Appointment Scheduling Setup and Support Guide

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Your Responsibilities for Safe Use

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

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Appointment Scheduling Setup and Support Guide

A patient's experience with your organization often begins with the patient calling a scheduler to make an appointment. Scheduling is one of the most universal workflows in healthcare because it is common to so many areas. Scheduling reserves time in a provider's or resource's schedule and lets the provider know who is coming and why.

In its simplest form, an appointment is made up of five things:

1. The department where the patient needs to go.
2. The purpose and details of the visit, represented by a visit type.
3. The provider or resource the patient needs to see.
4. The date the patient needs to attend the appointment.
5. The time the appointment begins.

No matter how complex the appointment, each appointment uses these five things as a foundation. Complex appointments have multiple visit types or multiple providers. Sometimes schedulers link appointments together (sequential appointments) or schedule appointments in a series (recurring appointments). Schedulers can reschedule, cancel, and change appointments as needed. Schedulers can also add or review appointment information so providers have all the details they need when the appointment begins.

Cadence offers several ways of scheduling appointments. Different types of schedulers will use different tools.

- Full Appointment Entry is the most robust and flexible way of scheduling an appointment. It contains multiple forms and is the only schedule method used to schedule complex appointments like recurring appointments. Centralized schedulers and department-based schedulers often use Full Appointment Entry.
- Quick Appointment allows staff such as nurses to quickly make a single appointment with a single provider. For example, urgent care departments might use Quick Appointment to make appointments.
- Walk in combines scheduling and check in into one workflow and schedules an appointment for the current time. Staff such as nurses and lab schedulers use it to schedule simple appointments for patients looking for an appointment now.
- One-click searches are the simplest way of scheduling an appointment. These pre-defined appointment searches are best used for simple and common appointments like office visits or labs.
- The Snapboard allows staff and clinicians to manage appointments, schedulable orders, and cases from a single workflow. For more information on scheduling from the Snapboard, refer to the Snapboard 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. Schedulers can notify patients and staff about appointments electronically (using e-mail and In Basket messages), manually (calling patients), via mail (sending letters or printing labels), or automatically (using a third-party automated calling system or MyChart notifications).

It's also important to consider a scheduling process that provides a positive patient experience for all visitors to your organization. While much of care for gender and sexual minorities depends on clinician training and comfort with these patients, it is also critical to integrate these patients' needs into standard workflows to connect them with the right providers and care. Within Appointment Scheduling there are several columns, fields, and forms

that you can configure to address all patients correctly. For more information on what to consider when updating your workflows, refer to the Sex, Gender, and Names Setup and Support Guide.

This guide helps you get your system ready for staff to schedule and manage appointments. Other guides describe scheduling-related features like visit types, templates, and providers. You can complete the majority of the tasks in this guide without setting up those other features. However, you might find it easier to set up appointment scheduling after setting up these other features:

- Visit Types Setup and Support Guide
- Provider/Resource (SER) Master File Setup and Support Guide
- Provider Schedules Setup and Support Guide

Across your organization

Schedulers and front desk staff do the majority of appointment scheduling in Cadence. However, some other users might schedule appointments by going into Cadence from other applications.

- OR schedulers and other OpTime users can schedule pre- and post-op appointments from activities in OpTime.
- Technologists and other Radiant users can schedule appointments for procedures from activities in Radiant. For more information on order scheduling, refer to the Appointment Request Scheduling Setup and Support Guide.
- Patient access staff schedule appointments from Grand Central that could later turn into hospital outpatient visits (HOVs). For more information on HOVs, refer to the Hospital Outpatient Visits Setup and Support Guide.
- Clinical staff can schedule simple appointments from activities in Nurse Triage, EpicCare Ambulatory, or EpicCare Inpatient.

While scheduling workflows are primarily owned by the Cadence project team, these workflows affect and are affected by a number of other Epic applications. A successful implementation of these workflows depends on close collaboration and cooperation among the Cadence project team and the project teams for the following areas:

- Prelude: schedulers can register and verify patients in Prelude while making an appointment.
- Referrals: schedulers can link appointments to referrals.
- Billing: schedulers can collect copays and record payments to Professional Billing and Hospital Billing during scheduling.
- MyChart: patients can self-schedule through MyChart. Scheduling workflows should work for online scheduling as well.

When notifying staff and patients about appointments, you might work with several different applications:

- If your organization uses MyChart, you can notify patients about their appointments with MyChart messages. Work with your MyChart team to set this up.
- If your organization uses In Basket, you can notify staff about their patients' appointments with In Basket messages. Work with your In Basket team to set this up.
- If your organization wants to use automatic appointment confirmation and no-show notification, you need to partner with a third-party vendor for automated appointment calling. Work with your vendor to obtain a license for the vendor's automated appointment calling system.

In the Foundation System

All major scheduling methods and workflows are set up in the Foundation System. We designed Foundation System workflows so that schedulers can make appointments quickly and easily. We configured scheduling at the system level whenever possible so that you only have to configure exceptions for department-specific workflows. We also integrated registration with scheduling workflows.

Appointment notification workflows are not configured in the Foundation System. However, we have configured several Batch Scheduler records for automated appointment calling in the Foundation System. You can view these records in the Foundation Hosted environment or use them as a reference when creating your own Batch Scheduler records. Log in to the Foundation Hosted environment as a scheduler to view these records.

Appointment Scheduling Strategy: Inpatient Scheduling

This section outlines the decisions that you need to make before implementing appointment scheduling in your inpatient departments. Inpatient scheduling involves scheduling patients and resources to organize care for the patient and provide a reliable patient itinerary. Most hospitals have a method of coordinating inpatient care before implementing Epic. These methods range from using an electronic scheduling system, to whiteboards with patient names, to a variety of paper systems. Inpatient scheduling is highly variable and can depend on a number of factors such as the type of appointment that needs to be scheduled or the department providing services. Some hospitals always schedule certain inpatient appointments while other types of appointments are never scheduled.

Benefits and Challenges of Scheduling Inpatient Appointments in Epic

The following are reasons why your organization might consider scheduling inpatients in Epic:

- The same resources (clinicians, rooms, equipment, etc.) are used for inpatient and outpatient procedures or services. Scheduling inpatient appointments allows you to check for time slot conflicts in a resource schedule and improves time and resource management throughout the hospital.
- You want to track patient location and movement throughout your organization. If a patient needs to leave their hospital room for treatment in other areas, scheduling the patient for their procedures helps inform hospital staff where the patient is when they are not in their room. This tracking helps mediate scheduled appointment and bedside treatment overlaps.
- Your organization currently schedules inpatients in an electronic system that will be replaced by Cadence. If you already use an electronic system to schedule inpatients, you can continue that workflow in Cadence.
- There are a limited number of resources in a hospital area and time and resource management is difficult to coordinate with existing workflows. If there are a limited number of patients who you can accommodate in a certain timeframe due to resource limitations, scheduling these patients will help reduce conflicts and improve department productivity.

Benefits of Inpatient Scheduling

Some of the benefits of scheduling inpatients in Epic include:

- Conflict checking: Cadence helps users to check for conflicts in scheduling. You can check for patient, clinician, or resource (such as a room or specific equipment) conflicts.
- Patient care coordination: Coordinating schedules is easiest when the patient's day is mapped out as completely as possible. Just like using a calendar or day planner to schedule meetings and manage free time, scheduling appointments in Epic helps patients, their families, and their clinicians to be mindful of the schedule for inpatient care. Staff can print calendars, reminders, and other documents relevant to appointments scheduled in Epic.
- Resource utilization: When all appointments for an entire department are scheduled in Epic, the department can maximize resource and staff utilization. This use of scheduling provides hospital staff with a clear and thorough view of their daily schedules, allowing them to be more efficient and to plan ahead.

The effectiveness of inpatient scheduling relates to the breadth of its scope. When more areas of the hospital

schedule inpatient appointments in Epic, patient care and staff schedules are more coordinated and result in greater efficiency in patient care.

Challenges of Inpatient Scheduling

Despite the many benefits to scheduling inpatients, there are some challenges to be aware of:

- User access: In order to schedule inpatients, your staff must have security and training for Cadence scheduling as well as access to an Epic computer throughout the day. If staff members use Epic to complete other workflows, such as clinical documentation, ordering medications, or placing charges, access to a computer is less of a concern.
- Time: Staff members must have time to schedule and check in the appointment in Epic.

As you visit specific departments and learn about your organization's current-state workflows, you might find areas in which it isn't beneficial to schedule inpatients. For example, hospital services that can be performed at any time of the day or that only take a few minutes, such as blood draws or blood-pressure checks, don't need to be scheduled in Epic. Your staff can continue to perform these functions on-the-fly as they fit into their schedules and the patient's schedule.

Evaluate Your Inpatient Scheduling Needs

You'll assemble an inpatient scheduling workgroup, identify existing inpatient scheduling workflows at your organization, and consider the costs and benefits of implementing inpatient scheduling in your hospital areas.

Assemble an Inpatient Scheduling Workgroup

Assemble an inpatient scheduling workgroup with representatives from each application that would be affected by or could benefit from inpatient scheduling:

- Cadence
- Radiant
- Cupid
- OpTime
- Beacon
- Long Term Care
- Rehab
- Grand Central
- EpicCare Inpatient Orders
- EpicCare Inpatient Clinical Documentation
- Resolute Hospital Billing

Also involve hospital staff such as therapists, managers, transport team, unit clerks as subject matter experts who can share details about your organization's current inpatient scheduling workflows and processes.

Document Your Existing Inpatient Scheduling Workflows

After establishing an inpatient scheduling workgroup, begin evaluating current-state workflows. This evaluation provides a base for your cost/benefit analysis.

Document Your Current State

The information collected about your organization's current inpatient scheduling workflows forms the foundation for determining the scope of inpatient scheduling. When documenting your organization's current-state workflows, identify the areas of the hospital in which inpatients need to be scheduled with specific resources (rooms, clinicians, equipment, etc.) in addition to areas where patients receive bedside treatment. Hospital areas that commonly use inpatient scheduling include:

- Cardiology
- Dialysis
- Imaging (X-Ray, CT, CT/PET, Nuclear Medicine, Interventional Radiology, etc.)
- Neurology
- Nutrition
- Ophthalmology
- PT/OT/ST (Physical, Occupational, and Speech Therapy)
- Pulmonary Function Test Lab
- Radiation Oncology
- Sleep Center or Sleep Lab

Department Walkthroughs

To begin your analysis, you should schedule department walkthroughs for inpatient scheduling areas. Include members from the various applications that are involved in inpatient scheduling decisions. You should also include your interface representatives to ensure there are no major interface considerations that would complicate any proposed inpatient scheduling workflows.

During your department walkthroughs, gather responses to the following questions, which you will use later to determine the scope of your inpatient install:

Question	Explanation
Do the same resources and clinicians accommodate inpatient and outpatient procedures and treatments?	If yes, scheduling inpatient appointments will allow for conflict checking of time slots. This option improves time and resource management. If no, there is a reduced need to check for availability because the machines are dedicated to inpatient care and/or the clinicians can round through the units without scheduling appointments.
Does the patient ever leave his hospital room for treatment in other areas?	If the patient leaves his room for the procedures performed by the department, then scheduling the inpatient would be beneficial so that other providers don't come to the bedside to perform their services while the patient is gone. If a provider performs the procedure or treatment bedside, there might be less incentive to schedule inpatients, because this type of patient care is more flexible and dynamic. Additionally, inpatient patient lists can accommodate this type of patient care.
Is the duration of the procedures, tests, or	If the procedure is longer than 15 minutes, scheduling those procedures might improve resource utilization.

Question	Explanation
appointments greater than 15 minutes?	For procedures that are very short, there might be less incentive to schedule inpatients. In some instances, it might take more time to coordinate a scheduled time than to actually perform the procedure, and therefore the benefit is reduced.
Will improved time and resource management through inpatient scheduling improve department productivity?	If scheduling would improve department productivity, there is good reason to schedule inpatients. For example, if there are a limited number of patients who can be accommodated in a certain period, scheduling those patients would reduce conflicts. If scheduling wouldn't have any impact on resource management (there are unlimited resources available), there might be less incentive to schedule inpatients.
Does the hospital area have the staff to perform inpatient scheduling workflows?	If the department feels they don't have the staffing or resources necessary to schedule, address this concern early in the decision-making process. Scheduling staff will need to be trained and available consistently to perform scheduling and check in tasks for inpatient appointments.
Is EpicCare Inpatient being installed on the same timeline as Cadence or is it already live in the hospital?	Scheduling inpatients creates a facilitated schedule view that can help inpatient clinical staff easily find patients to begin the charting process. If the department won't use EpicCare Inpatient at go-live, then it's likely that the only reason they would access Epic would be to schedule and check in appointments. If so, departments might feel that scheduling inpatients takes more time and creates more work than provides benefits.
Does the hospital area use a current scheduling system that will be replaced with Cadence?	If you are already using an electronic system to schedule inpatients, you will continue that workflow in Cadence.

Continuing Current-State Analysis

Over the course of your analysis, always try to include members from your inpatient scheduling workgroup. Workgroup members help facilitate dialogue as you gather information from the various areas of the hospital that might benefit from using inpatient scheduling. Make sure to engage all roles in your hospital who coordinate inpatient care to build the full picture of your current-state workflows. For example, include occupational therapists who schedule their own appointments or unit staff who coordinate patient care.

Decide Which Hospital Areas Can Benefit the Most from Inpatient Scheduling

After identifying existing inpatient workflows at your organization, you should define inpatient scheduling scope for your Epic Go-Live. Begin defining scope by deciding which hospital areas can benefit the most from using inpatient scheduling.

The following table outlines the hospital areas that can benefit the most from using inpatient scheduling.

Hospital Area	Dept/Specialty	Rationale
Imaging, Cardiology, & other areas	MRI, Diagnostic Imaging, Interventional Radiology, Mammography, Ultrasound, Nuclear Medicine, and Radiation Oncology Cardiac Rehab, Cardiac Catheterization, EKG, ECG, Electrophysiology, Vascular Lab, Pulmonary Function Lab, Stress Test Labs Ophthalmology, Neurology, Radiation/Oncology, Dialysis	The scheduling of inpatients for imaging and cardiology procedures allows therapists and other ancillary staff to better manage their patient load and account for when patients may not be in their room.
Therapy	Occupational Therapy, Speech/Language Pathology, Physical Therapy	Occupational Therapists, Speech/Language Pathologists, and Physical Therapists often see both inpatients and outpatients throughout the day. The scheduling of inpatients allows the therapist to better manage her patient load and also indicates to other ancillary departments that the patient is not available at that time.
Sleep Center or Sleep Lab	Sleep	Sleep centers or labs typically have specialized equipment that's used to monitor a patient's physiological parameters while sleeping. Because most of a sleep lab's equipment is stationary, inpatients might need to be moved to a sleep lab area to complete necessary tests. Inpatient scheduling in a sleep lab helps track patient location and improve equipment utilization for sleep studies.
Other areas	Mobile Equipment	Some hospitals may have shared mobile equipment that's used for bedside procedures. If this mobile equipment is used for an extended period of time with each patient and it needs to be tracked so that it isn't double booked, you can manage time allocations using inpatient scheduling. For example, you may have mobile dialysis machines that are used for a few hours at a time for bedside treatments.

These areas typically have higher costs to implementing inpatient scheduling than benefits:

Hospital Area	Dept/Specialty	Rationale
Lab	Phlebotomy, Specimen Lab	You do not need to schedule inpatient blood draws in Epic. Staff members can continue to perform these functions as bedside procedures on-the-fly as they fit into their schedules and the patient's schedule.
Surgery	Anesthesiology, Cosmetic Surgery, Transplants	Surgery cases are scheduled in advance through OpTime and would not be scheduled as appointments in Cadence. However, you may need to consider scheduling Pre-Anesthesia Testing (PAT) visits in Cadence. PATs typically occur prior to a scheduled surgery and require integrated coordination between Cadence and surgery schedulers.
Therapy	Respiratory Therapy	Respiratory therapists typically make rounds on inpatient floors and see patients for less than 15 minutes at a time throughout the day.
Other areas	Social Work, Urology, ENT-Otolaryngology	These departments make rounds on patients and the visits typically are for a short duration of time, which doesn't warrant scheduling the patient for an appointment.

Define and Configure Inpatient Scheduling Workflows

When defining inpatient scheduling workflows, review each workflow from an integrated-application perspective and from a patient-experience standpoint. You will need to complete a step-by-step walkthrough of each workflow to ensure that all application build considerations are accounted for and that the workflow makes sense from an operational and patient standpoint.

Multiple teams need to be involved in defining each inpatient scheduling workflow: You should review scheduling and check in workflows (Cadence), examine hospital account assignment and hospital outpatient redirection logic (Grand Central/Prelude, Facility Structure/HOD workgroups), verify clinical documentation requirements (EpicCare Inpatient and EpicCare Ambulatory), review billing requirements (Resolute Hospital Billing), and identify any referral or Auth/Cert requirements (Tapestry, Referrals).

Hospital Account (HAR) Assignment

End users should create or assign hospital accounts at the time of scheduling or pre-registration for preadmissions and outpatient appointments. The system should automatically assign hospital accounts for inpatient appointments at check in. However, during implementation and inpatient scheduling workflow design, you may find that you need to assign hospital accounts during scheduling, pre-registration, check in, or some hybrid of all three based on workflow or operational requirements. You should work closely with the Resolute Hospital Billing team when determining HAR-assignment workflows for departments in your organization.

Refer to the Hospital Accounts Setup and Support Guide for additional information.

Scheduling, Registration, and Check In

Because inpatient schedulers and check in staff often have other primary responsibilities, like providing direct patient care or updating clinical documentation, you should try to streamline inpatient scheduling and check in workflows as much as possible. You can reduce clicks by using One Click scheduling functionality or simple Snapboard scheduling workflows, and you can simplify registration and check in workflows by reducing required registration items and workflow screens whenever possible. If your inpatient schedulers need to collect

registration information during the check in workflow, you should configure the system to allow streamlined access to required registration forms within the workflow. You can also manipulate build to remove unnecessary activities from the Appointment Desk and minimize toolbar options to improve workflow efficiency.

Refer to the Create Pre-Defined Searches for One Click Scheduling topic and the Snapboard Setup and Support Guide for additional information about these scheduling tools that are commonly used for inpatient scheduling.

One of the biggest challenges most organizations face when implementing inpatient scheduling is determining who will be responsible for checking in each inpatient appointment. If dedicated front desk staff is not available to check in appointments, clinicians, technologists, or nurses may be responsible for completing check in.
All Epic appointments must be checked in for clinical documentation and subsequent ordering to occur. Checking in an appointment also changes an appointment status from Scheduled to Arrived, notifying other staff that a patient is currently being seen by a provider. Some scheduling interfaces may also depend on check in to trigger downstream workflows (for example, sending a scheduling interface message to a third-party system for clinical documentation and workflows).

If clinicians, technologists, or nurses can be responsible for checking in inpatient appointments, we recommend using the Snapboard for both check-in and scheduling workflows.

Your inpatient scheduling scope document should track any specialty scheduling, registration or check in needs, such as when patients schedule appointments (day-of, in advance, walk in, etc.) and if the department typically books recurring appointments.

Refer to the Sign In, Check In, and Check Out Setup and Support Guide for additional information about setting up your check-in workflows.

Printing

Appointments scheduled in Epic drive various printing options. In fact, some departments might have chosen to schedule inpatients specifically because of increased printing options. Be sure to determine the printing needs (patient labels, facesheets, etc.) for each inpatient scheduling workflow. Epic also can support on-demand and batch printing that some inpatient scheduling departments may find beneficial.

Security

Inpatient scheduling users might work mostly in a clinical application such as EpicCare Inpatient, Cupid, or Radiant, but their user records must allow appropriate access to scheduling, billing, and registration tools. For example, an after-hours imaging technologist who is responsible for checking in Nuclear Medicine appointments might need to assign a hospital account or update patient demographics as part of the Nuclear Medicine check in workflow. In this scenario, the technologist, whose main body of work resides in Radiant or EpicCare Inpatient, also needs Cadence and Prelude security classes.

It helps to think of security in terms of job responsibilities when configuring security templates and user records for inpatient schedulers.

Appointment Scheduling Setup: Essentials

In this section, we cover the essential tasks you need to complete to get your facility ready to schedule and manage appointments.

Importing Appointments

> ! If this is the first time you're importing appointments, contact your Epic representative to ensure that things go smoothly.

If you want to import appointments all at once rather than manually creating them, you can use an import specification to bring in this data. For example, an import of appointments is useful in the following scenarios:

- You're ready to go live and need to bring in appointments from your legacy system
- You're opening a new clinic and need to bring in appointments from the old clinic
- You're training users and need appointments for them to work with

There are two import specifications you can use to import appointments:

- EPT,1010-Template - AS, Future Appointment Import
- EPT,1015-Template - AS, Appointment Import with Checks

We recommend using EPT,1015 because it contains validation checks to make sure you're importing valid appointments. However, you can use EPT,1010 if you're early in your implementation and need to quickly get some test appointments and want to ignore template build issues.

The Appointment Import Autobook spreadsheet helps you organize and automate many parts of your appointment import. Download this file and follow the instructions within to complete your import.

Testing Your Appointment Import

Testing is crucial to an effective appointment import. Give yourself enough time to perform several (three or more) test runs and allow adequate time between them to adjust your build or crosswalks before the actual appointment import takes place. It is helpful to obtain updated reports from the legacy systems for each test in order to keep testing as similar to the final import as possible.

Tests should be done in an environment that refreshes daily with real patient, visit type, facility structure, provider, and template data that is reflective of Production. Often SUP is an appropriate environment to use for this testing. If SUP is not on a daily refresh, work with your Epic representative to ensure that an appropriate environment is available for testing your appointment imports.

The Testing Cycle

Testing should be a cyclical process:

- Gather up-to-date report, crosswalk, and crosswalk logic information.
- Update the spreadsheet, create your importable text file, FTP your file to the server, scan the file, and import the file.
- Spot check against your legacy system for comparison.
- Revise logic and crosswalk information for next trial.

Validating Test Imports

The most dangerous part of an automated appointment conversion is the possibility of missing appointments without realizing it. You don't want to come in on the first day of go-live and get calls that a provider doesn't have anything on their schedule, patients are showing up for appointments that aren't on the schedule, or patients are "no-showing" because you have an appointment scheduled on the wrong time slot or day. Make sure you incorporate some spot checking and involve operations, managers, and schedulers for each department.

You have many options for validating the import. Options include:

- Do a full visual validation.
- Do a spot check visual validation.
- Run the Reschedule Appointments report to verify that your imported appointments aren't splitting slots or scheduled outside the template.
- Run a Reporting Workbench report on your subset (usually limited to 30 days at a time).
- Run a Chronicles report on your subset.
- Export the value of the External Visit ID (I EPT 7) item from your subset and compare it with the appointments in your import spreadsheet.

If your error log includes an error indicating that a provider has a day off, start by loading your error file into your autobook spreadsheet and filter columns to show only those day off errors.

From there, you have two options:

1. Send the list of appointments to your practices for them to validate and specify an alternate day for the appointments to be scheduled. Reimport the appointments.
2. Temporarily remove the day off from the provider's template, reimport the appointments that errored out due to the day off, add the day off back to the template, and notify your practices to run the Reschedule Appointments report and reschedule the appointments to a day when the provider is available.

Import Errors

Import errors are reported in layers. If you import an appointment and it fails due to one error, even after you correct that error, the same appointment can fail due to a different error. You will need to retest your import until you receive no errors in the error log to fully validate the import.

ID Mismatch Errors

When you scan your source file, you may find appointments that cannot be imported because the patient cannot not be found. If so, work with your Identity team to determine why each appointment's MRN has not been associated with a patient.

ID mismatch errors are reported in the Chronicles import error log in text, but not in the error file generated by the import. To keep your error log clean, mark appointments in your import specification that have known patient lookup issues, hide those appointment rows, recreate your text file, and run the import scan again to verify that none of the remaining appointments have patient lookup issues.

Outgoing ADT Interface Considerations

Starting in February 2024

November 2023 by SU E10703461

August 2023 by SU E10608102

May 2023 by SU E10514327

February 2023 by SU E10417140

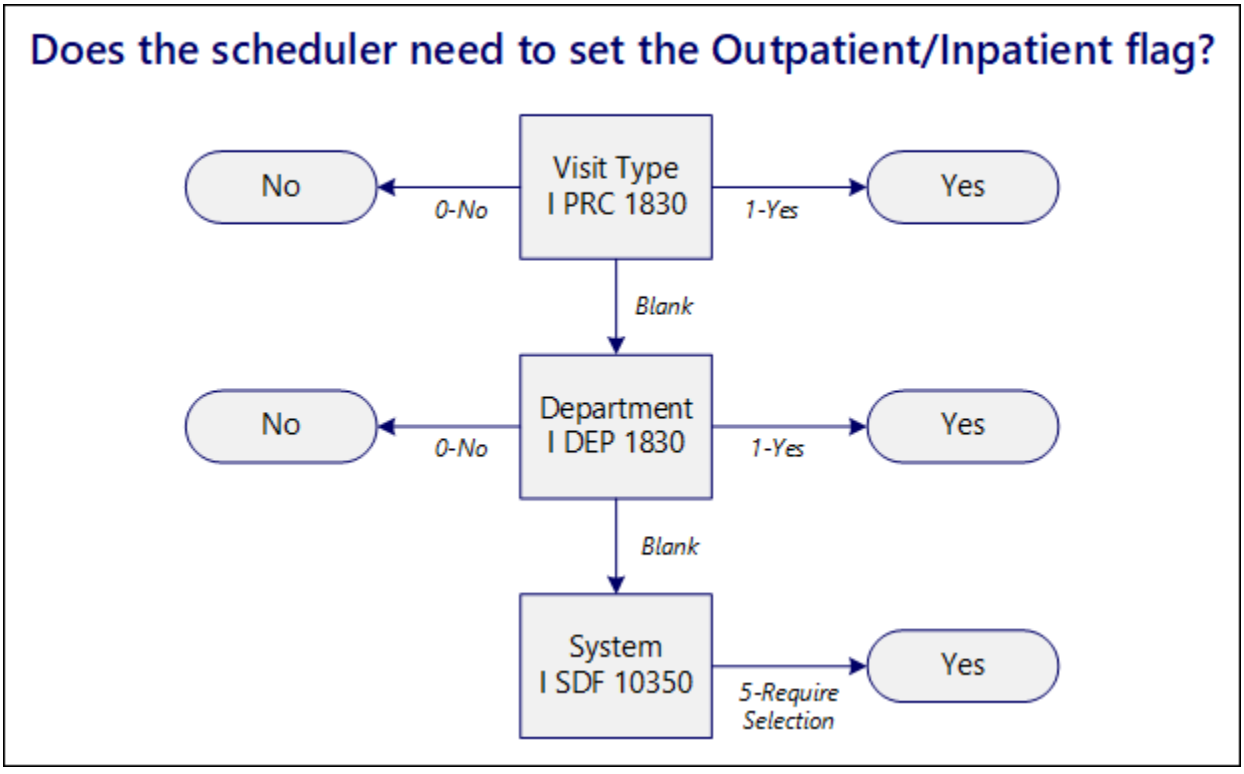
To ensure messages on outgoing ADT interfaces don't become backed up due to an appointment import, you can use metadata in the import flat file to prevent outgoing ADT interface messages from being sent while the import takes place. To use this metadata flag, insert "##DisableADTEDI=1" at the top of your import flat file. Refer to Edit the Flat File Before Import for more specific information about using metadata in flat files.

Determine Whether Appointments are Categorized as Inpatient or Outpatient

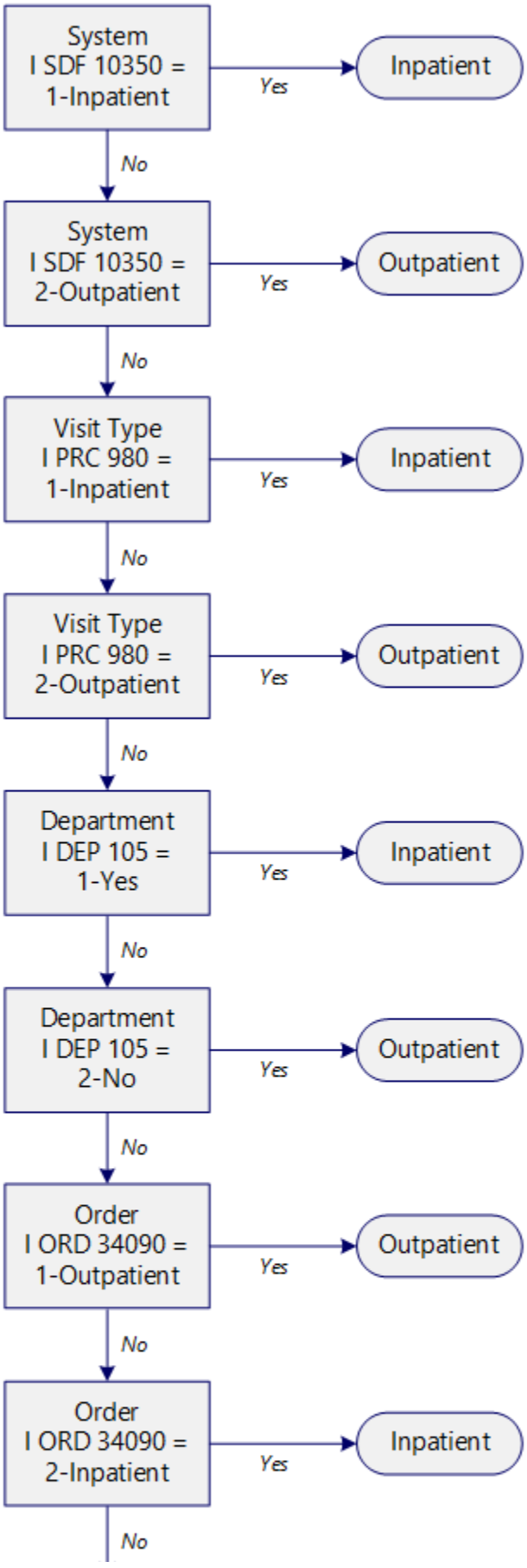
Some appointments might be considered inpatient appointments, meaning the encounters are for patients who are admitted or the encounters are related to an admission. This situation is common for inpatient therapy areas or some orders-related encounters. Other appointments are considered outpatient appointments, meaning they are for ambulatory encounters. This situation is most common for appointments. This determination, set by the inpatient/outpatient flag on the appointment contact, has effects on billing for the appointment, as well as tools like encounter redirection or related encounters.

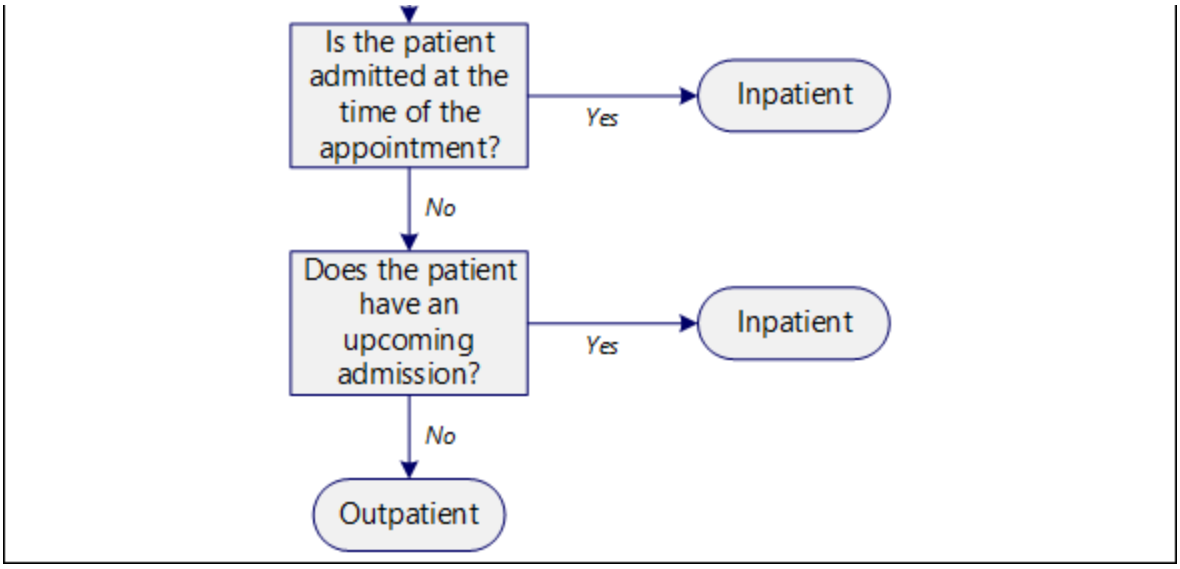
You determine at the system, department, and visit type levels which appointments are considered inpatient and which are considered outpatient. The department-level settings refer to the appointment department, not the scheduler's login department. You can also allow users to choose the flag, if there are areas or visits where the type of appointment varies based on the patient. The system also takes into account any orders when determining whether the appointment is inpatient or outpatient. The images below show the logic the system uses when determining the inpatient or outpatient status for an appointment.

The inpatient/outpatient settings are described in the order in which the system looks at them when determining what to set for an appointment. This order is not the same order as the facility structure.



When schedulers are not required to set the Outpatient/Inpatient flag, this is how the system determines the default value of the flag.





Require Schedulers to Set the IP/OP Flag

You can require schedulers to set the inpatient/outpatient flag at the visit type, department, or system levels. The hierarchy for this setting is visit type, then department, then system. If none of these levels require users to set the inpatient/outpatient flag, the system looks at the different levels for the default option.

To require users to set the inpatient/outpatient flag at the visit type level:

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Visit Type and open a visit type record.
2. Select the General form.
3. In the Require In/Outpatient? field (I PRC 1830), enter Yes to require users to select the mode when scheduling appointments that use the visit type.

To require users to set the inpatient/outpatient flag at the department level:

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > General form.
3. In the Require inpatient/outpatient selection? field (I DEP 1830), enter Yes to require users to select the mode when scheduling appointments in the department.

To require users to set the inpatient/outpatient flag at the system level:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Appointment Review form.
3. In the Default in/outpatient field (I SDF 10350), select Require Selection.

