I SDF 8046)
   - Default cancel letter (I SDF 8035)

Select Letter Templates at the Department Level

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Communications > Letter Defaults form.
3. Select the letter template from the Appointment Letter (I DEP 140) category list for each letter type you want to send to patients.
   - Appointment letter (I DEP 140)
   - Appointment notice (I DEP 155)
   - Reschedule letter (I DEP 135)
   - Cancel letter (I DEP 137)

- Follow up letter (I DEP 138)
- Result letter (I DEP 139)
- No show letter (I DEP 136)

Limit the Letter Templates Available in a Department

You might want to make it easier for schedulers in a specific department to choose the correct letter after scheduling by limiting the letters they can choose from.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Communications > Letter Restrictions form.
3. In the Limit form letters to (I DEP 134) field, enter the letter templates that schedulers can select for the department. This setting also controls which letter templates you can enter in the fields on the Communications > Letter Defaults form.

Define the Appointment Letter for Manually Printed Reminder Letters

Schedulers can manually print reminder letters for appointments from the Appointment Desk by right-clicking a future appointment and choosing Print Reminder. You define the letter that gets printed for this workflow in Cadence System Definitions.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Reminder/Add'l Forms form.
3. In the RTF appointment reminder (I SDF 10241) field, enter the SmartText record for your appointment reminder letter.

Override the Default Cancel Letter for Specific Cancel Reasons

You can send letters about canceled appointments that vary by the reason why the appointment was canceled. For example, you might want to send a different letter when a provider cancels an appointment due to a conflict than you send when a provider cancels due to a permanent change in their schedule.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Letters form.
3. Add a row to the Cancel Letter Override table for each cancel reason you want to override:
   - Cancel Reason (I SDF 8041)
   - Letter (I SDF 8042)

Override Appointment Letters by Visit Type

For a specific department, you can override which appointment letter to send based on an appointment's visit type.

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

2. Select the Communications > Letters Defaults form.
3. Add a row to the Visit Type Exceptions table for each visit type you want to override:
   - Visit Type (I DEP 141)
   - Appt Letter (I DEP 142)
   - Appt Notice (I DEP 156)

Show the Phone Number to Call for Appointment Information and Rescheduling in Appointment Letters

So that patients have accurate information about their appointments and can reach the correct department if they need appointment information or to reschedule, you can add SmartLink 60115-Appt Phone (mnemonic: .APPTPHONE) to appointment letters. This SmartLink shows the department's appointment phone number (I DEP 5060), the primary appointment provider's phone number (I SER 1280), or the department record phone number (I DEP 150), in this order. You can configure SmartLink parameters to do the following:

- Show the phone number for the ordering provider if no other phone number is found.
- Show the department phone number instead of the primary provider's phone number for certain providers.
- Show custom information when no phone number is found.

To add the SmartLink to a letter template:

1. In Hyperspace, create a copy of SmartLink 60115 in the SmartLink Editor (search: SmartLink) and configure the following parameters as necessary:
   - ordP. Optional. Enter 1 to show the ordering provider's phone number when neither the primary provider nor the department have phone numbers. If there are multiple orders attached to the appointment, the SmartLink starts with the provider for the first order and continues through the orders until it finds a phone number to show. By default, this parameter is null ("") and the SmartLink doesn't look at the ordering provider.
   - table. Optional. Enter the ID of a general table used to identify primary providers for whom the department phone number should appear instead of the provider's phone number. By default, this parameter is null and the SmartLink looks for phone numbers as described above. The general table option is available starting in February 2021 and in November 2020 with special update E9501605, August 2020 with special update E9405765, and May 2020 with special update E9308040. To create the general table, use specification (AIO) 420950-Provider Departments for Appointment Phone SmartLink in the Tables activity (search: Tables). Match providers to departments in each row of the table. Note that you can enter multiple departments for a provider.
   - text. Optional. Enter in quotation marks free text that appears when the SmartLink can't find a phone number to show. By default, this parameter is null and no text appears when the SmartLink can't find a phone number.
2. Open an appointment letter template in the Letter Template Editor (search: Appointment Letters) and add your copy of SmartLink 60115 to the letter template SmartText.
3. Click Accept to save and exit the template.

Print Appointment Letters in Batch

You might want to print letters in batch with the Batch Scheduler. Batch printing means the system automatically prints letters for appointments meeting the Batch Scheduler settings. Printing multiple letters in batch is easier and more flexible than printing letters during scheduling. It saves printing and system resources, saves time for the scheduler, and is done automatically on a set schedule.

1. In Cadence Text, follow the path Utility Menu > Batch Jobs > Job.
2. Create a new batch job for appointment letters. Use template 16-Appt and Result Letters. To make your settings match those in the Foundation System, refer to batch job 1170001601-ES Appt Reminder Letters in the Foundation Hosted environment.
3. Add the batch job to a batch and add that batch to a batch run. Refer to the Batch Scheduler Setup: Essentials topic for additional information.

Send Appointment Letters to MyChart or by Email

Some patients prefer to get electronic messages instead of paper letters. You can associate letters with MyChart and email messages so when a patient is slated to receive the letter and they prefer electronic contacts, the system automatically sends the MyChart or email message instead. This automatic notification happens when you print letters in batch.

Prerequisites

The system can send appointment letters to MyChart or by email only when you're using a batch job based on template 16-Appt and Result Letters to automatically print letters each day. Refer to the Print Appointment Letters in Batch topic for more information about setting up this batch job.

In the Foundation System

Automatic email notifications are configured in the Foundation System. Log in to Text to view the following records:

- Print Group (LPG) 1176203801-ES RTF Email Multi Appt Reminder
- Report (LRP) 1176203801-ES RTF Email Reminder

Send Letters in MyChart

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Letters form.
3. Fill out a row in the Mappings to MyChart and E-mail Messages table for each letter you want to send to MyChart:
   - Letters (I SDF 8189). Select a value from the Appointment Letter (I DEP 140) category list. Refer to the Create Content for Appointment Letters topic if you haven't created letters yet or need to create more letters.
   - MyChart Messages (I SDF 8192). Enter the report that appears in MyChart for the letter. Starting in August 2021 and with special updates in May 2021 and February 2021, you can use a rich text report.

Send Letters in Plain Text Emails

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

3. Fill out a row in the Mappings to MyChart and E-mail Messages table for each letter you want to send to MyChart or by email:
   - Letters (I SDF 8189). Select a value from the Appointment Letter (I DEP 140) category list. Refer to the Create Content for Appointment Letters topic if you haven't created letters yet or need to create more letters.
   - External E-mail Messages (I SDF 8193). Enter the report that appears in the email for the letter.

Send Letters in HTML Emails

Starting in August 2019

Preserve the formatting of your RTF letters by sending them in HTML emails. To do this, you need to add the SmartText records for your letters to Cadence System Definitions. Refer to the Create Content for Appointment Letters topic if you haven't created letters yet or need to create more letters. Note that the APPLCORESYNC queue must be configured in Interconnect to send letters in HTML emails.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Letters form.
3. Fill out a row in the Mappings to MyChart and E-mail Messages table for each letter you want to send by HTML email:
   - Letters (I SDF 8189). Select a value from the Appointment Letter (I DEP 140) category list.
   - External E-mail Messages (I SDF 8193). Enter the report that appears as the plain text version of the email, such as report 62038-Upcoming Appointments Reminder. This is required even when you are sending HTML emails. If you don’t set the E-mail Subject mnemonic in your batch job based on template 16, the name of the report you enter here is used as the email subject.
   - External E-mail RTF Messages (I SDF 8183). Enter the SmartText that appears as the HTML version of the email.

Print Bilingual Appointment Letters

You can print appointment letters that show patient and appointment information in two languages. Bilingual appointment letters help ensure patients who do not share a primary language with your organization can read and understand appointment details and instructions.

For example, various organizations in the Middle East use English as the primary language but also commonly use Arabic on everything from hospital signs to medication labels. In this case, you can configure appointment letters to include information in both English and Arabic.

Bilingual printing is enabled by default when both of the following conditions are true:

- Included appointment letters are enabled to show bilingual information.
- The patient's primary language matches one of the system's secondary languages.

Follow these steps to enable bilingual appointment letters:

1. Create the translations for the information that appears in report 62006-ES Arabic Appt Letter. For additional information, refer to the Customize and Create Translations for Multilingual Reports topic.
2. Create a category value in the Appointment Letter (I DEP 140) item to use report 62006.
   a. In Hyperspace, go to Category List Maintenance (search: Category List Maintenance).
   b. In the Category Editor window, enter the Department (DEP) master field and item 140-Appointment

Letter.

c. Enter an ID for your category and click Go.

d. Enter a title for your category.

e. In the Content field, choose Report and enter report 62006.

3. Make your appointment letter available at the department or system level. For additional information refer to the Define the Appointment Letters to Print for Different Scheduling Scenarios topic.

Show Patients Customized Instructions for the Highest-Severity Procedure in an Appointment

The information that your schedulers send to patients to remind them about appointments in letters or reminders can be set up to automatically include patient instructions tailored to the highest-severity procedure in an upcoming appointment. Including this information in appointment reminders allows your schedulers to provide information to patients about complex appointments without having to manually customize the instructions, and helps ensure that patients are properly prepared for procedures.

To set this up, you can use extension 56059-Img Ranked Procedure Sched Instructions. You can link procedure severity rankings to matching SmartTexts through a translation table. When you list that translation table in the fourth parameter of a copy of extension 56059, you can then enter that duplicate extension record in a SmartLink to put in either your standard appointment letter template or a MyChart appointment reminder.

To ensure that only the instructions for the most severe procedure included in an appointment appear in information sent to patients in letters or MyChart, do the following:

Create a Translation Table to Map Procedures to Severity Rankings

1. In Hyperspace, access the Translation Tables activity by selecting Epic button > Admin > Interface Admin > Translation Tables.
2. Create a table with the following attributes:
    - Direction: Both Ways
    - Source data type: String
    - Destination data type: String
    - Source values: Procedure IDs
    - Destination values: Numbers that indicate those procedures' respective severities.

Create SmartTexts for Your Scheduling Instructions

Create a SmartText for each procedure listed in your translation table. Note that you can link the same SmartText to more than one procedure.

1. In Hyperspace, access the ES Letter Template Editor (search: Appointment Letters).
2. Enter the text you want to send to patients on the main page.
3. In the Restrictions side card, list the following Functional Types:
    - MR Procedure Scheduling Instructions
    - Cadence Letter Template

Refer to the SmartTexts topic for more information on SmartTexts.

Link SmartTexts to Procedures

Enter the appropriate instruction SmartText into each procedure you listed in your translation table.

1. In Clinical Administration, follow the path Procedures, Scheduling > Procedures, open a procedure record, and go to the Procedure SmartTexts Settings screen.
2. Enter 1-Normal in the Class field and the appropriate SmartText in the Scheduling ETX field.

Make Sure the System Uses Your Translation Table

1. In Chronicles, access the Extensions (LPP) master file and go to Enter Data > Duplicate Extension. Duplicate extension record 56059.
2. When you return to the Enter Data menu, select Edit Extension and open your duplicate extension record.
3. In the Code field, enter your translation table's ID in the fourth parameter.
4. Exit the record.

Show Instructions to Patients in Appointment Letters

1. In Hyperspace, access the ES Letter Template Editor (search: Appointment Letters).
2. Open your appointment letter template.
3. In your appointment letter template, include SmartLink 52020-RISFRMTLINK (mnemonic: @RISFRMTLINK) where you want your scheduling instructions to appear.
4. In the Edit SmartLink Parameters window that appears, set the parameters as follows:
   - Extension. Enter your copy of extension 56059.
   - Text Format. Enter 1-Rich Text.
   - Show all orders or master? Enter 1-Master order in MOPS group only.

Show Upcoming Preadmissions and Cases in Appointment Letters

To show patients upcoming pre-admissions or surgical cases in their appointment reminder letters, configure the parameters of the extension used in SmartLink 60014-Multappt (mnemonic: .MULTAPPT).

1. In text, go to the Extension (LPP) master file.
2. If you don't have a copy of extension 42281-ES Multappt (Template) in use in the Multappt SmartLink, create a copy now.
3. Open your copy of extension 42281.
4. Go to the Parameters screen and configure the segments in the following parameters:
   - SmartTexts: In the ADT SmartText segment, enter a SmartText with a context of ADT/Registration Letters that includes upcoming pre-admissions and cases.
   - Rule Filter: In the Rule segment, enter a patient-context rule to filter out any encounters that should not appear in the appointment letter. Refer to the Create or Edit a Rule topic for more information.
   - Page Options: In the Lines per hospital encounter segment, enter the number of lines of text that appear in the SmartText in the ADT SmartText segment.
5. In Hyperspace, open your copy of SmartLink 60014-Multappt.
6. On the SmartLink tab, under SmartLink Information, click the Default to open the parameters. In the MULTAPPT LPP parameter, enter your copy of extension 42281.

7. Add the customized SmartLink to a Cadence letter.
   - In Hyperspace, search for Appointment Letters.
   - Open a letter and add your customized SmartLink to the letter template text in the format @MNEMONIC@.
8. Make sure the letter template is set up for use at the system or department level. Refer to the Create Content for Appointment Letters topic for additional information.

Prevent Certain Appointments from Appearing in Appointment Letters

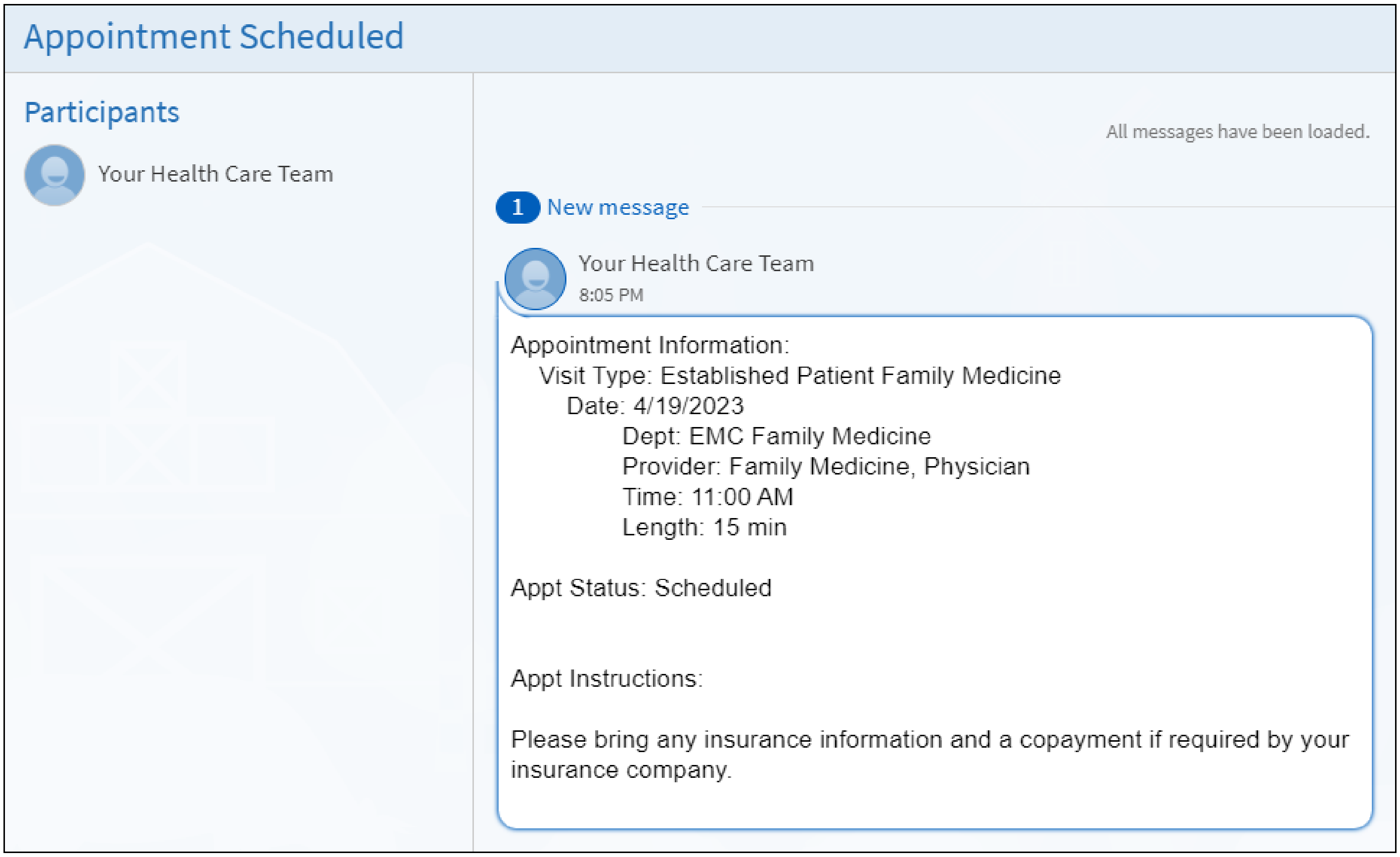
You can use a rule to determine when appointments shouldn't appear in appointment letters. This feature is useful for ensuring patients don't see appointments they don't need to know about, such as appointments that exist only for billing purposes. The Foundation System is set up to hide appointments of any visit type that is also hidden from review in MyChart.

Complete the following steps to hide appointments from reminder letters:

1. Create a Patient-context rule to identify the appointments you want to hide. Refer to the Create or Edit a Rule topic for more information.
2. Copy SmartLink 60014-Multappt and modify the following parameters. For detailed instructions about copying and modifying SmartLinks, refer to the Edit a SmartLink topic.
   a. Change the rule parameter to the ID of the rule you created in step 1.
   b. Change the hideoption parameter to 3.
3. Add the customized SmartLink to a Cadence appointment letter.
   a. In Hyperspace, search for Appointment Letters.
   b. Open a letter and add your customized SmartLink to the letter template text in the format @MNEMONIC@.
4. Make sure the letter template is set up for use at the system or department level. Refer to the Create Content for Appointment Letters topic for additional information.

Patient Appointment Notifications

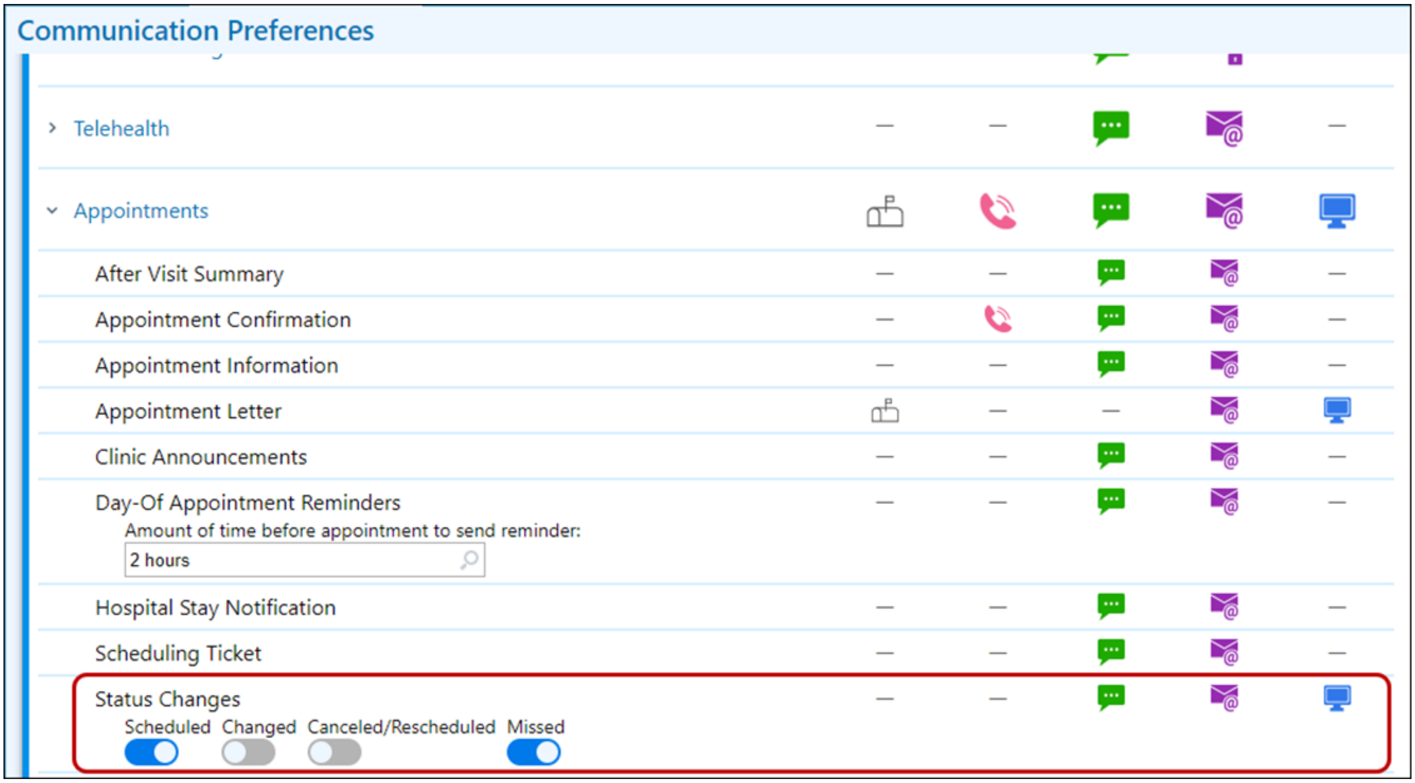
Cadence can send appointment notification reports to patients when they schedule new appointments or make changes to existing appointments. The example below is of an Appointment Notification MyChart message. Appointment notifications can be sent to patients by email, MyChart, or text message.



An example of an appointment notification message in MyChart

Whether patients receive notifications is based on each patient's preferences and is configured by schedulers in the Communication Preferences activity. Here's how the front desk workflow works:

1. Open a patient's Appointment Desk and go to Patient Options > Comm Prefs.
2. Expand the Appointments section.
3. In the Status Changes row, select the patient's preferred communication method for appointment notifications. If the patient does not have an email address on file, is not signed up for MyChart, or does not accept text messages, they cannot receive appointment notifications.
4. Select which appointment changes the patient wants to be notified about. Choose from:
    - Scheduled appointments
    - Changed appointments
    - Canceled/rescheduled appointments
    - Missed appointments



Considerations

In addition to sending notifications to patients, you can also send appointment notifications to staff members by email or In Basket. Patient notifications and staff notifications use the same framework. For more information, refer to the Notify Staff About Appointments with Appointment Notifications topic.

Keep in mind that the settings you specify for patient appointment notifications, such as assigning a staff member or generic user to appear as the sending user, also affect the notifications your organization sends to staff.

To send appointment notifications to patients, you must have the Cadence Appointment Notification license, which is included in the standard Cadence license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Send Appointment Notifications to Patients by Email

To send appointment notifications to patients by email, you need to create a user in your system to be the sending user of the email. The sending user is listed as the "From:" person on all notifications. You can designate a particular staff member as the sender or create a generic user. Make this decision based on the way your organization addresses responses to email notification messages. If you haven't already set up appointment notifications for staff as described in the Notify Staff About Appointments with Appointment Notifications topic, you also need to set up the Appointment Notification message type for In Basket because email notifications for patients are built on the same settings as In Basket notifications for staff.

For example, if several staff members might respond to patients, you might want to use a generic sender. This way, a patient will not respond to a staff member who is not involved in their care or assume that a different staff member has been assigned to their care team.

1. In Hyperspace, go to Epic button > Admin > Access Management > User Security.
2. Choose Edit single user to make an existing user the sending user. Alternately, you can choose Create single user to create a new user record for the sending user.
3. Go to In Basket > Mail Settings/Access form. In the Mail System field, enter External Mail.
4. In the Mail sending setup table, enter extension 4400-Staff Message SMTP in the System field to format a message routed to an external email address.
5. In the Account field, enter a valid email address
6. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
7. Select the Communications > Appt Notification form.
8. In the Appointment notification sending user (I SDF 8185) field, enter the user to serve as the sending user.
9. Open In Basket Epic-wide Settings (search: Epic-wide Settings).
10. On the Message Type Defaults form, add a new line to the table.
    - In the Message Type column enter 46-Appointment Notification.
    - In the Definition column, enter 46-Appointment Notification.
    - In the Registry column, enter 1-Staff.

Customize the Appointment Notification Email and MyChart Messages Sent to Your Patients

By default, the system uses report 62012-Appointment Notification Report - Patient External as the content for patient email and MyChart notifications. Complete the steps below if you want to use a different report. Rich text reports are supported for MyChart messages starting in August 2021, in May 2021 with special update E9704113, and in February 2021 with special update E9608329.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Appt Notification form.
3. In the Patient e-mail notification (I SDF 8188) field, enter the report patients should see when receiving notifications in an external email system.
4. In the Patient MyChart notification (I SDF 8194) field, enter the report that patients should see when receiving notifications in MyChart.

Use Hello World Content to Send Appointment Notifications to Patients by Text Message

Starting in February 2023

Prerequisites

To send text messages using Hello World content, you can use the Hello World SMS gateway or a third-party SMS vendor.

- Refer to the Hello World Setup and Support Guide for information about the Hello World SMS gateway.
- Refer to the Text Messaging Setup and Support Guide for information about working with a third-party SMS vendor.

If you're using a third-party SMS vendor and don't want to use the Hello World content, you need to complete the setup described in the Use SmartText Records to Send Appointment Notifications to Patients by Text Message topic instead of this topic.

Security Considerations

Appointment notification text messages can include a link to MyChart so patients can see more information about their appointment. To receive the MyChart link, patients need to meet both of the following criteria:

- They have a MyChart patient access security class that includes the necessary security points outlined below. Depending on how your organization assigns patient access classes to patients, it's possible for a patient to have a patient access security class assigned even if they don't have a MyChart account yet. To find out how this works at your organization, work with your MyChart team and refer to the MyChart Patient Access Setup: Security Administration topic.
    - To receive a MyChart link for an individual appointment, patients need patient access security point 13-Appointment Details.
    - To receive a MyChart link for a list of appointments, patients need at least one of the following patient access security points:
        - 14-Upcoming Appt List
        - 69-Recent Appointments
        - 70-Recent Visits List
        - 81-Hospital Visits
- They have an active MyChart account or secure link authentication is enabled for the patient and there is enough information entered in the patient's demographics that they can pass the demographic authentication page in MyChart.

Hello World includes content that you can use to send appointment notifications to patients by text message. The system uses your third-party SMS vendor or Hello World SMS gateway to send text messages based on a patient's communication preferences for appointment notifications, which are described in the Patient Appointment Notifications topic. Starting May 2024, if you use Hello World SMS gateway, appointment notifications text messages can be sent to proxies if their communication preferences for appointment notifications are turned on.

To set up the notifications described below, review the released communication templates with stakeholders at your organization to determine whether you can use the sample content as is. Refer to the Manage Message Content topic for instructions on creating or customizing your override communication templates. Then work with your Hello World team to approve your communication templates. Make sure to also review each possible response for two-way messages. If you make any changes to message content while reviewing and enabling response for two-way messages. If you make any changes to message content while reviewing and enabling communication templates, you need to also update the translated notification content for those messages. If you don't update the translated notifications, the messages are sent only in English.

Starting in November 2024, use the SMS content in the following communication workflows to send patients notifications about appointments that are scheduled, canceled, rescheduled, changed, or marked as no shows.

- 60001-Appointment Scheduled
- 60003-Appointment Changed
- 60005-Appointment Canceled
- 60007-Appointment No Show
- 60011-Appointment Rescheduled

Starting in August 2023, patients can receive one text message for multiple appointments that are scheduled or canceled. To enable this feature, you need to approve the communication templates for bundled appointments that are listed later in this section. After these templates are approved, the system automatically combines messages when:

- The appointments were scheduled or canceled in the same workflow.
    - For scheduled appointments, this would be the case when scheduling recurring visits in Book It or adding multiple visits to schedule at once in Book It.
    - For canceled appointments, this includes canceling multiple appointments at once from the Cancel Appointments window on the Appointment Desk and the OB Non-Pregnant Patients with Scheduled OB Appointments report. Refer to the Quickly Cancel OB Appointments and Cases When Patient Is No Longer Pregnant topic for more information about the report and how to combine email and MyChart notifications for canceled OB appointments.
- The appointments are in the same service area.

Messages for one, two, or three appointments include the dates and times of the appointments and a link to MyChart for more details. The MyChart link is included only if the patient meets the security requirements outlined above in the Security Considerations section.

Messages for four or more appointments include the dates and times of the first two appointments, the number of additional appointments that were scheduled or canceled, and a link to MyChart for more details. The MyChart link is included only if the patient meets the security requirements outlined above in the Security Considerations section.

The standard communication templates for appointment notifications are:

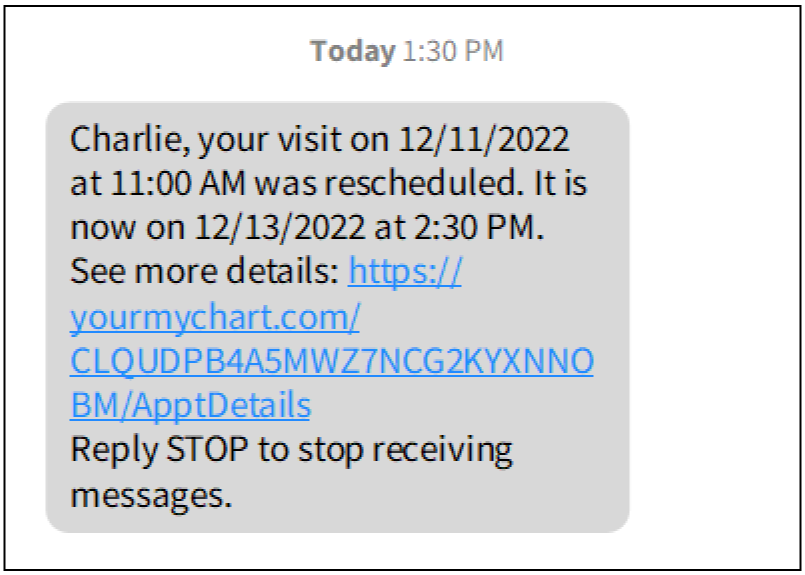
- 60174-Appointment Canceled - Single - SMS - Broadcast
- 60178-Appointment Canceled - Multiple - SMS - Broadcast
- 60185-Appointment Changed - SMS - Broadcast
- 60188-Appointment No Show - SMS - Broadcast
- 60187-Appointment Rescheduled - SMS - Broadcast
- 60150-Appointment Scheduled - Single - SMS - Broadcast
- 60152-Appointment Scheduled - Multiple - SMS - Broadcast

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 an override of each communication template. The override templates are what the system actually uses to send messages. You can set them at different levels of your facility structure. We recommend creating overrides only for the facility level if possible. However, you can also create overrides at the service area, location, or department level. In the override record for each communication template, you can customize the content for the message if needed and then enable it for use and mark it as approved.

No-Show Considerations

Unless you configure communication hours in the SMS Sender Profile, text messages are sent for missed appointments when the appointment is marked as a no-show appointment in the system, which could happen outside of business hours. Carefully consider whether you want to approve communication template 60006-Appointment No Show for missed appointments:

- If your schedulers add no-show appointments to the EOD Status List, missed appointment notifications are sent when your end-of-day processing batch job runs, which is most likely in the middle of the night.
- If your schedulers use the No Show button that's available on the Appointment Desk and in the Department Appointments report, the missed appointment notification is sent immediately. However, if schedulers miss marking appointments this way, text messages still go out when your EOD batch job runs or during the specified communication hours.



A sample appointment notification text message for a rescheduled appointment using the released communication template.

You need to have Hello World security as described in the Give Users Hello World Security topic to work with communication templates. If you don't have this security, work with your Hello World team to complete these steps for you.

1. Review the released communication templates for appointment notifications with stakeholders at your organization to determine whether you can use the sample content. Refer to the steps in Manage Message Content to create overrides of the communication templates attached to the following communication workflows:
    - 60001-Appointment Scheduled
    - 60003-Appointment Changed

- 60005-Appointment Canceled
- 60007-Appointment No Show
- 60011-Appointment Rescheduled

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

Use SmartText Records to Send Appointment Notifications to Patients by Text Message

> Starting in February 2023, we recommend that you use Hello World content instead of SmartText records. You can continue to use a third-party SMS vendor or you can use the Hello World SMS gateway if your organization is licensed for it. Refer to the Use Hello World Content to Send Appointment Notifications to Patients by Text Message topic for additional information.

Prerequisites

To send text messages using SmartText records, you need to work with a third-party SMS vendor. Refer to the Text Messaging Setup and Support Guide for additional information.

If you have a third-party text messaging vendor, patients can choose to receive appointment notifications by text message. The Text Message option is available by default for the Status Updates concept in the Communication Preferences activity in Hyperspace and MyChart.

To fully enable text messaging for appointment notifications, you need to define the content of your text messages in SmartText records and add those SmartText records to Cadence System Definitions for each type of appointment notification (Scheduled, Changed, Canceled, and Missed). If no SmartText is defined for a given status, no text messages are sent for the status. You cannot configure SmartText records at other levels of the system. If you don't want to use this feature, disable the Text Message option for the Status Updates concept so schedulers and patients cannot select it.

Considerations

Note that text messages are sent for missed appointments when the appointment is marked as a no-show appointment in the system, which can be outside business hours, so carefully consider whether you want to set up a SmartText for missed appointments:

- If your schedulers add no-show appointments to the EOD Status List, missed appointment notifications are sent when your end-of-day processing batch job runs, which is most likely in the middle of the night. Consider not setting up a SmartText for the Missed status to avoid texting patients in the middle of the night.
- If your schedulers use the No Show button that's available on the Appointment Desk and in the Department Appointments report, the missed appointment notification is sent immediately. However, if schedulers miss marking appointments this way, text messages would still go out when your EOD batch job runs.

Create SmartText Records for Appointment Notification Text Messages

1. In Hyperspace, open the ES Letter Template Editor (search: Letters).
2. Create a new SmartText.
3. On the General tab, enter the contents for the text message. Only the first line of text is sent to the patient. We don't recommend including PHI in these messages.
4. On the Languages & Overrides tab, optionally enter SmartTexts to use for different languages or for specific scenarios based on a rule. Here are some examples of rules you might create and enter here:
   - In your SmartText for scheduled appointments, you might list a rule that identifies rescheduled appointments and an override SmartText to use for rescheduled appointments since you can't specify a separate SmartText for rescheduled appointments in Cadence System Definitions.
   - If you want to use a different SmartText for appointments in certain departments, you can list a rule that identifies those appointments and the override SmartText to use.
   - If you want to turn on text messages only for certain areas, you can create a SmartText record with only a blank space in it (instead of text that you specify at the system level) and then specify rules to identify appointments in those areas and enter override SmartText records with text in them.
   - If you want to turn on text messages for most areas but turn it off for a few areas, you can specify SmartText records at the system level and specify rules to identify appointments in the few areas and enter an override SmartText record that has only a blank space in it instead of text.

Add Your SmartText Records to Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Appt Notification form.
3. Complete the Appointment Notification Text Messaging table:
   - In the Status Changes (I SDF 18200) column, enter Scheduled, Changed, Canceled, or Missed. Note that rescheduled appointments use the SmartText that you specified for the Scheduled status.
   - In the SmartText (I SDF 18201) column, enter the SmartText to send for the associated status change.

Block Appointment Notifications to Patients for Certain Appointments

In some cases, you might not want to notify a patient about an appointment. For example, if you schedule appointments for remote monitoring or phone screening, these are appointments the patient doesn't need to attend and shouldn't be notified about. Additionally, dialysis patients have many appointments every week and likely don't need appointment reminders.

You can choose to block patient email appointment notifications for some appointments to prevent patient confusion and to make sure patients don't attend appointments unnecessarily.

Create a Rule to Identify Appointments

Create an Appointment Notification Filter-context rule that identifies appointments for which patients should receive notification. Appointment notifications are not sent for appointments that do not meet the criteria of the rule. Refer to the Create or Edit a Rule topic for detailed information about creating rules.

In the Foundation System, we created rule 697352-MyChart Message Allowed Filter Without HH/HSPC or Dialysis to block appointment notifications for home health, hospice, and dialysis appointments. To see how this rule was built, log in to the Foundation Hosted environment as the Cadence administrator (ESADM).

Add Your Rule to the Appointment Notifications Settings in Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Appt Notification form.
3. In the Notification Filter Rule (I SDF 1141) field, enter your rule.