Determine the IP/OP Flag at the Visit Type Level

If the In/Outpatient field is blank, the system looks at the department levels, then any orders linked to the appointment and the patient's admission status.

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Visit Type, then open your visit type record.
2. Select the General form.

3. In the In/Outpatient (I PRC 980) field, determine if all appointments scheduled with this visit type are inpatient or outpatient. Leave this field blank to always look at the lower levels to determine in/outpatient status for appointments.

Determine the IP/OP Flag at the Department Level

If this field is blank, the system looks at any orders linked to the appointment and the patient's admission status.

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Department, then open your department record.
2. Select the General > Dept Type/Offsets form.
3. In the Inpatient Department (I DEP 105) field, enter Yes if appointments scheduled in this department are always inpatient appointments. Enter No if they are always outpatient appointments. Leave this field blank to always look at the lower levels to determine in/outpatient status for appointments.

Determine the IP/OP Flag at the System Level

If the Default in/outpatient field is not set to Inpatient, Outpatient, or Require Selection, the system looks at the visit type and department levels, then any orders linked to the appointment and the patient's admission status.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Appointment Review form.
3. In the Default in/outpatient field (I SDF 10350), determine how the in/outpatient value is set and what schedulers can see in the Appointment Review window.
    - If you specify Inpatient or Outpatient, all appointments are scheduled as either inpatient or outpatient, depending on this setting. With these two options, schedulers don't see a choice for this mode in the Appointment Review window.
    - If you specify Ask on Appt Review Window, the system sets the default value but schedulers can choose either inpatient or outpatient in the Appointment Review window.
    - If you specify Default without Asking, the system determines whether the appointment is inpatient or outpatient. Schedulers don't see the option in the Appointment Review window.
    - Leave this field blank to always look at the lower levels to determine in/outpatient status for appointments.

Disable Editing of the IP/OP Flag in Navigators

The in/outpatient flag can also be displayed and edited in the Appointment Information (R LVN 90029-ES_APPOINTMENT_INFORMATION_SECTION) navigator section. The ability to edit this flag is available by default with the released navigator configuration. See the Cadence Standard Records Setup and Support Guide for more information.

Organize Departments into Centers for Easier Scheduling

A center is a group of departments in a physical location like a clinic or hospital building. Schedulers who make appointments at multiple locations might find it helpful to relate departments to centers. Centers are useful for build because you can set up report settings or security and then push these changes out to all departments in the center.

Centers are also useful if you are implementing centralized scheduling because they allow the central schedulers to offer appointments based on location.

Be careful not to use centers as a way to group similar departments, such as creating a center for imaging

departments. This method can make using centers for scheduling difficult, and there are other ways of grouping similar departments, such as using the same department specialty.

Create Centers

Create your centers by adding values to the Center (I DEP 100) category list for each center represented in your system. Refer to the Modify a Category List's Values topic for additional information.

Link a Department to a Center

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Department and open a department record.
2. Select the General > Settings form.
3. In the Center (I DEP 100) field, enter the center that this department is part of.

Control Which Centers to Select When Scheduling

Your schedulers might need to search across centers when making appointments. For example, a patient needs a CT and you have three centers with imaging departments where the CT can happen. You can direct schedulers towards certain centers or give them the flexibility to choose the centers they want to search.

1. In Hyperspace, open Cadence System Definitions or a department record.
2. Select the Schedule > Auto Scheduler form in Cadence System Definitions or the Scheduling > Auto Scheduler form for a department record.
3. In the Site logic center default (I SDF 10730 or I DEP 1733) field, choose which center you want schedulers to use by default when scheduling. Choose from all centers, any center, or the center of the user's login department. In the Foundation System, this field is set to Center of Login Department at the system level.
4. In Book It, a list of centers always appears, but if you want to require that schedulers select a center, enter Yes in the Automatically show Center Selection? (I SDF 10732 or I DEP 1732) field. In the Foundation System, this field is left blank at the system level so that No is used by default.

Assign Visit Types to Centralized Call Centers

If you use multiple centralized call centers, you can assign visit types to those centers so you don't have to change the department on the Make Appointment form every time you use it.

1. Create centralized call center department records. Refer to the Create Centers topic in this guide for instructions on this step.
2. Assign a specialty of Central Scheduling to those records: Epic button > Admin > Schedule Admin > Master File Edit > Department > General > Settings > Specialty (I DEP 110) field.
3. Release visit types to the specialty of Central Scheduling: Epic button > Admin > Schedule Admin > Master File Edit > Visit Type > Restrictions.

Use these visit types when scheduling appointments to search across departments easily.

Configure the Full Appointment Entry Workflow

Schedulers have several tools for making appointments. Most of the time, schedulers use Full Appointment Entry because it gives them the most scheduling options. The main forms in this workflow are Book It and the Appointment Review window. The workflow also includes before and after activities. Refer to the Set Up Before Appointment Entry Advantage Activities and Set Up After Appointment Entry Advantage Activities topics for more information.

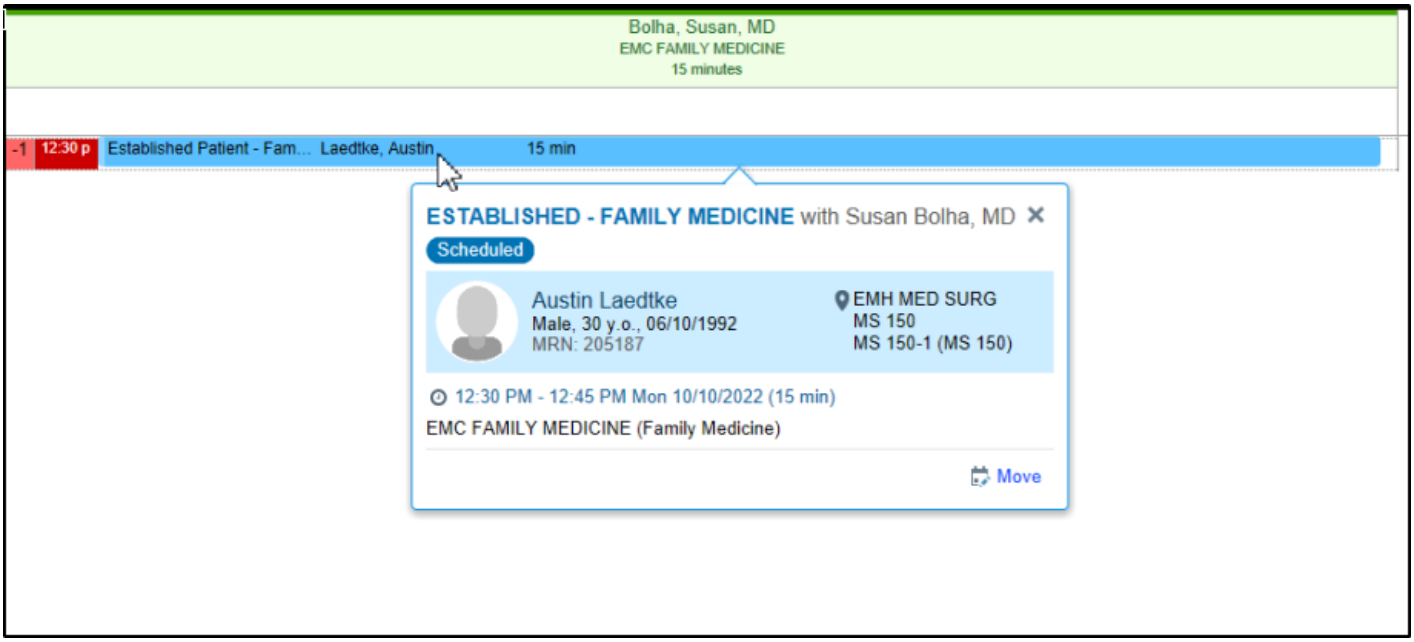
The Foundation System recommendations expand on the default functionality to streamline the scheduling workflow and give schedulers more options for easier scheduling.

Configure What Information Appears in the Appointment Entry Visit Bubble

Starting in November 2022

Visit bubbles appear in the View Schedules activity and Book It's Schedules view when users select an appointment on the schedule. We have designed the default visit bubble to meet the needs of most organizations. However, you can customize the default visit bubble to add additional information that does not appear in the visit bubble as released. The following customization options are available:

- Hide resource assignment information.
- Override patient name and sex/gender/name columns.
- Add additional report columns and icons in different places in the visit bubble. For example, if a patient has a default covering provider, an indicator can be added to indicate this in the visit bubble.
- Disable external visit type name.
- Show additional gender information.
- Show special needs.
- Hide patient information.



The default visit bubble as it appears in Schedules view for an appointment

Configure the Visit Bubble

1. In Hyperspace, open the Visit Bubble Configuration activity (search: Visit Bubble Configuration).
2. Create a new configuration or edit an existing one.
3. In the Patient Information section, configure the following options:
    a. Select the Hide patient information? checkbox if you want the visit bubble to hide patient information. This setting hides the patient's picture, name, age, date of birth, and MRN. This could be useful if you do not want to show patient information in visit bubbles in a public area. If you

configured the visit bubble to show additional patient information as well, this information still appears.

b. Select Full Text under the Additional Gender Information header to show a patient's gender identity, legal sex, and sex assigned at birth in the visit bubble. Select Icon to show only the patient's gender identity with an information icon. The icon and full text appear only if the system can't determine the patient's clinically relevant sex. For more information about how the system determines the patient's clinically relevant sex, refer to the Understand the System's Default Sex Logic topic. If the Hide patient information? checkbox is selected, no sex or gender information appears.

c. Optionally enter columns in the Patient Name Override Column (I ORT 4401) field and Sex, Gender, and Name Info Override Column (I ORT 4402) field. This might be useful if users are used to seeing patient names and SGN information appear in a particular way elsewhere in the system and want the visit bubble to show that information in the same format.

4. In the Additional Icon Columns, Below Patient Columns, Anesthesia Columns, and Additional Columns sections, enter any additional columns you want to show in the visit bubble.
5. In the Other section, configure the following options:
   a. Select the Show special needs? checkbox if you want the visit bubble to show any special needs for the patient.
   b. Select the Disable external visit type name? checkbox if you want the visit bubble to show the visit type record name (I PRC .2) instead of the external name (I PRC 901).
   c. Select the Hide resources? checkbox if you want to hide resource assignment information from the visit bubble.
   d. Select the Hide projected milestone times? checkbox if you want to hide the case times table from the visit bubble for scheduled cases.

Change the Default Visit Bubble at the System Level

1. In Hyperspace, open Cadence System Definitions.
2. In Cadence System Definitions, select the Scheduling > Display form.
3. In the Appointment Display Settings (I SDF 3120) field, create or edit a Schedule Appointment Display Settings report by selecting the button to the right of the field.
4. In the Schedule Appointment Display Settings report, navigate to the Display tab and enter the Visit Bubble configuration you created in the Popup configuration (I HRX 1210) field.
5. Save your selected report and click Accept.
6. Enter your created or edited report name into the Appointment Display Settings field.

Note that this changes the Visit Bubble for Book It, and the View Schedules and Move Provider Appts activities. To configure settings for Snapboards, refer to the Configure What Information Appears in the Snapboard Visit Bubble topic.

Change the Visit Bubble for an Individual Department

We don't recommend customizing the bubble by department, but if you have a business reason to do so, follow these steps:

1. In Hyperspace, open the Department Edit activity (search: Department) for your selected department.
2. In Department Edit, select the Schedule > Display form.
3. In the Appointment Display Settings (I DEP 3120) field, create or edit a Schedule Appointment Display

Settings report by selecting the button to the right of the field.

4. In the Schedule Appointment Display Settings report, navigate to the Display tab and enter the Visit Bubble configuration you created in the Popup configuration (I HRX 1210) field.
5. Save your selected report and click Accept.
6. Enter your created or edited report name in the Appointment Display Settings field.

Create Subgroups of Providers for Scheduling

Subgroups are groups of providers who share a common trait or are on a team together. Schedulers might find it helpful to schedule based on these traits, like when a patient wants to see only female providers or when a patient wants a provider who speaks Spanish. Subgroups are records in the Subgroup (SGR) master file.

If you want to import all subgroups at once rather than manually creating each subgroup, you can use import specification SGR,1000-Template - Subgroup to import all subgroups. For more information about importing records, refer to the Standard Import Guide.

Considerations

It's easy to confuse subgroups with pools. Both are groupings of providers, but subgroups are a different type of record than pools. You can tell these two record types apart by how they are used:

- Schedulers use subgroups to view or select groups of providers with a common trait, such as gender or spoken language, or who are on a team for scheduling, such as care teams.
- Auto Scheduler searches use pools to identify which providers and resources to schedule with an advanced visit type. Schedulers might see pools when scheduling, but they can't select a pool.
- Pools can be made up of subgroups. For example, you can enter a subgroup of chemotherapy providers rather than entering the providers one-by-one when you build the pool record.

If you want to allow users to edit subgroups in Hyperspace but don't want users to create subgroups, work with your Data Courier administrator to ensure users cannot create subgroups in your production environment.

1. In Hyperspace, open the subgroup editor (search: Subgroup).
2. Select the Create tab.
    - Either assign an ID to the subgroup or let the system assign an ID.
    - Name the record so that schedulers can easily identify its purpose.
3. On the General Settings form, add abbreviations and synonyms for the subgroup.
4. On the Providers/Depts form, select the departments and providers for the subgroup.
    - If the subgroup includes providers from multiple departments, enter Yes in the Span departments? (I SGR 90) field. If you set this field to Yes, all providers in all departments in the subgroup are used when selecting that subgroup. If you want schedulers to be able to use a subgroup that their department is not in, list their department in the Other Departments (I SGR 200) field.
    - Select providers and resources and then select the department for each provider and resource. In the Foundation System, subgroup 18-Purple Therapy Team is a multiple department subgroup.
    - If the subgroup doesn't span multiple departments, enter the department for the subgroup in the Department (I SGR 100) field, and leave the Span departments? (I SGR 90) field set to No. Then, select the providers and resources for the subgroup. With this setting, only the providers in the

department that the scheduler is in are used when a scheduler selects this subgroup. Keep in mind that when the Span Departments field is set to No, you can't enter departments in the Other Departments field. You can only edit the subgroup for one department at a time. In the Foundation System, subgroup 9-Blue Team is a single department subgroup.

5. Enter any scheduler instructions in the Scheduler instructions field so schedulers know when to use this subgroup. This information appears in Book It when scheduling in Cadence.
6. If there are other departments that should be able to view and schedule members of the subgroup, in addition to the departments that have providers in the subgroup, enter them in the Other departments in which this subgroup can be selected (I SGR 200) field. For example, if all the providers in your subgroup practice in departments A and B, but you would like users in department C to have access to this subgroup, specify department C in this field. This option is only available if the Subgroup is marked to span multiple departments, if a subgroup does not span departments this field will not be available.

Understand which records are affected by changes you make to a subgroup by checking the Linked Records form in the subgroup editor. This form shows lists of decision trees, One Click search algorithms, pools, providers using a team subgroup, recall templates, and prerequisite templates that use a particular subgroup.

Allow Managers to Edit Subgroups

If you maintain the Provider/Resource Directory (SER) master file in your production environment, you might choose to allow certain managers to maintain their own subgroups in production as well. There are several steps you need to complete to ensure that managers can edit subgroups.

1. Grant managers Chronicles security for the Subgroups (SGR) master file. Refer to the Chronicles Security Classes topic for detailed instructions.
2. Set Cadence security point Subgroups (I ECL 5690) to 10-Full access on the Reports & Sys Admin form in managers' Cadence security classes.
3. Add the Subgroups button (ES_IT_MF_SGR) to the Hyperspace toolbar in managers' user roles. Refer to the Modify a User's Options on an Existing Menu or Toolbar topic for detailed instructions.
4. Work with your Data Courier team to ensure that the items listed below can be edited in production. Refer to the Configure Data Courier Item Protection Settings topic for detailed instructions.
    - Span Department? (I SGR 90)
    - Departments (I SGR 100)
    - Providers (I SGR 110)
    - Scheduler Instructions for a single department (I SGR 120)
    - Scheduler Instructions for multiple department (I SGR 150)
    - Other Departments Using This Subgroup (I SGR 200)

Restrict Which Subgroups Users Can Select During Scheduling

Starting in May 2022

When the primary provider isn't available, schedulers can click the Team button in Book It to select a provider's default team as well as any other subgroups the provider belongs to for the department. This helps schedulers quickly find the subgroups they need without manually searching for them.

A provider's subgroups appear when schedulers click the Team button by default, but you can turn it off at the system level or for specific subgroups. You might want to turn it off at the system level if you have created a large number of subgroups meant for use with decision trees. When a scheduler clicks the button in this case, they'll see a long list of subgroups and it might be difficult to find the specific one they need. You can override the system level setting for individual subgroups so only a small number of subgroups appear when a scheduler clicks the Team button.

If you want only the provider's team to appear when a scheduler clicks the Team button, which appears as an icon to the right of a provider's name in the Provider Select window, follow these steps to turn off this feature at the system level:

1. In Hyperspace, open Cadence System Definitions and select the Scheduling > General form.
2. In the Show all subgroups as teams (I SDF 10765) field, enter No.

If you want to override the system-level settings for certain subgroups, follow these steps for each subgroup:

1. In Hyperspace, open a subgroup for editing (search: Subgroup).
2. On the General Settings form, update the Show in team selection? (I SGR 70) field to show or hide the subgroup. By default, this field has a value of Use System Default.
    - If the Show all subgroups as teams field in Cadence System Definitions is set to Yes, enter Never Show if you do not want the subgroup to appear.
    - If the Show all subgroups as teams field in Cadence System Definitions is set to No, enter Always Show if you want this subgroup to appear.

Customize the Icons and Colors for View Schedules and the Schedules View in Book It

By default, the View Schedules activity and the Schedules view in Book It follow the user's Hyperspace theme and do not have special icons or coloring for certain types of appointments. You can choose different icons and colors to use for View Schedules and Book It if needed. For example, you might color code appointments by visit type or appointment status.

Customize the Appointment Display at the System Level

If you want to customize the View Schedules activity and the Schedules view in Book It for schedulers across your organization, you can do so at the system level.

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > Display form.
3. In the Appointment display settings (I SDF 3120) field, select the settings to use, or click the edit button to create new settings. Refer to the Specify Appointment Display Settings section below for information about the available settings.

Customize the Appointment Display at the Department Level

If you want to customize the View Schedules activity and the Schedules view in Book It for only certain departments, you can do so at the department level. Or, if you customized the appointment display at the system level but want to customize it differently for certain departments, you can specify different settings for those departments. The system uses a department's settings for all users who log in to the department.

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

2. Select the Scheduling > Display form.
3. In the Appointment display settings (I DEP 3120) field, select the settings to use, or click the edit button to create new settings. Refer to the Specify Appointment Display Settings section below for information about the available settings.

Specify Appointment Display Settings

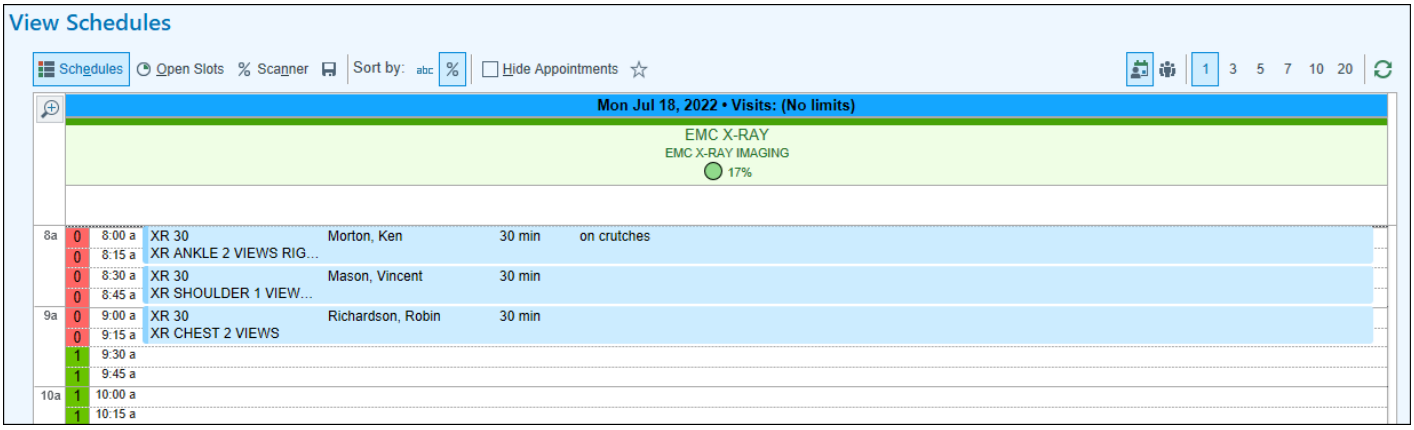
The following settings are available when you create an appointment display settings record:

- To show icon indicators in the Schedules view, select the Show icon indicators? (I HRX 944) checkbox and list the icons to show in the Override Icons (I HRX 953) list.
- To color appointments in the Schedules view, select the Color appointments? (I HRX 946) checkbox. Select an option in the Color by (I HRX 955) field and specify your colors in the table.
    - Appointment Status
    - Imaging Study Status
    - Inpatient/Outpatient
    - Patient Rule. Choose a Patient-context rule to base your coloring on, then define the color to use when the rule is true. Note that large or complex rules can adversely affect system performance.
    - Procedural Log Latest Event
    - Report Column. Choose the report column to base your coloring on, then define the colors for values that can appear in that report column. For example, you might use column 1743-Appt Visit Type ID to color appointments by visit type.

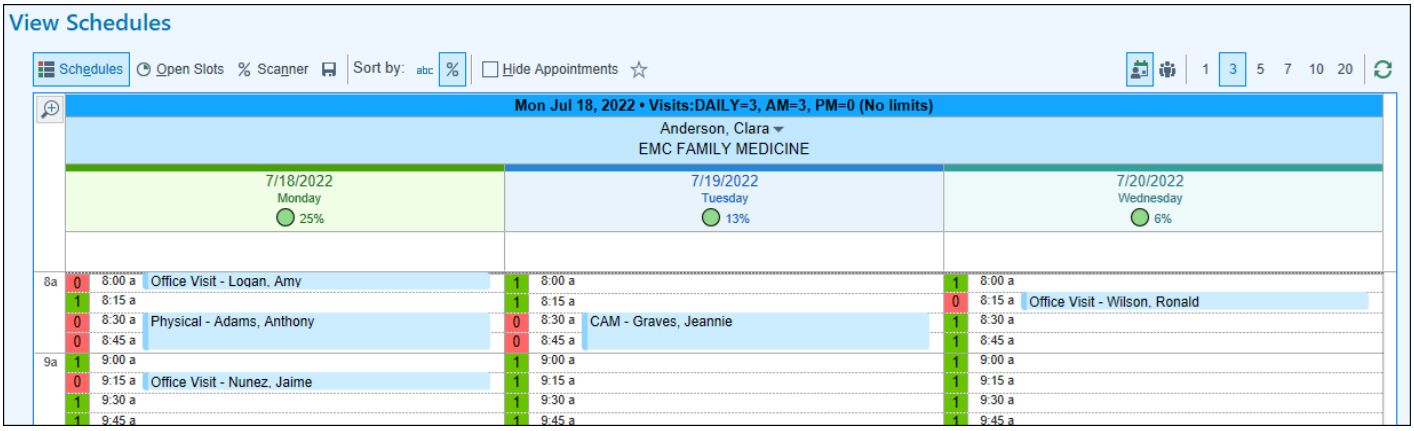
Customize the Captions for View Schedules and the Schedules View in Book It

By default, the View Schedules activity and the Schedules view in Book It show basic information about appointments in captions on the schedule. The contents of the caption are defined in an extension. If needed, you can customize the extensions that are used when schedulers are viewing one column or multiple columns.

- When schedulers are viewing the schedule for only one provider on one day, extension 40452-ES Appointment Entry Single Column Default Caption is used by default to show the abbreviated visit type name, patient name, appointment length, appointment notes, and procedure name.
- When schedulers are viewing the schedule for multiple providers or days, extension 40451-ES Appointment Entry Multiple Columns Default Caption is used by default to show the abbreviated visit type name, patient name, and procedure name.



One column



Multiple columns

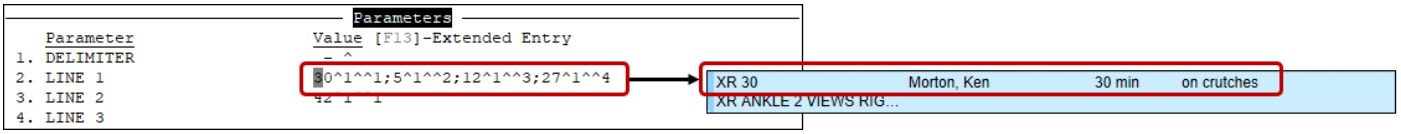
In each extension you edit, choose the data elements that appear in each line of a caption. Also select a style for each data element, which determines the font or the caption of that data, and, for multiple columns of schedules, choose which column of the caption the data element appears in. You can also use report columns to show information in captions and tooltips by adding the PAF Column data element to your extensions.

When you customize an extension for a caption, you can use columns that don't show icons from the master files listed below. Columns that show an icon typically have (Icon) in the record name. The system prevents you from using a column that isn't supported.

- Patient (EPT)
- Surgical Case (ORC)
- Surgical Log (ORL)
- Orders (ORD)

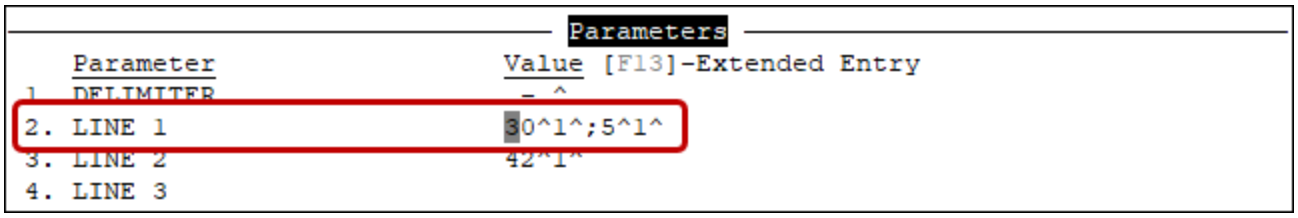
You can also use columns that have a field type (I PAF 90) of Multiple Context, such as column 48827-Case/Appt Length, that show appointment or case information as appropriate for the scheduled visit. Multiple Context columns are groupers for other columns that show the right column for the right context. In the example of column 48827, it displays column 48031-Length (as Scheduled) for a case (ORC) or column 1742-Appt Length for an appointment (EPT). The system does not check the context-specific columns to determine whether they are supported in View Schedules or Book It captions.

In the standard caption for a single column, the first line contains the abbreviated visit type name, patient name, appointment length, and appointment notes. These data elements are 30, 5, 12, and 27.

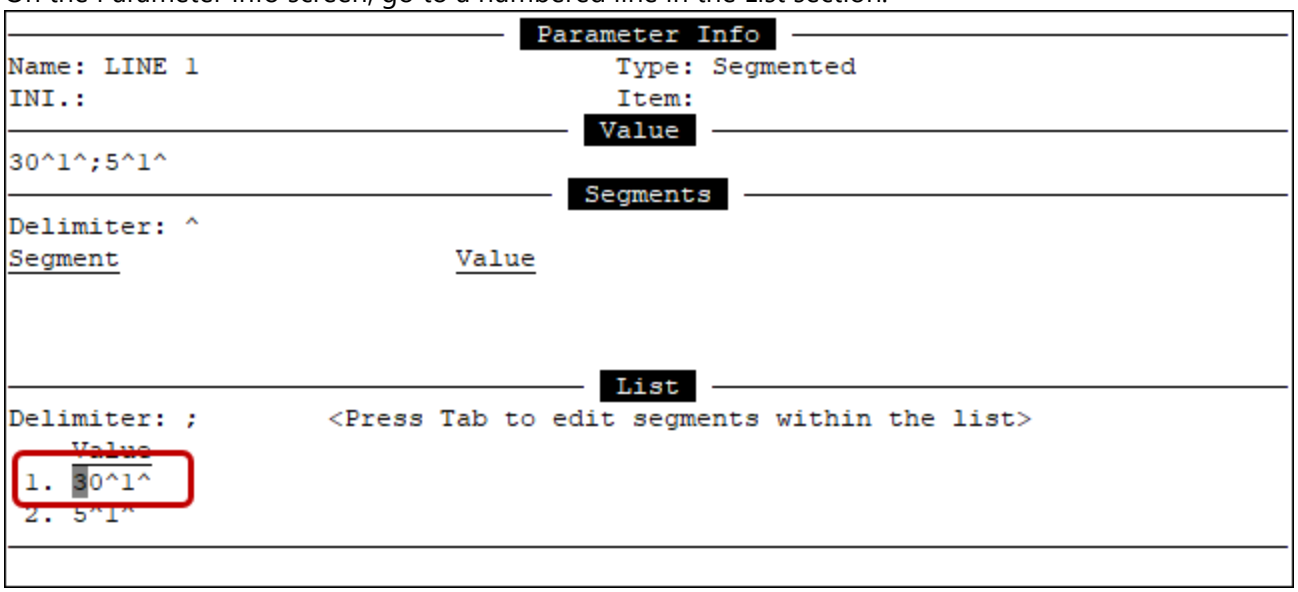


Customize Extensions for View Schedules and Book It Captions

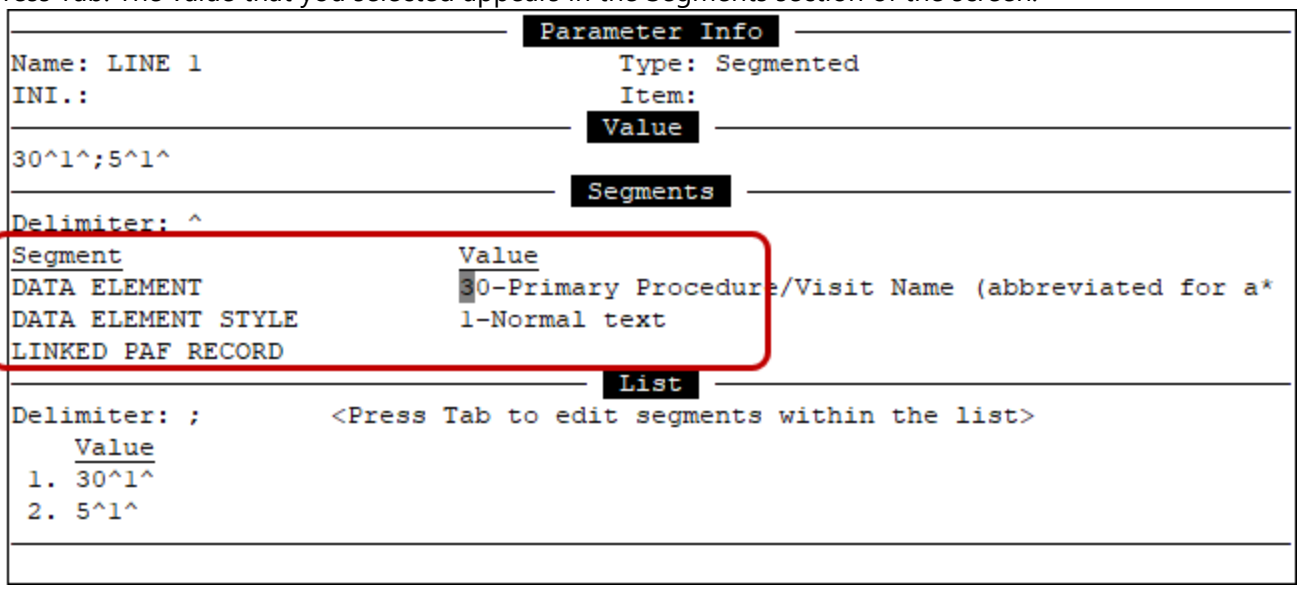
1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of one of the following extensions:
   - 40451-ES Appointment Entry Multiple Columns Default Caption
   - 40452-ES Appointment Entry Single Column Default Caption
3. Edit your extension. On the Parameters screen, go to the line you want to edit and press F6.



4. On the Parameter Info screen, go to a numbered line in the List section.



5. Press Tab. The value that you selected appears in the Segments section of the screen.



6. Enter a data element from the Snapboard Data Element (I ECT 5530) category list in the Value field. Press Shift+F5 to view a list of available data elements.
7. Go to the Data Element Style segment and enter a style in the Value column. Press Shift+F5 to see a list of possible styles.
8. If you selected the PAF Column data element, go to the Linked PAF Column segment and enter the report column in the Value field.
9. If you're editing an extension for multiple columns, go to the Data Element Column segment and specify which column to show the data element in. Column 1 is used by default. You can specify column 1, 2, 3, or 4.

10. Follow the same process for each line of the caption.
11. Back on the Parameters screen, there are several more parameters you can modify as needed:
    - Column Widths. There are four columns of data that can appear. By default, each of the first three columns is 150 pixels wide. In this parameter, you can specify a different value in pixels to use for the first three columns. The last column that has data uses the remaining width. For example, if the fourth column has no data, data from the third column extends to the fourth column.
    - Keep Data on Specified Line. By default, any empty space on a line causes data on the next line to be moved up to save space. Set this parameter to 1-Yes to force data to appear on the line you specified in the Line # parameters.
    - Line Wrap the Last Data Element. By default, when data is too long to appear in a column, it is truncated with an ellipsis. Set this parameter to 1-Yes to allow data in the last column on the last line to wrap to the next line instead of truncating it when it is too long to fit on the first line.

Add Your Custom Extensions to the Appointment Display at the System Level

If you want to customize the captions for the View Schedules activity and the Schedules view in Book It for schedulers across your organization, you can do so at the system level.

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > Display form.
3. In the Appointment display settings (I SDF 3120) field, select the settings to use, or click the edit button to create new settings.
4. In the settings record, select the Display tab.
5. Enter the extensions you want to use in the Single column caption (I HRX 939) and Multiple columns caption (I HRX 941) fields.