Automatically Set Patient Preferences for Notifications

Patients can change their notification preferences on the Notification Settings page in MyChart. You can choose to automatically set these preferences when a patient activates a MyChart account. To do so, work with your MyChart analyst to complete this setup:

1. In Chronicles, access the Extension (LPP) master file and duplicate extension 32900-MyChart-Setup Notification Prefs.
2. In your duplicate extension, modify the parameters as appropriate:
    - 3-Notify Patient. Required. Determines whether patients are set to prefer electronic communication by default. If this parameter is set to 1, as released, patients receive a MyChart message or email for appointment notifications. If this parameter is set to any other value, patients do not receive electronic messages and parameters 4-8 have no effect.
    - 4-E-mail or MyChart. Required. Determines the method of sending appointment notification messages. If this parameter is set to 2, as released, patients receive MyChart messages. If this parameter is set to 1, patients receive email messages.
    - 5-Appt Scheduled Notify. Required. Determines whether patients receive notification after scheduling an appointment. If this parameter is set to 1, as released, patients receive notification of scheduled appointments. If it is set to 2, patients do not receive notification of scheduled appointments.
    - 6-Appt Canceled Notify. Required. Determines whether patients receive notification after canceling an appointment. If this parameter is set to 1, as released, patients receive notification of canceled appointments. If it is set to 2, patients do not receive notification of canceled appointments.
    - 7-Appt Changed Notify. Required. Determines whether patients receive notification after an appointment is changed. If this parameter is set to 1, as released, patients receive notification of changed appointments. If it is set to 2, patients do not receive notification of changed appointments.
    - 8-Appt Missed Notify. Required. Determines whether patients receive notification of missed appointments. If this parameter is set to 1, as released, patients receive notification of missed appointments. If it is set to 2, patients do not receive notification of missed appointments.
    - 9-Patient Preferences. Optional. Determines how patients are contacted for appointment notifications. Enter a comma-delimited list of category values from the Patient Communication List (I ECT 5500). Depending on the Append Patient Prefs parameter, this list will either overwrite or append the patient's current preferences. This parameter affects the patient's preferences for Health Maintenance Reminders (HST 28101), Bulk Communication (HST 28102), Communication Management (HST 28103), and Cadence Appt Letter Preference (HST 28501). If blank, this parameter and the Append Patient Prefs parameter will have no effect.
    - 10-Append Patient Prefs. Determines whether the extension appends or overwrites existing communication preferences that are recorded for a patient. If this parameter is set to No, as

released, the patient communication preferences specified in the Patient Preferences parameter in this extension overwrite patient preferences that were already recorded for the patient. If this parameter is set to Yes, the patient's existing communication preferences are preserved and any additional preferences listed in the Patient Preferences parameter are appended. Note that the Do Not Contact preference is not appended if the Append Patient Prefs parameter is set to Yes. However, the Do Not Contact preference is overwritten if this parameter is set to No or left blank.

3. From the MyChart System Manager Menu, select Login and Access Configuration and access the Signup Options screen.
4. In the After Account Activate ext field, enter your copy of extension 32900.

Turn Off Certain Patient Appointment Notification Status Settings

If you don't want schedulers to be able to turn on patient appointment notifications for a certain status in the Communication Preferences activity, you can make the items view-only using item profiles. For example, you could make the Missed slider view-only if your organization has decided not to send appointment notifications for missed appointments.

1. In Hyperspace, open the Item Profile Editor (search: Item Profile Editor).
2. In the INI field, enter OYO.
3. In the item field, enter one of the item numbers:
   - 5001-Notify Patient When Appointment Scheduled
   - 5002-Notify Patient When Appointment Changed
   - 5003-Notify Patient When Appointment Canceled
   - 5004-Notify Patient When Appointment Missed
4. In the Value field, enter Read-Only.
5. Select the Facility check box or enter the service area, location, department, or security class to apply the item profile to.
6. In the Activity field, enter 7-Registration.
7. Click Add New. For additional details about item profiles, refer to the Managing Item Profiles topic.

Remove the Text Message Option for Patient Appointment Notifications

The Text Message option for appointment notifications is available by default in Communication Preferences. If you don't want to use this feature, you can remove the option in an override of communication concept 28503-Cadence Appointment Notifications Preference. Refer to the Lock a Media Setting On or Off topic for additional information.

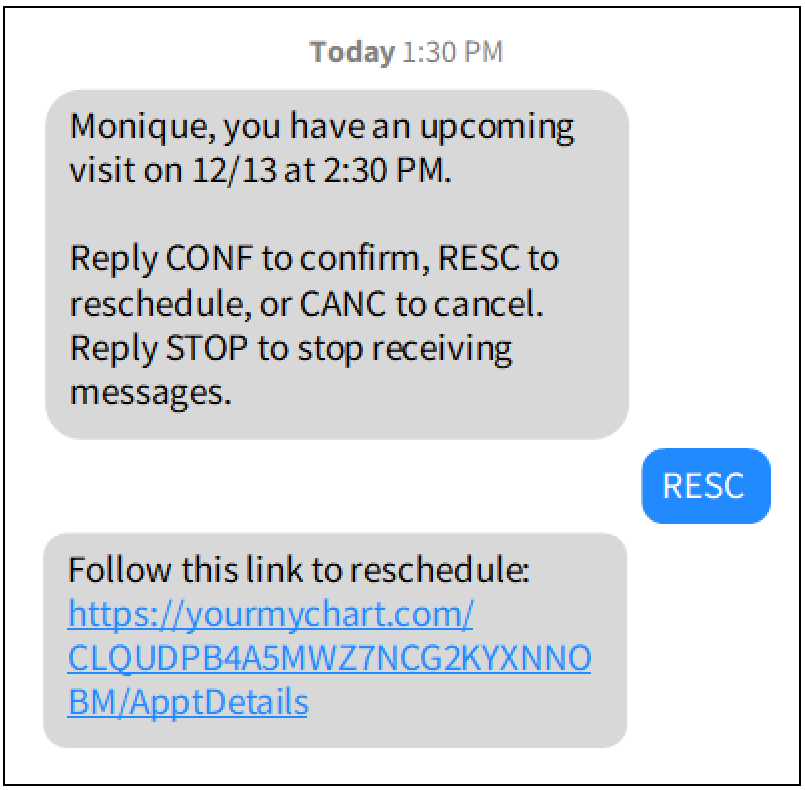
Automated Appointment Confirmation

Starting in February 2023

You can automatically send text messages to patients to confirm, cancel, or reschedule their upcoming appointment. To do so, you create a report to identify the appointments that you want to confirm, set up the report to run automatically each day, and enable Hello World content to use for the messages.

The system sends text messages to patients who have a mobile phone number on file, have opted in to receiving text messages from your organization, and have selected the text message option for the Appointment Confirmation communication concept, 28504-Cadence Automated Calling System Preference, in the Communication Preferences activity.

If the patient chooses to reschedule their appointment, they are sent a link to go to a page in MyChart where they can reschedule their appointment without needing to log in or create a MyChart account. Starting in November 2024, patients can choose to reschedule certain visits that qualify by replying directly to the text message without needing to go to MyChart.



A sample text message exchange with a patient who wants to reschedule their upcoming appointment

Determine Which Appointments Can Be Confirmed, Canceled, and Rescheduled by Text Message

Starting in February 2023

You can control which appointments patients are allowed to confirm, cancel, and reschedule by text message.

Confirm Behavior

Starting in August 2023, in May 2023 with special update E10504906, and in February 2023 with special update

E10410713, there are no settings that control which appointments can be directly confirmed by text message. If a patient responds with CONF and the appointment is in the future, the appointment is confirmed.

In May 2023 and February 2023 without the special updates listed above, automatic confirm behavior is determined by the Cadence settings described in the Automatically Confirm or Cancel Appointments Based on Patient Responses topic.

To give patients a consistent experience between MyChart and text messages, we recommend that you send text messages no earlier than your organization's window for confirming appointments in MyChart. Refer to the Identify the Appointments to Confirm by Text Messages from Hello World topic for additional information.

In May 2023 and February 2023 without the special updates listed above, when a patient replies with the CONF keyword and the system determines that the patient cannot directly confirm an appointment because of your Cadence settings, communication template 60044-Appointment Confirmation - Reviewing Confirm is sent as a response.

> As released, the sample content for communication template 60044 indicates that someone at your organization is reviewing the patient's request to confirm their appointment. If your organization doesn't have a process where schedulers review these appointments, update the language in your overrides for these templates to instruct patients to call the clinic. Consider using the same content that you use in your overrides of communication template 60027-Appointment Confirmation - Unable to Confirm.
>
> Refer to the Enable Hello World Content for Appointment Confirmation Text Messages topic for information about customizing your content.

Cancel Behavior

Starting in August 2023, in May 2023 with special update E10504906, and in February 2023 with special update E10410713, automatic cancel behavior is determined by the MyChart settings described in the Let Patients Cancel Appointments Directly topic.

In May 2023 and February 2023 without the special updates listed above, automatic cancel behavior is determined by the Cadence settings described in the Automatically Confirm or Cancel Appointments Based on Patient Responses topic.

Prerequisite

For patients to be able to cancel an appointment in response to the confirmation text message, you need to specify a default cancellation reason. If you configured your automatic cancel behavior through MyChart, this is Default Reason for Cancellation (I WDF 876) in Scheduling Configuration. If you configured your automatic cancel behavior through Cadence, this is Cancel Reason (I SDF 8527) in Cadence System Definitions. For more information about cancellation reasons, refer to the Define Reasons for Patients to Cancel Appointments topic.

When a patient replies with the CANC keyword and the system determines that the patient cannot directly cancel an appointment because of your Cadence or MyChart settings, one of the following communication templates is sent as a response:

- 60039-Appointment Confirmation - Reviewing Cancel

- 60058-Appointment Confirmation - Reviewing Cancel Bundle (available starting in August 2023)

> As released, the sample content for communication templates 60039 and 60058 indicates that someone at your organization is reviewing the patient's request to cancel their appointment. If your organization doesn't have a process where schedulers review these appointments, update the language in your overrides for these templates to instruct patients to call the clinic. Consider using the same content that you use in your overrides of the following communication templates:
>
> - 60029-Appointment Confirmation - Unable to Cancel
> - 60056-Appointment Confirmation - Unable to Cancel Bundle (available starting in August 2023)
>
> Refer to the Enable Hello World Content for Appointment Confirmation Text Messages topic for information about customizing your content.

Starting in November 2023, in August 2023 with special update E10600250, in May 2023 with special update E10507168, and in February 2023 with special update E10412579, the sample content includes the option for patients to reschedule after responding to cancel an appointment. For information about which appointments can be rescheduled, refer to the Let Patients Reschedule Appointments Directly topic.

Starting in February 2025, in November 2024 with special update E11204017, in August 2024 with special update E11109141, in May 2024 with special update E10913489, and in February 2024 with special update E10814871, you can control whether patients are offered the reschedule behavior above. See the Allow Reschedule Prompt After Reply to Cancel Appointment for Two-Way Appointment Confirmation topic for more information.

Reschedule Behavior

In all versions, reschedule behavior is determined by the MyChart settings described in the Let Patients Reschedule Appointments Directly topic.

When a patient replies with the RESC keyword and the system determines that the patient cannot reschedule an appointment because of your Cadence or MyChart settings, one of the following communication templates is sent as a response:

- 60041-Appointment Confirmation - Unable to Reschedule
- 60073-Appointment Confirmation - Unable to Reschedule Bundle (available starting in August 2023)

Starting in November 2024, if communication template 60719-Appointment Confirmation - Single is approved and the patient replies to reschedule, a message containing up to three of the next available slots with the original appointment provider and a link MyChart would be sent. The patients can reply the keyword corresponding the slot to complete rescheduling in the text chain rather than in MyChart. This option is only available if the visit meets the following conditions:

- The visit is available to be rescheduled in MyChart.
- The visit doesn't involve a decision tree that requires the patient to answer questions.
- The appointment confirmation SMS message was sent for a single appointment. For example, if a patient has two visits on the same day and communication template for Appointment Confirmation - Multiple is approved, a confirmation bundle message is sent for both visits and the patient can't complete rescheduling for either of the appointments by responding to the SMS message.

Enable Hello World Content for Appointment Confirmation Text Messages

Starting in February 2023

There are several communication templates that you need to configure to allow patients to confirm, cancel, or reschedule appointments by text message. There are primary templates that are used to send the initial message to the patient, and there are additional templates that tied to the primary templates and are used to send messages back to the patient based on how they reply to the initial message.

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.

To send appointment confirmation messages, use the SMS content in communication workflow 60021-Appointment Confirmation. For more information, refer to the setup steps in the Manage Message Content topic.

Starting May 2024, if you use Hello World SMS gateway, appointment confirmation text messages can be sent to proxies if their communication preferences for appointment confirmation are turned on.

Security Considerations

Appointment confirmation text messages can include a link to MyChart so patients can see more information about their appointment. To receive the MyChart link, patients need to meet both of the following criteria:

- They have a MyChart patient access security class that includes the necessary security points outlined below. Depending on how your organization assigns patient access classes to patients, it's possible for a patient to have a patient access security class assigned even if they don't have a MyChart account yet. To find out how this works at your organization, work with your MyChart team and refer to the MyChart Patient Access Setup: Security Administration topic.
  - To receive a MyChart link for an individual appointment, patients need patient access security point 13-Appointment Details.
  - To receive a MyChart link for a list of appointments, patients need at least one of the following patient access security points:
    - 14-Upcoming Appt List
    - 69-Recent Appointments
    - 70-Recent Visits List
    - 81-Hospital Visits
- They have an active MyChart account or secure link authentication is enabled for the patient and there is enough information entered in the patient's demographics that they can pass the demographic authentication page in MyChart.

Review the Primary Communication Templates

The available primary communication templates are:

- 60183 - Appointment Confirmation - Multiple - SMS - Prompt. This template uses conditional content to show the number of visits, date, time, arrival time, location of the patient's appointment, and a link to MyChart depending on a patient’s situation. For more information about how conditional content works, refer to the Send Conditional Content with SmartMarkup topic

- 60179 - Appointment Confirmation - Single - SMS - Prompt. This template uses conditional content to show the date, time, arrival time, location of the patient's appointment, and a link to MyChart depending on a patient’s situation.

When messages are combined for multiple appointments, patients can confirm or cancel all of the appointments by replying CONF or CANC to the message. If they want to reschedule the appointments, they can reply RESC and they are sent a link to go to a page in MyChart where they can reschedule their appointment without needing to log in or create a MyChart account. In MyChart, they can reschedule the appointments individually.

Create Overrides and Approve the Communication Templates

After reviewing the released content with stakeholders at your organization and determining whether any changes are needed, it's time to create overrides of communication templates attached to communication workflow 60021-Appointment Confirmation, which automatically creates overrides for all of the reply communication templates. In the override records for communication templates 60183 and 60179, you can customize the content for the initial message and the replies if needed and then mark them as approved.

You need to have Hello World security as described in the Give Users Hello World Security topic to work with communication templates. If you don't have this security, work with your Hello World team to complete these steps for you.

1. Work with your Hello World team to ensure that Hello World's SMS gateway has been set up for your organization to send text messages to patients.
2. Review the released communication templates with stakeholders at your organization to determine whether you can use the sample content. Refer to the steps in Manage Message Content to create overrides of the communication templates attached to communication workflow 60021-Appointment Confirmation.
3. When you're ready to use the content, work with your Hello World team to approve the communication templates as described in the Approve Message Content topic so you can move them to your production environment with Data Courier.

Identify the Appointments to Confirm by Text Messages from Hello World

Starting in February 2023

To define the criteria for which appointments that you want patients to confirm, you need to create a report built from Reporting Workbench template 55066-ES Automated SMS Notices. Set up the report criteria to identify the appointments that your organization wants to confirm by text messages.

To give patients a consistent experience between MyChart and text messages, we recommend that you send text messages no earlier than your organization's window for confirming appointments in MyChart, which is described in the Let Patients Confirm That They Will Come to Appointments topic. For example, if the Confirmation window (days) (I WDF 882) field is set to 7, set the search range of your report to T+7 and don't skip weekends.

Refer to the Create a Report from a Report Template topic for detailed instructions about creating reports. In the next section, you create a batch job that automatically runs this report every day and sends messages to the patients on the report.

Starting in February 2025 and in November 2024 with special update E11204185, we recommend using Automated Appointment Confirmation as the sole method of communicating with patients regarding upcoming appointments. Confirmation can replace any quick reminders and other appointment reminders you currently send to patients. An in depth discussion of Epic's recommendation can be found in this webinar.

We recommend that you use four reports to identify appointments that need confirmation messages.

- 7 days before the appointment. This report should ignore the confirmation status so all patients receive a message as an appointment reminder. In the Foundation System, this is report 797897-ES Send Automated Appt Confirmation SMS-7 Days.
- 3 days before the appointment. This report looks to the confirmation status and sends a message to patients that have not confirmed their appointments. In the Foundation System, this is report 767434-ES Send Automated Appt Confirmation SMS-3 Days.
- 1 day before the appointment. This report should ignore the confirmation status so it can be used as an appointment reminder. In the Foundation System, this is report 7978981-ES Send Automated Appt Confirmation SMS - 1 Day.
- Same Day. This report captures any appointments that are scheduled on the same day as the visit. In the Foundation System, this is report 7978991-ES Send Automated Appt Confirmation SMS - Same Day Visit.

These reports can handle all appointment reminder SMS messaging due to the branching logic of the released Hello World Appointment Confirmation templates. If a patient has not confirmed their appointment, they can reply via text message to do so. If the patient has already confirmed, the message directs them to use eCheck-In. If the patient has completed eCheck-In and confirmed their appointment, the message is simply an appointment reminder.

Allow Reschedule Prompt After Patients Reply to Cancel Appointment for Two-Way Appointment Confirmation

Starting in February 2025

November 2024 by SU E11204017

August 2024 by SU E1109141

May 2024 by SU E10913489

February 2024 by SU E10814871

When a patient responds to cancel an appointment, you have the option to ask if they want to reschedule instead of canceling the appointment.

To offer patients the option to reschedule after responding to cancel an appointment, follow the path using the General Application Menu in Text, Hello World > Hello World Settings > System Definitions > enter Yes in the Offer Reschedule Before Cancel (I HDF 85060) field.

Automatically Search for Appointments and Send Text Messages to Patients

Starting in February 2023

Complete the following steps to set up the system to automatically run your report daily:

1. In Cadence Text, go to Utility Menu > Batch Jobs > Job Enter/Edit.
2. Create a batch job based on template 1000-RW Batch Template. In the Report mnemonic, enter the report you created from template 55066.
3. Create a batch and schedule a run for your batch job. Refer to the Batch Scheduler Setup and Support Guide for detailed instructions. Starting in August 2024, May 2024 with special update E10901086, February 2024 with special update E10806717, and November 2023 with special update E10710608, users are no longer required to have General listed in their Report Action Groups (I EMP 29045) to send appointment confirmation messages.

After the batch job runs your report, a Reporting Workbench action pack sends text messages to patients. Complete the following steps to add the action pack to Analytics System Settings:

1. In Hyperspace, open Analytics System Settings (search: Analytics System Settings).
2. Select the RW Actions tab.
3. Add a new row to the Actions on Reports table:
   - In the Report column, enter the report you created from template 55066.
   - In the Report Action column, enter 20003-ES Send Automated Appt Confirmation SMS.

The Foundation System has two reports mapped to report action 20003. One is 767434-ES Send Automated Appt Confirmation SMS - 3 Days, which sends reminders to patients three days before their appointment, except during weekends. The other is 797897-ES Send Automated Appt Confirmation SMS - 7 Days, which sends patients reminders seven days before their appointment, even on the weekend.

Starting in August 2024, May 2024 with special update E10901586, and February 2024 with special update E10807139, report action 20003 logs information about the number of appointments for which confirmation messages were sent, as well as any errors that occurred while running the batch process. To send an output file to the batch user with the logged information, you need to create a copy of the released report action and set the Send message? (I HGA 110) field to Always. Then, link that copy to your appointment confirmation report in Analytics System Settings. Refer to the Configure a Report Action topic for more information.

To exclude patients who were sent a text message from Hello World from your report, add property 85501-Was Message Sent for Appointment as criteria.

1. Open your report.
2. In the Find Criteria field, scroll to the bottom of the list and choose Add new criterion.
3. In the Add Criterion window, select Property.
4. In the Property field, enter 85501-Was Message Sent for Appointment.
5. Click Accept.
6. Enter the following values in the Was Message Sent for Appointment criterion:
   - Base Template: 60022-Appointment Confirmation - 2-Way
   - Relationship: 1-Equal to
   - Was Message Sent for Appointment: 2-No

Identify the Appointments to Confirm by Automated

Phone Call from a Third-Party Vendor

Starting in February 2023

Some of your patients might not be able to or might not want to receive text messages about their appointments. If you currently use Reporting Workbench and the Batch Scheduler as described in the Automated Appointment Calling topic so that a third-party vendor can call or text patients, you need to update your build to exclude patients who are being contacted by text message from Hello World. This ensures that patients who aren't receiving text messages from Hello World still receive a phone call to remind them of their appointment, and it ensures that patients who are receiving text messages from Hello World don't also receive a call or text from your third-party vendor.

Update any Reporting Workbench reports that are based on extract template 55054-ES Automatic Appointment Notices to exclude patients who were sent a text message from Hello World. We also recommend that you update your batch job for automated calling to run after your batch job for Hello World.

1. Open the settings for a report based on extract template 55054-ES Automatic Appointment Notices. The steps for doing this differ based on whether you're using the Classic client or the Hyperdrive client:
   - In the Classic client:
     i. In Hyperspace, open the Analytics Catalog (search: Analytics Catalog).
     ii. Search for extract template 55054.
     iii. Expand the list of reports and click Edit to open the settings for a report.
   - In the Hyperdrive client:
     i. In Hyperspace, open the Analytics Catalog (search: Analytics Catalog).
     ii. Search for extract template 55054.
     iii. Click the hammer icon to open the Report Settings window.
     iv. Expand the left pane and select a report.
2. In the Find Criteria field, scroll to the bottom of the list and choose Add new criterion.
3. In the Add Criterion window, select Property.
4. In the Property field, enter 85501-Was Message Sent for Appointment.
5. Click Accept.
6. Enter the following values in the Was Message Sent for Appointment criterion:
   - Base Template: 60022-Appointment Confirmation - Two-Way
   - Relationship: 1-Equal to
   - Was Message Sent for Appointment: 2-No
7. Repeat the previous step for these other base templates:
   - 60071-Appointment Confirmation - Two-Way Bundle Non MyChart
   - 60070-Appointment Confirmation - Two-Way No Link
   - 60047-Multiple Appointment Confirmation
8. Update your batch job for automated calling to run after your batch job for Hello World. Refer to the Send Data to a Third-Party Vendor topic for information about the batch job.

Automated Appointment Calling

Many organizations call patients to confirm appointments and notify patients of missed appointments. These calls can improve appointment attendance and patient engagement with your organization because you are in better and more frequent contact with patients. Cadence's automated appointment calling feature takes these workflows one step further by automating the calling process, helping you maintain the benefits of good patient communication while reducing staff workload. To use automated appointment calling, your organization partners with a third-party vendor that uses the appointment and patient information from Cadence to automatically call patients.

Cadence supports two types of automated appointment calling:

- Appointment confirmation calls are placed to patients with upcoming appointments so those patients can confirm or cancel their appointments.
- No-show notification calls are placed to patients who recently missed appointments to remind them to reschedule.

There are many benefits to implementing automated appointment calling, including:

- Improved patient attendance due to increased chance of reaching the patient. Better appointment attendance can help maintain profit and productivity because there are fewer no-show appointments or last-minute cancellations.
- More effective use of schedules because appointments are canceled and confirmed in a timely manner. Better schedule use can increase clinician happiness.
- More time for schedulers and front desk staff to work on other tasks, which can increase their productivity.
- Improved marketability of your organization by presenting a consistent and high-quality message to your patients.
- Better and more frequent calls, which can encourage patients to communicate more with your organization.

Additionally, you have the following configuration options when you use this feature:

- Your organization determines who to call and when to call, making it easy to customize the process to fit your organization's policies.
- You can prevent calls from being made for certain appointments, patients, or providers, allowing flexibility for clinicians or patients with certain needs. For example, a provider might prefer to call her own patients.
- You can use the Batch Scheduler utility to automatically process files on a regular basis, so you don't need to do extra work before starting the process.
- Schedulers, front desk staff, and other users can view the resulting call and confirmation information right in Hyperspace, which can help your organization keep track of how effective the appointment notifications are. For example, if a patient doesn't show for her appointment, a user can check the call result history to see whether the appointment notification went to voicemail.
- Automated appointment calling integrates with call tracking features, which allow your users to see and track calls made to patients from your third-party vendor in a report or worklist. For more information, refer to the Let Schedulers Track Calls to Patients About Appointments topic.

Considerations

Considerations

As you determine whether to implement automated appointment calling, take into account the following considerations.

Integration Considerations

You need to partner with a third-party vendor to use automated appointment calling. You must obtain a license directly from the vendor for their automated appointment calling functionality.

Epic has several standard records for automated appointment calling that were originally created with the vendors AudioCare and SmartTalk/Televox in mind. However, customers successfully work with other vendors due to the flexibility of the Reporting Workbench extract framework.

Plan Your Implementation

Implementation Impact	**Moderate** Implementing automated appointment calling requires a few days for decision making, validation, and workflow configuration, and a few days for build and testing. The feature also requires you to work with an outside calling vendor to test and use the feature, which can take up to six months.
Training Impact	**Minimal** The impact on users is minimal because the system does all the work. No special training is needed, but you should notify your staff of the change and emphasize some best practices to make the feature work at its best. These reminders can be done using email or a newsletter.

Automated appointment calling is owned by the Cadence project team, but they need input from the following people when implementing this feature:

- IT staff: Your IT staff set up and coordinate the file transfer process with your vendor.
- Epic representatives: Your Cadence technical services representative can help you work with your vendor, make suggestions for settings, and troubleshoot issues with the transfer of information.
- Department managers or representatives: Department managers or staff members they designate can help you find and address any department-specific needs for automated appointment calling. You can also use their customer-service experience to help you define who to call and when to call. These staff members might also help create or review any phone scripts for your vendor.

Use the following estimates when planning a timeline for your project:

- A few hours to decide how automated appointment calling should be used and to validate workflows.
- A few hours to configure the records needed to make the automated calling feature work.
- A few hours to test automated calling workflows and records.
- Less than one hour to train schedulers and front desk staff on how to find and use the results of the automated appointment calling.

Testing

To test automated appointment calling, schedule appointments in several departments. Then, verify that the

Considerations

following occur successfully:

- Scheduled appointments and no-show appointments are correctly compiled in the files for your vendor.
- Appointments for blocked departments, patients, and providers are not compiled in the file for your vendor.
- Appointments which are outside your begin and end days are not compiled in the file for your vendor.
- The FTP process for your vendor works as expected.

If you want to test the script from the vendor, make sure to use an office number or project team member's cell phone number as the test patient's phone number.

You might want to add steps or scenarios for automated appointment calling to your workflow testing documents so you can test them for future upgrades.

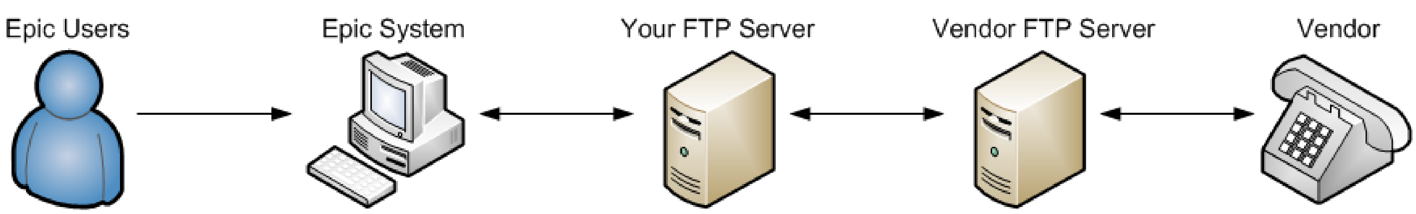
Training

Emphasize the following best practices to schedulers and front desk staff:

- General information about automated appointment calling and who to call if patients report problems. This information allows staff to accurately answer patient questions.
- How to look up call and confirmation information within the system so that they can reference this information when talking with patients about appointments.
- The importance of collecting accurate phone numbers when verifying patient demographics, to ensure that patients receive automated calls.
- How to follow up on cancel requests or cancelled appointments to ensure the patient receives the necessary care.

Understand the Automated Appointment Calling Process

Automated appointment calling is done automatically and behind the scenes. Information flows back and forth between your system and your vendor, as shown in the image below.



The automated appointment calling process works like this:

1. The Batch Scheduler creates two files and places them on a server at your organization.
   - A .txt file contains appointment and patient information extracted from a Reporting Workbench report.
   - A .sem file contains information that notifies a script that there's a new .txt file available.
2. Work with your Cadence and Server Systems representatives to create a script that copies the .txt file from your server to the vendor's server using a file transfer protocol (FTP) process. The script should also delete

the .sem file.

3. Your vendor downloads the .txt file and uses the information in it to call patients.
4. Your vendor creates a new .txt file that contains information about the calls and actions taken by patients. The vendor places the .txt file on their server, and a scheduled task copies the file to your server using the FTP process.
5. The script detects the new file and creates a .sem file to go with it so that the Batch Scheduler knows there is a new .txt file available from the vendor.
6. The Batch Scheduler retrieves the new .txt file from your server and pulls it into your system, adding appointment confirmations, cancellations, and call information to patient records in Epic.

Automatically Call Patients to Notify Them of Future or Missed Appointments

To use automated appointment calling, you must:

- Define the information that you send to your third-party vendor with a Reporting Workbench extract.
- Define the patients and appointments you send to your third-party vendor with a Reporting Workbench report.
- Send appointment information to your third-party vendor.
- Process patient responses from your third-party vendor.

You need to set up each type of appointment calling (appointment confirmation or no-show notification) individually, but many settings are similar. The only differences between the two types are the call's purpose and the patient's action. With appointment confirmation, patients can confirm or cancel appointments.

The Reporting Workbench extract framework builds your extract file based on the extract record and the report settings. The system takes patient preferences, preferred and temporary phone numbers, and your settings into consideration when building the file. This ensures that the file contains only patients who should be called and that the appropriate phone number is used.

You can also choose to create call records for your automated calling when you receive the file from your vendor, so you have a complete record of all calls for the appointment in your system. Refer to the Let Schedulers Track Calls to Patients About Appointments topic for more information about call tracking.

You can turn off automated appointment calling for certain departments, visit types, appointments, or providers. You might do this for patients who don't want automated calls, departments that prefer to call patients themselves, or providers who have their own calling policies.

Considerations

Take into account the considerations below before you begin setting up automated appointment calling.

Working with a Third-Party Vendor

This feature was designed with AudioCare and SmartTalk/Televox in mind, but it can work with other vendors. Check with vendors to make sure they can accommodate both types of calling. Some might call patients only for appointment confirmation.

Create a script for your vendor to use when calling your patients. A script allows you to tailor the message that patients receive when called, so you can emphasize certain aspects of your organization or scheduling

Considerations

policies. Talk with your vendor about what they say to patients when they are called and how you can customize that message. When you create the script, have several people and roles in your organization review it to make sure it conveys the correct message.

Reporting Workbench Extract

Work with your vendor when creating the extract record, to make sure they get the information they need to call patients and return the information to you. A typical extract for automated calling includes the following information:

- Department ID
- Department address
- Provider ID
- Department phone number
- Appointment date and time
- Appointment visit type
- Patient name
- Patient's preferred phone number

Work with your departments and providers to define your report settings.

- Some departments might prefer that staff call patients rather than use automated calling, or a department might want to adjust when calls are made. After you have identified these departments, determine the department-specific needs and configure the report settings for these departments. You can limit your maintenance and setup time by configuring only departments with exceptions to the default settings, and letting other departments use the system-level settings.
- Some clinicians might not want to use automated calling for their appointments. After you identify these providers, you have two options to block calling for their appointments. Refer to the Prevent the System from Automatically Calling an Individual Provider's Patients topic for more information on these options.
  - You can prevent automated appointment calling for any appointments with a provider by turning off the feature in the provider record. For example, you can turn off automated calling for resources or for providers who prefer to have staff call patients.
  - You can prevent automated appointment calling for appointments with a provider in a certain department by excluding that provider in the report settings.

Refer to the Define the Information You Send with a Reporting Workbench Extract topic for instructions on setting up the Reporting Workbench extract.

Define the Information You Send with a Reporting Workbench Extract

The first step to notifying patients of future or missed appointments is to define the information you send with a Reporting Workbench extract. If standard extract 55054-ES Automatic Appointment Notices includes the columns you need for your organization, you do not need to create a custom copy and you can skip to the next section, Define the Patients and Appointments You Include with Reporting Workbench Report Criteria.

1. In Hyperspace, open the Extract Format Editor (search: Extract Format Editor).

2. Select Create new extract format.
3. Enter a name and ID for your extract.
4. In the Copy from field, enter 55054-ES Automatic Appointment Notices.
5. Click Accept.
6. On the Format tab, add or remove columns to determine what information to include in the extract. For example, in August 2023 and earlier, if you don't want to create call records for automated calls, remove report column 1721-Create Call Record ID from the format.
7. Use the Extract Viewer to review your extract and make sure the information is correct.
8. Click Save and Exit.

For additional information about creating extract records, refer to the Create an Extract Format topic.

Define the Patients and Appointments You Include with Reporting Workbench Report Criteria

The next step towards automatically calling patients about their appointments is to define the patients and appointments you include with Reporting Workbench report criteria. If you want to use both appointment confirmation and no show calling, you need to create two separate reports.

1. In Hyperspace, follow this path: Epic button > Reports > Analytics Catalog.
2. Locate template 55054-ES Automatic Notices and click New report to begin creating a report from this template.
3. On the Criteria tab, select all criteria you need to determine which records appear in your extract. For example, you can select the departments, types of appointments, and types of patients to exclude or include in your calls. If you want to avoid making calls on weekends, make sure to enter Yes in the Skip Weekends field as part of the Search Range criteria.
    - Search range. Determine the range of appointments to include in the extract. For example, enter T+3 and T+7 to include appointments scheduled between the next 3 to 7 days. If you want to avoid making auto-calls on non-business days, make sure to enter Yes in the Skip Weekends field.
    - Phone number exists. Determine whether appointments for patients without a phone number on file are included in the extract. Clear the selection to include these appointments.
    - Is allowed for reminder calls. Determine whether appointments for which reminder calls are blocked for the appointment or the patient are included in the extract. Clear the selection to include these appointments.
    - Department specialty. Include appointments in departments with the specified specialties.
    - Center. Include appointments in departments in the specified centers.
    - Department and provider. Include appointments scheduled in the specified departments with the specified providers or provider types.
    - Use AAC configuration. Determine whether the extract respects the automatic appointment confirmation (AAC) settings that are defined at the department and Cadence System Definitions levels.
    - Use No Show configuration. Determine whether the extract respects the automatic no-show calling settings that are defined at the department and Cadence System Definitions levels.
    - Does not need rescheduling. Exclude appointments that need to be rescheduled, such as appointments that are scheduled in a slot that’s since been marked unavailable. Appointments that

appear on the Follow-up work list are excluded from the extract when you select this criterion.

- Inpatient appointment. Determine whether inpatient appointments are included in or excluded from the extract.
- Phone area code. Determine whether appointments for patients with specified area codes are included in or excluded from the extract.
- Department specialty to exclude. Exclude appointments scheduled in departments with the specified specialties.
- Center to exclude. Exclude appointments scheduled in departments in the specified centers.
- Department and provider to exclude. Exclude appointments scheduled in the specified departments with the specified providers or provider types
- Status. Include only appointments with the specified appointment statuses.
- Visit type. Include only appointments scheduled with the specified visit types.
- Reason for cancellation. Include only canceled appointments with the specified cancellation reasons.
- Appointment made date. Include only appointments that were scheduled on the specified date or within a specified date range.
- Confirmation status. Include only appointments with the specified confirmation statuses. To include appointments that have not been confirmed, enter Not Confirmed in this criterion.
- Confirmation date. Include only appointments that were confirmed on a specified date or within a specified date range.
- Appointment changed. Include either appointments that have been changed or appointments that have not been changed.
- Appointment change search group. Include changed appointments that were changed within a certain date range for a specified reason.
- Same-day cancel. Include appointments that were canceled on the same day they were scheduled for.
- Late cancel. Include appointments that were canceled within the specified late cancel threshold.
- Appointment cancel date. Include canceled appointments that were canceled on a specified date or within a specified date range.
- Made short-notice. Include appointments that were scheduled within the specified short notice threshold.
- Patient status. Include or exclude appointments for patients with a particular status. For example, you might include appointments for patients who are not deceased.
- No-show probability. Include appointments for patients with a no-show probability within the defined threshold. You must be using the Risk of Patient No-Show cognitive computing model for the system to calculate a patient's no-show probability. For additional information, refer to the Risk of Patient No-Show Setup and Support Guide.
- Patient communication preferences. Include appointments for patients with the specified communication preferences for the specified communication concepts. Select concept 28504-Cadence Automated Calling System Preference for automated calling.
  - When you select a method of Text Message, the Respect "Send Text Messages?" Flag setting determines whether the system respects the Send Text Messages? setting in the

Communication Preferences activity. The default behavior is to not respect this setting. The Respect "Send Text Messages?" Flag setting does not apply to methods other than Text Message.