Add Your Custom Extensions to the Appointment Display at the Department Level

If you want to customize the captions for the View Schedules activity and the Schedules view in Book It for only certain departments, you can do so at the department level. Or, if you customized the appointment display at the system level but want to customize it differently for certain departments, you can specify different settings for those departments. The system uses a department's settings for all users who log in to the department.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Display form.
3. In the Appointment display settings (I DEP 3120) field, select the settings to use, or click the edit button to create new settings.
4. In the settings record, select the Display tab.
5. Enter the extensions you want to use in the Single column caption (I HRX 939) and Multiple columns caption (I HRX 941) fields.

Control What Schedulers See on the Provider Schedule

The Provider Schedule form is like a calendar. It shows when providers are busy, when they are free, and how many patients they can see. Schedulers use the form to review a provider's schedule and select appointment times. You can control how the form looks and what information schedulers see.

You can configure the schedule in the following ways:

- How schedule details appear
- The colors of the slots on the schedule

Choose the Information Schedulers See on the Form

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Display form.
3. Select the information to show on the Provider Schedule form. The form shows slots from the current time forward, doesn't show blocks in filled or unavailable slots, and sorts providers by name. By default, blocks appear with their abbreviations, but starting in February 2024 you can set the Block display field (I SDF 8687) to Title if the abbreviation alone isn't enough information for schedulers.

Select the Slot Colors for the Form

Under the Schedule Display Slot Colors heading, select slot colors for the schedule. Click the Selection button to see available colors.

- Completely open (I SDF 10100). The default color is Key Lime. The Foundation System uses Key Lime.
- Partially open (I SDF 10110). The default color is Caribbean. The Foundation System uses Key Lime.
- Only overbooks (I SDF 10120). The default color is Golden. The Foundation System uses Golden.
- Completely full (I SDF 10130). The default color is Blush. The Foundation System uses Blush.
- On hold (I SDF 10140). The default color is Light Gray. The Foundation System uses Light Gray.
- Reserved (I SDF 10105). To identify slots that are reserved for a Fast Pass offer made in MyChart to a patient who is on the wait list. The default color is Dahlia. The Foundation System uses Dahlia.
- Appointment selection highlight (I SDF 10180). The default color is Caribbean. The Foundation System uses Caribbean.
- Background color scheme. Determines the background color of the schedule. Click the Selection button to open the Schedule Display Background Color Settings window where you can choose between a standard color scheme or a custom one. For both the lighter and darker colors, the Foundation System uses a light blue color with the following RGB values: R = 210, G = 233, B = 247.

Customize the Appointment Review Window

The last window schedulers see before the appointment is officially scheduled is the Appointment Review window. This window is a summary of the appointment which schedulers can use to review details like instructions or copays with the patient. You decide what information schedulers see in the window.

You can configure what insurance information appears in this window at the department level in addition to the system level. You might decide to hide insurance information in certain specialty departments, such as dental.

Prerequisites

You need Shared security point 199-Access Code to Execute to edit the Change copay display PP (I SDF 10354) and Dynamic SmartLink/Programming Point (I SDF 10353) fields.

To specify system level settings:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Appointment Review form.
3. Choose what information to show in the window:
    - Show insurance (I SDF 10300). Determine whether to show the patient's insurance plan, payer, payer and plan, or no insurance information. The default is None.
    - Show effective dates? (I SDF 10310). Determine whether to show the effective dates of the patient's insurance. The default is No.
    - Show copay? (I SDF 10320). Determine whether to show the patient's copay. The default is No.
    - Change copay display PP (I SDF 10354). If you use Resolute Professional Billing, you can use this field to enter a custom routine created by a programmer at your organization to customize how the caption and copay appear.
    - Show confirm? (I SDF 10351). Determine whether to show the Confirm now button. The default is No.
    - Default in/outpatient (I SDF 10350). Determine whether to automatically mark the visit as inpatient or outpatient. Choose from:
        - Ask on Appt Review. This is the default. Allow users to change the type of visit. The system selects an option by default based on the following hierarchy: visit type, department, order mode, patient admission status on the appointment date.
        - Default without Asking. Allow users to change the type of visit only when the visit type or department is configured to require the user to select inpatient or outpatient. Otherwise, use the system selects an option by default based on the following hierarchy: visit type, department, order mode, patient admission status on the appointment date.
        - Inpatient. Schedule all appointments as inpatient unless the visit type or department is

configured to require the user to select inpatient or outpatient.
        - Outpatient. Schedule all appointments as outpatient unless the visit type or department is configured to require the user to select inpatient or outpatient.
        - Require Selection. The system does not select a default option and requires the user to select an option.
    - Show VTM description? (I SDF 8224). Determine whether to show the visit type modifier description if a modifier was used to schedule the appointment. The default is Yes.
    - Show add to wait list option? (I SDF 10330). Determine whether to show the Add to wait list button. The default is Yes.
4. Use the Custom Fields table to add more information to the Appointment Review window.
    - Caption (I SDF 10352). Enter the caption for the information. The system automatically adds a colon after your caption.
    - Dynamic SmartLink/Programming Point (I SDF 10353). Enter the SmartLink or programming point that finds the information. Here are a few SmartLinks and programming points you can use:
        - Location instructions: getApptLocInstr^S2LPP21
        - Procedure: procAR^RISLPP4
        - Department address: DepAddr^S2LPP21
        - Scheduling instructions:
            - To show instructions for all appointments: schedInstrAR^RISLPP15()
            - To show instructions for only imaging appointments: schedInstrAR^RISLPP15(1)

To specify department level settings:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Appt Review form.
3. Choose what insurance information to show in the window:
    - Show insurance (I DEP 10300). Determine whether to show the patient's insurance plan, payer, payer and plan, or no insurance information.
    - Show effective dates (I DEP 10310). Determine whether to show the effective dates of the patient's insurance.
    - Show copay (I DEP 10320). Determine whether to show the patient's copay.

Determine How Long Appointment Times Are Held by Appointment Review, Book It, and Order Up

By default, the system holds the appointment times a scheduler has selected for 120 seconds in the following scenarios so that other schedulers cannot take them:

- While the Appointment Review window is open. After 120 seconds, the Appointment Review window is closed and the slots are released by default. You can change this behavior to close the window and schedule the appointments instead.
- While Book It or Order Up is active. After 120 seconds of inactivity in Book It or Order Up, a message appears to inform the user that the appointment times will be released in 30 more seconds unless they take action. If they do not take action within 30 seconds, the slots are released and another message

appears. The appointment that was previously held is also called out.

If needed, you can change the amount of time the system holds appointment times, which affects Appointment Review, Book It, and Order Up. You can also configure the Appointment Review window to schedule the appointments after the time-out period has passed instead of releasing the appointments.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Appointment Review form.
3. In the Time-out length in seconds (I SDF 8211) field, enter the amount of time for the Appointment Review window, Book It, and Order Up to hold appointment times. The default value is 120 seconds.
4. In the Time-out action (I SDF 8212), select the action the system takes for the Appointment Review window when the time-out length has been reached. You can choose to have the system automatically accept and schedule the appointment or cancel and go back to the last screen. The default value is Back Up.

Set Up Cadence Advantage Activities

Cadence advantage activities allow you to control which screens schedulers see when they complete certain scheduling workflows. There are five primary types of advantage activities, and each one is built a bit differently. In this section, we cover Patient Demographics, Appointment Demographics, Before Appointment Entry, and After Appointment Entry. For information about setting up advantage activities for sign in, check in, and check out workflows, refer to the Sign In, Check In, and Check Out Setup and Support Guide.

Set Up Patient Demographics Advantage Activities

Patient Demographics advantage activities can appear from two access points:

- Patient Demographics. Opens the Demographics activity when a scheduler clicks the Edit link in the Appointment Desk HTML display or clicks Patient Options > Demographics in Book It.
- New Patient Demographics. Opens the New Patient activity after a scheduler opens the Appointment Desk and creates a new patient record.

The standard and Foundation System Patient Demographics advantage activities meet the needs of most organizations, but you can customize them if needed. After you determine which advantage activity you want to use, add it to Cadence System Definitions or your department records.

Create a Custom Patient Demographics Advantage Activity

The navigator sections that you want to show in the Demographics or New Patient activity need to be listed in a navigator template, which you specify in your Patient Demographics advantage activity. Refer to the Cadence Navigator Templates topic for information about Epic-released navigator templates that you can use. If you want to customize an Epic-released navigator template or create your own, refer to the Collect Sections into Topics and Collect Topics into a Template topics. Refer to the Cadence Navigator Sections topic for information about Epic-released navigator sections that you can use.

To add your navigator template to an advantage activity record:

1. In Hyperspace, create an advantage activity record (search: Advantage Activity).
2. In the Subtype (I HAA 55) field, enter Patient Demographics.
3. Select the Patient Demographics form.
4. Select the access points (I HAA 50) that you want to use this advantage activity for.
5. In the Navigator Template to Use (I HAA 1001) field, enter the navigator template to show in the

Demographics or New Patient activity.

6. Optionally, in the Toolbar Menu to Display (I HAA 90) field, you can enter a toolbar menu record to override the default toolbar (menu record 1121-ES_MT_PATDEMTOOLBAR).

Add Patient Demographics Advantage Activities to Cadence System Definitions and Department Records

You can specify the Patient Demographics advantage activities to use at the system or department level. The department-level setting is used for schedulers who are logged in to the department.

To specify an advantage activity at the system level:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Adv Activities Core form.
3. In the Patient demographics (I SDF 14001) field, enter the advantage activity to use when a scheduler clicks the Edit link in the Appointment Desk HTML display.
4. In the New patient demographics (I SDF 14002) field, enter the advantage activity to use when a scheduler opens the Appointment Desk and creates a new patient record.

To specify an advantage activity 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 Adv Activities Core form.
3. In the Patient demographics (I DEP 1401) field, enter the advantage activity to use when a scheduler clicks the Edit link in the Appointment Desk HTML display or clicks Patient Options > Demographics in Book It.
4. In the New patient demographics (I DEP 1402) field, enter the advantage activity to use when a scheduler opens the Appointment Desk and creates a new patient record.

Turn Off the New Patient Demographics Advantage Activity at the Department Level

If a system-level advantage activity for the New Patient activity does not apply to certain departments, you can hide it by specifying a blank advantage activity at the department level. In the Foundation System, we created advantage activity 117000004-ES Blank New Patient Demog to turn off the New Patient activity at the department level.

1. Refer to the Create a Custom Patient Demographics Advantage Activity section above and leave the Navigator Template to Use (I HAA 1001) field blank.
2. Refer to the Add Patient Demographics Advantage Activities to Cadence System Definitions and Department Records section above and add your blank advantage activity record to your department records.

Set Up Appointment Demographics Advantage Activities

Appointment Demographics advantage activities appear when a scheduler opens the Appointment Information activity for an appointment from the Appointment Desk or Department Appointments report.

The standard and Foundation System Appointment Demographics advantage activities meet the needs of most organizations, but you can customize them if needed. After you determine which advantage activity you want to use, add it to Cadence System Definitions or your department records.

Create a Custom Appointment Demographics Advantage Activity

The navigator sections that you want to show in the Appointment Information activity need to be listed in a navigator topic, which you specify in your Appointment Demographics advantage activity. Refer to the Cadence Navigator Topics topic for information about Epic-released navigator topics that you can use. If you want to customize an Epic-released navigator topic or create your own, refer to the Collect Sections into Topics topic. Refer to the Cadence Navigator Sections topic for information about Epic-released navigator sections that you can use.

To add your navigator topic to an advantage activity record:

1. In Hyperspace, create an advantage activity record (search: Advantage Activity).
2. In the Subtype (I HAA 55) field, enter Appointment Demographics.
3. Select the Appointment Demographics form.
4. Select the Appointment Demographics access point (I HAA 50).
5. In the Navigator Topic Per Appointment to Use (I HAA 1001) field, enter the navigator topic to show in the Appointment Information activity.
6. Optionally, in the Toolbar Menu to Display (I HAA 90) field, you can enter a toolbar menu record to override the default toolbar (menu record 1122-ES_MT_APPTDEMOGTOOLBAR).

Add Appointment Demographics Advantage Activities to Cadence System Definitions and Department Records

You can specify the Appointment Demographics advantage activity to use for the Appointment Information activity at the system or department level. The department-level setting is used for appointments that are scheduled in the department.

To specify an advantage activity at the system level:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Workflow Definitions > Adv Activities Core form.
3. In the Appointment demographics (I SDF 14000) field, enter an Appointment Demographics advantage activity.

To specify an advantage activity 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 Workflow Definitions > Adv Activities Core form.
3. In the Appointment demographics (I DEP 1400) field, enter an Appointment Demographics advantage activity record.

Set Up Before Appointment Entry Advantage Activities

You can use Before Appointment Entry advantage activities to open Registration or the Demographics activity before a user is taken to a scheduling activity. You can specify different advantage activities to use for the following access points:

- Before Full Appointment Entry
- Before Quick Appointment Entry
- Before Class Entry

The standard and Foundation System Before Appointment Entry advantage activities meet the needs of most

organizations, but you can customize them if needed.

If you want to open Registration, the system uses the workflow specified for the Scheduling Before Appointment Entry jump from activity to determine what appears in Registration. Refer to the Specify from Which Activity Registration is Launched topic for additional information.

If you want to open the Demographics activity, create an advantage activity and specify a navigator topic that includes the navigator sections that you want to appear in the Demographics activity.

After you determine which advantage activity you want to use, add it to Cadence System Definitions or your department records.

Create a Custom Before Appointment Entry Advantage Activity to Open Registration

If you want schedulers to review and complete registration information before they schedule an appointment, you can set up the system to show the Registration activity before the scheduling activity. You can specify a confirmation (HCF) record for the system to evaluate when determining whether Registration should open and when determining which warnings and errors to show to users in Registration. Work with your Prelude team to identify confirmation records that you can use.

If you want to create a new advantage activity that is similar to one that already exists, you can duplicate that record in Chronicles and then open it for editing in Hyperspace. In Chronicles, access the Advantage Activity (HAA) master file and go to Enter Data > Duplicate Adv Activity.

1. In Hyperspace, create an advantage activity record (search: Advantage Activity).
2. In the Subtype (I HAA 55) field, enter Before Appointment Entry.
3. Select the Before Appointment Entry form.
4. Select the access points (I HAA 50) that you want to use this advantage activity for.
5. If you want to conditionally hide the activity in certain scenarios, enter a Patient context rule in the Rule to Suppress Before Appointment Entry (I HAA 407) field. When the patient or user meets the criteria of the rule, the advantage activity does not appear before scheduling.
6. In the When to Launch Registration (I HAA 450) field, enter one of the following options:
   - Always Auto Launch Reg. Registration always opens.
   - Auto Launch If Warning or Error. Registration opens only if the system finds warnings or errors using the confirmation record you specify in the next step.
   - Don't Launch. Registration does not open. This is the default value.
7. If you selected Auto Launch If Warning or Error in the previous step, enter your confirmation record in the Confirmation Record to Launch Registration (I HAA 452) field.
8. For the Suppress Display of Warnings? (I HAA 451) setting, select Yes if you don’t want to show warnings from the confirmation record you specified in step 7 to users in Registration and want to use the confirmation record only to determine whether Registration opens.

Create a Custom Before Appointment Entry Advantage Activity to Open Demographics

If you want schedulers to review and complete only demographic information before they schedule an appointment, you can set up the system to show the Demographics activity before the scheduling activity.

The navigator sections that you want to show in the Demographics activity need to be listed in a navigator

template, which you specify in your Before Appointment Entry advantage activity. Refer to the Cadence Navigator Templates topic for information about Epic-released navigator templates that you can use. If you want to customize an Epic-released navigator template or create your own, refer to the Collect Sections into Topics and Collect Topics into a Template topics. Refer to the Cadence Navigator Sections topic for information about Epic-released navigator sections that you can use.

> If you want to create a new advantage activity that is similar to one that already exists, you can duplicate that record in Chronicles and then open it for editing in Hyperspace. In Chronicles, access the Advantage Activity (HAA) master file and go to Enter Data > Duplicate Adv Activity.

To create the advantage activity record and add your navigator template to it:

1. In Hyperspace, create an advantage activity record (search: Advantage Activity).
2. In the Subtype (I HAA 55) field, enter Before Appointment Entry.
3. Select the Before Appointment Entry form.
4. Select the access points (I HAA 50) that you want to use this advantage activity for.
5. If you want to conditionally hide the activity in certain scenarios, enter a Patient context rule in the Rule to Suppress Before Appointment Entry (I HAA 407) field. When a patient or user meets the criteria of the rule, the advantage activity does not appear before scheduling.
6. In the Navigator Template to Use (I HAA 1001) field, enter the navigator template to show in the Demographics activity.
7. Optionally, in the Toolbar Menu to Display (I HAA 90) field, you can enter a toolbar menu record to override the default toolbar (menu record 1122-ES_MT_APPTDEMOGTOOLBAR).

Add Before Appointment Entry Advantage Activities to Cadence System Definitions and Department Records

Regardless of which version you're using, you can specify the Before Appointment Entry advantage activity to use at the system or department level. The department-level setting is used for schedulers who are logged in to the department.

To specify an advantage activity at the system level:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. To specify advantage activities for the Before Full Appointment Entry and Before Quick Appointment Entry access points, select the Workflow Definitions > Adv Activities Core form.
   - Before full appointment entry (I SDF 14007)
   - Before quick appointment entry (I SDF 14009)
3. To specify an advantage activity for the Before Class Entry access point, select the Workflow Definitions > Adv Activities Add'l form and enter an advantage activity in the Before class entry (I SDF 14011) field.

To specify an advantage activity at the department level:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. To specify advantage activities for the Before Full Appointment Entry and Before Quick Appointment Entry access points, select the Workflow Definitions > Adv Activities Core form.

- Before full appointment entry (I DEP 1407)
- Before quick appointment entry (I DEP 1409)

3. To specify an advantage activity for the Before Class Entry access point, select the Workflow Definitions > Adv Activities Add'l form and enter an advantage activity in the Before class entry (I DEP 1411) field.

Turn Off Before Appointment Entry Advantage Activities at the Department Level

If a system-level advantage activity does not apply to certain departments, you can hide it by specifying a blank advantage activity at the department level. In the Foundation System, we created advantage activity 11700010-ES Before Appt Entry - Blank to turn off Registration before appointment entry at the department level.

1. Refer to the sections above for how to create a Before Appointment Entry advantage activity and leave the Navigator Template to Use (I HAA 1001) field blank.
2. Make sure that the When to Launch Registration (I HAA 450) field is blank or set to Don't Launch.
3. Refer to the Add Before Appointment Entry Advantage Activities to Cadence System Definitions and Department Records section above and add your blank advantage activity record to your department records.

Set Up After Appointment Entry Advantage Activities

After Appointment Entry advantage activities appear in the Appointment Information activity after a scheduler finishes a scheduling workflow. They can also be used to show the Registration activity, with or without the Appointment Information activity. You can specify different advantage activities to use for the following access points:

- After Full Appointment Entry
- After Quick Appointment Entry
- After Class Entry
- After Schedule from Wait List
- After Schedule from Snapboard
- After Group Full Appointment Entry

The standard and Foundation System After Appointment Entry advantage activities meet the needs of most organizations, but you can customize them if needed. If you want to show the Appointment Information activity, create an advantage activity record that includes the navigator topic that you want to appear in the Appointment Information activity. You can also choose to show the Registration activity after the Appointment Information activity appears or skip the Appointment Information activity and show only the Registration activity. After you create your advantage activity, you need to add it to Cadence System Definitions or your department records.

Create a Custom After Appointment Entry Advantage Activity

The navigator sections that you want to show in the Appointment Information activity need to be listed in a navigator topic, which you specify in your After Appointment Entry advantage activity. Refer to the Cadence Navigator Topics topic for information about Epic-released navigator topics that you can use. If you want to customize an Epic-released navigator topic or create your own, refer to the Collect Sections into Topics topic. Refer to the Cadence Navigator Sections topic for information about Epic-released navigator sections that you can use.

To create the advantage activity record and add your navigator topic to it:

1. In Hyperspace, create an advantage activity record (search: Advantage Activity).

2. In the Subtype (I HAA 55) field, enter After Appointment Entry.
3. Select the After Appointment Entry form.
4. Select the access points (I HAA 50) that you want to use this advantage activity for.
5. If you want to conditionally hide the activity in certain scenarios, enter a Patient context rule in the Rule to Suppress After Appointment Entry (I HAA 407) field. When an appointment meets the criteria of the rule, the advantage activity does not appear after scheduling.
6. For the Prevent Canceling from After Appointment Entry? (I HAA 455) setting, select Yes if you want to hide the Cancel and Close buttons in the Appointment Information activity so that schedulers must fill out required fields before they click Accept. The default value is No, and the Cancel and Close buttons appear.
7. In the Navigator Topic Per Appointment to Use (I HAA 1001) field, enter the navigator topic to show in the Appointment Information activity.
8. Optionally, in the Toolbar Menu to Display (I HAA 90) field, you can enter a toolbar menu record to override the default toolbar (menu record 1122-ES_MT_APPTDEMOGTOOLBAR).

If a user schedules multiple appointments at one time, by default the advantage activity shows appointment information only for the first appointment in the series. To show appointment information for each appointment:

1. In Hyperspace, open the department in which you want to show appointment information for individual appointments (search: Department).
2. Go to the Workflow Definitions > Adv Activities Core form.
3. In the Show Demographic for Each Appointment in Sequential (I DEP 1112) item, select Yes to show the navigator topic once for each appointment that was scheduled.

Show Registration After an After Appointment Entry Advantage Activity

If you want schedulers to review and complete registration information after they schedule an appointment, you can set up the system to show the Registration activity after your After Appointment Entry advantage activity. The system uses the workflow specified for the Scheduling After Appointment Entry jump from activity to determine what appears in Registration. Refer to the Specify from Which Activity Registration Is Launched topic for additional information.

If a user schedules multiple appointments at one time, registration appears only for the first appointment in the series of appointments.

You can specify a confirmation (HCF) record for the system to evaluate when determining whether Registration should open and to determine which warnings and errors to show to users in Registration. Work with your Prelude team to identify confirmation records that you can use.

1. In Hyperspace, open your After Appointment Entry advantage activity record (search: Advantage Activity).
2. In the When to Launch Registration (I HAA 450) field, enter one of the following options:
    - Always Auto Launch Reg. Registration always opens. If you specify a confirmation record in the next step, the system evaluates it after the user clicks Accept in the Appointment Information activity. If there are multiple appointments, only the first appointment is evaluated, and Registration is opened only for the first appointment.
    - Auto Launch If Warning or Error. Registration opens only if the system finds warnings or errors using the confirmation record you specify in the next step. The system evaluates the confirmation record after the user clicks Accept in the Appointment Information activity. If there are multiple appointments, only the first appointment is evaluated, and Registration is opened only for the first appointment.

- Don't Launch. Registration does not open. This is the default value.
- Prompt for All Appts. The system evaluates the confirmation that you specify in the next step when the user clicks Accept in the Appointment Information activity. The Appointment Information activity stays open. If the system finds warnings or errors, it prompts the user to open Registration, go back to the Appointment Information activity, or close the Appointment Information activity. If the system doesn't find any warnings or errors, it closes the Appointment Information activity. If there are multiple appointments, all appointments are evaluated, and Registration can be opened for each appointment. This option can be useful if your confirmation check is looking only for appointment-specific issues.
- Prompt for One Appt. This option is similar to the Prompt for All Appts option. If there are multiple appointments, all appointments are evaluated, and the user is prompted only for the first appointment that the system finds warnings or errors for. This option can be useful if your confirmation check is looking for patient-level issues and not appointment-specific issues.

3. Enter your confirmation record in the Confirmation Record to Launch Registration (I HAA 452) field.
4. For the Suppress Display of Warnings? (I HAA 451) setting, select Yes if you don't want to show warnings from the confirmation record you specified in step 3 to users in Registration and want to use the confirmation record only to determine whether Registration opens.

Add After Appointment Entry Advantage Activities to Cadence System Definitions and Department Records

You can specify the After Appointment Entry advantage activity to use for the Appointment Information activity at the system or department level. The department-level setting is used for appointments that are scheduled in the department.

To specify an advantage activity at the system level:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. To specify advantage activities for the After Full Appointment Entry and After Quick Appointment Entry access points, select the Workflow Definitions > Adv Activities Core form.
   - After full appointment entry (I SDF 14008)
   - After quick appointment entry (I SDF 14010)
3. To specify advantage activities for the After Class Entry, After Schedule from Front Desk, After Schedule from Snapboard, After Group Full Appointment Entry access points, select the Workflow Definitions > Adv Activities Add'l form.
   - After class entry (I SDF 14012)
   - Front Desk > After appointment entry (I SDF 14013)
   - Wait List > After appointment entry (I SDF 14016)
   - Snapboard > After appointment entry (I SDF 14018)
   - Group Scheduling > After appointment entry (I SDF 14019)

To specify an advantage activity at the department level:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. To specify advantage activities for the After Full Appointment Entry and After Quick Appointment Entry access points, select the Workflow Definitions > Adv Activities Core form.

- After full appointment entry (I DEP 1408)
- After quick appointment entry (I DEP 1410)

3. To specify advantage activities for the After Class Entry, After Schedule from Front Desk, After Schedule from Snapboard, After Group Full Appointment Entry access points, select the Workflow Definitions > Adv Activities Add'l form.
   - After class entry (I DEP 1412)
   - Front Desk > After appointment entry (I DEP 1413)
   - Wait List > After appointment entry (I DEP 1416)
   - Snapboard > After appointment entry (I DEP 1418)
   - Group Scheduling > After appointment entry (I DEP 1419)

Turn Off After Appointment Entry Advantage Activities at the Department Level

If a system-level advantage activity does not apply to certain departments, you can hide it by specifying a blank advantage activity at the department level. In the Foundation System, we created advantage activity 2120000204-ES No Form Appt Info to turn off After Appointment Entry advantage activities at the department level

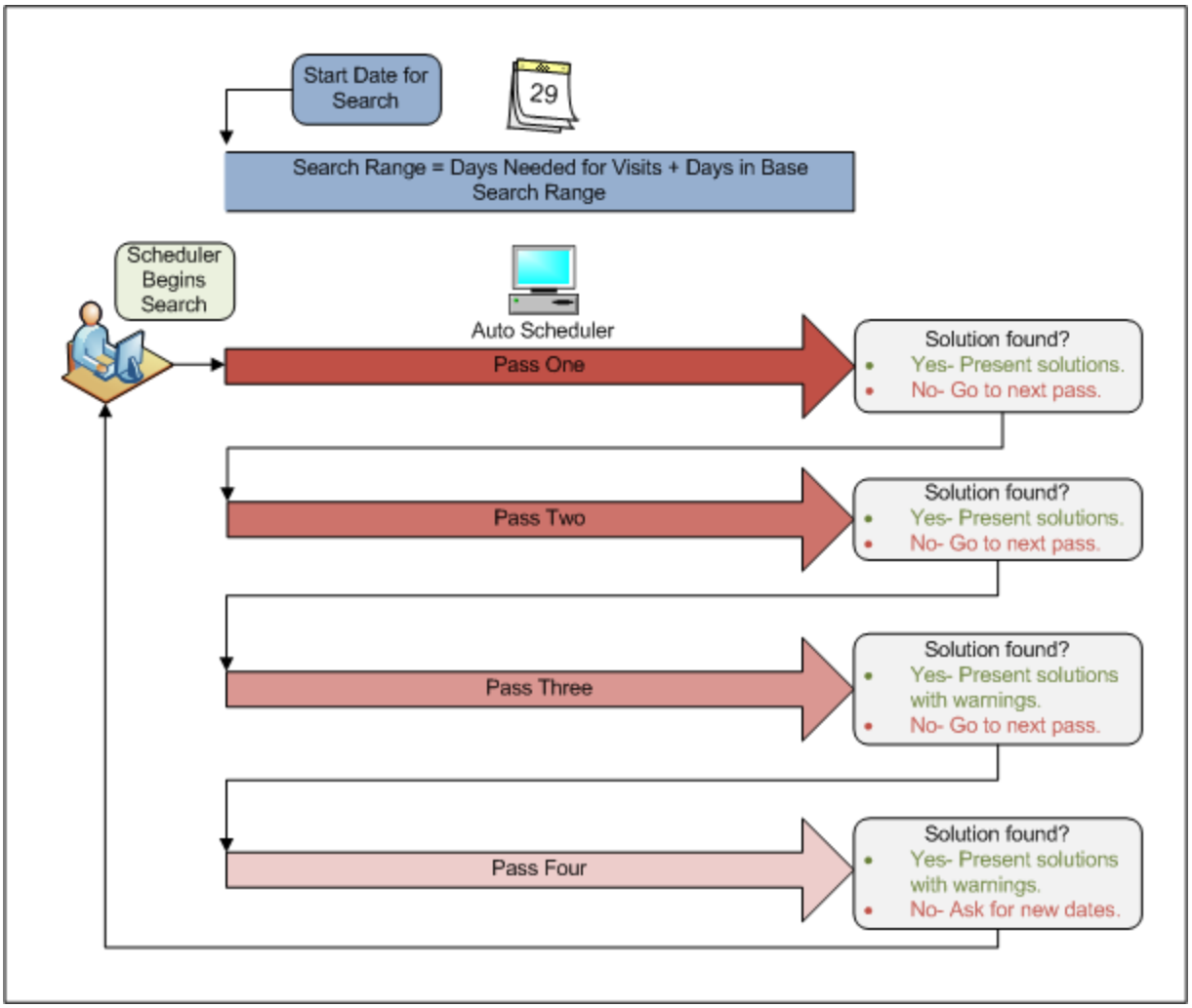
1. Refer to the Create a Custom After Appointment Entry Advantage Activity section above and leave the Navigator Template to Use (I HAA 1001) field blank.
2. Make sure that the When to Launch Registration (I HAA 450) field is blank or set to Don't Launch.
3. Refer to the Add After Appointment Entry Advantage Activities to Cadence System Definitions and Department Records section above and add your blank advantage activity record to your department records.

Configure the Auto Scheduler

The Auto Scheduler is Cadence's simple tool for complex scheduling. It automatically finds possible appointment times, called solutions. Schedulers might want to use this tool for advanced or multiple visits, or visits with multiple providers. The Auto Scheduler does all the hard work, finding available solutions for the appointment based on the rule for the visit type. Schedulers just choose a time for the appointment.

Here's how the Auto Scheduler works: The Auto Scheduler searches for possible appointment times within a search date range. The search date range is the time needed for the appointment plus the number of days in the future that you want the search to cover. The Auto Scheduler respects visit type rules, provider availability, and other variables when searching. It makes up to four individual passes over the search date range to find solutions:

1. First, the Auto Scheduler searches for solutions that allow you to schedule all of the requested visit types on the same day, without overbooking, without scheduling into days on hold, and without overruling any rules.
2. Next, the Auto Scheduler searches for solutions that allow you to schedule all requested visit types on multiple days, without overbooking, without scheduling into days on hold, and without overruling any rules.
3. Then, the Auto Scheduler searches for solutions that allow you to schedule all of the requested visit types on the same day, with overbooking, scheduling into days on hold, or by overruling any rules.
4. Finally, the Auto Scheduler searches for solutions that allow you to schedule all of the requested visit types on the multiple days, with overbooking, scheduling into days on hold, or by overruling any rules.



Note the Auto Scheduler might overrule individual rules on the first pass if it determines that it has to in order to find a solution for an appointment time.

Here's how the Auto Scheduler works with some specific records:

- Pools: When there is a pool of providers or resources to choose from for the appointment, the Auto Scheduler chooses the provider or resource to use in one of three ways:
  - If the Randomize? setting in the pool is set to Yes, the Auto Scheduler starts with a random resource from the pool with the goal of evenly distributing appointments to the pool members.
  - If the Sort provider by availability? setting in the pool or system definitions is set to Yes, the Auto Scheduler starts with the most available resource, then moves on to the next most available resource, with the goal of assigning appointments to the most available pool members first.
  - If both of these settings are blank or set to No, the Auto Scheduler starts with the first resource listed in the pool.
- Subgroups: When there is a subgroup of providers or resources to choose from for the appointment, the Auto Scheduler chooses a provider or resource to use in one of two ways:
  - If the Sort provider by availability? setting in system definitions is set to Yes, the Auto Scheduler starts with the most available resource, then moves on to the next most available resource, with the goal of assigning appointments to the most available resources first.
  - If this setting is blank or set to No, the Auto Scheduler starts with the first resource listed in the

subgroup.

- Blocks: When the visit type is restricted to certain blocks of time in the schedule, the Auto Scheduler respects these restrictions on the first two passes, then overrides these restrictions on the last two passes. Whether the Auto Scheduler looks for solutions with all slots matching, the first slot matching, or secondary slots matching, the block is based on the visit type setting and the user's security. Refer to the Restrict Time in Schedules for Specific Visit Types Using Blocks topic for more information on using visit type blocks.

Determine How the Auto Scheduler Searches for Appointments

Schedulers can use the Auto Scheduler right out of the box. However, you can adjust how it searches for appointment times to use more specificity and efficiency in scheduling.

Considerations
There are department- and system-level settings for the Auto Scheduler. In the Foundation System, the Auto Scheduler is configured only at the system level. You reduce maintenance and build time by using the system level settings as much as possible. You might want to configure department-level settings in special situations only, such as when a department or specialty uses blocks differently from the rest of the organization or when a department or specialty has restricted resources and providers. The Auto Scheduler is how MyChart offers appointments for self-scheduling. Ensure that any settings you configure for the Auto Scheduler don't affect patients' ability to self-schedule online.

This table describes the settings that determine how the Auto Scheduler searches and how the settings are configured in the Foundation System.

The hierarchy for these settings is panel, visit type, department, system. So, if a setting is blank at the department level, the system looks to the system level setting.

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
Use auto scheduler by default?	System (I SDF 8159) Department (I DEP 112)	Cadence System Definitions > Scheduling > Auto Scheduler Department master file > Scheduling > Auto Scheduler	This setting applies only to Make Appointment and does not apply to Book It. For information about how to select the initial view in Book It, refer to the Specify the Initial View for Book It topic. Enter Yes to always select the Auto search checkbox in Make Appointment. Schedulers can still clear this checkbox and perform manual scheduling.	Yes

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
Default search method	System (I SDF 8815) Visit Type Panel	Cadence System Definitions > Scheduling > Auto Scheduler Visit Type master file > Advanced > Restrictions Panel master file > General	Choose whether the Auto Scheduler uses a vertical or horizontal search for appointments. • If you choose Horizontal, Cadence takes the earliest possible appointment time based on available resources. Horizontal searches look at one time across many providers, thereby spreading work out among resources. This method is based on time. Therefore, if you reject a time for one resource, you reject that time for all of them. Using Next in a horizontal search takes the search to the next available opening for any provider. Horizontal is the default setting. • If you choose Vertical, Cadence takes the earliest possible appointment time based on specific resources. It searches one resource at a time. If there are no available times for that resource, then	Horizontal

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			it searches the next one. This method is based on resources. Using Next in a vertical search takes you to the next time slot for the same provider. The search does not move on to another provider until all slots for the initial provider are filled on a particular day.	
Auto generate pools?	System (I SDF 8870)	Cadence System Definitions > Scheduling > Auto Scheduler	Enter No if you don't want the system to automatically create pool records for provider and department combinations when the providers are created and associated with a department. The only time you should have Auto generate pools? set to No is during your system build. This way you can create departments without automatically creating a pool. This saves time when you need to delete the departments you created in your practice build because you will not have to delete the pools that would have been automatically generated. Also, if this setting has been set to No and you change it to Yes, pools will be generated only when	No

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			future department edits are made to the provider's record. No pools will be created retroactively.	
Restrict visit types by blocks?	System (I SDF 8107)	Cadence System Definitions > Scheduling > Auto Scheduler	Enter Yes if the Auto Scheduler should respect block restrictions when searching for appointment times. This setting also applies to manual scheduling.	Yes
Use block restrictions for	System (I SDF 10720)	Cadence System Definitions > Scheduling > Auto Scheduler	If the Auto Scheduler restricts visit types by blocks, specify whether the blocks need to be in all providers' schedules or only the first provider's schedule. Notes: • The system definition Restrict visit types by block? (I SDF 8107) must be set to Yes for any block checking to occur. If that system definition is set to No, this setting is irrelevant. • Regardless of what is specified for this setting, if a scheduler doesn't have Block Overrule Access set to Yes in his Cadence security classification, all providers in the Auto Scheduler (or	All Providers

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			manual scheduling) must still match the visit type's block restrictions. • This system definition affects scheduling in Hyperspace only, not in Cadence Text. Think carefully about whether you want to set this to All Providers. If you do so, all joint appointments scheduled by the Auto Scheduler will require that each provider has matching blocks (unless blocks on all providers can be overruled). If provider templates have not been set up carefully, some appointments won't have viable solutions, and for other appointments it will take longer for the system to find a solution.	
Base search range number of days	System (I SDF 10715) Department (I DEP 3715)	Cadence System Definitions > Scheduling > Auto Scheduler Department master file > Scheduling > Auto Scheduler	Enter the number of days the Auto Scheduler searches into the future to find appointment times. After searching this number of days, the Auto Scheduler returns to the current date and starts the next pass. The minimum number of days needed for the specified visit type is calculated each time the search runs and is added to	30

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			the number specified here. For example, if a combination of visit types requires 2 days to be complete and you set the Base number search range number of days to 60, Auto Scheduler searches 62 days out. Further, the minimum number of days added for the visit type spread is 1 day (that is, a 5 minute visit type equals 1 day spread). If you leave this blank, 30 days is assumed.	
Auto search time out in seconds	System (I SDF 8208)	Cadence System Definitions > Scheduling > Auto Scheduler	Specify in seconds how long the Auto Scheduler searches before timing out.	60
Warnings to always obey	System (I SDF 10725)	Cadence System Definitions > Scheduling > Auto Scheduler	Select warnings that are always obeyed during searches, even if the scheduler has security to overrule the warning. Appointment times associated with these warnings don't appear as solutions. The following warnings are available: • Agent Rule Conflict: The Auto Scheduler doesn't break any agent rule conflicts, even when a scheduler has overrule security. • Appointment Delay Insufficient: The Auto Scheduler doesn't suggest	(Blank)

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			times that are within a visit type's delay period. • Arrival Time Conflicts: The Auto Scheduler doesn't suggest times that are within the arrival time window for a patient's visit in another department. • Block Conflict: Schedulers must use a block in the provider schedule that matches the visit type block settings or the provider level block settings for the visit type. This is true regardless of how the overrule setting in the visit type record is set. The Use block restrictions setting on this form controls whether secondary providers need to match on block settings. • Block Scheduling Restriction: The Auto Scheduler doesn't suggest a time such that a block scheduling restriction has to be overruled, even when a scheduler	

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			has overrule security. • Date Restriction: Schedulers must make the appointment on the date that matches the visit type date restrictions. • Day Of The Week Restriction: Schedulers must make the appointment on a day of the week that matches the visit type day of the week restrictions. • Duplicate Visit: The Auto Scheduler doesn't suggest a time that would create a duplicate visit type for a patient. • Exceeds Session Limits: The Auto Scheduler only suggests a solution such that session limits (visit type and overbook) are obeyed, even if the scheduler has session limit overrule security. • Fasting And Breaks Fast Conflicts • Fasting Time Insufficient • Insufficient	

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			Minimum Separation: The Auto Scheduler doesn't suggest a time that does not meet the minimum separation requirements for the therapy plan (available starting in November 2023). • Lag Time Conflict: The Auto Scheduler doesn't suggest a time that would involve breaking lag time rules. • Length Different From Slot: The Auto Scheduler doesn't suggest a time where the end of the appointment for that provider doesn't match the end of the slot. • Patient Prefs Don't Match Provider: The Auto Scheduler displays only solutions for those providers who match the patient's preferences, if patient has provider preferences and the user has selected the Use Patient Preferences button in Book It. • Patient Prep/Recovery	

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			Time Conflicts: The Auto Scheduler doesn't suggest a time that overlaps with a patient's prep or recovery time for another appointment. • Private Slot: The Auto Scheduler doesn't suggest a time that uses a private slot, even if the scheduler has security to schedule in one. • Provider Out Of Network: All providers used must be in network for the patient. • Provider Scheduling Rule Conflict: The Auto Scheduler doesn't suggest a time that would break provider scheduling rules, even when a scheduler has overrule security. • Referral Required: If a referral is required for the visit type, the scheduler must assign one in order to schedule the appointment. Note that for this setting to be effective, the During Auto Scheduler setting	

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			on the Referral Warnings form in your Referrals system definitions should be set to either Alert, prompt to jump or Alert, automatic jump, so that the scheduler is either warned about the necessary referral or is automatically brought to the form to assign one. • Reservation Conflict: The Auto Scheduler doesn't suggest times that are reserved for other patients, such as times reserved for wait list offers. • Resource Schedule Finalized: The Auto Scheduler doesn't suggest times that are within a resource's finalized schedule. • Sequencing Rule Conflict: The Auto Scheduler doesn't break sequencing rules, even when a scheduler has overrule security. • Service Not Covered: The service must be covered in order to schedule the appointment. Note	

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			that for this setting to be effective, the During Auto Scheduler setting on the Services Warnings form in your Referrals system definitions should be set to Check, warn, prompt to continue, so that the scheduler sees a warning about the service not being covered. • Shift-Assigned Resource Not Available: The Auto Scheduler doesn't suggest times where a shift-assigned resource is not available for the appointment. This applies only if the appointment requires a resource such as an anesthesiologist. • Task and Event Conflict: The Auto Scheduler doesn't suggest times that conflict with any tasks or events for the patient. • Time On Hold: The Auto Scheduler doesn't suggest time on hold, even if the scheduler has security to	

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			schedule into it. • Time Restriction: The Auto Scheduler suggests only times within the visit type time restrictions. • Time Splits Slot: The Auto Scheduler doesn't suggest a time that isn't the beginning of a slot for a provider. It always does this for the first provider, but doesn't check or warn if it needs to do this for a secondary provider. • Use Overbook: The Auto Scheduler doesn't suggest a time using an overbook slot, even if the scheduler has security to schedule into overbooks. • Visit Type Modifier Conflict: The user is unable to schedule for a provider where there is a visit type modifier that allows scheduling with a warning (i.e., there must either be no visit type modifier or it must allow scheduling).	
Sort providers by	System (I SDF 10735)	Cadence System Definitions >	Enter Yes if you want the Auto Scheduler to use	(Blank)

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
availability?	Pool	Scheduling > Auto Scheduler	providers in the pool with the most availability first. Here are a few technical notes about this option: • This order option isn't used if the scheduler is searching for an appointment with one provider, as is often done in MyChart. • This option is best used with horizontal searches, because that method searches for the first opening across providers in the pool and because adding availability as a sort order changes the order of the providers. The option still affects vertical searches but is less useful since that search method isn't generally used to evenly distribute appointments across providers. • The Auto Scheduler doesn't use randomize provider pools when you configure the system to sort by availability because both options achieve the same	

Setting Name	Levels	Setting Location	Setting Description	Foundation System Configuration
			thing in different ways. Both options are intended to distribute appointments across providers in the pool. The randomize option does this randomly while the availability option does it by availability. This randomize option is still effective if you decide not to use the order option. • If two providers in the pool have the same availability, the Auto Scheduler uses the order of the providers in the pool to determine who to use first.	
Default to schedule visits in any order?	System (I SDF 10745)	Cadence System Definitions > Scheduling > Auto Scheduler	Enter Yes if you want the Auto Scheduler to search for solutions for multiple visits in any order, regardless of the order in which the scheduler entered them in Book It.	Yes

Determine How the Auto Scheduler Uses Providers in Pools

When the Auto Scheduler looks for provider records in a pool of providers, you can determine whether it randomly chooses a provider or selects the first one listed. Which one you choose depends on the availability of providers in the pool.

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Pools and select a pool.
2. In the Randomize? field, determine how the Auto Scheduler uses the providers in the pool when searching for appointment times.

- If the Auto Scheduler should randomly select providers in the pool, enter Yes. This method helps schedulers to evenly distribute appointments to all providers in the pool.
- If the Auto Scheduler should always attempt to schedule with the first provider listed and then move down the list until an appointment time is found, enter No. This method uses providers for appointments in the order they appear in the pool. Providers listed first are scheduled more often. To replicate the Foundation System, set this field to Yes.

3. In the Sort providers by availability? field, specify whether the Auto Scheduler should use providers in the pool based on their availability.
   - If the Auto Scheduler should use the most available providers first, enter Yes. This method uses the most available in the pool first, to evenly distribute appointments.
   - If you enter No, the Auto Scheduler uses the first provider and then moves down the list.
   - If you leave this field blank, the Auto Scheduler obeys the system level setting.

Control How the Auto Scheduler Selects Centers

If schedulers are searching across centers with the Auto Scheduler, you can determine which centers the Auto Scheduler uses.

Refer to the Control Which Centers to Select When Scheduling topic for more information.

Allow Schedulers to Make Overlapping Appointments

An overlapping appointment is an appointment that starts before another appointment ends. If one appointment ends at the same time as another appointment starts, they don't overlap. Schedulers might need to make overlapping appointments when multiple providers need to see a patient at one time but each provider needs a separate appointment for billing or documentation reasons.

Allow Appointments to Overlap Other Appointments and Cases

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > General form.
3. In the Allow overlapping appts (I SDF 8134) field, specify that schedulers can schedule overlapping appointments with a warning, without a warning, or not at all. To replicate the Foundation System, set this field to Allow with a warning.
4. In the Allow overlap with cases? (I SDF 8198) field, enter Yes if schedulers can schedule appointments that overlap with cases. To replicate the Foundation System, set this field to Yes.

Give Users Security to Schedule Appointments That Overlap with Other Appointments and Cases

1. In Hyperspace, open a user's Cadence security class (search: Cadence Security).
2. Select the Appointment Entry form.
3. In the Overlapping appointments (I ECL 5072) field, enter Yes to allow schedulers to make appointments that overlap with other appointments.
4. In the Overlap with surgery cases (I ECL 5073) field, enter Yes to allow schedulers to make appointments that overlap with cases.

Allow Overlapping Appointments Without Security for Certain Visit Types

You can prevent certain appointments from ever interfering with scheduling for other appointments and surgical

cases. To do so, you configure the visit type to always allow overlapping appointments and cases, regardless of whether the scheduling user has security to create overlapping appointments or cases. This configuration also allows schedulers to schedule overlapping appointments into the arrival time, travel time, and patient prep or recovery time for another appointment. The security needed to schedule cases that overlap with appointments is described in the Allow Users to Schedule Cases That Overlap with Appointments topic.

This option is especially useful for appointments with private duty nurses who provide long periods of care, during which other appointments might be needed. For example, consider this scenario:

- Jim is a patient cared for by a private duty nurse for eight hours a day, 8 AM to 4 PM.
- Jim needs to see a physical therapist at 1 PM, at the same time that a nurse is caring for him.
- Sue is the scheduler for the physical therapist. Sue doesn't have any security to overlap appointments, but she is able to schedule a physical therapy appointment that overlaps with Jim's scheduled time with his nurse because the Private Duty Nurse visit type allows overlapping appointments.

If the visit type didn't always allow overlapping appointments, Sue wouldn't be able to schedule the physical therapy appointment for Jim. She would need to contact her supervisor or call the help desk to get Jim's overlapping appointment scheduled.

Overlapping appointments without overlap security isn't available when they're scheduled using the following methods (although schedulers are able to manually schedule overlapping appointments for visits that were originally scheduled using these methods):

- One-Click scheduling
- Case scheduling
- Dorothy Remote Client scheduling

Here's how to configure a visit type to always allow overlapping appointments:

1. In Hyperspace, open a visit type record (search: Visit Type).
2. Select the General form.
3. In the Allow overrule of patient busy time (I PRC 70) field, enter one of the options listed below.
    - Always - display warnings. A warning appears when a scheduler attempts to schedule an appointment that overlaps with an appointment or a patient's busy time using this visit type. The scheduler is allowed to create the overlapping appointment. Warnings do not appear to patients in MyChart.
    - Always - suppress warnings. A scheduler is allowed to create an appointment that overlaps with an appointment or a patient's busy time using this visit type. No warning appears.
    - Only with security. A scheduler can create an appointment that overlaps with an appointment or a patient's busy time using this visit type only if they have the security to do so. This is the default option.
    - Same center only - display warnings. A warning appears when a scheduler attempts to schedule an appointment that overlaps with an appointment or a patient's busy time using this visit type and the appointments are in the same center. The scheduler is allowed to create the overlapping appointment. Warnings do not appear to patients in MyChart. If the appointments are in different centers, a scheduler must have the proper security for overlapping appointments or scheduling over a patient’s busy time.
    - Same center only - suppress warnings. A scheduler is allowed to create an appointment that

overlaps with an appointment or a patient's busy time using this visit type and the appointments are in the same center. No warning appears. If the appointments are in different centers, a scheduler must have the proper security for overlapping appointments or scheduling over a patient's busy time.

- Same department only - display warnings. A warning appears when a scheduler attempts to schedule an appointment that overlaps with an appointment or a patient's busy time using this visit type and the appointments are in the same department. The scheduler is allowed to create the overlapping appointment. Warnings do not appear to patients in MyChart. If the appointments are in different departments, a scheduler must have the proper security for overlapping appointments or scheduling over a patient's busy time.
- Same department only - suppress warnings. A scheduler is allowed to create an appointment that overlaps with an appointment or a patient's busy time using this visit type and the appointments are in the same department. No warning appears. If the appointments are in different departments, a scheduler must have the proper security for overlapping appointments or scheduling over a patient's busy time.

If the overlapping appointments have different visit types where this field is configured differently, here's how the system determines overlapping behavior:

- If Appointment A's visit type allows overlapping and Appointment B's visit type requires security for overlapping, the system allows overlapping according to the visit type from Appointment A.
- If Appointment A's visit type shows a warning and Appointment B's visit type doesn't show a warning, the system allows overlapping and does not show a warning.

Allow Schedulers to Overbook Appointments

An overbook appointment is an extra appointment time added to a provider's schedule. For example, a provider wants one appointment scheduled from 11:00 AM to 11:30 AM, but he could have another appointment scheduled during that time if he had to. Schedulers usually place last minute visits or frequent no-show patients in overbook slots. If they have super overbook security, schedulers can also schedule overbook appointments when a provider is out of regular slots and overbook slots.

Prerequisites

Along with configuring your system to allow overbooking, you need to complete the following tasks before schedulers can overbook:

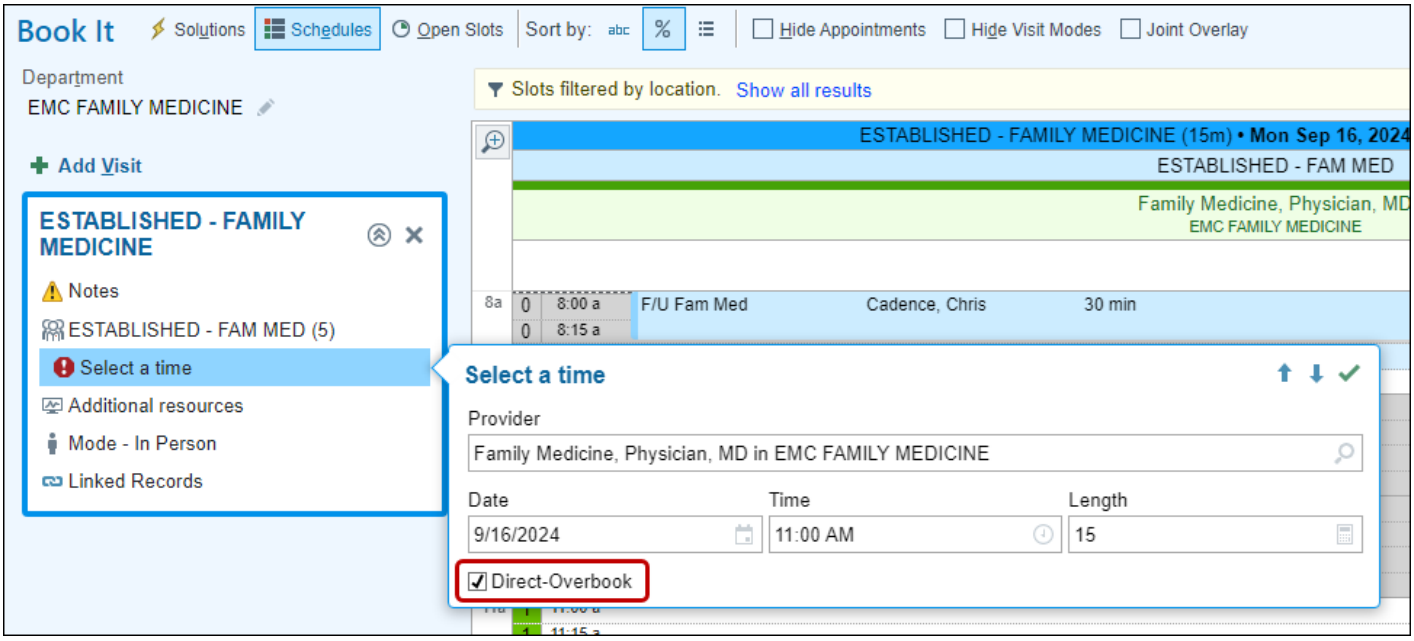
- Allow overbooks in provider schedules.
- Add overbook openings to provider templates.

When you set up the system to allow overbooking, you configure a provider's record to allow overbooks and add overbook slots to their scheduling template, give users overbook security, and set up overbook behavior in Cadence System Definitions. You can also allow schedulers to schedule an appointment directly into a provider's overbook slots without having to fill up the provider's regular openings first.

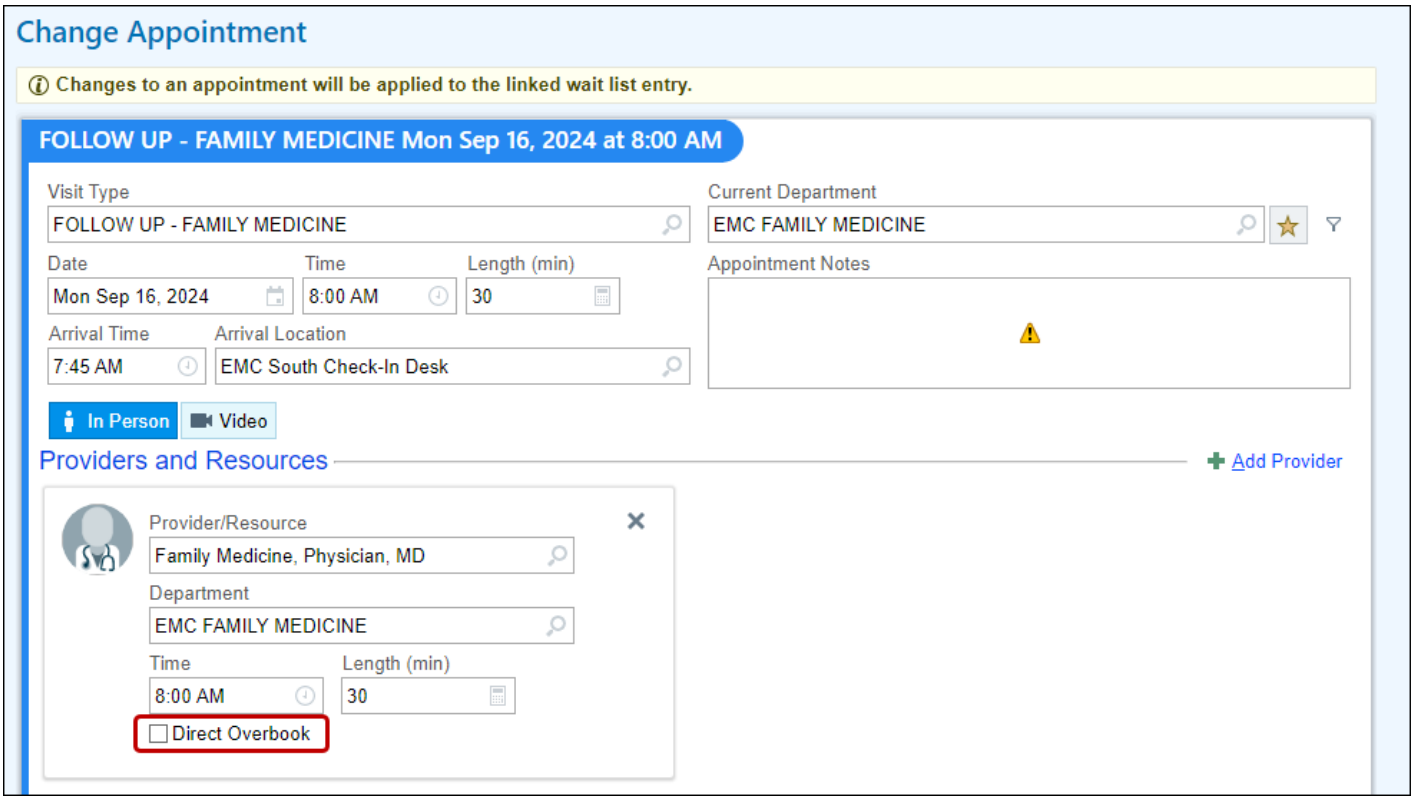
We recommend using the direct-overbook feature only for one-off situations when a provider needs to fit a patient into their schedule for a quick visit and you don't want to modify the provider's template to make it work. The provider might not have a regular opening at the time the patient is coming in or the patient doesn't need to use up a full appointment slot for a quick visit with the provider. For example, a scheduler with direct-overbook security could schedule a 10-minute appointment in a 20-minute overbook slot, which would split the slot for

overbooks but would still allow normal scheduling of regular openings for the 20-minute slot. Because this feature is meant for one-time scheduling needs, schedulers cannot create recurring direct-overbook appointments. Also, the direct-overbook flag (I EPT 7048) on an appointment is not kept if the appointment is moved or rescheduled.

Schedulers can make a direct-overbook appointment by selecting the Direct-Overbook checkbox in the Schedules view of Book It or in the Change Appointment activity.



Direct-Overbook checkbox in the Schedules view of Book It



Direct Overbook checkbox in the Change Appointment activity

Give Schedulers Overbook Security

1. In Hyperspace, open a user's Cadence security class (search: Cadence Security).
2. Select the Appointment Entry form.
3. Enter Yes in the Overbook (I ECL 5060) field to allow users to overbook appointments for a provider (assuming that the provider record and system allow overbooking and that there are overbook openings on the provider's schedule).
4. Enter Yes in the Super overbook (I ECL 5061) field to allow users to schedule an appointment in a slot even if there are no more regular or overbook openings left. Users must also have overbook security to use super overbook.
5. Enter Yes in the Direct-overbook (I ECL 5062) field to allow users to schedule directly into a provider's overbook slots. Users must also have overbook security to use direct-overbook. If they are going to schedule direct-overbook appointments for providers who don't have overbook openings specified in their templates, they also need super overbook security.

Specify Overbook Settings in Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. In the Can staff overbook? (I SDF 8105) field, enter Yes if schedulers can overbook appointments. In the Foundation System, this field is set to Yes.
4. In the Overbook OR resources? (I SDF 10775) field, enter Yes if schedulers can overbook appointments for providers and resources in OR departments. In the Foundation System, this field is set to Yes.
5. In the Skip ID prompt in overbook? (I SDF 8108) field, enter Yes if you don't want to prompt schedulers for an ID and password when they overbook appointments and don't have overbook security. In the Foundation System, this field is set to No.

Automatically Restrict Scheduling to Imaging Resources Using Weight Limits

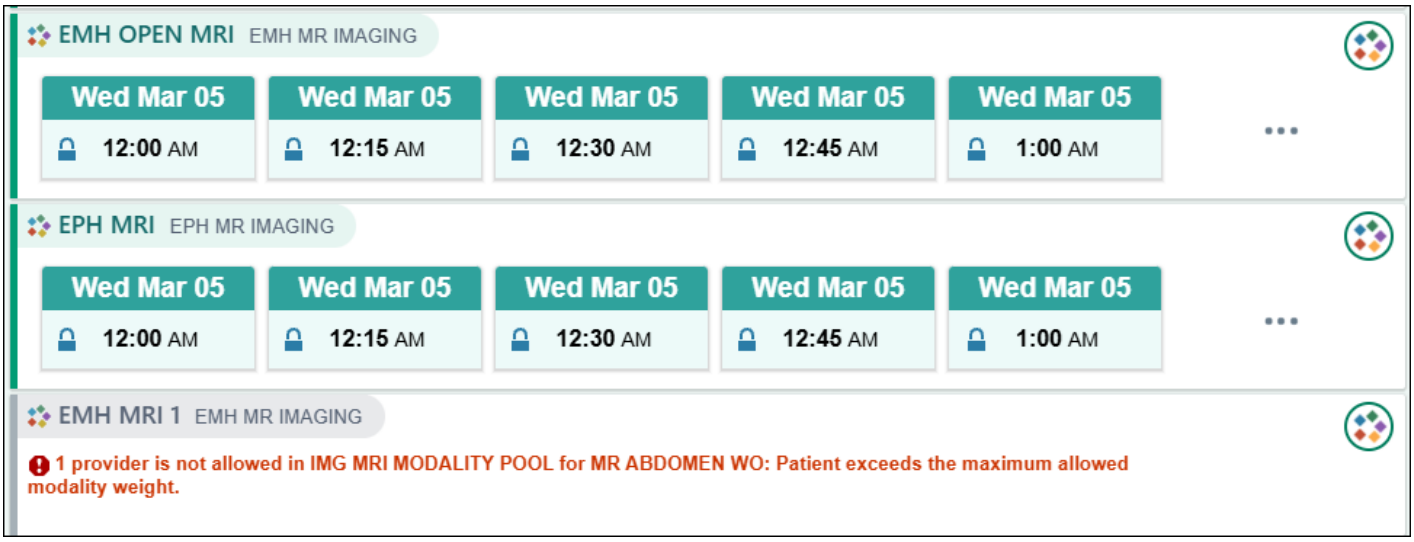
Starting in May 2025

Imaging modalities often have maximum weight limits for patients. To prevent last-minute rescheduling and ensure that patients are scheduled for only appointments that can accommodate them, indicate to schedulers when a patient's weight exceeds the limit so they can book them to a more appropriate one. To do this, specify a weight limit for modalities that have one.

To make it easier for you to get the scheduling questions and rule for showing patient weight, we've created a Turbocharger package for decision tree related records. This package is available for download starting in May 2025. For information about importing this package, refer to the 318001-Automatically Restrict Scheduling to Modalities with Weight Limits topic.

To use this functionality, at a minimum, refer to the Configure Provider Weight Limits section below to set weight limits for your imaging resources. If this is the only configuration that you do, the system compares the patient's last documented clinical weight to the resource's weight limit during scheduling and removes resources for which the patient's weight exceeds the resource's weight. To capture a more up-to-date patient weight at the time of scheduling and give certain users the ability to overrule the weight restriction, complete the rest of the build

steps in this section.



Resource automatically removed from scheduling

Configure Weight Limits for Imaging Resources

Resources have weight limits established by the manufacturer to ensure patient safety during care. Setting weight limits on your imaging resources allows the system to compare the patient's last documented clinical weight against the resource's weight limit. Resources are hidden from scheduling options if the patient's weight exceeds the weight limit.

To set a weight limit for an imaging resource:

1. In Hyperspace, open an imaging resource (search: Provider).
2. Select Procedural Settings > Resource Modality.
3. In the Weight Limit (I SER 52050) field, enter the weight limit for the imaging resource.
4. In the Weight Units (I SER 52051) field, enter the unit that corresponds to the weight.

To update the weight limit and weight units items using an import, use import specification SER,1000-Template - Provider.

Create a Scheduling Question to Capture Patient Weight

We expect most organizations will want to capture patient weight at the time of scheduling for the most up-to-date weight. If you already have a scheduling question related to patient weight in your appointment entry decision trees linked to your imaging procedures, update the question. If the question you are currently using is a yes/no response type question or if you do not currently have a question related to the patient's weight, follow the steps below to create a new numeric question. If you have an existing numeric response type question that asks for the patient's weight, you do not need to create a new question.

1. In Hyperspace, open Question Editor (search: Question Editor).
2. To create a new question, enter a type of Form Question and click Continue. Click Create a New Record.
3. Enter a name for your question record and click Continue.
4. Accept the current contact.
5. In the Prompt field, enter the question as you want it to appear to schedulers.
6. In the Response type field, enter Numeric.

Create a Rule to Pull in the Patient's Last Documented Weight

When scheduling appointments, patients might have a weight recently documented in their chart. To save schedulers time, configure your form questions to automatically pull in the patient's weight if they have a weight documented in the last 30 days using a rule:

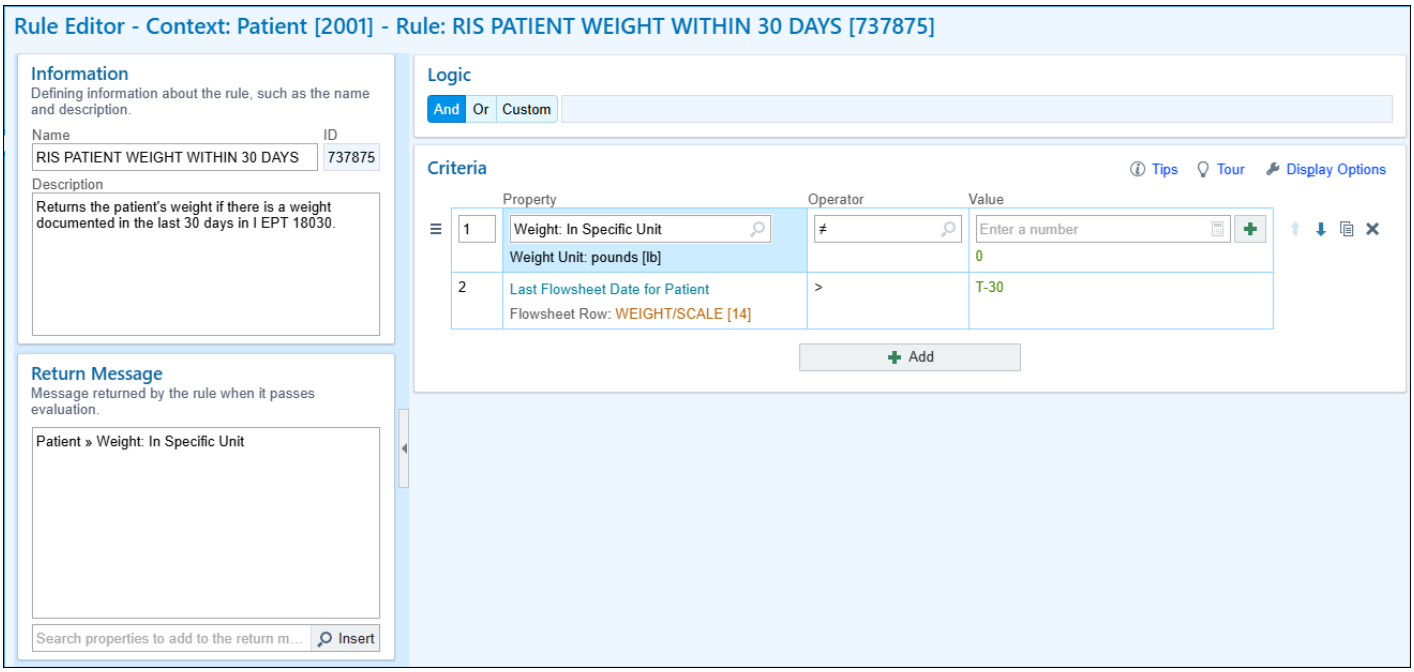
1. In Hyperspace, open Rule Editor (search: Rule Editor)
2. Select Create a New Rule.
3. Enter Patient in the Context field.
4. Enter the name of the rule. Follow your organization's naming convention.
5. In the property field, enter Weight: In Specific Unit.
    a. Set the Weight Unit to the weight unit used in your scheduling questions.
    b. Set the Operator to not equals.
    c. Set the Value to 0.
6. Add a second property for Last Flowsheet Date for Patient.
    a. Set the Flowsheet Row to Weight/Scale [14].
    b. Set the Operator to greater than.
    c. Set the Value to T-30.
7. In the Return Message, insert property Patient > Weight: In Specific Unit.