  - Communication Reason. Defines the communication reason added to the Communication Tracking (CAL) record when the extract runs with column 1721-Create Call Record ID added. Available starting in August 2025, in May 2025 with special update E11404132, in February 2025 with special update E11309091, and in November 2024 with special update E11213034.

4. On the Extract tab, enter standard extract 55054-ES Automatic Appointment Notices or the custom extract you created in the previous task and the file path where the system should save the file.
5. On the General tab, configure the report's name, description, and other settings as needed.
6. Click Save.

For additional information about creating extract reports, refer to the Create an Extract Report topic.

To see how we configured these reports in the Foundation System, log in to the Foundation Hosted environment as your organization's Cadence administrator (ESADM) and search for the following reports in the Reporting Workbench Library:

- 10167-ES Automatic Appt Confirmation
- 335512-ES Automatic Appt Confirmation Second Attempt. This report finds patients who have not confirmed their appointments after the first call attempt and who have a high probability of being a no-show. You must be using the Risk of Patient No-Show cognitive computing model to use this report. For additional information, refer to the Risk of Patient No-Show Setup and Support Guide.

Send Data to a Third-Party Vendor

Batch jobs using template 71000-RW Extract Batch Template format extracts for your third-party vendor according to system, department, or report settings, and create a flat file that can be used by third-party vendors.

You need to create and schedule a batch process that uses this template to format these extracts. Refer to the Batch Scheduler Setup: Essentials topic for information about creating batch jobs.

Only appointments in departments in which the user you enter in the User mnemonic for the batch job has Cadence security point Reports (I ECL 5115) appear in the results of reports based on Reporting Workbench template 55054-ES Automatic Notices. Appointments in confidential departments do not appear in the extract unless the user also has Cadence security point Confidential dept override (I ECL 5130) in the department.

To help keep track of when you extract appointments to your vendor, the system can create communication (CAL) records that are linked to each appointment that you extract. Starting in November 2023, you need to add action pack 29005-ES Create CAL Record to your report in Analytics System Settings in order to create these records. Starting in August 2024 and in May 2024 with SU E10901359, February 2024 with SU E10806931, and November 2023 with SU 10710771, you don't need to complete these steps because communication records are automatically generated by extracts.

1. In Hyperspace, access Analytics System Settings (search: Analytics System Settings).
2. Select the RW Actions tab.
3. Add a row to the Actions on Reports table:
   a. In the Report (I EAF 49540) column, enter the Reporting Workbench extract report you created from template 55054 in the Report column.
   b. In the Report Action (I EAF 49550) column, enter action pack 29005-ES Create CAL Record.

Also make sure that column 1721-Create Call Record ID is in your extract report.

1. In Hyperspace, open the Extract Format Editor (search: Extract Format Editor).
2. Open template 55054-ES Automatic Appointment Notices.
3. In Format grid, make sure there is a row for column 1721-Create Call Record ID.

Process Data from a Third-Party Vendor

Batch jobs using template 93-Automatic Notices Appointment Import take information from your third-party vendor, store it, and automatically confirm or cancel the appointments as appropriate.

You need to create and schedule a batch process that uses this template to format these extracts. Refer to the Batch Scheduler Setup: Essentials topic in your online documentation for additional information on creating batch jobs.

Starting in February 2021, the PatientAutomatedAppointmentConfirmationResponse web service can also be used to import patient responses from a vendor.

Refer to the Automatically Confirm or Cancel Appointments Based on Patient Responses topic to make sure that your system is configured to automatically confirm or cancel appointments.

Prevent the System from Automatically Calling an Individual Provider's Patients

In some situations, you might want to prevent a certain provider's patients from receiving automatic phone calls. For example, some providers might prefer that their staff notify the patient personally. Other providers might see their patients so often that those patients do not need to be notified of their appointments.

In situations like this, you can turn off automatic calling for an individual provider's appointments.

1. In Cadence Text, go to Cadence Management > Provider and open the provider record you want to edit.
2. On the Encounter Forms Definitions screen, go to the Automated Calling section.
   - In the Allow Auto Appt Confirm (I SER 550) field, enter No.
   - In the Allow Auto No Show Call (I SER 552) field, enter No.

Translate Appointment Information for Automated Calling Text Messages

Starting in Epic 2018

Epic 2017 by SU E8306201

Epic 2015 by SU E8229893

If you use automated calling extracts to send appointment-related SMS messages to patients whose primary language is not English, you can include translated data in the extract that you send to your third-party vendor, removing the need for third-party translation services for the messages. For example, you might send patients a reminder text containing the patient name, department specialty, and appointment time. Translating this data yourself saves money and helps ensure that the translations meet your expectations.

First, you need to translate values, such as your department specialties, into the different language in the

Translation Editor. Alternatively, you can find single-response category items that contain values in the different language. After you translate or find the necessary items, you need to specify each item in a copy of extract format extension 44846-ES Extract Translate Item (Template). Then, add the copies of the extension to the extract that you use for extracting appointment-related data from the system for use in SMS messages. When the copies of the extension are associated with a column in the extract, the extensions enter the translated value in the column rather than the English value, ensuring that the translated value ultimately appears in the SMS message. Additionally, because these translated values are encoded in the UTF-8 format, you need to use another new extract format extension with all non-translated columns in the extract. This additional extension ensures that non-translated values are also in the UTF-8 format.

Translate Values for Items

> You can import translations for certain items. Refer to the Import Translations for Certain MyChart, MyChart Bedside, and AVS Items topic for additional information.

Translate values for items in the Translation Editor if those items don't already use non-English values. Note that you need Shared security point 9000-Bilingual Translation to access the Translation Editor:

1. In Hyperspace, open the Translation Editor (search: Translation Editor) and select a target locale that uses the language you're translating values into.
2. Find the item you want to translate. For example, if you include the department specialty in your SMS communications, find the Specialty (I DEP 110) item.
3. Select a value for the item and enter your translation of the value in the Custom translation field.
4. Repeat steps 2 and 3 for additional items and values.

Create Copies of Extension 44846 for Each Translated Item

Create extract format extensions for each item you translated and for any item that already uses non-English values:

1. In Chronicles, access the Extension (LPP) master file and create a copy of extension 44846-ES Extract Translate Item (Template).
2. Configure the following parameters:
   - INI. Enter the master file of the item.
   - Lookup Item. Enter the item.
   - Secondary Locale. Enter the locale into which the item is being translated.
   - Show Primary Language. Enter Yes to show the item's value in the primary language if a translated value doesn't exist. If this parameter is set to No or left blank, the item returns a blank value if no translated value exists.
3. Repeat these steps for each item you translated.

Add Translated Items to Your Extract

1. In Hyperspace, access the Extract Format Editor (search: Extract Format Editor) and open an existing extract or create a copy of extract format 55054-ES Automatic Appointment Notices.
2. On the Format tab, add columns that show the record ID associated with the items you translated. For example, if you translated the department specialty, add column 1744-Appt Department ID. The extension uses the department ID to find the appropriate translated department specialty value. Note that if you

translated the patient name to a different language, you need to use column 19001-Patient Internal ID.

3. Associate these columns with the extensions you created by entering the extensions in the Format Ext fields.
4. For every column in the extract that doesn't use an extension you created, enter extension 44847-ES Extract Encode to UTF8 in the Format Ext field.
5. Use the Extract Viewer to review your extract and make sure the information is correct.
6. Click Save and Exit.

Send Translated Data to Your Vendor

If you haven't already done so, follow the steps in the Automatically Call Patients to Notify Them of Future or Missed Appointments topic to create a Reporting Workbench report for your extract and send the data to your third-party vendor.

Quick Reminders and Updates

You can send emails and text messages with quick reminders and updates to patients.

- Quick reminders: The system automatically sends quick reminders to patients for upcoming appointments based on the patient's communication preference for communication concept 28502-Day-of Appointment Reminders Preference, called Cadence Quick Reminders Preference in May 2024 and earlier versions.
- Updates: Schedulers create and send updates to patients as needed. For example, you could notify your afternoon patients that the clinic is running 30 minutes late or that you are closing because of weather. Updates are sent to patients based on their communication preference for communication concept 28505-Cadence Updates Preference.

Some benefits of using quick reminders and updates include the following:

- Quick reminders help patients remember to attend their appointments. This might reduce your no-show rates.
- Quick reminders are sent close to appointment times and can help patients attend their appointments on time and help your departments run on time.
- Messages are sent based on patient preferences. Patients can choose which messages they receive and how they get messages. Staff can set this information in Patient Preferences or patients can do it themselves in MyChart.
- Updates remind patients of short-notice cancellations or delays, which can increase patient satisfaction with your organization.
- Emails and text messages use fewer resources and less staff time than sending letters.
- Simple build means your project teams can set up and maintain the feature relatively easily.
- Messages are integrated into existing workflows and reports, such as the Department Appointments report.

Note, however, that:

- Starting in February 2025, you can create communication templates to allow users to select prewritten messages to send to patients. In prior versions, you can't define update messages ahead of time. Users must create the message at the time of sending. You might want to create a template outside of Epic so users have something to reference when they create free text update messages.
- You can't receive information back from quick reminder and update text messages like you can with automated appointment calls. For example, a patient can't confirm their appointment through quick reminder and update text messages.
- Enabling quick reminders for appointments does not generate a reminder for appointments that are already scheduled.

To send quick reminders and updates to patients, you must have the Cadence Appointment Notification license, which is included in the standard Cadence license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Planning Your Quick Reminders and Updates Implementation

This section outlines the considerations and decisions for implementing quick reminders and updates.

Seeing This Feature

The Foundation System is set up to send updates and quick reminders by email only.

The Foundation System uses SmartText 11700013-ES Quick Reminder Subject for the email subject line, which simply says "Appointment Reminder." The Foundation System uses SmartText 11700014-ES Quick Reminder Body for the email message. This SmartText uses dynamic SmartLinks to show the following message in the email: <Patient name> has an upcoming healthcare appointment on <appointment date> at <appointment time>. The total amount of payment due at the appointment time is $<self pay total>. Reference Estimate <appointment estimate> for more information.

The following Foundation System Cadence security classes have access to send updates from reports and work lists:

- ES Supervisor/Superuser
- ES Clinic Manager
- ES Project Team/Administrator

People and Timelines

Your Cadence team should take the lead on this feature. You might need to involve your MyChart team if you are implementing text messages.

If you are using text messaging, you'll also need to work closely with your Epic representatives to make sure the technical pieces of this feature work smoothly.

The following table shows Epic's estimates of the time it might take to implement real-time scheduling updates and reminders. Actual implementation time varies based not only on the considerations below, but also on factors such as whether you're implementing additional functionality at the same time, whether you're also completing an upgrade, and the experience and availability of your project team members.

Person: Task	Time Estimate
Administrators, project teams, and users: Make decisions about updates and reminders.	A few days to a week for all decisions If you are implementing text messages with a third-party SMS vendor, you might need to factor in more time for choosing and working with your vendor.
Project teams: Build message records.	Less than an hour per message
Project teams: Configure facility and service area settings.	A few minutes per record If you are implementing text messages with a third-party SMS vendor, factor in more time for configuration and working with your vendor.
Project teams: Configure security classifications.	A few minutes per security class
Project teams: Configure reports to show message information.	A few minutes per report
Project and testing teams: Test your build.	A few days to a week If you are implementing text messages with a third-party SMS vendor, you might need to add a few more days of testing time.
Trainers: Prepare and train users.	A few hours for each group of affected users

Decisions

Your project team needs to make several decisions before setting up this feature, including which types of messages to send, whether to send messages through email or text messages, and how to use updates. After the team makes these decisions, they need to set several system and service area settings and create several SmartText records for your messages. We estimate it will take your project team about a month to complete this project.

If your organization chooses to send updates and quick reminders in text messages, you can use Hello World as your SMS gateway starting in February 2023. Otherwise, you need a third-party gateway vendor to send the text messages. Using a third-party vendor might increase the implementation time and effort for this feature.

Choose How to Send Updates and Reminders

The first decision you need to make is whether to send updates and quick reminders in email messages or both email and text messages.

When you've decided how to send your messages, you set this information in your facility record. This facility-level information determines what options users can select when setting up messages for patients in the patient's preferences.

- If you want to send emails, you also need to enter an email address from which you send patient emails.
- If you want to use a third-party vendor to send text messages, you also need to complete several settings

so that your vendor can send the text message to the patient.

Choose Whether You Send Only Updates or Both Reminders and Updates

The next decision you need to make is what notification type to send. You have the flexibility to choose between sending both notification types or sending only updates.

Remember that you use these two types of messages in different situations:

- Quick reminders are sent automatically a certain amount of time before an appointment, to remind the patient of their appointment. For example, the system can send a quick reminder two hours before a patient's appointment.
- Updates are sent out manually as needed, to let the patient know important information regarding their appointments. For example, managers can send updates to patients to let the patients know the clinic is running 30 minutes behind.

When you've decided which messages to send, you set this information in your facility record. In order to send only quick reminders, set your allowed message types to both updates and quick reminders and then follow the instructions in the Hide a Communication Concept topic to hide communication concept 28505-Cadence Updates Preference.

Determine When to Send Updates

If you plan to send updates to patients, set some guidelines on when to send updates so you aren't overwhelming patients with messages. You might send updates for only certain situations, such as closing a clinic due to weather or when the clinic is running behind 30 minutes or more. Communicate these guidelines to front desk users or managers who can send updates.

Create Message Text for Your Updates

Starting in February 2025

You can allow users to select from approved, prewritten messages when they send a patient an SMS message in the Send Update activity alongside or instead of allowing them to send free-text messages. Using Hello World communication templates you can create preapproved content that can be selected in the Send Update activity. This content can be formatted and customized with SmartLinks to pull in patient and appointment related information. This allows users to send personalized messages to multiple patients at once. As well, it is now possible to restrict the use of free text messages and require users to select from only approved, prewritten messages. Refer to the Allow Users to Send Prewritten, Free-Text, or Both Types of Messages in Send Updates topic for more information.

For versions prior to February 2025, you can't create messages ahead of time. Instead, the user creates an update message when they send it. To make sure you send consistent messages to patients and to make it easier for users to send updates, you might want to create a message template outside of Epic so users have something to reference when they create update messages.

Testing and Training

Testing

After you complete your build, verify that your update and quick reminder workflows work as expected. You should adjust your testing based on your decisions for the feature. Consider testing the following workflows:

- Set a patient's preferences in both Hyperspace and MyChart and verify that they receive messages based on their preferences.
- If you are sending quick reminders in emails, create appointments for patients and verify that they receive

the reminder messages for their appointments.

- If you used a rule to exclude some patients from quick reminders, create appointments for patients who qualify for the rule and verify that they don't receive the reminder messages for their appointments.
- If you are sending quick reminders in text messages, create appointments for patients and verify that they receive the reminder messages for their appointments.
- If you are sending updates in emails, send an update to a patient and verify that they receive the message. Also make sure the report columns show the outcome of the sent update.
- If you are sending updates in text messages, send an update to a patient and verify that they receive the update. Also make sure the report columns show the outcome of the sent update.

Training

This feature requires some training for users based on how they interact with real-time scheduling updates and reminders.

- Trainers, managers, or project team members need to tell schedulers and front desk users which message options your organization uses so that staff can talk about these options with patients. These staff members also need to know how to sign up patients for updates and quick reminders.
- Front desk users and managers who send updates to patients need some additional training on when and how to send updates.

Both of these trainings could be done at a department meeting or with other announcements.

To be successful using this new feature, users must:

- Know how to sign up patients for the messages and be able to explain these messages to patients as needed.
- Understand how to look up whether reminders and updates were sent so that they can answer patient questions regarding the messages.
- Know when and how to send updates to patients.

Also, emphasize the importance of collecting accurate phone numbers and emails when verifying patient demographics. Patient phone numbers and emails are used to send messages, so if this information is accurate, reminders have a better chance of reaching the patient.

During training, be sure to follow the recommended curriculum:

1. Make users aware of the change. If you communicate using email, ensure that users read and understand your email. It might also be helpful to ask your super users to help publicize and personally announce the upcoming change to real-time scheduler reminders and updates. Lastly, be sure to use this opportunity to gain end-user buy-in by focusing on what the new feature can do for them: updates and quick reminders can help patients attend appointments on time and increase their happiness with our organization!
2. Prepare training materials.
3. Train users. This training doesn't need its own session and can be done during other trainings or department meetings.
4. Provide post-training resources. Consider posting tip sheets to a community bulletin board or space, and provide contact information for a person who can answer end-user questions that arise post-training. Follow up with users who had initial problems understanding the new workflow to ensure they have received the help they need.

Update existing training documentation with real-time scheduling updates and reminders training. If you are unable to do so, ensure that new users receive training on the new feature with the above documents and curriculum.

Create a Generic Queue to Hold Quick Reminders That Need to Be Sent

After a scheduler makes or changes an appointment for a patient, the system determines whether the patient should receive a quick reminder for the appointment and adds the quick reminder to a generic queue. The quick reminder stays on the queue until it is time to send it. You need to set up the queue to hold quick reminders that need to be sent.

Considerations
If you already use appointment request workqueues, you don't need to do these steps.

Create the Queue

1. From the Epic Application Access menu, select Generic Queue.
2. Select Manage Queue Definitions > Enter/Edit Queue Definitions and enter SCHQ to create a queue definition.
3. On the Definition Information screen, enter the following information:
    - Template: 1001-ES FIFO QUEUE
    - Descriptor: SCHQ
4. In February 2020 and earlier, go to the Start/Stop Information screen. In the Machine List field, enter the server that corresponds to the environment in which you are working. Press SHIFT+F5 to view all available options. If you have any doubt, contact your Epic representative and mention SLG 1428745.

Activate the Queue

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

Start the Queue

1. From the Generic Queuing menu, select Status of All Queues.
2. On the Status of All Queues screen, scroll until you find the SCHQ entry.
3. Highlight the queue and press S to start the queue.
4. To confirm that the queue is running, make sure the Running Daemons column equals 1 for each queue.

Allow Users to Send Updates

In order for schedulers or front desk staff to send updates, they need proper Cadence security. When they have the security, they see the Send Updates button on the Department Appointments report, the Follow-up work list, and the Reschedule work list. They click this button to create an update message and send it to patients.