Add the Rule to Your Form Question

After creating the rule to pull in the patient's last documented weight, you need to add that rule to your form question. Refer to questions 1050118-RIS Patient's Weight and 102585-RIS MyChart Patient Weight in the Foundation System to model your build.

1. In Hyperspace, open Question Editor (search: Question Editor).
2. Open your form question for documenting patient weight.
3. In the Custom Load Code field, enter QuesLoad^S2LPP4(<CER ID>) where <CER ID> is the ID of your rule created above.

Review the Gather Patient Information with Form Questionnaires topic for more information about configuring form questions.



Example of rule configuration

Add Scheduling Question to Appointment Entry Decision Tree or Scheduling Questionnaire

To use the scheduling question that you created above, add the question to either an appointment entry decision tree or a scheduling questionnaire. Consider your existing scheduling build when deciding whether to use a decision tree or scheduling questionnaire,. You might already have a decision tree or scheduling questionnaire for your imaging procedures.

If you do not already have a scheduling decision tree for imaging procedures, follow the instructions in the Create a Decision Tree topic to create an appointment entry decision tree that includes a node for the form question you created above. Consider also creating or updating decision trees used for scheduling imaging exams in MyChart.

If you already have a scheduling decision tree for your imaging procedures, you likely have a question that asks if the patient's weight is above a certain threshold. Replace this question with the form question that you created above.

Refer to appointment entry decision trees 1050000028-RIS MRI MyChart Scheduling Decision Tree and 1051000011-RIS MRI Scheduling Decision Tree in the Foundation System as a model for your build.

To create a scheduling questionnaire, refer to the Create a Questionnaire topic.

Configure Cadence System Definitions

By default, without any questions configured in Cadence System Definitions, the system looks to the last documented clinical weight to compare to the resource's weight limit. Configure the system to know which scheduling questions it should reference to determine patient weight. The questions set here should be the same ones that you created for your decision tree or scheduling questionnaire:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select Scheduling > Decision Support.
3. In the Form Questions (I SDF 42500) field, enter the questions used to capture patient weight during scheduling.
4. In the Weight Units (I SDF 42501) field, enter the unit that corresponds to the weight captured in the

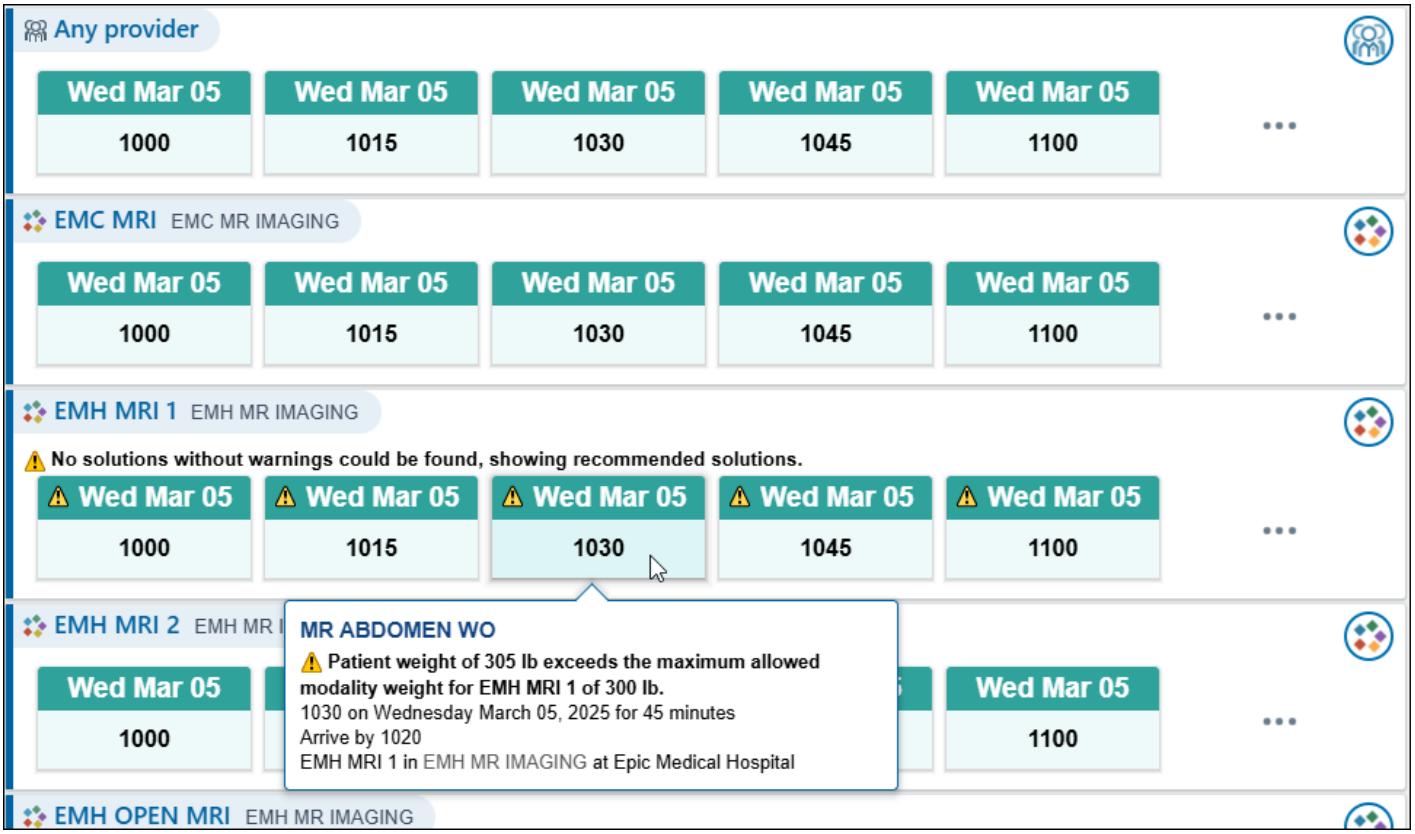
question.

Give Users Security to Overrule Weight Restrictions

In some situations, an appointment can still be completed on a resource even though the patient's weight exceeds the limit. For example, if a patient needs an MRI of their elbow, but their weight exceeds the limit for the MRI machine, radiology techs might modify the patient's position by having them sit to perform the scan. In the event that the patient can still be scheduled to the imaging resource, users with security to overrule the weight restriction can bypass the warning and schedule the appointment.

1. In Hyperspace, open a user's Cadence security class (search: Cadence Security).
2. Select the Appointment Entry form.
3. Enter Yes in the Overrule Weight Restrictions (I ECL 5094) field to allow users to overrule the scheduling warning and schedule the imaging appointment with a weight restricted resource.

If you have multiple security classes to update, use import specification ECL,1130-Cadence ECL Import Spec to update this security point for multiple security classes at once.



Scheduling warning for users with security to overrule the weight restriction

To see how we set up this workflow in Foundation System, log in to the Foundation System Hosted environment as your organization's radiology technologist user (RISTECH). In Ancillary Orders, place an order for an MRI procedure. Log in as your organization's radiology front desk user (RISFD) and go to the Front Desk activity to find your patient's order and schedule an appointment.

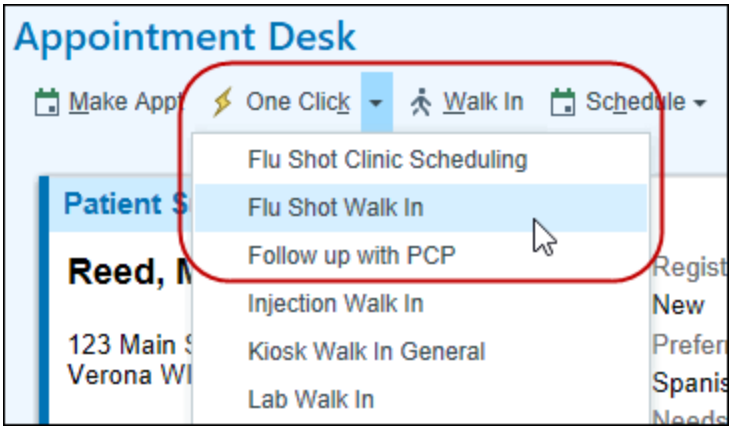
Create Pre-Defined Searches for One Click Scheduling

Schedulers sometimes make the same kind of appointment over and over. Examples of these frequent appointments are office visits, follow-up visits with a patient's PCP, and consults in a cardiology department. You can save schedulers time and effort by creating One Click appointment searches. You create pre-defined search

algorithms for either regular or walk-in appointments. With the One Click activity, schedulers select a pre-defined search with all the necessary information and then simply choose an appointment time.

The One Click activity does not provide solutions with a warning or error message that would prevent a user from scheduling an appointment due to scheduling restrictions for the visit type or the user's Cadence security. If you rely on schedulers overruling these warnings on occasion, they should use manual scheduling or the Auto Scheduler instead:

- Agent Rule Conflict
- Appointment Delay Insufficient
- Arrival Time Conflict
- Duplicate Visit
- Fasting and Breaks Fast Conflicts
- Fasting Time Insufficient
- Past Breach Date (applies only to organizations in the U.K.)
- Patient Prep/Recovery Time Conflict
- Provider Scheduling Rule Conflict
- Reservation Conflict
- Resource Schedule Finalized
- Sequencing Rule Conflict
- Shift-Assigned Resource Not Available
- Task and Event Conflict
- Travel Time Conflict



Considerations

Don't create search algorithms for visit types that require questionnaires. One Click can't display scheduling questionnaires.

Also, One Click can't open registration before scheduling because it doesn't use any before scheduling activities. One Click does use the after quick appointment activities, so you can open registration after scheduling with One Click.

One Click cannot use advanced visit types.

To use one-click searches, you must have the Cadence One Click Scheduling 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.

Create a Search Algorithm

1. In Hyperspace, create a new search algorithm record (search: Search Algorithms).
2. Enter a title for this record. This is the text that appears when schedulers select a search record in One Click. Make sure it's descriptive enough for schedulers to understand the type of appointment for which they should use this search.
3. In the Type field, select the type of search you want to create. Choose either One Click Search or Walk In One Click Search. In the Foundation System, search algorithm 19-Office Visit With PCP is a One Click Search. Search algorithm 25-Flu Shot Walk-In is a Walk In One Click Search.
4. Choose the departments where schedulers can use this search.
    - If you want the search to be available in only some departments, enter those departments in the Departments field.
    - If you want the search available in all departments, select the All departments check box and leave the Departments field blank.
    - If you want the search available in all departments except for some, select the All departments check box and list the departments that should not have access to the search in the Exclude departments field.
5. In the Visit type field, enter the visit type you want associated with this search.

Customize Display Options for a Search Algorithm

There are a few display options that you can customize to change how the search appears to schedulers:

- Solution load threshold. By default, the One Click activity shows 25 solutions at a time. Schedulers can click the More button to load more solutions. Increasing this value could lower performance of the activity.
- Special instructions. By default, this check box is selected so that the special instructions that you enter in the Scheduling instructions field for the search algorithm appear in the One Click activity. Clear this check box if you don't want to show special instructions.
- Instructions appear by default. By default, users need to click the Instructions button to view visit type scheduling instructions. Select this check box to show visit type scheduling instructions expanded by default.
- General provider messages. By default, this check box is selected so that general provider messages appear in One Click. Clear this check box if you don't want to show general provider messages.
- No slots with VTM warnings. By default, solutions for slots that have visit type modifier warnings appear in One Click. Select this check box to hide these solutions.
- Visit type instructions. By default, this check box is selected so that scheduling instructions for the visit type appear in One Click. Clear this check box if you don't want to show visit type scheduling instructions.

Define the Search Parameters

Use the settings on the Search Definition tab to define how the algorithm searches for solutions. You can create multiple search passes by clicking Add.

- Use search definition from algorithm. If you have another search algorithm that you want to reuse the definitions from, enter the algorithm here.

- Current department. Change the department in this field if you need to select providers and subgroups for a different department.
- Type and Selection. Choose who the appointment should be scheduled with. Enter the type of search and what to search for, such as Provider to create a search for a specific provider, or General PCP in Current Department to create a search for the patient's PCP in the scheduler's login department.
- Start (t+?) and End (t+?). Enter the relative start and end dates for the search. For example, if you want to start searching tomorrow and end after two weeks, enter 1 in the Start (t+?) field and 14 in the End (t+1?) field. These fields are unavailable if you're creating a search algorithm for walk-in appointments.
- Start time and End time. Enter the start and end times for the search.
- Block. Choose whether the solutions that are presented to schedulers must match a block. You can enter a specific block or choose one of the following options:
  - Visit Type Blocks. Use the blocks from the visit type to find solutions. This is the default value.
  - Any Block or Unblocked. Find solutions that use any block or are unblocked.
  - Unblocked. Find only unblocked solutions.
- Min hours and Max hours. Set the minimum or maximum number of hours between the time the search runs and the first slot that appears in the One Click activity using . For example, if you enter 2 in the Min hours field and 8 in the Max hours field, the slots must be at least two hours but no more than eight hours after the time a scheduler runs the search.
- Max utilization %. By default, One Click returns solutions until a provider's schedule is full for the day. If you don't want to allow One Click to fill up a provider's schedule, enter a maximum utilization percentage that, when reached, stops returning solutions.
- Overbooks. By default, solutions for overbook slots do not appear in One Click. Enter Include Overbooks to include solutions for overbook slots when slots are full. Enter Only Overbooks to include only solutions for full slots that have available overbook slots.
- Stop. Select this check box if the algorithm should stop searching for solutions in additional passes if it finds solutions in this pass.
- Exact length only. Select this check box to show only solutions for slots that exactly match the length of the visit type. For example, a 30 minute visit type would match on a 30 minute slot but not on two 15 minute slots. Clear this check box to show solutions for slots that match the exact length and solutions that span multiple slots.
- Hide private slots. Select this check box to hide solutions for private slots from One Click.
- Hide held slots. Select this check box to hide solutions for held slots from One Click.
- Ignore session limits. Select this check box to show open slots regardless of visit type session limits. Schedulers still need Session limit overrule (I ECL 5146) security to schedule these slots.
- Use patient preferences. Select this check box to respect a patient's preferences when searching for solutions.
- In network only. Select this check box to return solutions only for providers who are in the patient's insurance network.
- Link scheduling instructions. If you entered another search algorithm in the Use search definition from algorithm field, select this check box to use the special instructions from that algorithm.
- Scheduling instructions. Enter special instructions for the search algorithm.

Specify Additional Search Algorithm Settings

Use the settings on the Additional Info tab to further configure the search.

- Allow user to change the search start date. Select this check box to allow users to override the start date you specified.
- Override schedule workflow. Determine the type of workflow schedulers follow after selecting a slot in the One Click activity.
  - No override. Schedulers follow the usual scheduling workflow for quick appointments. This is the default value.
  - Review/schedule appt after selection (skip workflow). Schedulers see the Appointment Review window to schedule the appointment.
  - Schedule appt after selection (skip workflow). The appointment is scheduled immediately after a scheduler selects a slot. They don't see any additional forms in the workflow.
- Web questionnaire. If you are building a search that is used with a web product like EpicCare Link, you can select a questionnaire to appear after a scheduler selects a solution in the web product.

Set Up Appointment-Related Labels and Printed Forms

Schedulers might need to print visit labels or encounter forms during or after scheduling.

- Visit labels are used to identify forms or paper charts for the patient's visit. Staff attach the visit labels to appointment-related paper items like charts or labs. A visit label typically includes visit-specific information like provider, visit type, and insurance.
- Encounter forms are used if clinicians don't submit charges from the patient's electronic chart. Clinicians use encounter forms to write down what they did in an encounter and then staff manually enter these charges into the system. An encounter form typically includes encounter-specific information like provider, procedure, and coverage.

The Foundation System has sample SmartText templates for visit labels and encounter forms. Refer to the Foundation Hosted environment to see these templates.

This section covers scheduling-specific settings for printing letters, labels, and forms. To learn more about setting up printers and general printing functionality, refer to the Printing Setup and Support Guide.

Identify Visit Labels for Appointments

You use visit labels to identify appointment-related papers, lab samples, and medications for a patient's visit. Unlike address labels, visit labels contain appointment-specific information. You can select visit labels to use and then staff can print them for the appointments.

Prerequisites

You need to create visit type label templates before you can associate them with appointments. Visit label templates are created with a SmartTool activity called the RTF Label Editor. Refer to the Enable Staff to Print RTF Labels from the Appointment Desk topic for instructions on creating visit type label templates.

You also need to set up printer classifications. Refer to the Printing Setup and Support Guide for additional information on printer classifications.

You can define visit labels at the system or department level. You can also define visit labels for individual visit

types.

Select Templates at the System Level

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Visit Labels form. In February 2024 and earlier versions, select the Communications > Labels form.
3. In the RTF visit labels (I SDF 8379) field, select the label template you want to use for visit labels.
4. In the Number of copies (I SDF 8373) field, select the number of labels to print and the maximum number that can be printed at one time.
5. If you want visit labels to print with a specific print classification, enter that classification in the Printer class override (I SDF 8374) field.
6. Decide whether you want to print labels on holidays (I SDF 8846), Saturdays (I SDF 8847), and Sundays (I SDF 8848).

Select Templates at the Department Level

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department and open your department record.
2. Select the Communications > Labels form (In the Hyperdrive client starting in August 2023, Visit Labels form).
3. Enter Yes in the Print visit labels? (I DEP 173) field.
4. In the Number of copies (I DEP 145) field, enter the number of labels to print each time.
5. Select the label template record for this department in the RTF visit label (I DEP 182) field.
6. If you have a specific printer classification you want to use for visit labels in your department, enter that classification in the Printer class override (I DEP 174) field.

Identify Encounter Forms for Appointments

You use encounter forms to manually collect procedure information for appointments.

Prerequisites

You need to create the encounter form templates before you can associate them with appointments. Encounter form templates are created with a SmartTool activity called the RTF Encounter Form Editor.

You also need to set up printer classifications. Refer to the Printing Setup and Support Guide for additional information on printer classifications.

You can define encounter forms at the system or department level. You can also define encounter forms for individual visit types or providers.

Select Templates at the System Level

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions)
2. Select the Communications > Encounter Form form.
3. In the RTF encounter form (I SDF 8268) field, select the encounter form template you want to use for encounter forms.
4. Select the number of forms to print for each appointment (I SDF 8269).

5. If you want encounter forms to print with a specific print classification, enter that classification in the Printer class override (I SDF 8273) field.
6. Decide whether you want to print encounter forms on holidays (I SDF 8841), Saturdays (I SDF 8842), and Sundays (I SDF 8843).

Select Templates at the Department Level

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department and open your department record.
2. Select the Communications > Encounter Form form.
3. Enter Yes in the Print encounter forms? (I DEP 177) field.
4. Enter the number of encounter forms to print for each appointment (I DEP 179).
5. Select the encounter form template record for this department in the RTF encounter form field (I DEP 183).
6. If you have a specific printer classification you want to use for encounter forms in your department, enter that classification in the Printer class override field (I DEP 181).

Print Encounter Forms in Batch

If your front desk staff need an encounter form for every appointment, you might want to print them ahead of time in batch. This way, front desk staff have the forms ready for them in the morning and you save time and resources.

Prerequisites

You need to create the encounter form templates before you can print the forms with the Batch Scheduler. Creating encounter form templates is similar to creating other SmartText records. Encounter form templates are created with a SmartTool activity called the RTF Encounter Form Editor.

You also need to identify the encounter form to use with appointments. Refer to the Identify Encounter Forms for Appointments topic for further instructions.

You set up batch printing with the Batch Scheduler. Refer to the Batch Scheduler Setup: Essentials topic for additional details on setting up batch processes.

1. In Cadence Text, follow the path Utility Menu > Batch Jobs > Job.
2. Create a new batch job for encounter forms. Use batch template 550-Encounter Forms by Date & Center & Dept & Prov. Refer to the Cadence batch template reference content for more information on creating batch jobs from a template.
   To make your system match the Foundation System, use batch jobs 1170055002-ES Encounter Form (Fridays) and 1170055001 ES-Encounter Form Batch in the Foundation Hosted environment.
3. Add the batch job to a batch and add that batch to a batch run.

Select Data to Copy Between Appointments

You can configure the system to copy information, such as display notes and referring provider details, between linked appointments. Copying this information reduces your scheduling staff's workload, making scheduling faster and easier. It also ensures the information for each appointment is consistent.

You choose what demographic and clinical information the system copies in the following situations:

- Scheduling sequential appointments

- Scheduling a recurring appointment series
- Canceling and rescheduling appointments
- Copying forward an appointment
- Scheduling follow-up appointments
- Scheduling from the Wait List

> **!** Some items are related or dependent on each other. You need to copy all related items to prevent errors in data. Also, some items might not be suitable to copy between contacts. Unless you are replicating the Foundation System exactly, work with your Epic representative to decide which items to copy and ensure that you've accounted for all dependencies.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Under the Copy Items folder, there is a form for each situation in which items can copy. Select the clinical and demographics items to copy on these forms.

The Foundation System copies items when scheduling sequential and recurring appointments, and when canceling and rescheduling appointments. To emulate the configuration of the Foundation System, refer to the Foundation Hosted environment.

Here is an example of information copied between recurring appointments:

Items to Copy between Recurring Appointments

	Demographics Items
1	APPT DISPLAY NOTES [7050]
2	REFERRING PHYSICIAN [31000]
3	ALT REF PROV ADDRESS [8351]
4	ALT REF PROV CITY [8352]
5	ALT REF PROV NAME [8350]
6	ALT REF PROV STATE [8353]
7	ALT REF PROV COUNTY [8355]
8	ALT REF PROV ZIPCODE [8354]
9	ALT REF PROV COUNTRY [8356]

Copy Data Between Appointments That Are Not Linked

May 2023 by SU

Starting in August 2023

There are instances where appointments are not linked but would still share similar registration information. For example, if an X-ray appointment is scheduled from a same-day consultation, the two appointments are not linked, but you might still want to copy information to the X-ray appointment. This can be done via an before check in extension in Cadence System Definition.

1. In text, create a copy of extension 43960-ES Before Checkin Item Copy. Refer to the Duplicate and Modify an Extension topic.
   a. Configure the Link Type according to the type of appointments being scheduled where registration

information are to be copied.

b. Add EPT items to be copied in Item List field.

c. Enter a patient-context rule in Check In Rule field. Items are copied only if appointment that is being checked in passes the rule.

d. If Link Type parameter is set to 5, which is to find matching encounter, populate the Looping Rule and Lookback Days parameter.

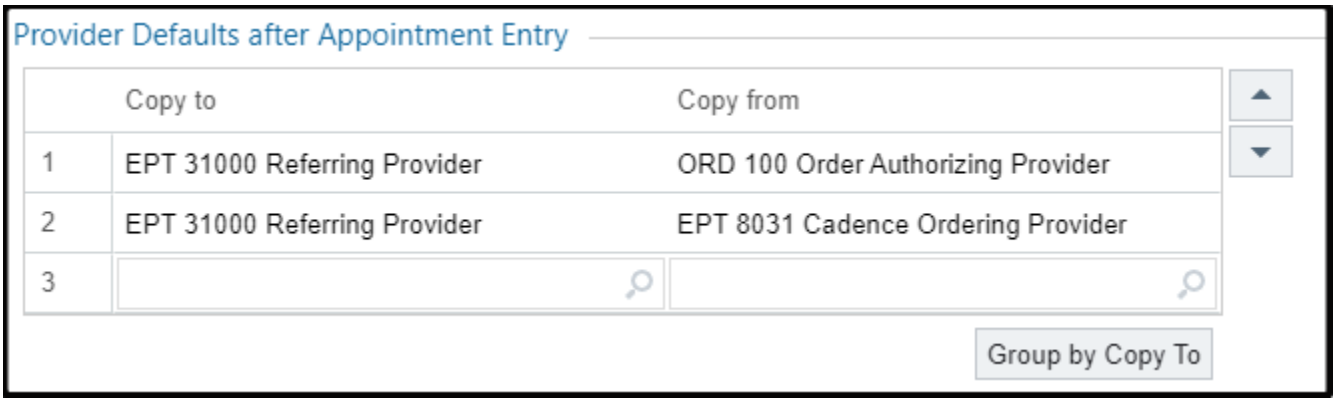
2. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
3. Select the Custom Extensions/EOD > Check In/Out form.
4. Add your copy of extension to Before check in (I SDF 20018) field.

Enter Default Providers After Appointment Entry

You can automatically enter default provider names into appointment entry forms based on records attached to the appointment or what the scheduler already entered when she created the appointment. By pulling the providers from information already entered, users filling out hospital claims have an accurate provider list to choose from and schedulers save time during scheduling.

1. In Hyperspace, open Cadence System Definitions.
   - Search: Cadence System Definitions
   - Path: Epic button > Admin > Schedule Admin > Cadence System Definitions
2. Select the Scheduling > Provider Defaults form.
3. Enter the items you want automatically populated in the Copy to (I SDF 8690) field. Choose from:
   - EPT 18864 ADT Attending Provider
   - EPT 31000 Referring Provider
   - EPT 8031 Cadence Ordering Provider
   - EPT 8035 Cadence Attending Provider
4. Enter where you want the provider to come from in the Copy from (I SDF 8691) field. Choose from:
   - EPT 7040 Appointment Provider
   - EPT 80102 General PCP
   - EPT 8031 Cadence Ordering Provider
   - ORD 100 Order Authorizing Provider

To see how this is configured in the Foundation System, refer to this image:



Configure Change and Cancel Appointment Workflows

Schedulers have two tools for modifying appointments: Change Appointment and Cancel/Reschedule. You control what options schedulers have when changing or canceling appointments.

Remember these differences between changing an appointment and canceling and rescheduling an appointment:

- Changing an appointment means the scheduler just modifies a piece of data for the appointment. Records attached to the appointment, like questionnaires or visit accounts, don't reflect these changes.
- Canceling and rescheduling an appointment creates a new appointment contact. The system reprocesses attached records like questionnaires and visit accounts to reflect these changes. Cancel and reschedule appointments for which, for example, the patient's answers to the questionnaire might have changed.

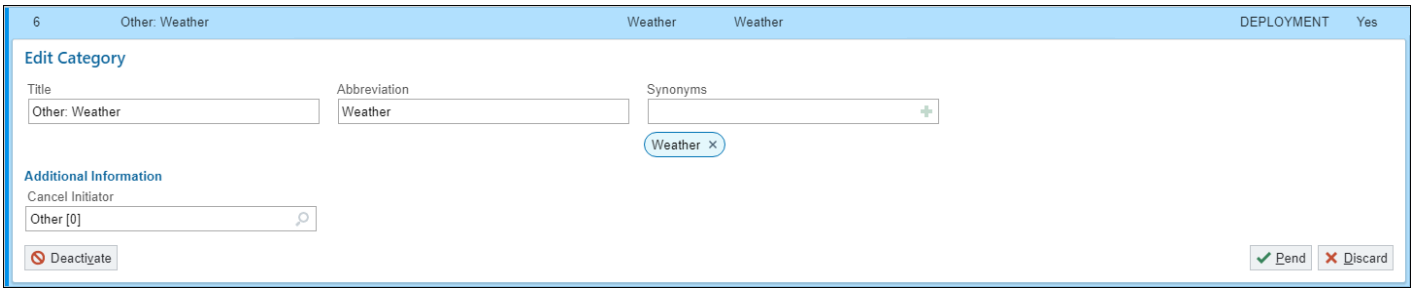
When training your schedulers, make sure they know when to change an appointment and when to cancel and reschedule.

Create Reasons for Schedulers to Choose From When Canceling Appointments

Schedulers cancel appointments for many reasons. You can create a list of cancel reasons to meet your organization's needs. Schedulers choose from this list when canceling and rescheduling appointments.

Cancellation reasons are stored in the Reason for Cancellation (I EPT 7300) item. Create a category for each cancel reason you want available to schedulers. For reporting purposes, you can also group cancellation reasons by who initiated the cancellation.

1. In Hyperspace, go to Category List Maintenance:
   - Search: Category List Maintenance
   - Path: Epic button > Admin > General Admin > Category List Maintenance
2. In the Category Editor window, enter the Patient (EPT) master file and item 7300-Reason for Cancellation.
3. Enter an ID for your category and click Go.
4. Enter a title for your category.
5. In the Cancel Initiator field, choose a general grouping for who initiates this cancel reason: Patient, Provider, or Other. Grouping cancellation reasons by initiator allows you to report on these groupings in Clarity or Reporting Workbench using report template 55050-ES Appt Search.



The Foundation System has numerous cancel reasons, including Patient, Error, Financial, Provider, and Canceled via MyChart. Refer to the Foundation Hosted environment to see the whole list.

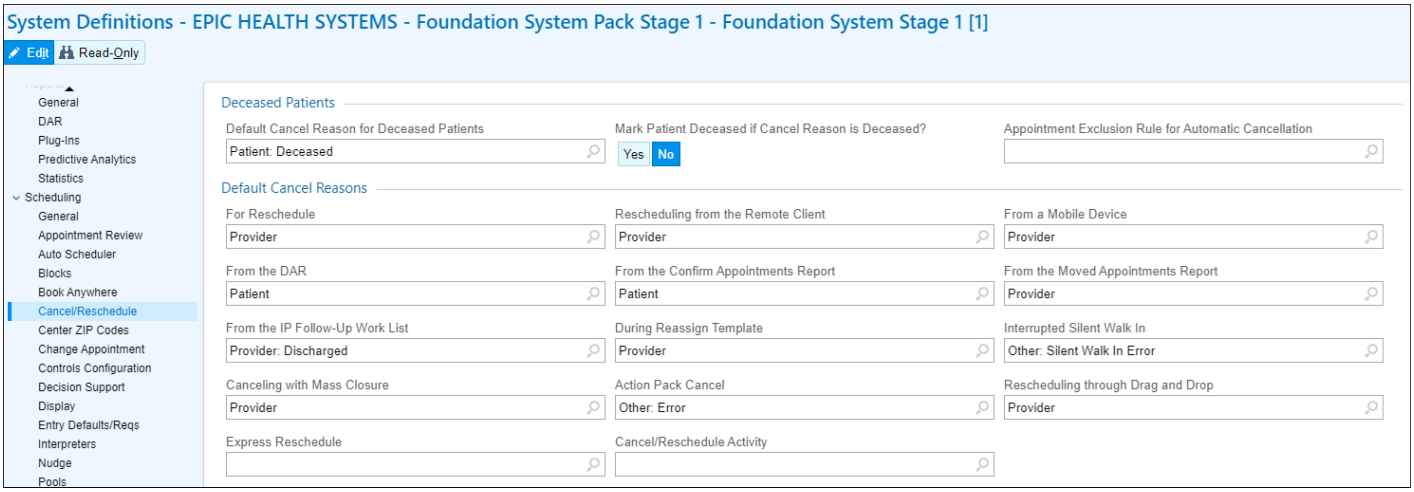
Assign Default Cancel Reasons to Scheduling Events

Sometimes schedulers cancel appointments through specific actions or activities. For example, marking a patient as deceased or reassigning an appointment to another provider cancels the appointment. You set default cancel

reasons for certain activities to keep appointment audit trail information updated and accurate, and to make it easier for schedulers to cancel appointments in these situations.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Cancel/Reschedule form.
3. In the fields under Default Cancel Reason, select various reasons why the associated event or activity cancels appointments. The system selects these reasons automatically when schedulers cancel appointments from the associated activity or when the system cancels an appointment.
4. Starting in November 2023, use the Rescheduling through Drag and Drop (I SDF 10782) field to specify a cancel reason to record when a scheduler drags and drops an appointment to a different day, which cancels the original appointment and schedules a new one. Schedulers can drag and drop appointments in the Snapboard, View Schedules, Week at a Glance, Book It, and Map It.
5. Starting in May 2025, use the Cancel/Reschedule Activity (I SDF 10784 or I DEP 3140) field to specify a default cancel reason to appear when a scheduler opens the Cancel/Reschedule activity. Schedulers still have the option to change the default cancel reason in the activity if they would like. Schedulers can access the Cancel/Reschedule activity from the Appointment Desk, the Snapboard, and Map It.

To emulate the Foundation System, refer to this image and the Foundation Hosted environment.



Quick Cancel Appointments in the Snapboard

Starting in May 2025

Quick canceling an appointment is a great way to save schedulers clicks by removing the need to go through the cancel/reschedule activity. If an appointment has no warnings associated with it, schedulers will be able to use a right-click option to Quick Cancel it. See the Design the Right-Click Menu on the Snapboard topic for additional details on how to add the Quick Cancel option to your Snapboard Report.

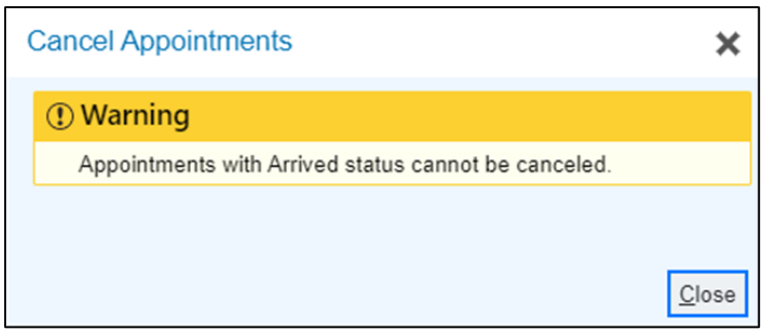
A few things to keep in mind when using this option:

- You need to specify a default cancel reason in I SDF 10784 or I DEP 3140 in order to use Quick Cancel.
- You can either access the Quick Cancel option by selecting an appointment and using the right-click menu, or by selecting an appointment and using the "delete" hotkey.
- Quick Cancel will support cancelling appointments for multiple different patients.