Starting in February 2025, you can allow users to select from approved, prewritten messages when they send a patient an SMS message in the Send Update activity alongside or instead of allowing them to send free-text messages. You can also restrict the use of free-text messages in the Send Update activity and require that users select from only approved, prewritten messages. If you use prewritten messages, Epic recommends that you allow all users to work with the Send Updates activity because content is preapproved and consistent for patients. Refer to the Allow Users to Send Prewritten, Free-Text, or Both Types of Messages in Send Updates topic for more information.

In November 2024 and earlier, Epic recommends restricting updates to a few users such as supervisors, managers, or super users since you cannot create messages ahead of time. These users are often the ones making decisions about when to send updates, so restricting this feature to these users can reduce updates sent in error.

After you decide who can send updates, you need to adjust their Cadence security classes to include the Send Patient Updates security point.

1. In Hyperspace, open the Cadence security class for users who will send updates (search: Cadence Security).
2. On the Reports/System Admin form, in the Send Patient Updates (I ECL 5182) field, enter Yes.

Allow Users to Send Prewritten, Free-Text, or Both Types of Messages in Send Updates

Starting in February 2025

You have three options for how to implement the Send Updates activity. You can allow users to send only free-text messages, send only prewritten messages, or send both types of messages. All of these options assume that you use the Hello World content management framework and that some users have access to the Send Update activity.

Allow Users to Send Only Free-Text Messages

Review released communication template 60026-Appointment Update Free Text with your organization's legal and compliance teams to determine whether you can use the sample content as is. Template 60026 contains only SmartLink 60034-Scheduling Free Text Message (mnemonic: .SCHEDFREETEXTMESSAGE) that pulls in the free-text message. Create an override communication template and add any content that should be included in every free-text message alongside SmartLink 60034. Do not remove the SmartLink.

Allow Users to Send Only Prewritten Messages

To allow users to send only prewritten messages to patients, make sure you don't have an override of communication template 60026-Appointment Update Free Text marked Ready to Send. If you do, set the override communication template's status to Do Not Send, as described in the Approve Message Content topic. Then, determine whether you want to use released base communication template 60166-Running Behind, create custom communication topics, or do both.

To create custom communication topics, refer to the Create Communication Topics topic for instructions and create communication topics in communication workflow 60025-Appointment Update. When planning custom communication topics, consider what types of messages would be useful to send to patients regarding upcoming appointments. If you previously allowed users to send free-text messages in the Send Updates activity, review common messages schedulers are sending to patients to determine which ones should be made into communication topics.

Allow Users to Send Both Free-Text and Prewritten Messages

To allow users to send free-text and prewritten messages to patients, first confirm communication template 60026-Appointment Update Free Text is approved, and, if it isn't, follow the steps in the Approve Message

Content topic to approve it. Then determine whether you want to use released communication template 60166-Running Behind, create custom communication topics, or do both.

Approve Content

After you determine what free-text or prewritten messages to use, review all communication templates with your organization's legal and compliance teams. Refer to the Manage Message Content topic for instructions on creating or customizing your override communication topics. Then, work with your Hello World team to approve your communication templates as described in the Approve Message Content topic.

Considerations

- When creating content overrides for any Send Update related content, a facility-level override is required for the content to be selectable in the Send Update activity. Overrides at lower levels, like service area or department, are possible, but we recommend only using facility-level overrides to ensure that consistent and predictable messages are sent to patients.
- Each communication topic you create for prewritten messages can use only a single base template. If you create multiple base templates for workflow 60025-Appointment Update, only the first communication template you create is used.

Send Quick Reminders and Updates by Email

You can send quick reminders and updates in emails. The quick reminder emails are sent based on the patient's preference. If the patient doesn't set a preference, the system sends the reminder two hours before the patient's appointment. Updates are sent whenever a user creates a message.

In addition to enabling emails for quick reminders and updates, you need to define the content of your emails in SmartText records that you add to your facility or service area record. You can specify SmartText records for each of the following:

- The subject for update emails.
- The subject for quick reminder emails.
- The body for quick reminder emails.

Prerequisites

Work with your server team or your database administrator to make sure your environment is setup to send emails and that you have the correct email settings for your servers. If you send other emails from Hyperspace, this configuration is mostly likely done already.

Even if this configuration is already done, you might need to work with your server team or your database administrator to know which email to use as the sending email for your messages.

Allow the System to Send Emails for Quick Reminders and Updates

In your facility record, you need to allow the system to send quick reminders and updates and specify that they should be sent by email. You also need to specify the email address that appears as the address the email was sent from. You might need to work with your database administrator to determine what the email address should be.

1. In Cadence Text, follow the path Cadence Management > Service Area and enter 1 to open the service area record for your facility.
2. Go to the Patient Appointment Updates and Quick Reminders screen.
3. Enter a value in the Allowed Message Types (I EAF 15300) field.
   - 1-Updates Only. Send only update messages.
   - 2-Updates and Quick Reminders. Send updates and quick reminders.
   - 3-No Updates or Reminders. Don't send updates or quick reminders. This is the default value.
4. Enter a value in the Delivery Types Allowed (I EAF 15302) field.
   - 1-E-mails Only. Send updates and quick reminders only by email.
   - 2-Both Text Messages and E-mails. Send updates and quick reminders by email and text message.
5. In the E-mail Source Address (I EAF 15305) field, enter the email address that appears as the address the email was sent from.

Create Content for Quick Reminder and Update Emails

You need to create three SmartText records that contain the content for your quick reminder and update emails and specify those SmartText records in your facility record. Create one SmartText record for each of the following:

- The subject for update emails.
- The subject for quick reminder emails.
- The body for quick reminder emails.

If needed, you can specify different SmartText records to use at the service area level. Refer to the Change Delivery Types for Quick Reminders and Updates for a Service Area topic for additional information.

Considerations

- Emails are not a secure form of communication. Be careful not to include protected health information (PHI) in your SmartText records. We recommend you use a very simple message such as "You have an upcoming healthcare appointment on 11/11/2021 at 2:30 P.M."
- Quick reminders are sent to patients and proxies based on their individual communication preferences, so ensure that your SmartText is appropriate for both audiences.
- Quick reminders are considered duplicate if a patient has received another quick reminder from the same center on the same day. For example, if a patient has two appointments from the same center in one day and receives a quick reminder for the first appointment, any quick reminder for the second appointment is considered duplicate.

1. In Hyperspace, open the ES Letter Template Editor (search: Appointment Letters).
2. Create a new SmartText.
3. Enter your content on the General tab.
4. Select the Released checkbox and click Accept.

Add the SmartText Records to Your Facility Settings

1. In Cadence Text, follow the path Cadence Management > Service Area and enter 1 to open the service area record for your facility.
2. Access the Patient Appointment Updates and Quick Reminders screen.
3. Under the Quick Reminders heading, enter your SmartText records for quick reminder emails in the following fields:
    - E-mail Reminder Message (I EAF 15307)
    - E-mail Subject (I EAF 15306)
4. Under the Updates heading, enter your SmartText record for the subject line of update emails in the E-mail Subject (I EAF 15308) field.

Use Hello World to Send Quick Reminders and Updates by Text Message

Starting in February 2023

If you're using Hello World's SMS gateway, which is license key C for Hello World, instead of a third-party vendor to send text messages to patients, you can use it for sending quick reminders and updates by text message. You need to enable text messages and Hello World content for quick reminders and updates.

Starting May 2024, if you use Hello World SMS gateway, quick reminders and appointment update text messages can be sent to proxies if their communication preferences for reminders and clinic announcements respectively are turned on.

Allow the System to Send Text Messages for Quick Reminders and Updates

In your facility record, you need to allow the system to send quick reminders and updates and specify that they should be sent by text message.

1. In Cadence Text, follow the path Cadence Management > Service Area and enter 1 to open the service area record for your facility.
2. Go to the Patient Appointment Updates and Quick Reminders screen.
3. Enter a value in the Allowed Message Types (I EAF 15300) field.
    - 1-Updates Only. Send only update messages.
    - 2-Updates and Quick Reminders. Send updates and quick reminders.
    - 3-No Updates or Reminders. Don't send updates or quick reminders. This is the default value.
4. In the Delivery Types Allowed (I EAF 15302) field, enter 2-Both Text Messages and E-mails.

Enable Hello World Content for Quick Reminders and Updates

Security Considerations

Quick reminder text messages can include a link to MyChart so patients can see more information about their appointment. To receive the MyChart link, patients need to meet both of the following criteria:

- They have a MyChart patient access security class that includes security point 13-Appointment Details. Depending on how your organization assigns patient access classes to patients, it's possible for a patient to have a patient access security class assigned even if they don't have a MyChart account yet. To find out how this works at your organization, work with your MyChart team and refer to the MyChart Patient Access Setup: Security Administration topic.
- They have an active MyChart account or secure link authentication is enabled for the patient and there is enough information entered in the patient's demographics that they can pass the demographic authentication page in MyChart.

Hello World has standard communication templates that you can use for sending quick reminders and updates by text message.

Starting in February 2025, the Send Update activity allows users to send both free-text and prewritten messages sent to patients. Template 60166-Running Behind is an Epic-released base communication template that is an example of the types of prewritten messages that you can create. To create your own prewritten content for the Send Updates activity, refer to the Manage Message Content topic for instructions on creating communication topics in the 60025-Appointment Update workflow.

Starting in November 2024, to send quick reminders, use the SMS content in communication workflow 60009-Quick Appointment Reminder. To configure SMS notifications for appointment confirmation, use the Communication Topic activity to create and approve override templates. For more information refer to the setup steps in the Manage Message Content topic.

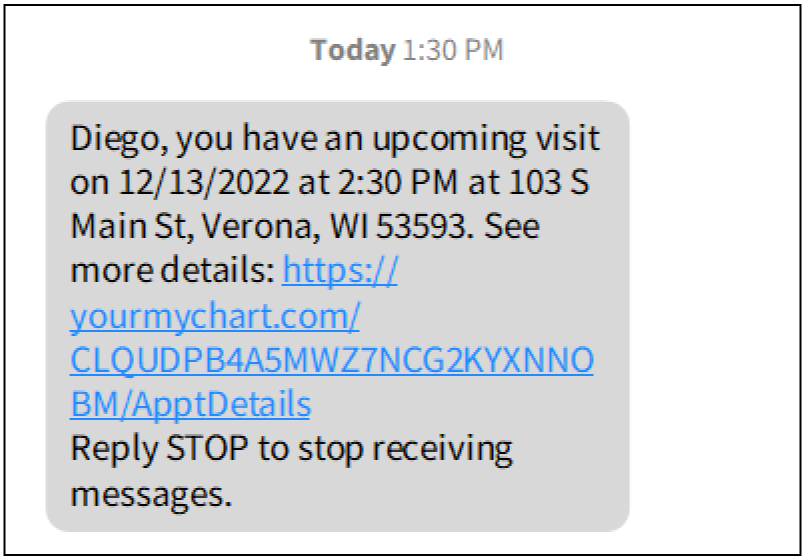
Some of these notifications use conditional content so you can send the right information for a patient's situation without needing to set up multiple communication templates. For more information about how conditional content works, refer to the Send Conditional Content with SmartMarkup topic.

The Epic-released base communication templates for quick reminder and appointment update are:

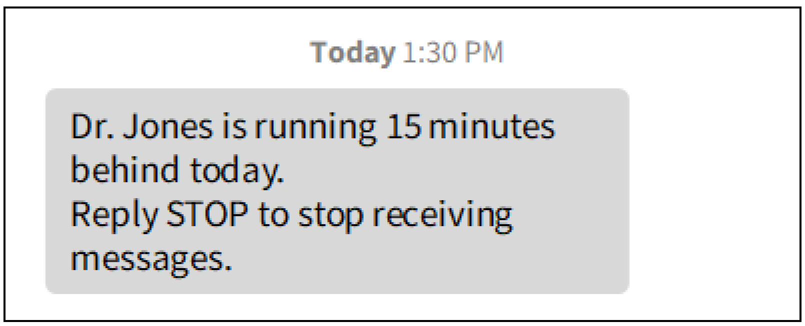
- 60184- Quick Appointment Reminder - SMS – Broadcast. This template uses conditional content to show the date, time, arrival time, location of the patient's appointment and a link to MyChart depending on a patient's situation. For more information about how conditional content works, refer to the Send Conditional Content with SmartMarkup topic
- 60026-Appointment Update. This template includes the free text appointment update entered by front desk staff.

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 an override of communication templates 60008, 60062, 60026, and 60166. The override templates are what the system actually uses to send messages. You can set them at different levels of your facility structure. We recommend creating overrides only for the facility level if possible. However, you can also create overrides at the service area, location, or department level. In the override records for communication templates 60008, 60062, 60026, and 60166, you can customize the content for the message if needed and then enable it for use and mark it as approved.

> If you customize communication template 60026-Appointment Update, do not remove the @SCHEDFREETEXTMESSAGE@ SmartLink. That SmartLink is used to include the free text that front desk staff enter when they send updates to patients.



A sample quick reminder text message using the released communication template.



A sample update text message using the released communication template.

You need to have Hello World security as described in the Give Users Hello World Security topic to work with communication templates. If you don't have this security, work with your Hello World team to complete these steps for you.

1. Review the released communication templates with stakeholders at your organization to determine whether you can use the sample content. Refer to the steps in Manage Message Content to create overrides of the communication templates attached to communication workflows 60009-Quick Appointment Reminder and 60025-Appointment Update.
2. When you're ready to use the content, work with your Hello World team to approve the communication templates as described in the Approve Message Content topic so you can move them to your production environment with Data Courier.

Use a Third-Party Vendor to Send Quick Reminders and Updates by Text Message

If you have a third-party text messaging vendor, patients can choose to receive quick reminders and updates by text message. The timing of quick reminder text messages is based on the patient's preference. If the patient doesn't set a preference, the system sends the reminder two hours before the patient's appointment. Updates are sent whenever a user creates a message.

In addition to enabling text messages for quick reminders and updates, you need to define the content of your text messages. You can do this in one of two ways:

- Starting in February 2023, you can use content from Hello World, even when using a third-party vendor to send the actual messages.
- You can create a SmartText record for quick reminder text messages and add it to your facility or service area record. Schedulers determine the content of appointment updates, so you don't need to create a SmartText record for update text messages.

Prerequisites

To send text messages, you need to work with a third-party SMS vendor. Refer to the Text Messaging Setup and Support Guide for information about working with a third-party SMS vendor.

To send quick reminders and updates using content from Hello World, you must be licensed for the Core and Content Management modules, which are included in the standard Hello World license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Allow the System to Send Text Messages for Quick Reminders and Updates

In your facility record, you need to allow the system to send quick reminders and updates and specify that they should be sent by text message.

1. In Cadence Text, follow the path Cadence Management > Service Area and enter 1 to open the service area record for your facility.
2. Go to the Patient Appointment Updates and Quick Reminders screen.
3. Enter a value in the Allowed Message Types (I EAF 15300) field.
   - 1-Updates Only. Send only update messages.
   - 2-Updates and Quick Reminders. Send updates and quick reminders.
   - 3-No Updates or Reminders. Don't send updates or quick reminders. This is the default value.
4. In the Delivery Types Allowed (I EAF 15302) field, enter 2-Both Text Messages and E-mails.

Use Content from Hello World

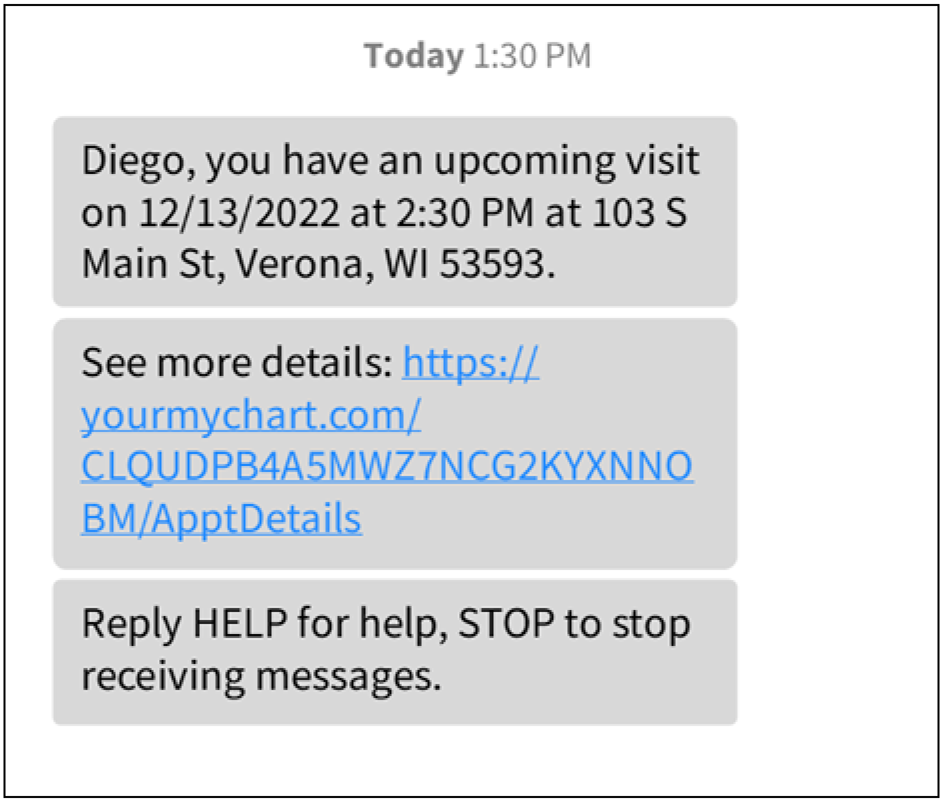
Starting in February 2023

Hello World has standard communication templates that you can use for sending quick reminders and updates by text message with your third-party vendor:

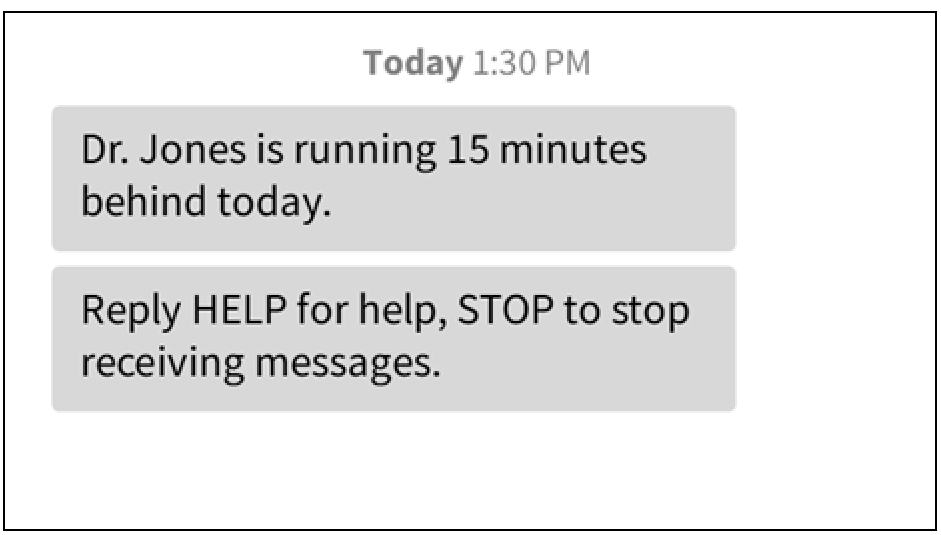
- 60008-Quick Appointment Reminder
- 60026-Appointment Update
- 60166-Running Behind (Available starting in February 2025)

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 an override of communication template 60008, 60026, and 60166. The override templates are what the system actually uses to send messages. You can set them at different levels of your facility structure. We recommend creating overrides only for the facility level if possible. However, you can also create overrides at the service area, location, or department level. In the override record for communication template 60008 60026, and 60166., you can customize the content for the message if needed and then enable it for use and mark it as approved.