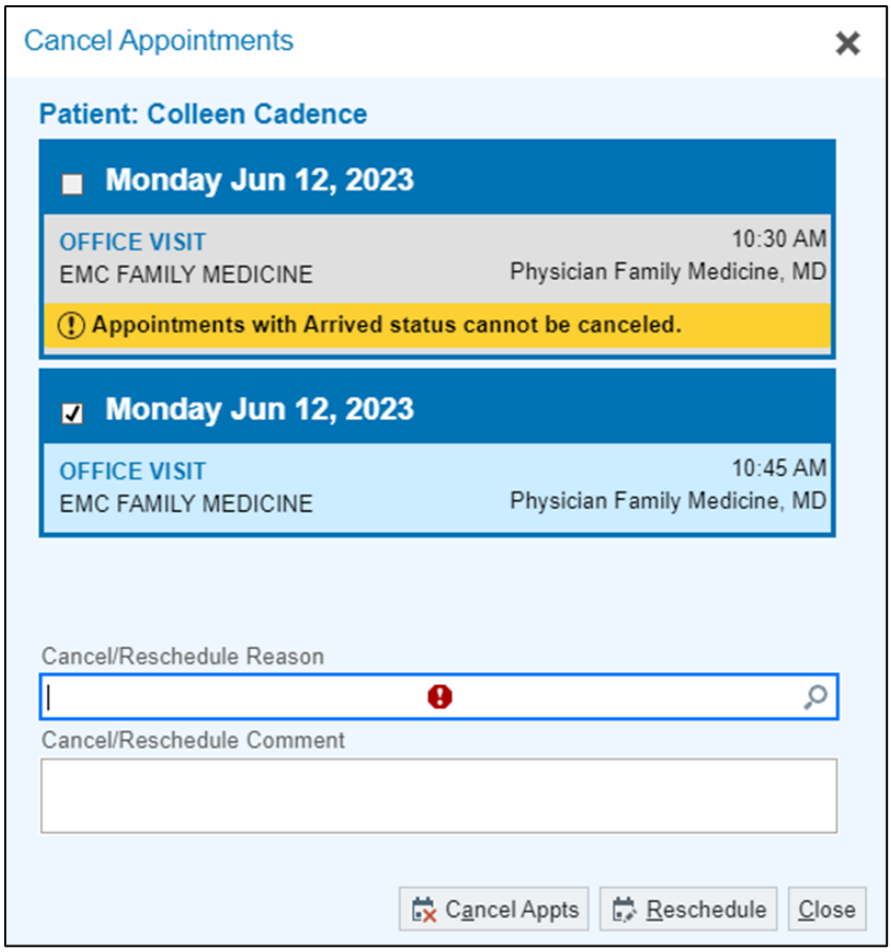
Prevent Schedulers from Canceling Certain Appointments

You can prevent users from canceling certain appointments or just warn them about the action they are about to take by specifying rules in Cadence System Definitions. When a user tries to cancel an appointment that meets the criteria of a rule, an error or warning message appears. You can specify multiple rules in Cadence System Definitions to cover different scenarios and present different messages to schedulers about why a certain appointment cannot be canceled and also indicate whether the message should be an error or warning.

An error message for an individual appointment appears in a separate window:



Warning messages and error messages for multiple appointments appear in the Cancel Appts activity:



1. In Hyperspace, create one or more Patient context rules to identify appointments that should not be canceled and specify the message schedulers see when they cancel an appointment that meets the criteria of the rule. Refer to the Create or Edit a Rule topic for more information about creating rules.
2. In Chronicles, access the Extension (LPP) master file.

3. Duplicate extension 40284-ES Appointment Cancel Check.
4. Set the following parameters in the extension:
    - Rules. Enter one or more of the rules you created to identify appointments.
    - Hard Stop. Enter Yes if users should not be allowed to cancel appointments that meet the criteria of your rules. The default value is No, and users see the message from the rule as a warning, not an error.
5. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
6. Select the Custom Extensions/EOD > General form.
7. In the Appointment cancel check (I SDF 11660) field, enter your copy of extension 40284.

Create Reasons for Schedulers to Choose When Changing Appointments

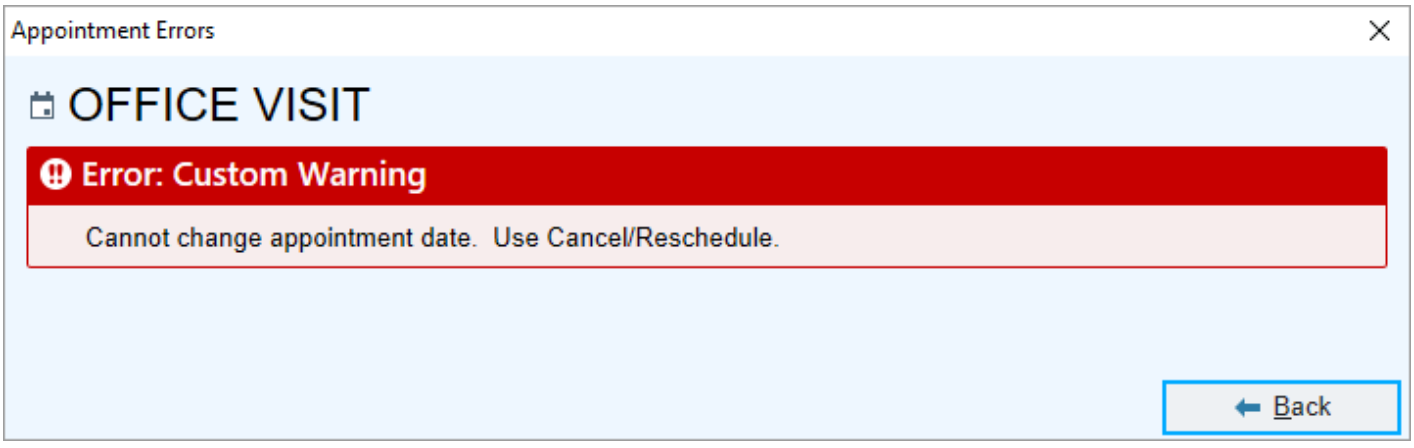
Schedulers shouldn't just change appointments on a whim—they should have reasons. You create the list of reasons that schedulers choose from when they identify why they changed the appointment.

Create a category for each change reason you want available to schedulers by editing the Reason for Change (I EPT 7880) category list. Refer to the Modify a Category List's Values topic for instructions on editing category lists.

The Foundation System has several change reasons, including Error, Patient, and Provider. Refer to the Foundation System Hosted to see the whole list.

Prevent Schedulers from Changing the Date of an Appointment

If a scheduler changes the date of an appointment and the appointment is attached to a hospital account, the hospital account might span multiple dates of service. To avoid this, you can add extension 43103-ES No Dt Chg to Cadence System Definitions to prevent schedulers from using Change Appointment to change the date of an appointment and require them to cancel and reschedule the appointment instead. As released, extension 43103 shows an error message when a scheduler changes the date of an appointment in the Change Appointment activity and clicks Change. You can customize a copy of this extension to apply only to certain departments, to show a warning message instead of an error message, and to allow changing the appointment date for joint appointments in different departments when only one of the departments is allowed to change appointment dates. For example, you might set this up for departments that schedule appointments and attach hospital accounts, such as hospital outpatient departments. This keeps the visit account accurate, which can reduce payment or claims issues later.



This is the error message that appears to schedulers when you use extension 43103 as released.

Create a Report Grouper to Allow Certain Departments to Change the Appointment Date

If you want to allow schedulers to change the date of an appointment for certain departments, you need to create a report grouper that includes those departments.

1. In Hyperspace, open the department record that you want to allow date changes for (path: Epic button > Admin > Schedule Admin > Master File Edit > Department).
2. Select the Reports > Report Groupers 1 form.
3. Identify an unused category report grouper to use for this. Shift+click on the field to see the item number. For example, Grouper 6 is I DEP 4305.
4. Open Category List Maintenance for the item you identified (search: Category List Maintenance).
5. Create category value 1 and give it an appropriate title, such as "Can change date with Change Appointment."
6. Return to the Report Groupers 1 form for your department record. In the grouper field you identified in step 3, enter 1 to allow schedulers to change the date for appointments in this department.
7. Repeat step 6 for additional departments that you want to allow date changes for.

Customize Extension 43103

If you want to customize the behavior of extension 43103, create a copy of it and modify the parameters as needed.

1. In Chronicles, access the Extension (LPP) master file.
2. Select Enter Data > Duplicate Extension 43103.
3. Edit the following parameters as needed in your copy of extension 43103:
    - Department Grouper Item. Enter the department report grouper item that, when set to 1 for a department, allow schedulers to change the date of appointments scheduled in that department. If they are also changing the department for the appointment, the system checks whether the new department allows date changes. For example, if you set up report group item I DEP 4305 to identify departments that allow changing appointment dates, set this parameter to 4305. When this parameter is set to 0 or left blank, no departments allow changing appointment dates.
    - Only a Warning? Determines whether an error message or warning message appears. Set this parameter to 1 to show a warning message and still allow schedulers to change the date of the appointment. Set this parameter to 2 or leave it blank to show an error message and stop schedulers from changing the date of the appointment.
    - Error Message. Enter a custom message to appear for the warning or error. When this parameter is blank, the default message is shown: Cannot change appointment date. Use Cancel/Reschedule.
    - Allow If Joint Across Deps. Determine whether date changes are allowed for joint departments that are scheduled across departments. Set this parameter to 0 or leave it blank to allow date changes only if all of the departments allow date changes. Set this parameter to 1 to allow date changes if at least one of the departments allows date changes.

Add Extension 43103 or Your Copy to Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Custom Extensions/EOD > Appointment Entry form.
3. In the Patient schedule custom check (I SDF 20001) field, enter extension 43103 or your copy.

Prevent Schedulers from Changing Appointments with Hospital Accounts

To prevent certain situations where incorrect billing can occur, users are warned about changing an appointment

when the status of an attached hospital account is not Open or Discharged/Not Billed. This warning appears in the Change Appointment activity.

Users are also warned in the scenarios listed below when they change the primary department for an appointment and click Change in the Change Appointment activity, drag-and-drop an appointment in the Snapboard, or use the Move Provider Appts or View Schedules activity to change an appointment's primary department.

- The appointment has a hospital account assigned, and the new primary department does not match the hospital account's location or service area.
- The appointment has a hospital account assigned, and the new primary department does not use hospital accounts.
- The new primary department does not allow the patient class on the appointment.

Determine when it is appropriate for users to ignore the warnings and continue changing an appointment. Inform users about the warnings and your policies for when it is and is not okay to change the appointment. When it's not okay to change the appointment, inform users about what they should do instead, such as cancel and reschedule the appointment.

You can turn off this feature by entering Yes in the Disable hosp acct check? (I SDF 8411) field on the Scheduling > Change Appointment form in Cadence System Definitions.

You can also create a Patient context rule to prevent users from changing departments in situations that are unique to your organization. When an appointment meets the criteria of the rule, the Department field is unavailable in the Change Appointment activity. Users are warned when they drag-and-drop an appointment in the Snapboard or use the Move Provider Appts or View Schedules activity to change an appointment's department for appointments that meet the criteria of the rule.

There are two pieces to this setup: creating a rule and entering that rule in Cadence System Definitions.

1. Create a rule in the Patient context. Refer to the Create or Edit a Rule topic for details about building rules.
2. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
3. Select the Scheduling > Change Appt form.
4. Enter your rule in the Disable dept rule (I SDF 8410) field.

Prompt Users to Update the Length of Changed Appointments

When a scheduler changes an appointment, such as by updating the provider or department, that change can result in a visit type modifier or advanced visit type being applied to the appointment. You can configure a setting in the visit type record to ensure that the changed appointment's length reflects any appointment length modifiers specified in that visit type record. This feature makes it less likely that a changed appointment is an inappropriate length for the providers or resources that are assigned to the appointment, or the department or time slot that appointment is scheduled in.

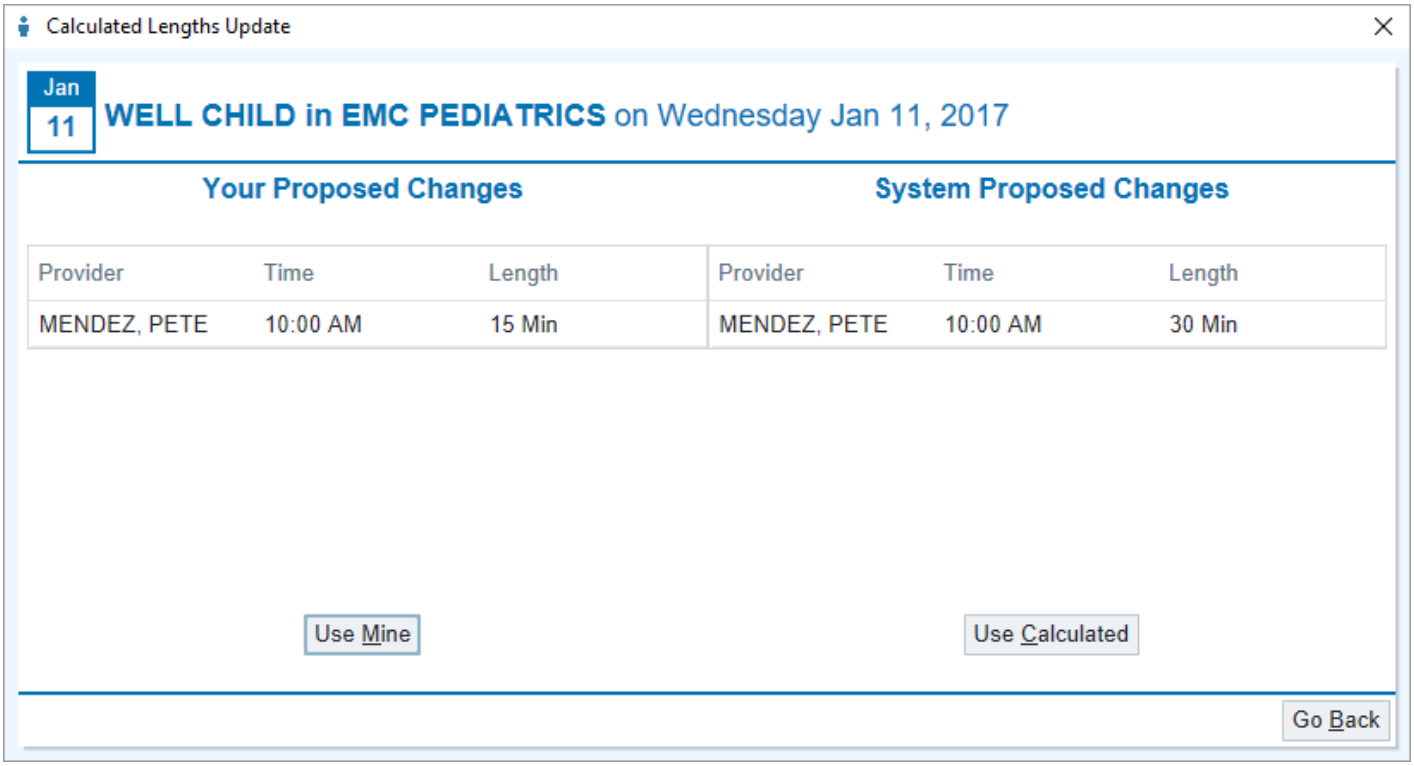
There are two different ways that this feature works depending on the activity that the scheduler is using to change the appointment:

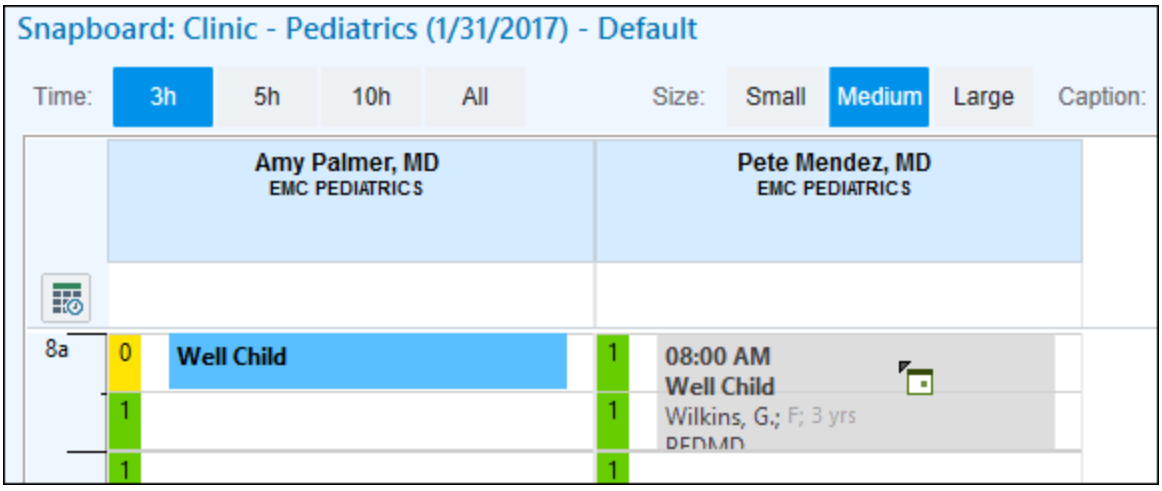
- When the scheduler changes an appointment in the Change Appointment activity, a Calculated Lengths Update window appears in which the scheduler can choose to use the updated appointment length or keep the original appointment length.
- When the scheduler changes an appointment in the Snapboard, Move Provider Appointments activity, or

View Schedules activity, the system automatically uses the updated appointment length without showing the Calculated Lengths Update window.

The example screen shot below demonstrates how this features works in the Change Appointment activity. A Well Child visit with a non-resident is typically 15 minutes long. When the visit is scheduled with a resident, a visit type modifier adds 15 minutes to the visit. So when a scheduler changes the provider for a Well Child visit from a non-resident to a resident in the Change Appointment activity, the new Calculated Lengths Update window appears. In that window, the scheduler can choose to use the appointment length that includes the extra 15 minutes for the resident, or she can choose to keep the original appointment length.

Although the Calculated Lengths Update window doesn't appear when the scheduler changes an appointment in the Snapboard, Move Provider Appointments activity, or View Schedules activity, the scheduler is still made aware of the potential new appointment length before she completes the change. The new appointment length appears when the scheduler drags the appointment to the new provider's schedule, as shown in the second screen shot below. This appearance helps the scheduler make sure that the new appointment length fits in the schedule before she completes the change. If the new appointment length doesn't fit in the schedule, but she wants to make the change anyway, she needs to use the Change Appointment activity to complete the change and choose to keep the original appointment length.





1. In Hyperspace, open a visit type record (search: Visit Type).
2. Select the General form.
3. In the Update length when changing? (I PRC 1060) field, enter one of the following values:
    - Always. The system prompts users to update the appointment length unless the appointment was moved to a different time with the same provider.
    - Except when manual length chosen. The system prompts users to update the appointment length unless the original length was manually entered.
    - Never. The system never prompts users to update appointment lengths. This is the default value when this field is blank.

Automatically Cancel Future Appointments When a Patient Is Marked Deceased

You can set up the system to automatically cancel future appointments when a patient is marked deceased. The setup varies based on how the patient is marked as deceased.

Patient Flags

Users can mark a patient deceased from the Patient Flags activity. In order for the system to automatically cancel future appointments for the patient, you need to specify a default cancellation reason in Cadence System Definitions:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Cancel/Reschedule form.
3. Enter a reason in the Default Cancel Reason for Deceased Patient (I SDF 8428) field.

Canceled Appointments

1. In Hyperspace, open Cadence System Definitions.
2. select the Cancel/Reschedule form.
3. When a user cancels an appointment using the reason that you specified in the Default Cancel Reason for Deceased Patient (I SDF 8428) field, the system automatically marks the patient as deceased if you have the Mark Patient Deceased If Cancel Reason Is Deceased (I SDF 8429) field set to Yes, and then the system automatically cancels future appointments for the patient.

Hospital Discharge

When a user discharges a patient as deceased in Grand Central workflows, that patient's future appointments are

automatically canceled if you've performed the following setup:

1. Specify a reason in the Default Cancel Reason for Deceased Patient (I SDF 8428) field in Cadence System Definitions, as detailed above.
2. In Grand Central Text, open your facility record and go to the ADT Facility Level Definitions - 3 screen.
3. In the Cancel future appointments for deceased patient? (I EAF 70168) field, enter Yes.

Interface

When an interfaced system indicates that a patient is deceased and the interface is configured to file the patient status directly, the system automatically cancels future appointments for the patient if you have specified a reason in the Default Cancel Reason for Deceased Patient (I SDF 8428) field in the Cancel/Reschedule form of Cadence System Definitions. For more information, visit the Incoming Patient Administration Interface Reference Guide using Quick Jump Code Q421294#V2I^701^701^1031^1^J.

Set Exceptions to Auto-Cancellation When a Patient Is Marked Deceased

If you have your system configured so that all of a patient's future appointments are canceled when the patient is marked Deceased in cancel/reschedule workflows, the Patient Flags activity, or the Incoming External Encounters Interface, as detailed in the Automatically Cancel Future Appointments when a Patient is Marked Deceased topic, there may still be situations where you don't want an appointment to be canceled. For example, your organization might want to make an appointment with a patient's family, or with a mortuary, after the patient's status is changed to Deceased, and sometimes these appointments are scheduled before the patient's status is officially changed.

To make sure that these appointments aren't automatically canceled when you don't want them to be, you can configure a patient-context rule to specify the appointments you don't want to be canceled when a patient is marked Deceased. Any appointments that satisfy the rule are treated as exceptions to the auto-cancellation behavior that occurs when a patient's status is changed.

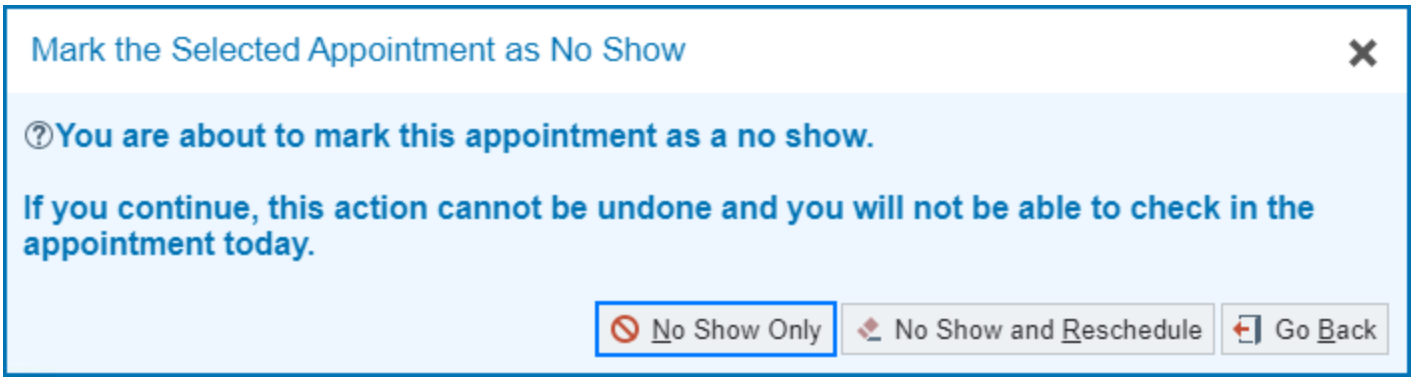
First, build a patient-context rule to identify the appointments you want to exclude from being canceled. For example, you might create a rule that contains a list of visit types and is satisfied by an appointment matching any of those visit types. Refer to the Create or Edit a Rule topic for setup steps.

Next, apply this rule in Cadence System Definitions.

1. In Hyperspace, go to Cadence System Definitions > Scheduling > Cancel/Reschedule > Cancel and Reschedule.
2. In the Appointment Exclusion Rule for Auto Cancellation (I SDF 8580) field, enter the the rule you created.

Allow Schedulers to Mark Appointments As No-Shows in Real Time

Schedulers can mark the day's appointments as no-shows and reschedule them in real time from the Department Appointments report or the Appointment Desk. This method is more efficient and effective than schedulers adding an appointment to the EOD Status List and indicating there that it is a no-show. Using the button in the Department Appointments report or the Appointment Desk keeps the appointment on the provider's schedule for reporting purposes and also sets the scheduling status for any linked orders or requests back to Needs Scheduling so they can be scheduled again.



The No Show button appears automatically on the Department Appointments report toolbar if you're using the standard toolbar. You should also add a No Show/Reschedule button to the Future and Past tabs of the Appointment Desk. The buttons are available to any users with Cadence security point Cancel/Real time no show (I ECL 5068) set to Yes.

If you don't use the standard Department Appointments report toolbar (ES_MT_DEP_APPTS_REP), add menu record ES_IT_NO_SHOW to your custom toolbar so schedulers can access the No Show button. Refer to the Add or Remove Buttons from the Activity Toolbar topic for additional information.

To add the No Show/Reschedule option to the Appointment Desk:

1. In Hyperspace, open the Appointment Desk settings in Cadence System Definitions or for a department:
   - Open Cadence System Definitions and select the Appointment Desk > Configuration form.
   - Open a department record and select the General > Appointment Desk form.
2. Click the Edit report button for the Future tab.
3. On the Criteria tab, add the No Show/Reschedule option to the list of right-click actions or toolbar actions.
4. Repeat steps 2 and 3 for the Past tab.

Help Schedulers Complete Appointment-Related Tasks with Work Lists

Schedulers use various work lists to manage appointments. These work lists are like tasks lists: they show schedulers the appointments for which they need to accomplish a specific task. You can set up the reports for these work lists so that schedulers see the appointments they need to work on.

Create a Report for Schedulers to Confirm Appointments

If your organization uses manual confirmation, your schedulers can use the Confirm Appointments work list to track appointments that need confirmation.

Refer to the Report Repository for information on creating reports for the Confirm Appointments Work List Report.

Create a Report for Schedulers Who Follow Up on Appointments

A scheduler's work isn't always done when the appointment is scheduled. Schedulers might need to call patients to remind them that they missed appointments or to follow up on a rescheduled appointment. The Follow-up work list identifies appointments that are canceled and rescheduled or marked as no show so schedulers can take action on the appointments.

Refer to the Report Repository for information on creating reports for the Follow-Up Work List Report.

Create a Report for Schedulers to Reschedule Appointments

A provider's schedule can change unexpectedly and sometimes these changes mean appointments need to be rescheduled. Schedulers use the Reschedule work list to find appointments canceled because of a schedule change and reschedule them. For example, if a template manager sets a day as unavailable or changes the template so that some appointments are now outside the regular schedule, the appointments appear on the report.

Refer to the Report Repository for information on creating reports for the Reschedule Appointments Work List Report.

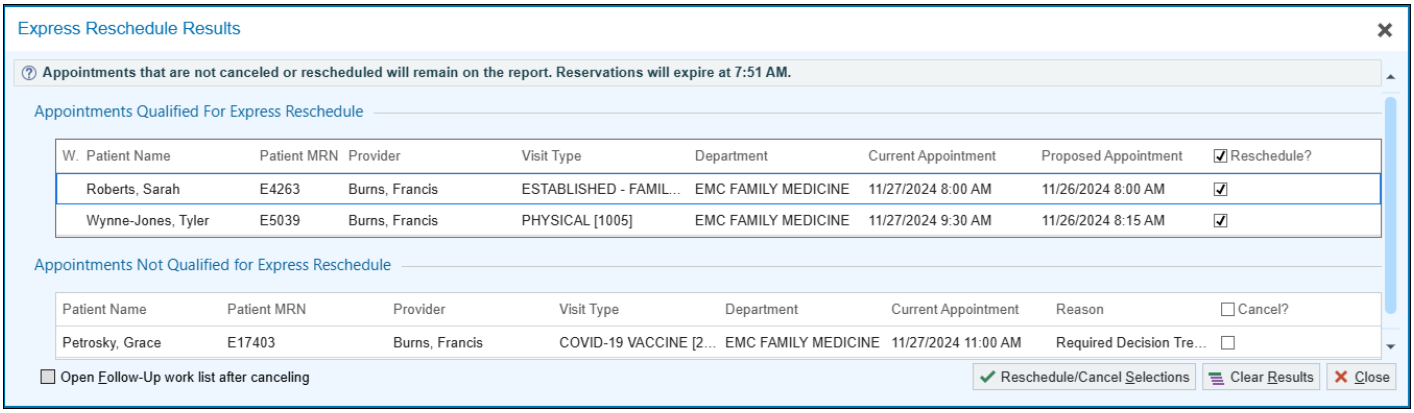
Express Reschedule

Starting in February 2025

Schedulers can save time using the Express Reschedule button in the Reschedule Appointments worklist toolbar to find new times for multiple appointments and patients at the same time. A scheduler can run this on a subset of appointments in the report, or they can choose to run it for all appointments on the report. The system will search for available times with only the original provider, meaning visits with pools do not search for availability with other providers in the pool.

Express Reschedule can only run on 50 appointments at the same time, so the option to reschedule all does not work for very large reports. Results are only valid for five minutes, after which point the slots that were reserved are released.

There are limitations to what can and cannot be rescheduled with Express Reschedule. Recurring, sequential, joint, and panel appointments, as well as appointments that require a decision tree or questionnaire to be filled out, cannot be rescheduled. If an appointment cannot be rescheduled for any reason, it is shown in the Appointments Not Qualified for Express Reschedule section of the results popup, and a reason is displayed in the Reason column. These appointments can be canceled from the results popup.



Schedulers can review suggested appointments, and cancel or reschedule as necessary.

To enable this feature, a cancel reason must be set in Cadence System Definitions. To create a new cancel reason, refer to the Create Reasons for Schedulers to Choose From When Canceling Appointments topic. To add a cancel reason in the Cadence System Definitions:

1. Open Cadence System Definitions (search: Cadence System Definitions).
2. Open the Cancel/Reschedule form under the Scheduling header.

3. In the Default Cancel Reasons section, add your desired cancel reason in the Express Reschedule (I SDF 10783) field.
4. Optionally, set a value in Number of Days to Look Ahead for Express Reschedule (I SDF 20064) to specify how many days out the system should search for a new time for an appointment. By default, the system looks up to 30 days into the future.

Starting in May 2025, Express Reschedule copies forward the results of Decision Trees and Questionnaires attached to the original appointment to the new appointment after Express Reschedule runs. We expect this feature to be useful for most organizations, but you might want to disable this feature, for instance, if your organization has a lot of visits where the answers to attached decision trees and questionnaires are time sensitive. If you disable this feature, schedulers can't reschedule appointments with attached decision trees or questionnaires using Express Reschedule. To prevent copying forward results of decision trees and questionnaire responses, follow these steps:

1. Open Cadence System Definitions (search: Cadence System Definitions)
2. Go to the Cancel/Reschedule Node.
3. Set the Copy Decision Trees and Questionnaires for Express Reschedule (I SDF 20065) field to No.

To quickly see appointments that failed to find a new appointment time, consider adding the following columns to saved Reschedule work lists:

- 5323-Express Reschedule Status
- 5326-Express Reschedule Failure Reasons

For steps on how to customize the columns on a report, refer to the Add An Existing Column to the Available Columns List section of the Determine Which Columns Appear in a Report topic.

To track appointments that failed to be Express Rescheduled, use the Express Reschedule Status criteria in Reporting Workbench report template 55050-ES Appt Search.

Let Schedulers Track Calls to Patients About Appointments

Schedulers use call records to track calls made to patients about appointments. To help schedulers more easily see calls made for an appointment, you can add columns that show the number of calls to your reports. The table below shows the reports and work lists where these columns are available and the column to use for each report or work list.

Report or Work List	Associated Column
Confirm Appointments work list	1330-Number of Calls to Confirm Note: This number doesn't include calls made from third-party automated calling systems.
Follow-up work list	1331-Number of Calls to Follow Up
Reschedule Appointments work list	1332-Number of Calls to Reschedule
Wait List	1333-Number of Calls from Wait List
Patient Recalls work list	1334-Number of Calls from Recalls
Recalls work list	1334-Number of Calls from Recalls
Patient Prerequisites work list	1335-Number of Calls from Prerequisites
Prerequisites work list	1335-Number of Calls from Prerequisites
Schedule Orders work list	1336-Number of Calls from Orders
Schedule Orders workqueue	1336-Number of Calls from Orders
Orders work list in Cadence Front Desk activity	1336-Number of Calls from Orders

To replicate the Foundation System, add the columns to all available reports and work lists except the Front Desk Orders work list in Cadence, the Patient Recalls work list, and the Patient Prerequisite work list.

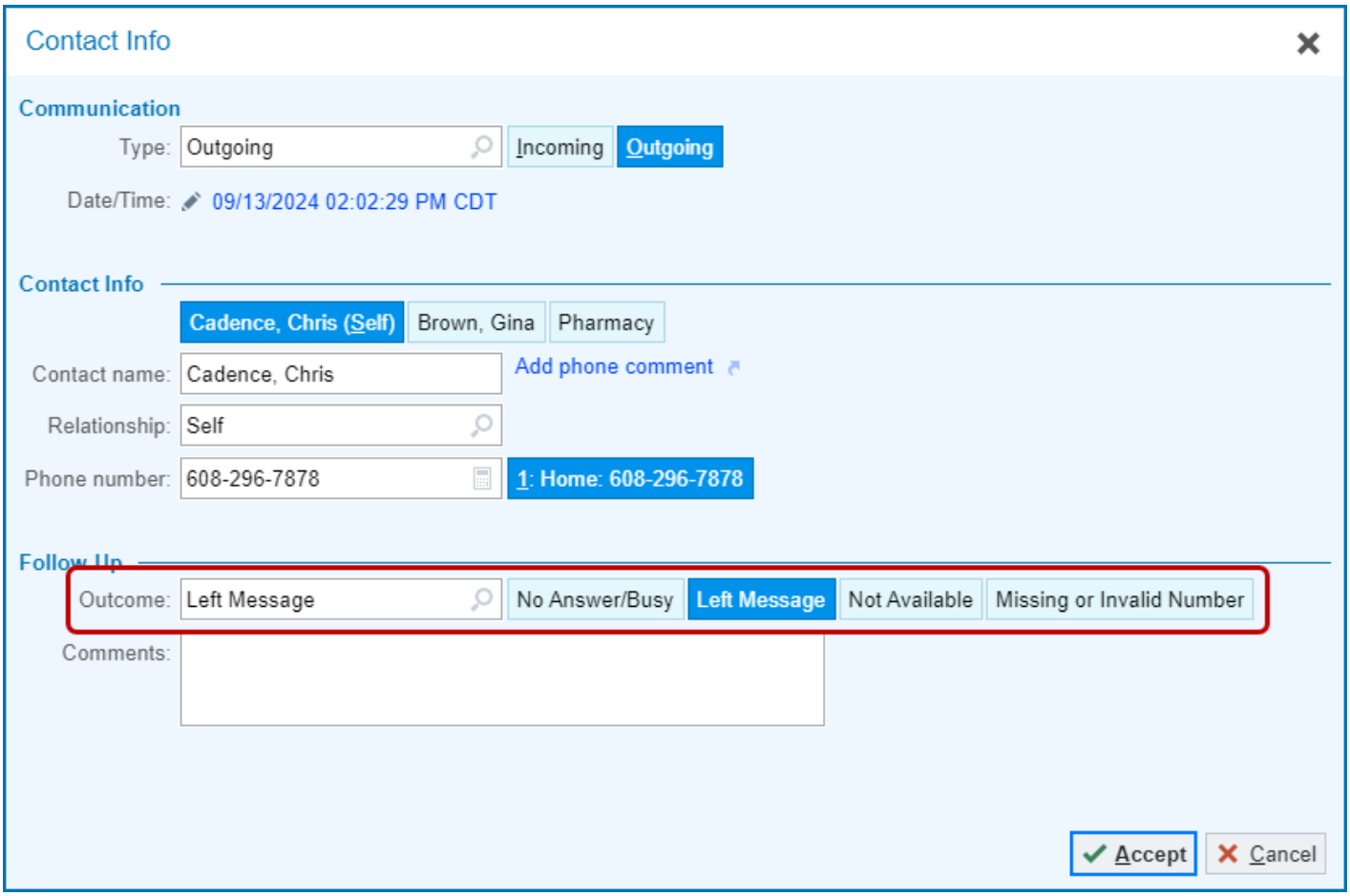
1. In Hyperspace, open the Report Settings for a report or work list.
2. Click the Display tab. Add the report column to the associated report.
3. Save the report settings.