If you customize communication template 60026-Appointment Update, do not remove the @SCHEDFREETEXTMESSAGE@ SmartLink. That SmartLink is used to include the free text that front desk staff enter when they send updates to patients.



A sample quick reminder text message using the released communication template.



A sample update text message using the released communication template.

You need to have Hello World security as described in the Give Users Hello World Security topic to work with communication templates. If you don't have this security, work with your Hello World team to complete these steps for you.

1. Review the released communication templates 60008-Quick Appointment Reminder and 60026-Appointment Update with stakeholders at your organization to determine whether you can use the sample content. In Hyperspace, open the base templates (search: Communication Template). On the SMS Content form, you can see the message that is sent to patients.
2. Click Create New Override and create overrides of communication templates 60008 and 60026 at the facility, service area, location, or department level. We recommend creating overrides only at the facility level if possible. You need to complete this step even if you're not planning to edit the released content. Refer to the Create Communication Override Templates topic for additional information about working with communication templates.
3. If you want to edit the released content, select the SMS Content form and click Edit to make your changes.
4. When you're ready to use the content, work with your Hello World team to approve the communication templates as described in the Approve Message Content topic so you can move them to your production environment with Data Courier.

Create Content for Quick Reminder and Update Text Messages

You don't need to complete the SmartText build described in this section if you are using Hello World content, as described above.

You need to create a SmartText record for that contains the content for your quick reminder text messages.

Considerations
• Text messages are not a secure form of communication. Be careful not to include protected health information (PHI) in your SmartText record. We recommend you use a very simple message such as "You have an upcoming healthcare appointment on 11/11/2021 at 2:30 P.M." • Quick reminders are sent to patients and proxies based on their individual communication preferences, so ensure that your SmartText is appropriate for both audiences. • Quick reminders are considered duplicate if a patient has received another quick reminder from the same department on the same day. For example, if a patient has two appointments from the same department in one day and receives a quick reminder for the first appointment, any quick reminder for the second appointment is considered duplicate.

1. In Hyperspace, open the ES Letter Template Editor (search: Appointment Letters).
2. Create a new SmartText.
3. Enter your content on the General tab.
4. Select the Released checkbox and click Accept.

Add the SmartText Record to Your Facility Settings

You don't need to complete the SmartText build described in this section if you are using Hello World content, as described above.

1. In Cadence Text, follow the path Cadence Management > Service Area and enter 1 to open the service area record for your facility.
2. Access the Patient Appointment Updates and Quick Reminders screen.

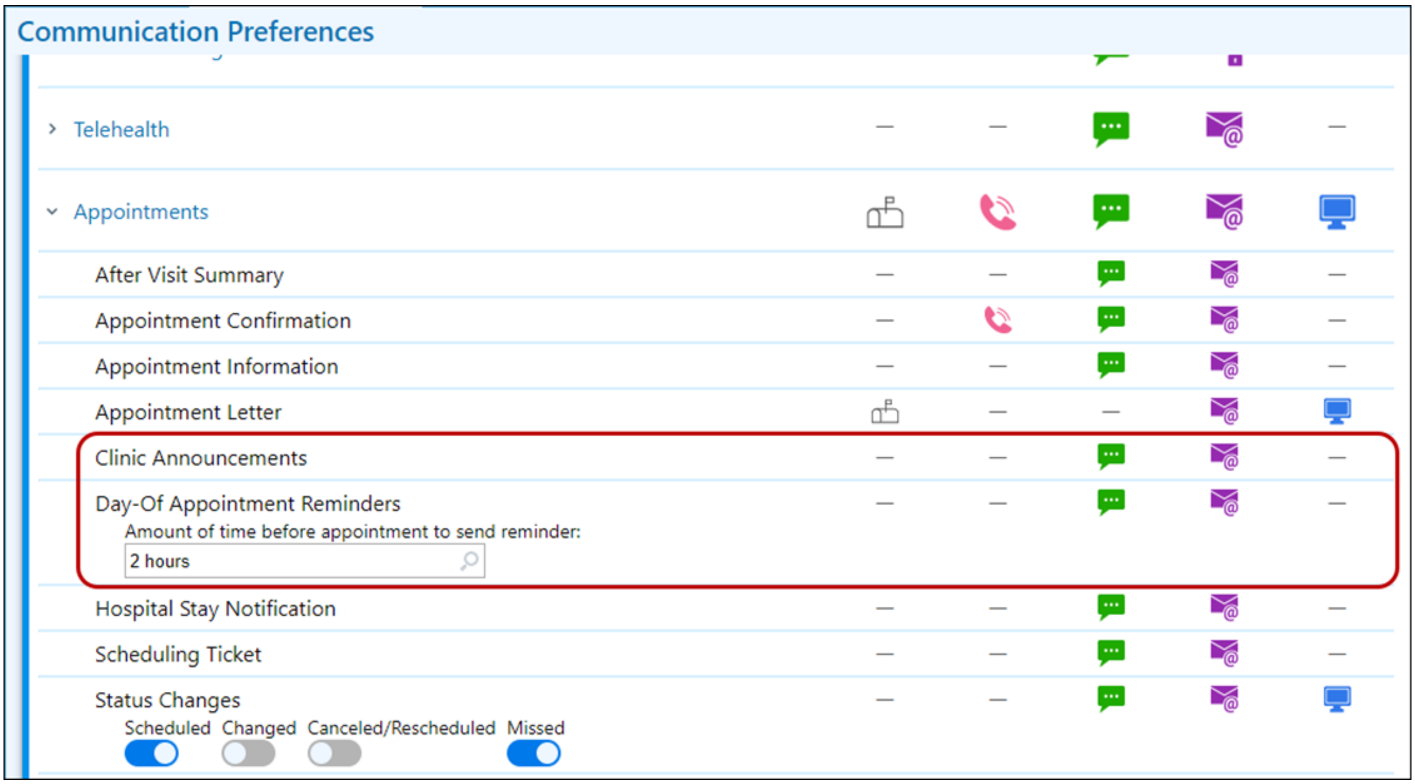
3. Under the Quick Reminders heading, enter your SmartText record in the Text Message Reminder Message (I EAF 15304) field.

Customize the Communication Preferences Activity for Quick Reminders and Updates

Configure the Communication Preferences activity to match how you have enabled quick reminders and updates. To do so, edit the following communication concepts:

- 28502-Day-of Appointment Reminders Preference (called Cadence Quick Reminders Preference in May 2024 and earlier versions)
- 28505-Cadence Updates Preferences

You can also change the amount of time before an appointment to send quick reminders. Refer to the Change the Default Offset Time for Quick Reminders topic for additional information.



Show Schedulers Whether a Patient Received a Quick Reminder for an Appointment

When schedulers confirm appointments with the Confirm Appointments work list, they might want to know whether the patient received a quick reminder for their appointment. This way, the scheduler can skip calling that patient and move on to others. You show schedulers this information with a report column.

1. In Hyperspace, open the Confirm Appointments work list (search: Confirm) and open the report settings for a report.
2. On the Display tab, add report column 1297-Patient Appointment Reminder Sent? to the report. This column shows a Yes if the patient received a quick reminder for the appointment.
3. Save the report settings.

Show Schedulers and Front Desk Staff Which Patients Already Received an Update

When schedulers or front desk staff send updates, they need to know which patients received the updates. If a patient didn't receive an update, staff might need to call them. You can use report columns on your Department Appointments reports, Follow-up work lists, and Reschedule Appointments work lists to show which patients received updates and which didn't.

If your Department Appointments reports have a large number of columns already, consider moving these update columns to the far right because they aren't used as much as other columns. Or, if the users who send update messages have security to create their own reports, you might tell these users to add the columns when they need them or create their own update reports.

1. In Hyperspace, select the Department Appointments report, the Follow-up work list, or the Reschedule Appointments work list. Open the report settings.
2. On the Display tab, add the following report columns to the report:
   - 1219-Update Type: Shows how the patient receives updates for the appointment if they opted to get updates.
   - 1229-Last Update/Time: Shows the date and time of the last attempted update for the appointment.
   - 1248-Last Update Outcome: Shows the outcome of the last attempted update for the appointment.
3. Save the report settings.

Block Certain Patients from Receiving Quick Reminders

You might not want some patients to receive quick reminders. You can identify these patients with a rule and then use that rule to prevent patients from receiving the messages.

For example, if you don't want to send quick reminders to patients under 16 years old, you can create a rule that identifies patients under 16. You then enter this rule in your facility or service area settings to block those patients from receiving quick reminders.

There are two steps to blocking patients from receiving quick reminders: create a rule to identify the patients and then enter that rule in your service area settings.

Build a Rule Record to Identify Patients to Block

Build a Patient-context rule that identifies the patients you want to prevent from receiving quick reminders. Refer to the Create or Edit a Rule topic for additional information. In the Foundation System, rule 730660-ES Quick Reminder Filter prevents quick reminders from being sent for video visits and appointments that are eligible for eCheck-In but do not have eCheck-In complete.

Enter a Rule Record in Your Service Area or Facility

1. In Cadence Text, follow the path Cadence Management > Service Area and enter the ID for your service area. If you want to block certain patients across your entire facility, enter service area 1.
2. Access the Patient Appointment Updates and Quick Reminders screen.
3. In the Rule for Quick Reminder (I EAF 15303) field, enter your rule. Patients who match this rule don't receive quick reminders.

In the Foundation System

In the Foundation System, the ES Quick Reminder Filter (R CER 730660) rule blocks Quick Reminders for video visits and appointments that are eligible for eCheck-in but do not have eCheck-In complete.

Change Delivery Types for Quick Reminders and Updates for a Service Area

Certain locations in your facility might want to send quick reminders and updates with only emails instead of both emails and text messages, or they might want to have different settings for quick reminders and updates. You can change the delivery type of quick reminders and updates for a location in the service area record.

Keep in mind that the Communication Preference settings configured in the Communication Concept Editor can be set only at the facility level. Discuss updates to this item with other teams at your organization, including Resolute Professional Billing and Prelude, before making changes.

1. In Cadence Text, follow the path Cadence Management > Service Area and enter the ID of your service area.
2. Access the Patient Appointment Updates and Quick Reminders screen.
3. In the Delivery Types Allowed (I EAF 15302) field, enter E-mails Only if you want to send updates and quick reminders only by e-mail. Enter Both Text Messages and E-mails to send messages with both delivery types.

Change the Default Offset Time for Quick Reminders

By default, quick reminders have a default offset time of two hours, which means quick reminders are sent to patients two hours before their appointment. You can change this setting at the facility level by configuring an item default for the Time Offset for Appt Reminder (I OYO 5000) item:

1. In Hyperspace, open the Item Default Editor activity (search: Item Default Editor).
2. In the INI field, enter OYO.
3. In the Item field, enter 5000.
4. Select the Facility checkbox.
5. In the Value field, enter the default offset time for quick reminders.
6. In the Activity field, enter 7-Registration.

Starting in February 2024, concepts 28580-Self Arrival Reminders, 32019-eCheck-In Manual Reminder, 28529-ED Self Registration, and 28584-Non-Proxy ED Self-Registration are grouped with Quick Reminders in Communication Preferences. The Time Offset for Appt Reminder item applies only to Quick Reminders. Starting in August 2024, this item is hidden if Quick Reminders are disabled.

Appointment Reminders

You can use a batch job based on Batch Scheduler template 80-Cadence Generic Appt Looper to send appointment reminders to patients in MyChart or by email or text message. Note that the appointment reminders in this batch are not controlled by a communication concept, which means that patients cannot choose how they want to receive appointment reminders and they cannot opt out of receiving them if you are not sending via Hello World.

To set up appointment reminders, you need to:

- Create the content for the reminders. Starting in February 2023, you can use Hello World for text messages. In earlier versions, for other types of messages, or if you aren't licensed for Hello World, you can use SmartTexts.
- Determine whether to send reminders only once or also when appointments are changed.
- Create a batch job for the delivery method: MyChart, email, or text message. If you're sending appointment reminders by text message, you need to work with a third-party SMS vendor to send text messages or, starting in February 2023, you can use Hello World's SMS gateway to send text messages.

Create Appointment Reminder Content

The way you create content for appointment reminders depends on how you're delivering the reminders to patients:

- For MyChart, create two SmartText records: one for the subject and one for the body.
- For email, create one SmartText record for the email body.
- For text messages, you have two options:
    - Starting in February 2023, you can use content from Hello World.
    - Create one SmartText record for the message content.

To create SmartText records:

1. In Hyperspace, open the ES Letter Template Editor (search: Appointment Letters).
2. Create a new SmartText.
3. Enter your content on the General tab.
4. Select the Released checkbox and click Accept.

Determine the Number of Appointment Reminders to Send

Choose whether you'll send only one appointment reminder per appointment or if you'll send a new appointment reminder after an appointment is changed. The latter option helps ensure that patients have the most up-to-date information about their appointments, potentially reducing no-shows.

Depending on which option you choose, you need to create one or two values in the Looper Action (I EPT 7980) category list. To send reminders for changed appointments, you also need to add a programming point to Cadence System Definitions.

Send Only One Reminder Per Appointment

Create a value of Message Sent in the Looper Action (I EPT 7980) category list. Refer to the Modify a Category List's Values topic for detailed information about creating category list values.

When you create your batch job, you specify the Message Sent value in the Action Type mnemonic. When the batch job sends a reminder for an appointment, it sets the Looper Action item for the appointment to Message Sent so that another reminder isn't sent for the same appointment the next time the batch job runs.

Send a New Reminder After an Appointment Is Changed

To send a new reminder after an appointment is changed, you need to create two values in the Looper Action (I EPT 7980) category list and add a programming point to Cadence System Definitions.

Prerequisites
You need Shared security point 199-Access Code to Execute to configure Cadence System Definitions to send an appointment reminder after an appointment is changed.

1. In Hyperspace, create two values in the Looper Action (I EPT 7980) category list (search: Category List Maintenance). Refer to the Modify a Category List's Values topic for detailed information about creating category list values.
   a. Message Sent
      - When you create your batch job, you specify the Message Sent value in the Action Type mnemonic. When the batch job sends a reminder for an appointment, it sets the Looper Action item for the appointment to Message Sent so that another reminder isn't sent for the same appointment the next time the batch job runs.
      - You also specify this value as the old value in the programming point steps below so that the system can change the value of the Looper Action item for an appointment that is changed, which allows the system to send a new reminder the next time the batch runs.
   b. Message Sent but Appointment Changed
      - You specify this value as the new value in the programming point steps below so that the system can change the value of the Looper Action item for an appointment that is changed, which allows the system to send a new reminder the next time the batch runs.
2. Open Cadence System Definitions (search: Cadence System Definitions).
3. Select the Custom Extensions/EOD > General form.
4. Add the following programming point to the After change (I SDF 8222) field, setting the parameters as described below: `chLooperAudit^SXLOOPER4(eptID,eptDAT,oldCatVal,newCatVal,filterRule,dateChangeRelevant,timeChangeRelevant,lenChangeRelevant,depChangeRelevant,provChangeRelevant,visitTypeChangeRelevant)`
   - eptID. Required. This parameter should always be set to ID.
   - eptDAT. Required. This should always be set to datAry(1,ID).
   - oldCatVal. Required. Enter the ID of the Message Sent category value you created.
   - newCatVal. Required. Enter the ID of the Message Sent but Appointment Changed category value you created above.
   - filterRule. Optional. Enter the record ID of a Patient-context rule that signifies that an additional appointment reminder should not be sent after the first.

- dateChangeRelevant. Optional. Set this parameter to 1 if you want to send a new appointment reminder when the appointment date is changed.
- timeChangeRelevant. Optional. Set this parameter to 1 if you want to send a new appointment reminder when the appointment time is changed.
- lenChangeRelevant. Optional. Set this parameter to 1 if you want to send a new appointment reminder when the appointment length is changed.
- depChangeRelevant. Optional. Set this parameter to 1 if you want to send a new appointment reminder when the appointment department is changed.
- provChangeRelevant. Optional. Set this parameter to 1 if you want to send a new appointment reminder when the appointment provider is changed.
- visitTypeChangeRelevant. Optional. Set this parameter to 1 if you want to send a new appointment reminder when the visit type for the appointment is changed.

Here are some examples of how you might configure the code for the programming point in different scenarios:

- Always send an additional appointment reminders each time an appointment is changed regardless of the type of change: `chLooperAudit^SXLOOPER4(ID,datAry(1,ID),320000,320001)`
- Always send an additional appointment reminder each time an appointment is changed, unless rule 12345 is true: `chLooperAudit^SXLOOPER4(ID,datAry(1,ID),320000,320001,12345)`
- Only send an additional appointment reminder if the date, time, or department is changed: `chLooperAudit^SXLOOPER4(ID,datAry(1,ID),320000,320001,"",1,1,0,1,0,0)`
- Only send an additional appointment reminder if the date, time, or length is changed, unless rule 12345 is true: `chLooperAudit^SXLOOPER4(ID,datAry(1,ID),320000,320001,12345,1,1,1,0,0,0)`

Create a Batch Job to Send Appointment Reminders to MyChart

In your batch job for appointment reminder MyChart messages, you specify the content of the messages and other features of MyChart messages, such as who the message is from and the message type. You can also specify an optional rule to limit the appointments that you send reminders for. The steps in this section assume you have already completed the steps in Create Appointment Reminder Content and Determine How Many Appointment Reminders Are Sent topics.