Allow Users to Document Successful Patient Contact Outcomes

When users at your organization call a patient, they can document the outcome of their attempt to call the patient in the Outcome field in the Contacts navigator section or Contact Info window. You can configure which outcomes users can select by adding values to the Call Outcome (I CAL 2000) category list.

By default, the system assumes that users document by exception, the same way they do in the patient's chart. This means that by default, if the user enters a call outcome, the system considers the outcome of the contact to be unsuccessful. Unsuccessful outcomes appear in red bold text in HTML displays in Cadence workflows and appear with red missed-call icons in Nurse Triage communications.

If you want users to document successful contact outcomes, such as Patient Contacted or Spoke to Patient, you can specify in your compiled configuration record which of your outcomes counts as successful outcomes. That way, users can explicitly attest to having contacted the patient. These successful outcomes appear in plain text instead of red bold text in HTML displays. They also appear with successful call icons in Nurse Triage communications. When a Nurse Triage communication has a successful outcome, the Put Back button isn't selected automatically the way it is when an unsuccessful outcome is selected. This helps ensure users don't accidentally returning calls to the Triage Queue.



To consider certain outcomes successful outcomes:

1. In Hyperspace, open the Call Outcome (I CAL 2000) category list (search: Category List Maintenance).
2. Record each value in the list that corresponds to a successful contact outcome, such as Spoke with Patient. Refer to the Modify a Category List's Values topic for more information about adding values to category lists.
3. In Clinical Administration, open your compiled configuration record and go to the Contact Outcome Configuration screen (Management Options > Complete Configuration (HDF)).
4. In the Successful Outcomes (I HDF 26100) field, enter the values you recorded in step 2.

Allow Managers to Block or Dismiss Certain Patients from Scheduling

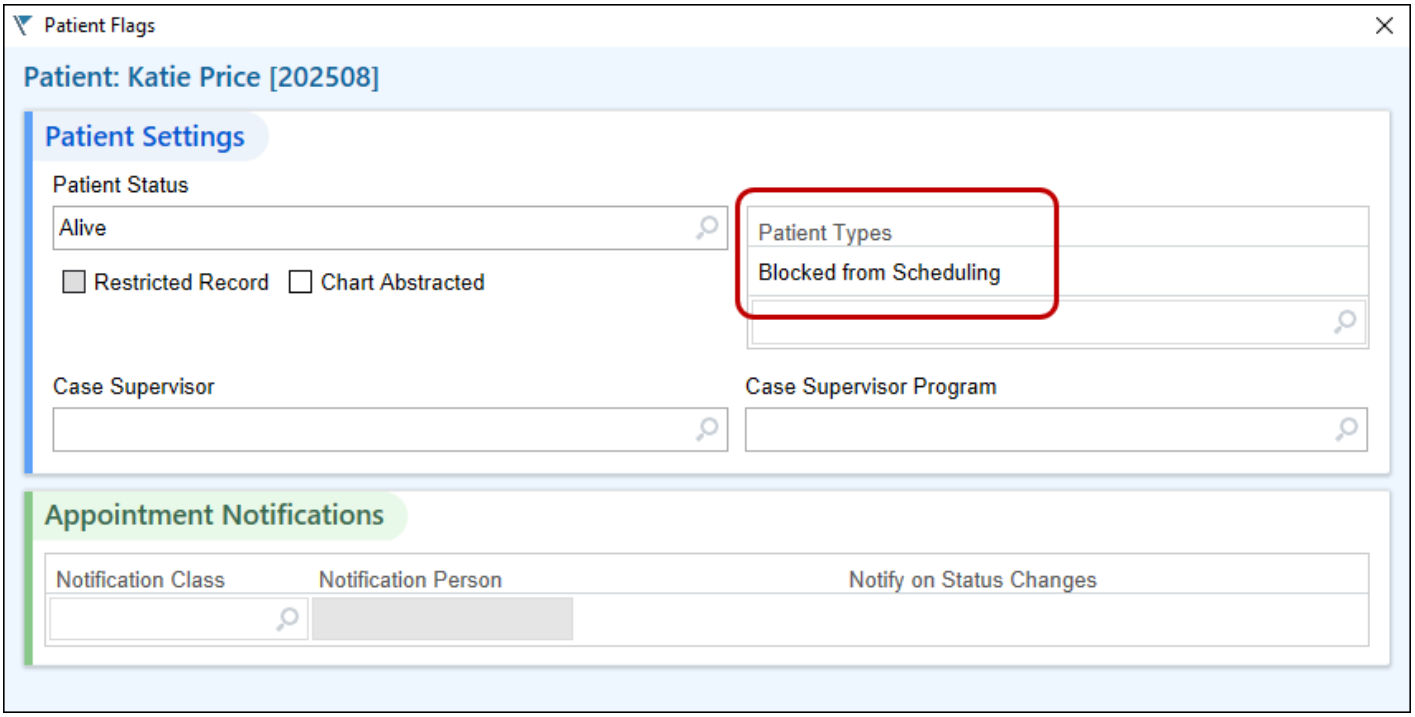
You might want to allow managers to block or dismiss patients who are not allowed at your organization because of a patient incident or because they missed too many appointments. Blocking or dismissing a patient in Cadence prevents schedulers from making appointments for the patient.

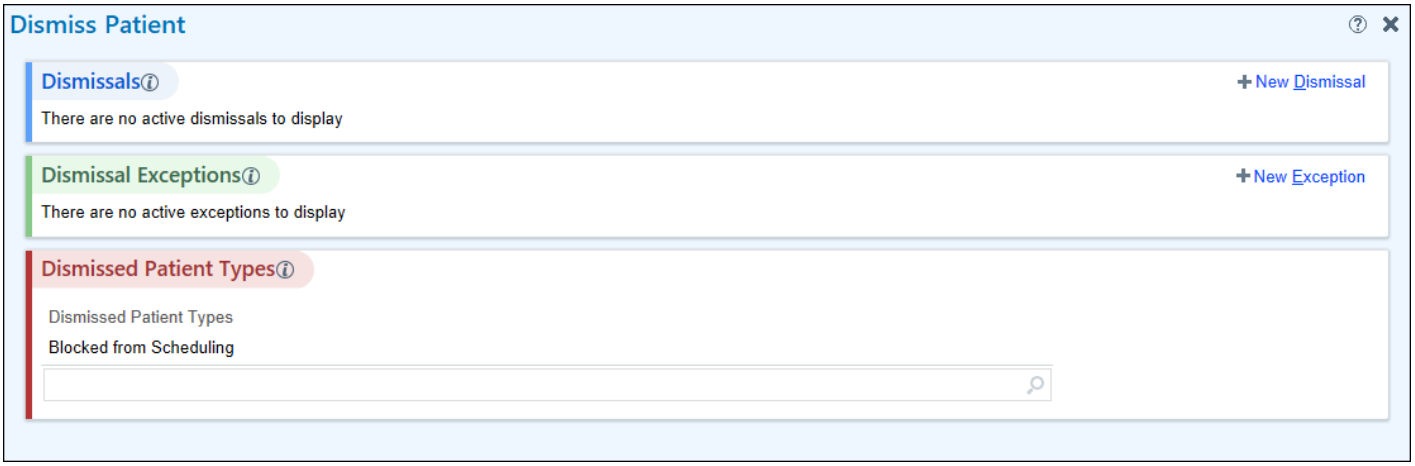
Considerations
Preventing a scheduler from scheduling a patient with a blocked patient type is different from dismissing a patient. If you implement both methods, make sure managers know when to dismiss a patient and when to assign a blocked patient type.

Allow Managers to Block Patients from Scheduling Across Your Organization

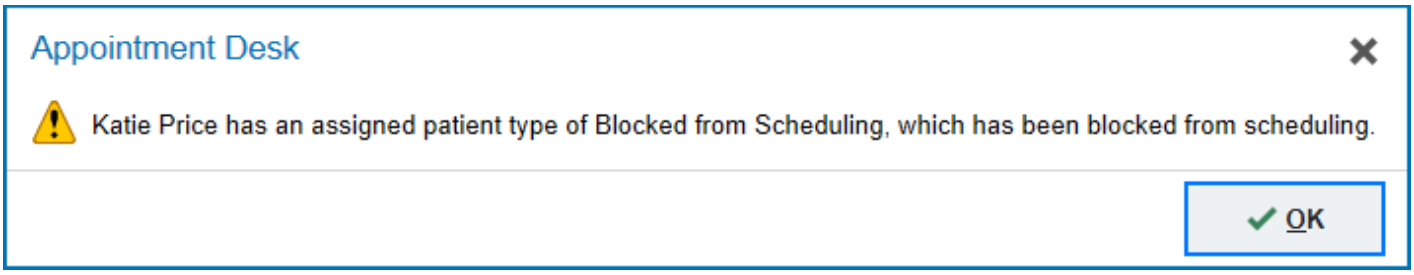
Blocking a patient means the patient cannot be scheduled anywhere at your organization. Managers can block a patient from scheduling in the Patient Flags activity or the Dismiss Patient activity by setting the patient's type to a blocked patient type.

- Appointment Desk > Patient Options > Patient Flags
- Appointment Desk > Patient Options > Dismiss Patient





When a scheduler opens the Appointment Desk for a patient who has been blocked from scheduling at your organization, she sees the following message, and the buttons that are used for scheduling are unavailable.



Specify the Patient Types That Block Patients from Scheduling

You decide which patient types (I EPT 101) indicate that a patient is blocked from scheduling by entering those types in Cadence System Definitions:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. Enter patient types in the Patient types blocked from scheduling (I SDF 8426) field.

Give Managers Access to the Patient Flags Activity

Access to the Patient Flags activity is controlled by Cadence security point Edit patient flags (I ECL 5405).

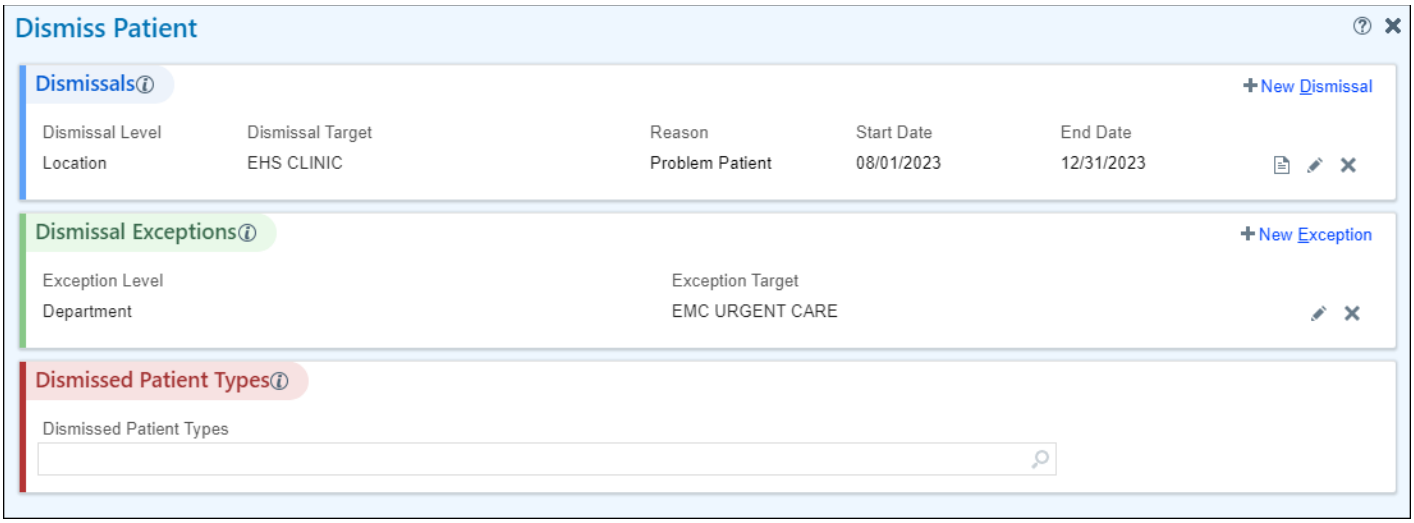
1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Security Class and open the security class for your clinic managers.
2. Select the Patient Functions form.
3. In the Edit patient flags field, enter Yes.

Allow Managers to Dismiss Patients from Certain Parts of Your Organization

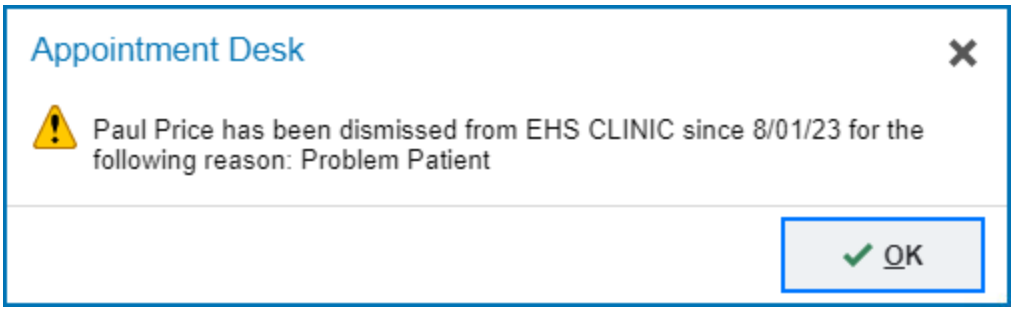
Dismissing a patient differs from blocking a patient in that dismissals can be added at the following levels of your organization's facility structure:

- Department
- Provider
- Center
- Specialty
- Location
- Service Area

Managers use the Dismiss Patient activity to manage a patient's dismissal (Appointment Desk > Patient Options > Dismiss Patient).



When dismissing a patient, managers must enter a reason why the patient has been dismissed. This reason appears to schedulers when they open the Appointment Desk for a patient who has been dismissed, and the buttons that are used for scheduling are unavailable.



Managers can enter dismissal exceptions for a patient, which allow the patient to still be scheduled in some areas of your organization, such as urgent care. You can also configure certain departments to always allow scheduling of dismissed patients.

Considerations

Patients who are dismissed from scheduling with a department or provider are also prevented from sending medical advice request messages and e-visits from MyChart to those departments and providers. There are a few exceptions:

- If a provider or department initiates contact with a dismissed patient, the patient can respond to that contact.
- If a provider works in multiple departments and a patient isn't dismissed from all of them, the patient can still send messages to that provider through the other departments.
- If a patient is dismissed from a department but is still allowed to contact at least one provider in that department, such as the patient's PCP, the patient is also able to send messages to that department.

Create Reasons for Dismissing a Patient

When managers dismiss a patient from scheduling, they must assign a reason for the dismissal. You create these reasons in the Reason for Dismissal (I EPT 97) category list. Create a category for each dismissal reason you want available for managers to select. For more information about editing category lists, refer to the Modify a Category List's Values topic.

The Foundation Hosted environment has several dismissal reasons like Problem Patient and Confidential. Refer to the Foundation Hosted environment for the complete list.

Give Managers Access to the Dismiss Patients Activity

Access to the Dismiss Patients activity and to write free-text notes for dismissals is controlled by Cadence security point Edit patient dismissal (I ECL 5408). Managers can add a dismissal or exception for areas in which they have security. For example, to add a dismissal for a location, a manager must have the Edit patient dismissal security point set to Yes for at least one department in that location.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Security Class and open the security class for your clinic managers.
2. Select the Patient Functions form.
3. In the Edit patient dismissal (I ECL 5408) field, enter Yes.

Allow Scheduling of Dismissed Patients in Certain Departments

Patients who have been dismissed from your facility might still need to be seen in certain departments such as urgent care. Instead of managers listing this exception for every dismissed patient, you can set this exception at the department level.

1. In Hyperspace, go to Epic button > Admin > Scheduling Admin > Master File Edit > Department and open your department record.
2. Select the Scheduling > General form.
3. In the Allow scheduling of dismissed patients? (I DEP 1900) field, enter Yes or Admitted Patients Only.
    - Enter Yes to allow dismissed patients to be scheduled in the department.
    - Enter Admitted Patients Only to allow dismissed patients who are registered in the ED or admitted to the hospital to be scheduled in the department. For the purposes of scheduling, dismissed patients who are on a leave of absence are considered admitted and can be scheduled in the department.

Import Patients' Dismissal Statuses

If you want to import patients' dismissal statuses all at once rather than manually setting each patient's status, you can use an import specification to bring in this data. For example, this import might be useful when implementing if you have many dismissed patients in your old system that you need to mark as dismissed in Epic. Use import specification EPT,1110-Patient Dismissal to import patients' dismissal statuses. For more information about importing records, refer to the Standard Import Guide.

Customize the Expand Appointment Window

Schedulers use the Expand Appointment window from activities like the Department Appointments report and the Appointment Desk to investigate appointment details. For example, schedulers can review attached referrals or orders, see any sent appointment notifications, and check out the history of the appointment. In fact, some people call this window the appointment audit trail because it displays a detailed account of the appointment and its history.

You decide what information schedulers see in this window by adding or removing HTML tables from the HTML display. You can use standard HTML tables or create your own.

Refer to the Use Report/HTML Assistance to Troubleshoot and Maintain Your HTML Displays and Tables and Use Record Viewer to Find HTML Display Overrides topics for information about tools to help you manage and

customize your HTML displays.

1. In Hyperspace, follow the path Epic button > Admin > General Admin > HTML Display Configuration.
2. Select HTML display 4-AS Appointment. Choose whether you want the configured display to appear for your facility, a specific location or service area, or a specific department.
3. Use the HTML Display Editor to add, remove, and reorder HTML tables. Refer to the Customize an HTML Table topic for more information on editing an HTML table.

Note that your organization might want to perform additional setup for confidential departments, such as restricting documents sent through Care Everywhere. Refer to the Prevent Encounter Summaries from Being Sent from Visits That Occur in Restricted Departments topic for more information.

Protect Patient Privacy by Creating Confidential Departments

Some departments, like psychiatry, want their appointments kept confidential to protect patient privacy. Schedulers without confidential department override security in their Cadence security classification can't schedule in confidential departments. These schedulers also can't view information about appointments scheduled in the department.

Mark a Department As Confidential

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Department and select the department that should be marked as confidential.
2. Select the General > Dept Type/Offsets/EOD form (In the Hyperdrive client starting in August 2023, Dept Type/Offsets).
3. In the Confidential department? (I DEP 125) field, enter Yes.

Give Users Confidential Department Override Security

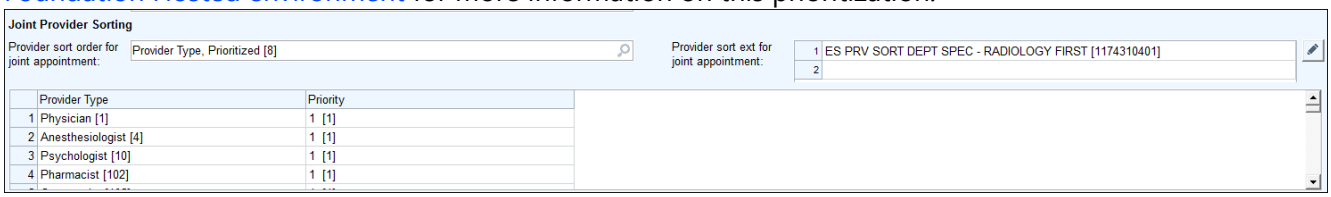
1. In Hyperspace, open a user's Cadence security class (search: Cadence Security).
2. Select the Appointment Entry form.
3. Enter Yes in the Confidential dept override (I ECL 5130) field.

Determine the Order of Providers for Joint Appointments

You need to determine the order of the providers on joint appointments so that the system can accurately identify the primary provider for the appointment. The first provider is considered the primary provider and often documents on the encounter before the other providers. Also, the primary provider is often the billing provider for the appointment. It's important that the primary provider is accurate when the appointment is scheduled so that documentation and billing are accurate from the beginning of the encounter.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Custom Extensions/EOD > Appointment Entry form.
3. In the Provider sort order for joint appointment field, select how providers for joint appointments are sorted. There are several choices, all of which are based on either the provider ID, the time the provider is scheduled for the appointment, or the type of provider.
   To replicate the Foundation System, set this field to Provider Type, Prioritized.
4. If you chose to sort by Provider Type, Prioritized, enter provider types and associated priorities in the table at the bottom of the form.

To replicate the Foundation System, assign priorities to various provider types. Refer to this image and the Foundation Hosted environment for more information on this prioritization.



5. In the Provider sort ext for joint appointment field, enter any extensions you want to use to determine provider sort order. Note that any sorting rules specified in the Provider sort order for joint appointment field are applied before the sorting rules specified in this field.
    - To replicate the Foundation System, create a copy of extension 43104-ES Prv Sort Dept Spec and set the Department Specialty parameter to 40-Radiology. This extension gives resources in radiology departments a priority of 1.
    - You can configure a copy of extension 43104 to skip department-based re-sorting in joint appointments. Department-based re-sorting is useful for radiology departments so that resources appear sorted ahead of providers for joint appointments, but this sorting might not be helpful in other departments. To turn this feature off, set the Skip Dept Type Sort? parameter in your copy of extension 43104 to 1-Yes.
    - You can configure a copy of extension 40484-ES Provider Sort Primary Pool (Template) to sort by the primary provider when using multiple pools for scheduling an appointment. This will set the first/primary provider in the selected pools as the primary provider for the visit. You can configure the Visit Types and Pools parameters so that the extension applies only to appointments using certain visit types or pools. You can also use this extension with an empty pool, which allows your users to choose the primary provider at the time of scheduling.

Enable Appointment Authorization Status in Your System

Appointment authorization (AA) status is a value that can help schedulers and referral coordinators to prioritize their work and clinicians to track whether there are any procedures that aren't yet authorized for an upcoming encounter. Your system determines whether an appointment requires authorization by following the logic described in the Require Referrals in Specific Situations topic.

The AA status can be any of the following values with the corresponding meaning:

- Not Authorized: none of the referrals linked to the appointment are authorized, or any referrals that are authorized have errors.
- Authorized: all of the referrals linked to the appointment are successfully authorized.
- Authorization Not Needed: no referrals are linked to the appointment and the appointment doesn't require authorization.
- Partially Authorized: some of the referrals linked to the appointment are successfully authorized, but not all of them.
- Missing Authorization: no referrals are linked to the appointment, but the appointment requires authorization.
- Not Applicable: the appointment is not scheduled, arrived, or completed and so doesn't currently need to be considered for authorization.

Note that AA status is calculated based on the value in the Referral Status (I RFL 50) field for each referral linked to an appointment and whether there are any errors in the Associated Referral Authorization Error Codes (I EPT

23026) field for the appointment. For more information about how your system calculates AA statuses, refer to the Understand Appointment Authorization Status Logic topic below. Any custom values you have for the Referral Status item are considered unauthorized in these calculations. Thus, you cannot use custom values that represent an authorized referral for this item, otherwise AA status calculations will show that authorization is still required for referrals that are technically authorized.

To make sure that your users have consistent information regarding appointment authorization (AA) status and related referrals across your system, you must make sure that custom records show AA status and that places that previously referenced the singular linked referral now consider all linked referrals. You also must use the Build Wizard to enable your system to begin using AA status and related referrals information at all.

Use the Build Wizard in Hyperspace to update reports and HTML display configurations with AA status fields and related referral fields as appropriate. You can also update report settings for Appointment Desk with open linked referrals actions and enable user roles to access open linked referrals actions as well. To get started, open the Build Wizard (search: Build Wizard) and search for feature 160006-Show Appointment Authorization Details (application: Referrals).

If you need to adjust these settings after running the Build Wizard, refer to the applicable topic from the following list for manual setup steps. Refer to the questions in the Build Wizard for what new print groups, HTML tables, and actions you might want to update your records with to support this feature.

- For report column setup, refer to the Determine Which Columns Appear in a Report topic.
- For print group-based report setup, refer to the Defining a Print Group-Based Report topic.
- For HTML display configuration setup, refer to the Add an HTML Table to a Hyperspace Screen topic.
- For report settings, refer to the Pick the Actions Available to Users from a Tab section in the Design the Look and Use of the Appointment Desk Tabs topic.

Understand Appointment Authorization Status Logic

It can be helpful to better understand how the multi-referral links and AA status calculations work, especially if you get questions from affected users or need to troubleshoot build and workflows. The logic that drives the linking is determined by several key items across master files.

- Patients (EPT):
  - Requires Referral (I EPT 22600): whether the appointment needs a referral based on the build described in the Require Referrals In Specific Situations topic. If no referral is linked to the appointment, the value in this field determines whether the AA status is 2-Authorization not needed or 4-Missing authorization.
  - Authorization Status (I EPT 23010): the overall authorization status of the appointment, calculated based on the individual authorization statuses and any authorization errors of each linked referral. Refer to the list in the previous section for possible values for this item and what each means.
  - Referral (I EPT 23015): the first linked referral. Any referral listed in this field also appears in the Associated Referrals for Authorization field. The referral listed in this field has no priority or importance over other linked referrals.
  - Associated Referrals for Authorization (I EPT 23025): a full list of referrals linked to the appointment. It can be affected by referral-generating orders that were scheduled to the appointment.
  - Associated Referral Authorization Error Codes (I EPT 23026): any issues with the authorization status

of the linked referral on the corresponding line in the Associated Referrals for Authorization list.

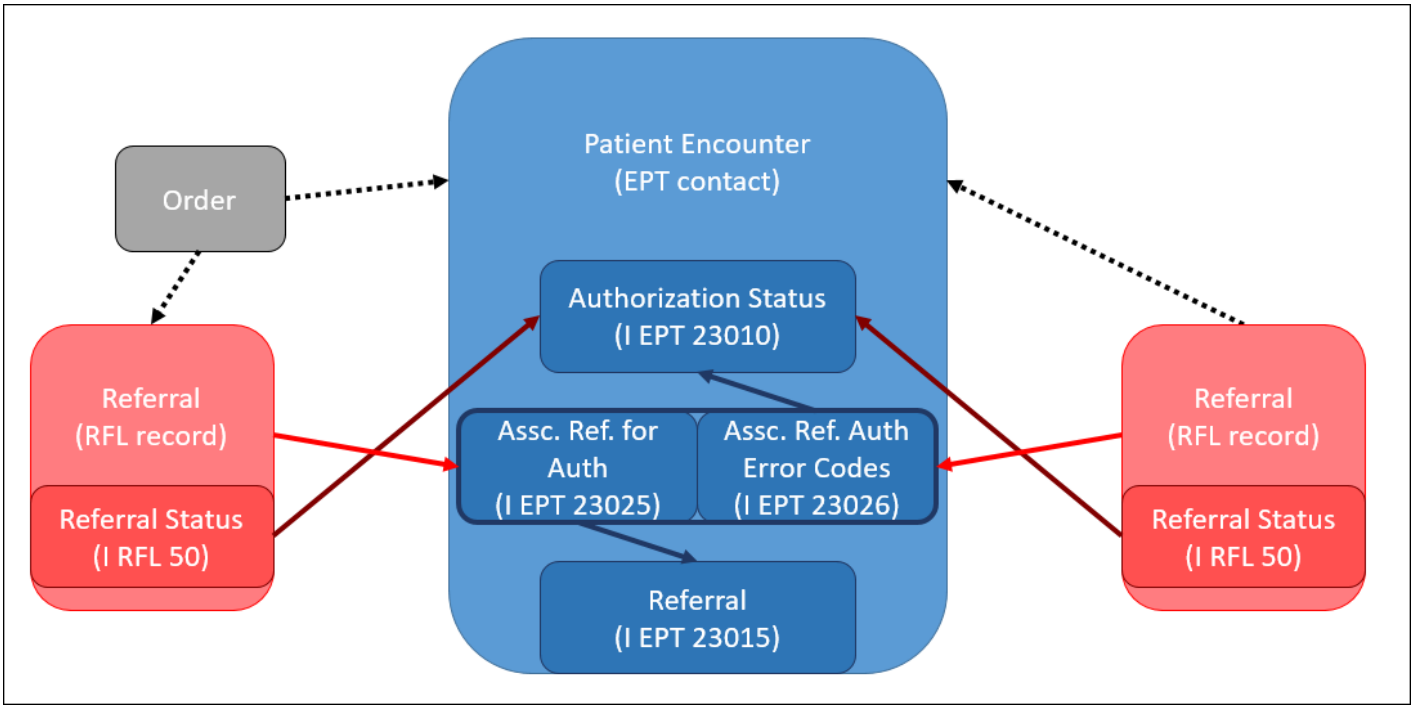
- Referrals (RFL):
  - Referral Status (I RFL 50): the authorization status of the referral, which is used to help calculate the Authorization Status field's value for the patient encounter.
- Treatment Plans (TPL):
  - Next Unauthorized Day (I TPL 7020): whether a treatment day within a treatment plan is authorized. If a referral is linked to a treatment plan, the system considers that referral authorized for the purposes of calculating the AA status as long as there is a treatment day-level authorization for the same date as the appointment. Otherwise, the system records an error of 7-Treatment Day Not Authorized in the Associated Referral Authorization Error Codes field for the linked referral.

For a visual map of an example of how these items interact, refer to the diagram below. Consider the following example:

A provider places an order that generates a referral. A scheduler then schedules the encounter from that order, thereby linking its referral to the encounter. Later, a referral coordinator creates a separate referral manually and assigns it to the encounter, thereby linking it as well.

Linked referrals appear listed in the Associated Referrals for Authorization (I EPT 23025) field. A user can also manually set a single referral with or without an order in the Referral (I EPT 23015) field, or the system automatically populates it with either of the linked referrals. In the example above, the manually linked referral is populated in this field.

The value in the Authorization Status (I EPT 23010) field is calculated based on whether referrals are attached, whether the Referral Status (I RFL 50) of those referrals is equal to 1-Authorized, and whether any authorization errors are associated with those referrals in the Associated Referral Authorization Error Codes (I EPT 23026) field. Your system also considers the Requires Referral (I EPT 22600) field, which is now updated whenever a coverage for the patient changes instead of only upon appointment creation and check-in.



If you want to evaluate any of the items related to AA status in your rule build, use the following properties to do so.

Item	Property
Appointment Status (I EPT 23010)	1400-Appointment Authorization Status
Referral (I EPT 23015)	1461-Referral
Associated Referrals for Authorization (I EPT 23025)	1756-Linked Referrals
Associated Referral Authorization Error Codes (I EPT 23026)	1757-Linked Referral Errors
Referral Status (I RFL 50)	1404-Referral Status

The following properties are also available to show more specific information.

Information	Property
The Authorization Status of the next appointment for the current referral.	1758-Next Appointment Auth Status
The referrals linked to the next appointment for the current referral.	1773-Next Appointment Linked Referrals
The authorization errors that the current referral has for its next appointment.	1776-Errors on Next Appointment

Point of Service Warnings

If your organization uses Referrals, there are several options that you can configure to remind front-end users to assign referrals to appointments that require a referral.

Similarly, you can warn front-end users when certain services linked to an appointment aren't covered by the patient's insurance.

Require Schedulers to Assign Referrals During Appointment Entry

You can configure your system to prevent schedulers from making an appointment without a referral if a referral is required according to Benefits Engine or, in systems that don't use Benefits Engine, the coverage's benefit plan.

1. In Hyperspace, open Referrals System Definitions and go to the Point of Service > Referral Warnings form.
2. In the Required Referral Warnings section, enter Yes in the Require referral during appointment entry? (I POS 3318) field.
3. In the Notification Point list of the Required Referral Warnings section, define how you want the system to behave at various points in the scheduling and check in workflows.
    - After provider. Specify whether Cadence checks for referral requirements after a provider is specified and, if it finds them, how it reacts. This setting applies to Appointment Entry and Quick Appointment Entry.
    - During auto scheduler. Specify whether Cadence prevents users from scheduling an appointment using the Auto Scheduler based on a referral being required. If this field is left blank, the Auto Scheduler always checks for required referrals and gives warnings if appropriate, but it does not prevent scheduling based on these checks.
    - Before appointment accept. Specify whether Cadence checks for referral requirements after an

appointment is defined but before it is accepted and, if it finds them, how it reacts.

- Before check-in. Specify whether Cadence checks for referral requirements before an appointment is checked in and, if it finds them, how it reacts.
- After registration. Specify whether Cadence checks for referral requirements after registration and, if it finds them, how it reacts.
- Before sign in. Specify whether Cadence checks for referral requirements before sign in and, if it finds them, how it reacts.