You can also use tickler messages to notify patients that they have an appointment reminder in MyChart. Refer to the Send Different Email Tickler Messages for Different Types of Information and Define the Text for Tickler Text Messages topics for additional information.

Optional: Create a Rule to Exclude Certain Appointments

If there are certain appointments that you don't want to send reminders for, you can create a Patient-context rule to exclude them. If the rule evaluates as false for an appointment, a reminder is not sent. Refer to the Create or Edit a Rule topic for general information about creating rules.

You need to add your rule to a copy of extension 40427-ES Generic Looper Rule Filter Template and add the extension to your batch job. Refer to the steps below to create your extension.

1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of extension 40427.

3. Edit your copy of extension 40427.
4. On the Parameters screen, enter your rule ID in the Condition parameter.

The batch also respects any rules that filter encounters in MyChart set in MyChart System Definitions (I WDF 7900). Refer to the Filter Appointments and Encounters Based on Rules topic for more information on MyChart encounter filtering.

Create an Extension to Send MyChart Appointment Reminders

You need to create a copy of extension 40422-ES Generic Looper Send MyChart Message Template so that the batch job can send MyChart messages to patients.

1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of extension 40422.
3. Edit your copy of extension 40422.
4. On the Parameters screen, set the following parameters:
    - Body SmartText. Optional. Enter the ID of the SmartText record you created for appointment reminder MyChart messages in the Create Appointment Reminder Content topic.
    - Subject SmartText. Optional. Enter the ID of the SmartText record you created for appointment reminder MyChart messages in the Create Appointment Reminder Content topic.
    - Subject Text. Optional. Enter the text to be used for the MyChart message subject. This value is used over the Subject SmartText if both are specified.
    - Condition. Optional. Enter the record ID of a rule that uses the Patient context. If this rule evaluates to True or if you leave this parameter blank, the appointment reminder message is sent. You can use this rule if you have certain types of appointments that you don't want to remind patients about because you use them as placeholders or because they occur in a block of appointments scheduled together and you want to filter out the extra reminders.
    - From User. Optional. Specify the user ID of the user from which you want the messages to be sent if the encounter provider does not have security to send the message. For upcoming appointment reminders sent from the encounter provider, you should set this to parameter to a default user, such as the MyChart messaging user, to ensure that reminders are sent even if the encounter provider doesn't have the security to send the message. Make sure that the user has MyChart security point 1-Secure Patient Message (which replaces Shared security point 37-Send Patient Message). If you've configured your routine to attach questionnaires to appointment reminder messages, this user must also have MyChart security point 15-Send Questionnaire in Patient Message (which replaces Shared security point 32015-MyChart - Send Questionnaire in Patient Message).
    - Message Type. Optional. Enter the message type to use for the MyChart message. If this parameter is left blank, the first message type listed in the Patient Message Type column on the Secure Patient Message Options screen in Patient Access System Definitions is used. For upcoming appointment reminder messages sent from an encounter provider, we recommend using message type 12-Patient Appointment Schedule Requests. If the Patient Message Type column is blank, message type 1-User Message is used.
    - Send Tickler. Optional. Enter 0-Send to send the MyChart tickler for the message. Enter 1-Do Not Send to suppress the MyChart tickler.
    - Link DAT. Optional. Enter 0-Do Not Link to prevent the message from being linked to an encounter. You might do this if you want the patient to be able to reply to the message but don't want the

reply associated with the encounter. This helps avoid issues that might occur if the provider opens a reply message in a navigator, which could cause the encounter type to change from Appointment to something else, like Office Visit. Enter 1-Link to link the message to the appointment.

Create the Batch Job for Sending Appointment Reminders

You can configure a batch job to prevent appointment reminders from being viewed by proxies who do not have security to view the appointment in MyChart. With this configuration, you can either send reminders from the encounter provider or send reminders from a fixed sending user.

1. In Clinical Administration, select Management Options > Utilities > Batch Menu > Job Enter/Edit.
2. Create a new batch job a name it something like MyChart Appt Reminder Job.
3. On the Job Definition screen, enter 80-Cadence Generic Appt Looper in the Template to use field.
4. If you want to receive emails when there is an error with the appointment reminder batch job, enter an email address in the Send error e-mail to field.
5. Access the Single and Multiple Response Values screen and configure the mnemonics as follows:
    - !Start Date: t
    - !End Date: t+7
    - !Departments: ALL
    - Updates Only?: Yes
    - Action Type: Enter the category value you created for the Looper Action item in the Determine the Number of Appointment Reminders to Send topic.
6. If you created a Patient-context rule to exclude certain appointments, enter your copy of extension 40427 in the Filter LPP mnemonic.
7. Enter your copy of extension 40422 in the Main LPP mnemonic.
8. Create a batch as described in the Define a Batch topic.
9. Schedule your batch as described in the Define and Submit a Run topic.

Create a Batch Job to Send Appointment Reminders by Email

In your batch job for appointment reminder emails, you specify the content of the messages. You can also specify an optional rule to limit the appointments that you send reminders for. The steps in this section assume you have already completed the steps in the Create Appointment Reminder Content and Determine How Many Appointment Reminders Are Sent topics.

Optional: Create a Rule to Exclude Certain Appointments

If there are certain appointments that you don't want to send reminders for, you can create a Patient-context rule to exclude them. If the rule evaluates as true for an appointment, a reminder is not sent. Refer to the Create or Edit a Rule topic for general information about creating rules.

The way that you add your rule to your batch job differs depending on your version:

- Starting in August 2020, you need to add your rule to a copy of extension 40427-ES Generic Looper Rule Filter Template and add the extension to your batch job. Refer to the steps below to create your extension.
- In May 2020 and earlier, you add your rule to a routine in the batch job.

Follow these steps to create a copy of extension 40427 to use with your rule:

1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of extension 40427.
3. Edit your copy of extension 40427.
4. On the Parameters screen, enter your rule ID in the Condition parameter.

Create a Batch Job

Next, create and schedule a batch job to send your appointment reminder emails:

1. In Clinical Administration, select Management Options > Utilities > Batch Menu > Job Enter/Edit.
2. Create a new batch job a name it something like Appt Reminder Email Job.
3. On the Job Definition screen, enter 80-Cadence Generic Appt Looper in the Template to use field.
4. If you want someone at your organization to be notified when there is an error with the appointment reminder batch job, enter an email address in the Send error e-mail to field.
5. Access the Single and Multiple Response Values screen and configure the mnemonics as follows:
    - !Start Date: T
    - !End Date: T+7
    - !Departments: ALL
    - Updates Only?: Yes
    - Action Type: Enter the Message Sent category value you created for the Looper Action item in the Determine How Many Appointment Reminders Are Sent task.
6. If you created a Patient-context rule to exclude certain appointments, set the Filter LPP or Filter Rou mnemonic as appropriate for your version:
    - Starting in August 2020, enter your copy of extension 40427 in the Filter LPP mnemonic.
    - In May 2020 and earlier, enter the following code in the Filter Rou mnemonic and replace <Rule ID> with the ID of the rule you created: `$$ruleFilter^SXLOOPER3A(<Rule ID>,eptID, eptDAT)`
7. In August 2024 and earlier, enter the following routine in the Main Rou mnemonic, and set the parameters as described below: `$$wpSendEmailBasic^WPOPNSCH2(eptID,eptDAT,subj,etxID,options,smtpCode,err,type,locale)`
    - eptID. Required. Do not modify this parameter.
    - eptDAT. Optional. Do not modify this parameter.
    - subj. Required. Enter the text for the email subject in quotation marks.
    - etxID. Required. Enter the SmartText record ID to use for the email body.
    - options. Optional.
    - smtpCode. Optional. Do not modify this parameter.
    - err. Optional. Do not modify this parameter.
    - type. Optional. Enter the type of email being sent. Choose from options in the MyChart SMTP Message Type Information (I EPT 28943) category list.
    - locale. Optional. Do not modify this parameter.

    Starting in November 2024, enter the following routine in the Main Rou mnemonic, and set the parameters as described below: `$$wpSendEmailBasic^WPOPNSCH2(eptID,eptDAT,subj,etxID,options,smtpCode,err,type,locale,topicID)`

- eptID. Required. Do not modify this parameter.
- eptDAT. Optional. Do not modify this parameter.
- subj. Required. Enter the text for the email subject in quotation marks. This is not needed if you are using Hello World Email.
- etxID. Required. Enter the SmartText record ID to use for the email body. This is not needed if you are using Hello World Email.
- options. Optional.
- smtpCode. Optional. Do not modify this parameter.
- err. Optional. Do not modify this parameter.
- type. Optional. Enter the type of email being sent. Choose from options in the MyChart SMTP Message Type Information (I EPT 28943) category list.
- locale. Optional. Do not modify this parameter.
- topicID. Optional. Communication Topic HST ID. If you are using Hello World Email, pass this in instead of subj and etxID.

8. Create a batch as described in the Define a Batch topic.
9. Schedule your batch as described in the Define and Submit a Run topic.

Create a Batch Job to Send Appointment Reminders by Text Message

In your batch job for appointment reminder text messages, you specify the content of the messages, how to send them to patients, and whether to create communication tracking (CAL) records. You can also specify an optional rule to limit the appointments that you send reminders for. The steps in this section assume you have already completed the steps in the Create Appointment Reminder Content and Determine How Many Appointment Reminders Are Sent topics.

Optional: Create a Rule to Exclude Certain Appointments

If there are certain appointments that you don't want to send reminders for, you can create a Patient-context rule to exclude them. If the rule evaluates as true for an appointment, a reminder is not sent. Refer to the Create or Edit a Rule topic for general information about creating rules.

- You need to add your rule to a copy of extension 40427-ES Generic Looper Rule Filter Template and add the extension to your batch job. Refer to the steps below to create your extension.

1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of extension 40427.
3. Edit your copy of extension 40427.
4. On the Parameters screen, enter your rule ID in the Condition parameter.

Create an Extension to Send Text Messages from a Third-Party Vendor

You need to create a copy of extension 40426-ES Generic Looper Send SMS Message Through ECS so that the batch job can use your third-party SMS vendor integration to send text messages to patients.

1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of extension 40426.
3. Edit your copy of extension 40426.
4. On the Parameters screen, set the following parameters:
   - Body SmartText. Optional. Enter the ID of the SmartText record you created for appointment reminder text messages in the Create Appointment Reminder Content topic.
   - Create CAL Record. Optional. Enter 1-Create CAL Record to create communication tracking (CAL) records and link them to the appointments that reminders are sent for. When this parameter is blank or set to 0-Do Not Create CAL Record, communication tracking records are not created.
   - Endpoint ID. Optional. When this parameter is blank, the batch job uses the external endpoint for your third-party SMS vendor that's specified in the SMS Vendor Server (I EAF 15005) field for your facility or service area. If you want to use a different external endpoint with this batch job, enter the endpoint record ID here.
   - Request Extension. Optional. Applies only when the Endpoint ID parameter is set. Enter the vendor-specific extension to use with the external endpoint you specified. Refer to the Set Up Epic to Communicate with Your Vendor topic for information about the available extensions.
   - CAL User. Optional. Applies only when the Create CAL Record parameter is set to 1-Create CAL Record. Enter the user ID to associate with the communication tracking records that the batch jobs create.
   - Phone Types. Optional. By default, the system sends text messages to a patient's mobile phone number, which is the phone number of type 1-Mobile from the Phone Types (I EPT 94) category list. If you use a different value for mobile phone numbers, enter that value here.
   - CAL Type. Optional. Available starting in November 2022, in May 2022 with special update E10209313, and in February 2022 with special update E10113702. Applies only when the Create CAL Record parameter is set to 1-Create CAL Record. By default, the batch job sets the type (I CAL 1020) to 48-Cadence Batch Notifications for communication tracking records it creates. If you want to set a different type, enter that here. For example, you might specify a different value here so that you can filter contacts as described in the Filter Unnecessary Contacts from the Call Navigator and Print Groups topic.
   - Communication Template. Optional. Available starting in February 2023. Enter the Hello World communication template to use as the content for text messages. Refer to the Manage Message Content topic for additional information. When you enter a value for this parameter, the Body SmartText parameter is ignored.

Create an Extension to Send Text Messages from Hello World

Starting in February 2023

You need to create a copy of extension 40476-ES Generic Looper Send SMS Message Template so that the batch job can use Hello World to send text messages to patients. Depending on your use case, you might also need to create a custom communication concept if one doesn't already exist that makes sense to use for appointment reminders. Refer to the Edit Communication Concepts topic for additional information.

Starting May 2024, if you use Hello World's SMS gateway to send text messages, appointment reminders can be sent to a proxy if you have set proxies as a recipient option in the extension and the proxy's communication preferences are turned on for the communication template you choose.

1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of extension 40476.
3. Edit your copy of extension 40476.
4. On the Parameters screen, set the following parameters:
   - Communication Template. Required. Enter the Hello World communication template to use as the content for text messages. Refer to the Manage Message Content topic for additional information.
   - Recipient Options. Required. By default, text messages are sent only to patients. To send text messages only to proxies, set this parameter to 2-Send to proxies. To send text messages only to the visit contacts for an appointment, set this parameter to 3-Send to visit contacts.
   - Create CAL Record. Optional. Enter 1-Create CAL Record to create communication tracking (CAL) records and link them to the appointments that reminders are sent for. When this parameter is blank or set to 0-Do Not Create CAL Record, communication tracking records are not created.
   - From User. Optional. Applies only when the Create CAL Record parameter is set to 1-Create CAL Record. Enter the user ID to associate with the communication tracking records that the batch jobs create.
   - CAL Type. Optional. Applies only when the Create CAL Record parameter is set to 1-Create CAL Record. By default, the batch job sets the type (I CAL 1020) to 48-Cadence Batch Notifications for communication tracking records it creates. If you want to set a different type, enter that here. For example, you might specify a different value here so that you can filter contacts as described in the Filter Unnecessary Contacts from the Call Navigator and Print Groups topic.

Create a Batch Job

Next, create and schedule a batch job to send your appointment reminder text messages:

1. In Clinical Administration, select Management Options > Utilities > Batch Menu > Job Enter/Edit.
2. Create a new batch job a name it something like Appt Reminder SMS Job.
3. On the Job Definition screen, enter 80-Cadence Generic Appt Looper in the Template to use field.
4. If you want someone at your organization to be notified when there is an error with the appointment reminder batch job, enter an email address in the Send error e-mail to field.
5. Access the Single and Multiple Response Values screen and configure the mnemonics as follows:
   - !Start Date: T
   - !End Date: T+7
   - !Departments: ALL
   - Updates Only?: Yes
   - Action Type: Enter the Message Sent category value you created for the Looper Action item in the Determine How Many Appointment Reminders Are Sent task.
6. If you created a Patient-context rule to exclude certain appointments, enter your copy of extension 40427 in the Filter LPP mnemonic.
7. Set the Main LPP or Main Rou mnemonic as appropriate for your version:
   - If you're using Hello World to send text messages to patients, enter your copy of extension 40476 in the Main LPP mnemonic. This option is available starting in February 2023.
   - If you're using a third-party vendor to send text messages to patients, enter your copy of extension 40426 in the Main LPP mnemonic.

8. Create a batch as described in the Define a Batch topic.
9. Schedule your batch as described in the Define and Submit a Run topic.

Reach All Your Patients at Once with Appointment Campaigns Bulk Outreach Action Pack

Starting in August 2024

You can now send bulk outreach messages automatically with a Reporting Workbench action pack.

Prerequisites
To use this feature, you need Hello World license 185C, Campaigns license 153A, and Cadence licenses 5Aa. If you're not sure whether you have these licenses, contact your Epic representative and mention SLG 3550868 for help determining which licenses you have.

To build this action pack, you need to set up:

- A base communication template and override communication templates with the message content you want to send.
- A Reporting Workbench report and action pack to identify patients you want to target with bulk outreach messaging.
- A batch job to send SMS notifications to the patients identified by your report.

Set Up Your Bulk Outreach Action Pack

First, create your communication templates:

1. In Hyperspace, go to the Communication Template activity (search: Communication Template).
2. Click Create a New Record and name your new base template.
   - For detailed steps, refer to the Create Base Communication Templates topic.
   - You must add Appointment Campaigns in the Communications Workflow (I HST 85515) field for this action pack.
3. Click Create New Override and make the override communication templates you plan to use this action pack in. For detailed steps, refer to the Create Override Communication Templates topic.

Next, set up your action pack and Reporting Workbench report:

1. In Chronicles, open the Extension (LPP) master file and make a copy of extension 42670-ES Appointment Bulk Outreach SMS.
2. In the Base Template parameter, enter the base communication template you created.
3. Open the Action Pack (HGA) master file and make a copy of action pack 20005-ES Appointment Bulk Outreach SMS.
4. In Hyperspace, open your copy of action pack 20005 in the Report Action Editor activity (search: Report Action Editor).
5. In the Action Settings section, replace the extension in the Action Extension (I HGA 50) field with your copy of extension 42670.
6. Go to the Report Builder activity (search: Report Builder) and open template (HGR) 55066-ES Automated

SMS Notices Report Template.

7. In Report Settings, add your appointment criteria in the Criteria tab.
8. Click the General tab and add a name to the report.
9. Click Accept to save your report.
10. Open the Analytics System Settings activity (search: Analytics System Settings), go to the RW Actions tab, and enter your copy of action pack 20005 to the Report (I EAF 49540) column.
11. Enter your copy of extension 42670 to the Report Action (I EAF 49550) column.

Finally, create a batch job to send your campaign:

1. In Chronicles, create a batch job based on template 1000-RW Batch Template.
2. In the Report mnemonic, enter the report you created from template 55066.
3. Schedule a run for your batch job. For detailed instructions, refer to the Batch Scheduler Setup: Essentials topic.

Validate Your Bulk Outreach Action Pack

Follow the steps below to verify that only patients with the appointment criteria you specified receive bulk outreach SMS messages.

1. Schedule appointments for two test patients—one patient that meets your report's appointment criteria and one patient that doesn't.
2. Ensure that each test patient is opted in to receive SMS and that their phone numbers are listed as allowed numbers. For detailed instructions, refer to the Prepare Non-Production Environments for SMS topic.
3. Run the batch job you created for the bulk outreach action pack.
4. Confirm that the first test patient's phone received the expected SMS message and that the second test patient did not receive an SMS message.