4. Choose one of the following actions for each notification point:
   - Warn, Stop, Hyperlink. This option lets users know that a referral is required and allows them to choose to jump to the Referral Action activity or cancel scheduling the appointment.
   - Warn, Continue, No Hyperlink. This option lets users know that a referral is required, but doesn't give them the option to jump to the Referral Action activity to assign a referral to the appointment.
   - Warn, Continue, Hyperlink. This option lets users know that a referral is required and allows users to jump to the Referral Action activity, cancel scheduling the appointment, or continue scheduling the appointment. If they choose to go to the Referral Action activity, they are not required to assign a referral.
   - Warn, Stop, No Hyperlink. This option lets users know that a referral is required, but it does not give users the option to jump to the Referral Action activity using a hyperlink.
   - No Warning.

Warn Users When Scheduling a Referral with Scheduling Errors

You can configure your system to warn schedulers when they're scheduling a referral that has scheduling errors for the current appointment, such as if the appointment is not being scheduled in a department with the same specialty as the department specialty on the referral. You can also decide whether these warnings are hard stops that prevent the scheduler from finalizing scheduling the referral, or soft stops that allow the scheduler to continue their workflow and resolve the errors later.

Before starting build, decide under which conditions your system should warn a scheduler of a referral with scheduling errors. Extensions that have a Type (I LPP 30) of 298-Appointment Referral Assignment Routine define these conditions. If none of the released extensions of this type work for your organization, refer to the Duplicate and Modify an Extension topic for instructions to copy one of them. Then, to configure the extension in your system:

1. In Hyperspace, open Referrals System Definitions (search: Referrals System Definitions) and go to the Miscellaneous > Assignment form.
2. In the Appointment Assignment section, in the Extension (I POS 4008) column, enter the extension that you decided to use above.
3. In the If False (I POS 4009) column in the corresponding row, enter one of the following:
   - To make the warning for this extension a hard stop, enter Warn and Stop.
   - To make the warning for this extension a soft stop, enter Warn and Ask.
4. In the Message (I POS 4010) column in the corresponding row, enter the text that your system shows in the warning.
5. Repeat steps 2-4 for any additional conditions that you want to configure.
6. If you are using extension 17184-Department/Department Specialty or a copy of it to warn when the

department or department specialty on a referral does not match the department or department specialty in which the referral is being scheduled, you can limit which department and department specialty mismatches can trigger this warning. If you want the warning to appear for all department and department specialty mismatches, select the Exclude department/department specialty checkbox and leave the Department List and Specialty List column blank. If you want to limit which department and department specialty mismatches trigger the warning, do the following:

a. To set which department mismatches can trigger the warning, enter the departments in the Department List (I POS 4017) column.

b. If you want the warning to appear for all department and department specialty mismatches save for a few, enter the departments you wish to exclude in the Department List column and select the Exclude department/department specialty (I POS 4019) checkbox.

c. If you want to limit which department specialty mismatches can trigger the warning, enter the department specialties in the Specialty List (I POS 4018) column. Select the Exclude department/department specialty checkbox if you want the warning to appear for all specialties except those listed.

d. If you want the warning to appear for all department and department specialty mismatches, select the Exclude department/department specialty checkbox and leave both the Department List and the Specialty List column blank. If you don't select this checkbox and don't list anything in the Department List and the Specialty column, no warning appears.

Warn Users When Checking In an Appointment with an Unauthorized Referral

You can configure your system to warn users at check in if the referral linked to an appointment is unauthorized.

1. In Hyperspace, open Referrals System Definitions and go to the Point of Service > Referral Warnings form.
2. In the Check in message (I POS 3210) field, you can enter text that appears in addition to the standard warning message of "The referral assigned to this visit is not Authorized. The current status is <STATUS>."
3. In the Check in default (I POS 3215) field, specify how you want the system to behave when a user checks in an appointment that has unauthorized referrals associated.
    - No Warning
    - Warn, Continue, No Hyperlink
    - Warn, Continue, Hyperlink
    - Warn, Stop, Hyperlink
    - Warn, Stop, No Hyperlink

Specify Whether Users Can Create Referrals During Appointment Entry

You can allow schedulers to create new referrals and edit existing referrals during appointment entry.

Prerequisites
The user must also have the appropriate Referrals security.

1. In Hyperspace, open Referrals System Definitions and go to the Point of Service > General form.
2. In the General Fields sections of the form, enter Yes or No in the Entry/edit during scheduling field.

Warn Users About Non-Covered Services During Scheduling Workflows

You can warn users about non-covered services, as determined by the benefit grouping assigned to a visit type, at different times in the scheduling and check in workflows. Refer to the Define Benefit Groupings topic for information about creating benefit groupings.

1. In Hyperspace, open Referrals System Definitions and go to the Point of Service > Services Warnings form.
2. In the Use all coverages (I POS 3295) field, specify whether the system checks all coverages or only the patient's primary coverage. This setting applies to both non-covered services warnings and required referral warnings.
3. In the Services Warning Notification Points List section, specify how you want the system to behave at different points in the process:
    - The following notification points are available:
        - After provider (I POS 3610). Specify whether Cadence checks for non-covered services after a provider is specified and, if it finds them, how it reacts. This setting applies to both Appointment Entry and Quick Appointment Entry.
        - During auto scheduler (I POS 3611). Specify whether Cadence prevents schedulers from scheduling an appointment based on a non-covered service provider check.
        - Before appointment accept (I POS 3615). Specify whether Cadence checks for non-covered services after an appointment is defined but before it's accepted and if it finds them, how it reacts.
        - Before check in (I POS 3616). Specify whether Cadence checks for non-covered services before an appointment is checked in and if it finds them, how it reacts.
        - After registration (I POS 3617). Specify whether Cadence checks for non-covered services after registration and if it finds them, how it reacts.
        - Before sign in (I POS 3618). Specify whether Cadence checks for non-covered services before sign in and if it finds them, how it reacts.
    - For each notification point, you can choose one of the following options:
        - No Warning
        - Warn, Continue, Hyperlink
        - Warn, Stop

Warn Users About Network Mismatches During Scheduling and Check-In

You can warn users if they try to schedule or check in a patient and the provider isn't in the patient's network. With the right configuration, you can also warn users based on a combination of network, provider status, location information, and more.

1. In Hyperspace, open Referrals System Definitions and go to the Point of Service > Network Warnings form.
2. In the Provider Network Warnings section, specify how you want the system to behave at different points in the process. For each notification point (check-in and appointment entry), you can choose one of the following options:
    - No Warning
    - Warn, Continue, Hyperlink
    - Warn, Stop
3. If you want to customize the message users see, enter text in the appropriate field.

4. If you want to hide network names when warning users, enter Suppress Network Names in the Network names (I POS 3640) field.
5. If you want to show only providers in the patient's network during provider selection, enter a value in the Filter during provider selection (I POS 3645) field.
6. If you want to create more complex network warnings, complete the Custom Network Warnings table. For each appointment, the system searches this table from top to bottom until all criteria for a given row match the appointment. An appointment matches if the appointment provider matches the network and any other specified criteria for the patient as of the appointment date and for the visit coverage. If there isn't a visit coverage, the system checks the patient's primary coverage:
    - Network. Enter a network you want to check against the appointment's scheduled provider. The system skips this row if the provider isn't in this network.
    - Provider Status. Enter an appointment provider status you want to check for in the associated network. The system skips this row if the provider doesn't have this status.
    - Chk Pt? Enter Yes to skip the current row entirely if the patient isn't in the listed network. You can use this field to avoid showing messages to schedulers when the patient isn't a member of the network in the Network field.
    - Service Area. Enter a service area you want to check against the appointment's service area. The system skips this row if the appointment department isn't in this service area.
    - Location. Enter a location you want to check against the appointment's location. The system skips this row if the appointment department isn't in the specified location.
    - Department. Enter a department you want to check against the appointment department. The system skips this row if the department you enter here isn't also the appointment department.
    - Message. Enter the message you want to show schedulers when the table matches on the current row. If you don't enter a message, the system shows "<The provider's name> is not a member of this patient's networks."
        - In the message, you can specify the provider, plan, and payer using @prov@, @plan@ and @payer@ as mnemonics.
        - For example, if the message is "@prov@ is out of network for @payer@." the @prov@ will be replaced by the name of the appointment provider and @payer@ will be replaced by the payer's name.

Warn Schedulers About Expected Authorization Lead Time to Prevent Rescheduling Visits

Starting in February 2025

Authorizations require varying lengths of time to be acquired, leaving schedulers unsure of when to schedule appointments for patients. You can configure warnings to appear on visits in Book It to let schedulers know the expected authorization lead time linked records might need. This helps prevent them from scheduling appointments prior to when patients receive authorization, saving schedulers time and the frustration of having to reschedule appointments.

When a scheduler is viewing possible visits in the solutions view in Book It, they see different warnings depending on how you configure the Authorization Lead Time table in Referrals System Definitions.

- If you set the matching row's Warning Level to 1-Informational, schedulers see the expected date of authorization when hovering over visit solutions prior to the expected date of authorization. If they choose

to proceed with scheduling, a warning appears with more information on the expected date of authorization.

- If you set the matching row's Warning Level to 2-Warning, schedulers see only visit solutions past the expected date of authorization. To see visit solutions before that date, schedulers can select the Allow solutions with warnings checkbox in Book It. After they select this checkbox, visit solutions prior to the expected date of authorization appear with a warning icon. When they hover over the visit solutions with this warning, the expected authorization date appears. If they choose to proceed with scheduling, a warning appears showing them the expected date of authorization.

Optionally, you can require or recommend your users enter an appointment warning overrule reason when scheduling an appointment before the expected date of authorization.

Required Task: Configure Lead Time Table

Rows in the Authorization Lead Time table in Referrals System Definitions match to possible appointments with linked records, from top to bottom, that pass the rule specified in the Rule field. To configure the Authorization Lead Time table:

1. Go to Referrals System Definitions.
2. Access the Auth Lead Time form under the Authorizations section.
3. Create or add a rule to the Rule (I POS 17310) field.
    - Only rules of the 5006-Appointment Entry Provider Check context are available for use. For a configurable example, refer to 736987-Expected Authorization Lead Time in the Foundation System. Note that this rule's properties are blank and will not function without adding values.
    - This rule matches to possible appointments in Book It and applies the warning level and lead time you specify below.
4. Add a number of days to the Lead Time (Days) (I POS 17315) field.
5. Choose a warning level for this rule to apply in the Warning Level (I POS 17316) field.

Optional Task: Configure Appointment Warning Overrule Reason

Optionally, you can require or recommend your users enter an appointment warning overrule reason when scheduling an appointment before the expected date of authorization at the system or department level.

To set the warning overrule reason at the system level:

1. Go to Cadence System Definitions.
2. Access the Warnings form under the Scheduling section.
3. Add 119-Earlier than Expected Auth to the Warning (I SDF 11650) field.
4. Add a reason requirement of 1-Recommended or 2-Required to the Reason Requirement (I SDF 11652) field.
    - Adding 1-Recommended prompts schedulers to enter a reason for scheduling through the earlier than expected auth warning, but they are not required to enter a reason.
    - Adding 2-Required adds a hard stop for schedulers, requiring them to enter a reason for scheduling an appointment earlier than the expected auth time.

To set the warning overrule reason at the department level:

1. Go to department Edit for the desired department.
2. Access the Warnings form under the Scheduling section.

3. Add 119-Earlier than Expected Auth to the Warning (I DEP 1196) field.
4. Add a reason requirement of 1-Recommended or 2-Required to the Reason Requirement (I DEP 1198) field.
    - Adding 1-Recommended prompts schedulers to enter a reason for scheduling through the earlier than expected auth warning, but they are not required to enter a reason.
    - Adding 2-Required adds a hard stop for schedulers, requiring them to enter a reason for scheduling an appointment earlier than the expected auth time.

For more information, refer to the Have Schedulers Provide Reasons When They Overrule Appointment Warnings topic.

Calculate Patient Arrival Times for Appointments

You can calculate an arrival time for patients, so they know if and when they need to show up early for an appointment. The system calculates arrival time for appointments by looking at the appointment start time and then applying the arrival time offset specified at the department or visit type levels. For example, if a department has an offset of 10 minutes, a 10:00 AM appointment has an arrival time of 9:50 AM. The arrival time for an appointment cannot start on the previous day. For example, the arrival time for an appointment at midnight would be midnight, not 11:50 PM on the previous day.

You can show this arrival time throughout the system as well as in patient communications such as reminder letters.

When a patient has an appointment scheduled with an arrival time, the system warns schedulers about scheduling an appointment for the patient in another department during the arrival time window. These warnings do not appear for appointments that are scheduled in the same department. Schedulers cannot override patient arrival time conflict warnings without having the Overlap arrival time (I ECL 5088) security point set to Yes in their Cadence security class.

Prerequisites

Before implementing this feature, you might need to edit your patient instructions if these instructions already show information about patient arrival times. If you leave this information in the patient instructions and set up patient arrival time, patients could see this arrival time information twice. Consider all the following when determining where patient arrival time information currently exists:

- Patient instructions and scheduling instructions in visit types
- Appointment reminder letters, emails, MyChart messages, and texts
- The script used by your automated appointment reminders

Considerations

Patient arrival time appears throughout scheduling workflows and can appear in these activities and workflows owned by other applications:

- Welcome workflows, typically owned by the Welcome team.
- Patient Station and Today's Patient report, typically owned by Grand Central.
- The Schedule activity, typically owned by the EpicCare Ambulatory team.
- Below the appointment time on the Upcoming Appointments and Appointment Details pages in MyChart. If an early arrival reason is given, patients can see it by clicking the info button next to the arrival time on the Appointment Details page.

Patient arrival time appears in a view-only format when scheduling in EpicCare Link.

To use patient arrival times, you need to define arrival time settings at the department level and, if necessary, override the arrival time at the visit type level. You can also show arrival times in certain Cadence activities and reports, and you can add arrival times to patient communications.

Determine Arrival Time for a Department

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Open your department record and select the General > Dept Type/Offsets form.
3. Under the Arrival Time heading, in the Use Arrival Time? (I DEP 3700) field, select Yes.
4. In the Default Arrival Offset (I DEP 3702) field, set the default number of minutes early patients should show up for appointments in this department. You can override this offset at the visit type level.
5. Enter the department's start time in the Department Start Time (I DEP 3701) field to prevent the system from calculating patient arrival times before the department is open. Schedulers can manually enter an earlier or different arrival time during appointment entry.
6. If you want to give patients a reason for arriving early, enter that reason in the Default Reason for Early Arrival (I DEP 3703) field.
7. If some visit types in this department need to use a different arrival offset, enter those visit types (I DEP 3710) and their specific offsets (I DEP 3711) in the Visit Type Overrides table. You can also enter individual reasons for early arrival (I DEP 3712) for each visit type override. If a visit type needs an override offset in all departments, consider defining the arrival time offset in the visit type record instead of at the department level.

Determine Arrival Time for a Visit Type

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Visit Type.
2. Open your visit type record.
3. On the General form, in the Arrival time offset (I PRC 1700) field, set the default number of minutes early patients should show up for appointments that use this visit type. This offset overrides the offset at the department level, but not the department-level visit type overrides.
4. If you want to give patients a reason for arriving early for these appointments, enter that reason in the Reason for early arrival (I PRC 1701) field. This field is unavailable until you enter an arrival time offset. Also, this reason overrides the reason at the department level, but not the reason in the department-level visit type overrides.

Show Arrival Time in Reports and Activities

You can add report column 1503-Appt Arrive By Time to the Future Tab on the Appointment Desk and the Department Appointments report, so schedulers and front desk staff can see the estimated patient arrival time for appointments. You can also add this column to Patient Station and the Schedule.

- For instructions about adding a column to an Appointment Desk tab, refer to the Design the Look and Use of the Appointment Desk Tabs topic.
- For instructions about adding a column to the Department Appointments report, refer to the Design Department Appointments Reports topic.
- For instructions about adding a column to Patient Station, refer to the Choose Patient Station Activities topic.
- For instructions about adding a column to the Schedule, refer to the Customize the Columns That Appear in the Schedule topic.

You can also add the following report columns to Reporting Workbench reports, to report on waiting times for patients:

- 1607-Appt Check In to Expected Arrival Time
- 1609-Appt Sign In to Expected Arrival Time

For details about adding any of the three new columns to Reporting Workbench reports, including extracts for automated calling, refer to the Determine Which Columns Appear in a Report topic.

Show Arrival Time in Printed and Electronic Patient Communications

Two SmartLinks, 60050-Appt Arrival Time (mnemonic: .ARRIVALTIME) and 60055-Appt Arrival Reason (mnemonic: .ARRIVALREASON), show the patient arrival time and arrival time reasons for the appointment in your reminder letters, emails, and text messages. Add SmartLinks 60050 and 60055 to your Cadence SmartTexts as needed.

For more information about the SmartLinks available in your system, refer to the Search for Information About SmartLinks in Your System topic.

For additional information on editing SmartLinks, refer to the Edit a SmartLink topic.

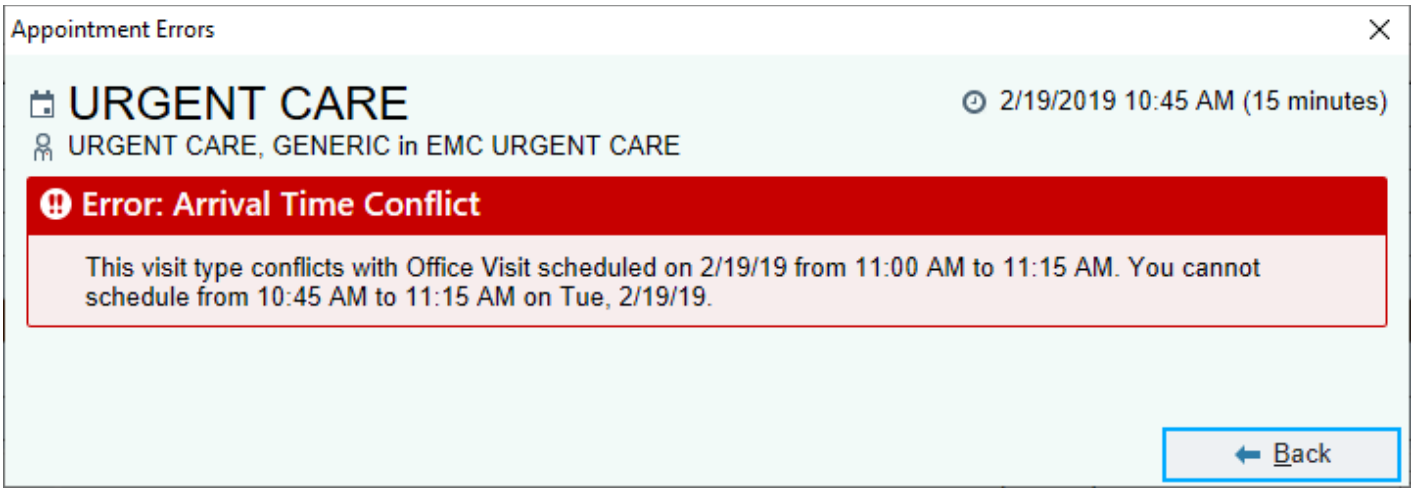
For additional information on editing SmartTexts, such as appointment reminder letters, refer to the Create and Edit a SmartText topic.

Include Arrival Time in Automated Appointment Calls

If you use automated calls to remind patients of upcoming appointments, you can include arrival time information in the extract you send to your third-party by including report column 1503-Appt Arrive By Time in the extract. For more information about automated appointment calling, refer to the Automatically Call Patients to Notify Them of Future or Missed Appointments topic.

Allow Schedulers to Override Patient Arrival Time Scheduling Conflicts

If you're using patient arrival time and patient arrival time conflict checking, any user who does not have Cadence security point Overlap arrival time (I ECL 5088) is prevented from scheduling into a patient's arrival time for an appointment in another department.



Follow these steps to give schedulers the security to override patient arrival time conflict warnings:

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Appointment Entry form.
3. Enter Yes in the Overlap arrival time (I ECL 5088) field.

Turn Off Arrival Time for Your Organization or Certain Departments

Arrival time is on by default. If you don't want to use arrival time, you can turn it off for your facility. If you don't want to use arrival time in a certain department, you can turn it off for just those departments.

To turn off arrival time for your facility:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. In the Show Arrival Time fields? (I SDF 8141) field, enter No.

To turn off arrival time for a department:

1. Follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Open your department record and select the General > Dept Type/Offsets form.
3. Under the Arrival time heading, in the Use arrival time? (I DEP 3700) field, enter No.

Turn Off Arrival Time Conflict Checking

If you're using patient arrival time but don't want to use patient arrival time conflict checking, you can turn it off at the system level:

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. In the Conflict check Arrival Time? (I SDF 8146) field, enter No.

Hide Arrival Time in Welcome

By default, arrival time appears in place of appointment time in Welcome. If you don't want to show arrival time in Welcome, you can hide it for a kiosk workstation. However, note that even if you set this to No, the arrival time is shown during follow-up scheduling if arrival time is enabled for the department.

1. In Hyperspace, open a kiosk workstation record (search: Kiosk).
2. On the Data Configuration tab, set Display arrival time? (I LWS 35092) to No.

Set Arrival Time for Pre-Existing Appointments

Run the Arrival Time Update utility to set the arrival time for scheduled appointments that were in your system before you turned on this feature.

Appointments updated by this utility are marked for delayed extraction to Clarity.

1. In Cadence Text, go to Utility Menu > Arrival Time Update > Start Utility.
2. At the Appointment start date prompt, enter the date to start looking for appointments. The default start date is today. Enter ALL to skip the Appointment end date prompt and run the utility for all future appointments in your system.
3. At the Appointment end date prompt, enter the date to stop looking for appointments. The default end date is one year from today. Leave this prompt blank to run the utility for all future appointments beginning from the start date you entered in step 2.
4. At the Departments prompt, enter the departments for which you want to set the arrival time for scheduled appointments. You can enter individual department IDs, a range of department IDs, or type ALL to include all departments.
5. Decide whether you want to update arrival time for appointments that already have an arrival time set. Enter Yes or No.
6. Confirm you want to run the utility by entering Yes. The utility runs in the background.
    - You can check the status of the utility by selecting Utility Menu > Arrival Time Update > Check Monitor.
    - Appointments that weren't updated by the utility are stored in a subset. You must process the subset before you can run the utility again.

Create Geographic Classifications

A geographic classification is a ZIP Code-based region. Geographic classifications are useful if you serve patients across multiple geographic regions.

The system calculates the geographic classification based on the ZIP Code and country of the patient's permanent address. The classification is calculated each time it's accessed, so it's always using the most current information available. Plus, the classification is stored on each appointment, so you can report on the patient's geographic classification at the time of the appointment's creation.

After you've created and populated the classifications, you can configure Storyboard or workspace headers to show this information using report column 1723-Patient Geographic Classification. Refer to the Storyboard Setup and Support Guide or the Show the Geographic Classification in the Workspace Header topic for more information.

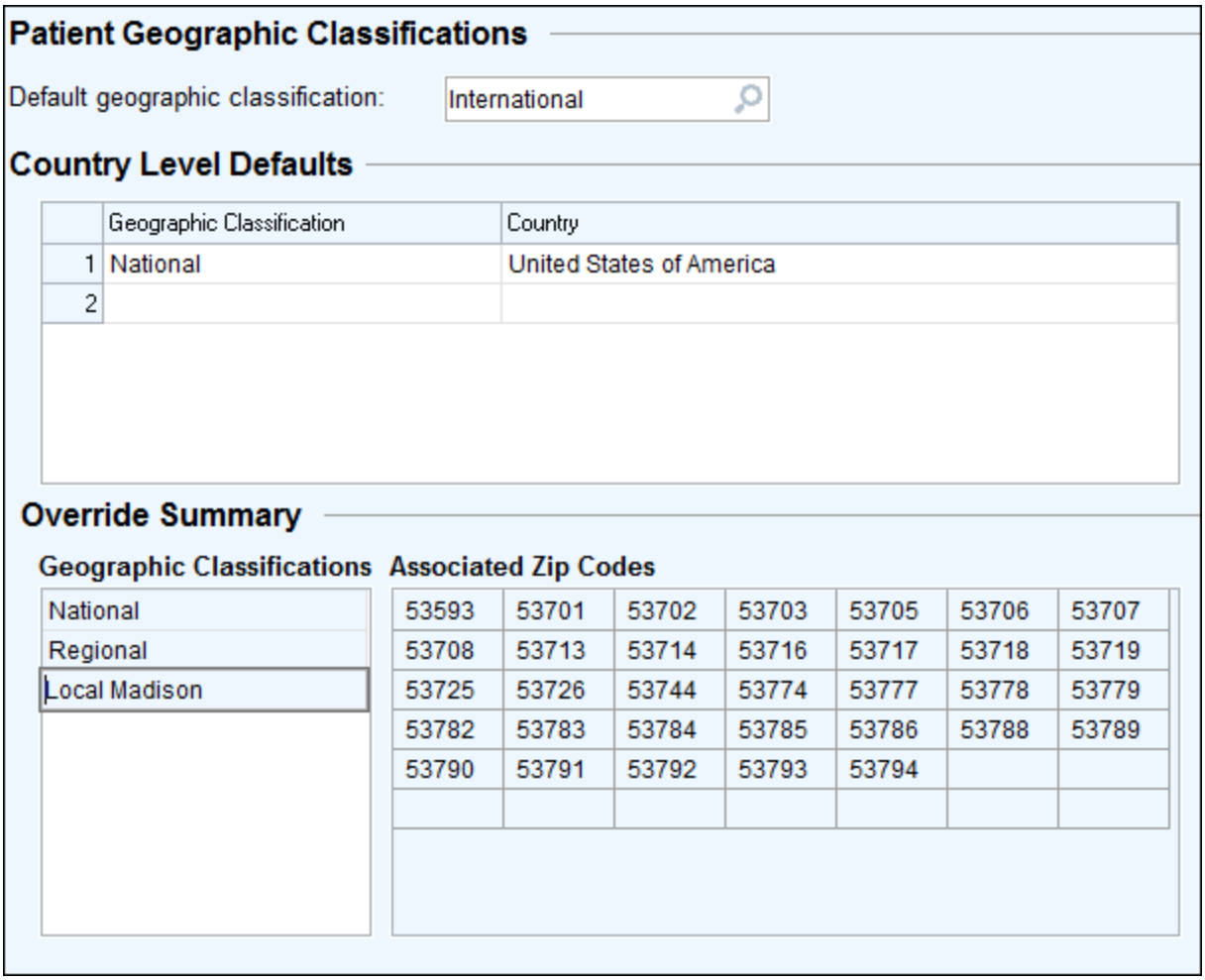
Create your geographic classifications based on your organization's patients. For example, if your organization is based in Madison, WI, your classification for ZIP Codes within the U.S. could be National. You could then further specify your classifications by having Madison-area ZIP Codes be in a Local Madison classification, and surrounding ZIP Codes in a Regional Madison classification.

You might configure your classifications to be International by default, to indicate that those patients didn't meet any of your other classifications for being in the U.S.

1. Geographic classifications are stored in the Geographic Classification (I EZP 500) category list. For information about working with category lists, refer to the Modify a Category List's Values topic.

2. Make updates to your categories using standard import specification EZP,1009-ZIP CODE-US POSTAL SERVICE LOAD W GEOCLASS.
3. Open your facility record. (Epic button > Admin > Registration/ADT Admin > System Definitions).
4. Go to the Pt Geo Class form.
5. In the Default geographic classification field, enter an appropriate default classification.
   Your default classification is like a backup, which is used in case the patient doesn't fall into any of the other classifications you have created, if the patient has an address with ZIP Code and country defined. If the patient does not have and address defined, the patient is not classified, even by the default.
6. In the Country Level Defaults table, specify the classification for any countries that are exceptions to the default geographic classification.

The Override Summary section shows the areas you've imported.



Track New Patient Appointments for Reporting

Reporting on new patient appointments allows your organization to measure the growth and health of your organization. Cadence can identify appointments for new patients at your organization using rules you define for each level of your facility. Then, you can report on this information using the Visits Data Model in Slicer Dicer, the Professional Billing New Patients metric, and the Cadence average lead time metrics.

Configure New Patient Visit Evaluation Settings

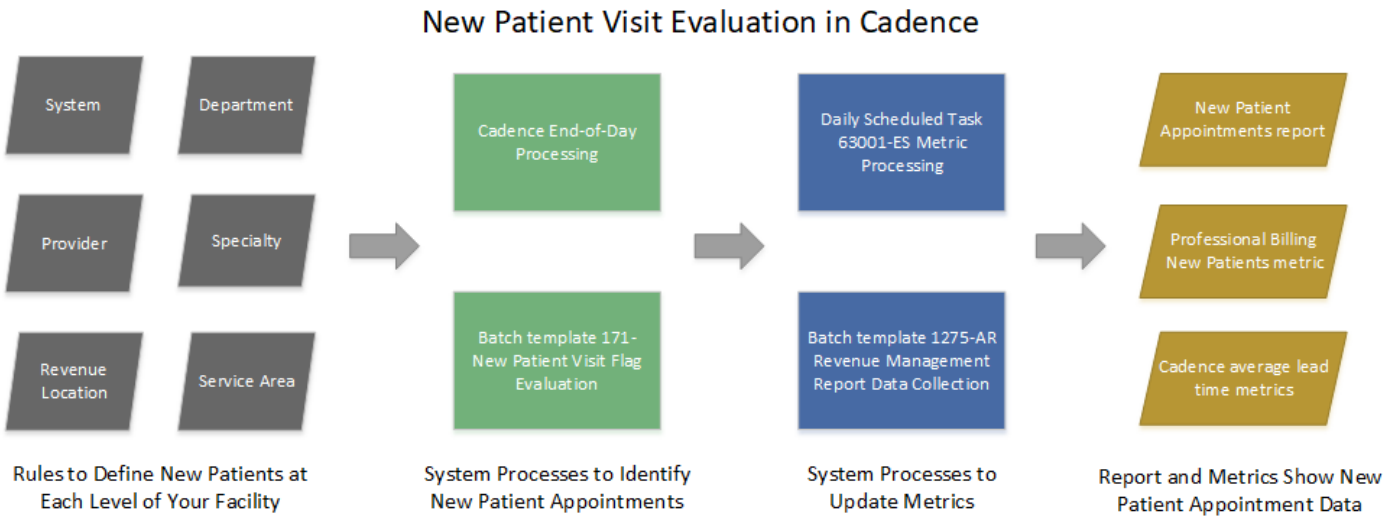
The Visits Data Model in Slicer Dicer, the Professional Billing New Patients metric, and the Cadence average lead

time metrics rely on new patient visit evaluation settings to define new patients and system processes to collect the data.

To evaluate appointments in your system for new patient reporting, you need to:

- Define who qualifies as a new patient
- Start processes for collecting the data
- Determine when the system re-evaluates appointments turn on new patient reporting

You can also choose to turn off new patient appointment if you don't want to use it.



Define New Patients for Your Organization

Your system is set up with default settings for new patient visit evaluation that we expect most organizations to use out of the box. However, you can customize the rules for your organization if you have a different definition of a new patient appointment.

You use rules to identify when a patient is considered new, and you can define rules for the following levels:

- System
- Department
- Provider
- Specialty
- Revenue Location
- Service Area

You can set up different rules for different levels in your organization. For example, at the system level, you might consider a patient new if they haven't completed an appointment in the whole organization for the last three years. At the department level, you might consider a patient new if they haven't completed an appointment in that department in the last year. You might have similar considerations for provider, specialty, revenue location, and service area.

We created the following standard rules that you can use:

- 31000-ES Patient Has No Previous Completed Appointments. Returns true for patients who have no previous completed appointments in the past three years.

- 31001-Visit has New Patient Level of Service Charge. Returns true for patients who have appointments that include at least one new patient level of service charge.
- 31004-ES Patient Has No Previous Active Appointments with Provider. Returns true for patients who have no scheduled, arrived, or completed appointments with the same provider in the past three years.
- 31006-ES Patient Has No Previous Active Appointments in Department. Returns true for patients who have no scheduled, arrived, or completed appointments in the same department in the past three years.
- 31007-ES Patient Has No Previous Active Appointments in Location. Returns true for patients who have no scheduled, arrived, or completed appointments in the same revenue location in the past three years.
- 31008-ES Patient Has No Previous Active Appointments in Service Area. This rule identifies scheduled, arrived, or completed appointments for patients who have no previous appointments in the same service area in the past three years.
- 31009-ES Patient Has No Previous Active Appointments in Facility. Returns true for patients who have no scheduled, arrived, or completed appointments in the facility in the past three years.
- 31012-ES Patient Has No Previous Active Appointments in Specialty. Returns true for patients who have no scheduled, arrived, or completed appointments in the same department specialty in the past three years.

You can also create your own rules in the patient context. You might want to copy these standard rules to use as a starting point for building your own rules. If you don't specify a rule for a level, the system does not calculate new patient appointment data.

You can use any property in the Patient context, but might find the following properties most useful for this purpose:

- 98023-Has Previous Appointment
- 98024-Has New Patient Level of Service
- 98025-Visit Type Record Type

There are also properties for each of the visit type report grouper items.

To define new patients:

1. In Hyperspace, create patient rules as needed using the Rule Builder. Patients that meet these rules are considered new patients.
2. In Chronicles, access the Shared Configuration (HDF) master file.
3. Open your compiled configuration and go to the New Patient Visit Flag Evaluation screen.
4. Enter rules in the fields listed below to define new patients for each area. If you do not want to define new patients for an area, leave that field blank.
    - New to system rule (I HDF 7730)
    - New to department rule (I HDF 7731)
    - New to provider rule (I HDF 7732)
    - New to specialty rule (I HDF 7733)
    - New to revenue location rule (I HDF 7736)
    - New to service area rule (I HDF 7734)

Collect New Patient Data

By default, the system uses Cadence end-of-day processing to collect patient data for the New Patient

Appointments report, metric 170016-PB New Patients, and the Cadence average lead time metrics. For more information about Cadence end-of-day processing, refer to the End of Day Setup and Support Guide.

If you don't use Cadence or don't want to use Cadence end-of-day processing for new patient visit evaluation, you can use a batch job based on template 171-New Patient Visit Flag Evaluation instead. Refer to the Batch Scheduler Setup: Essentials topic for information about setting up batch jobs.

Re-Evaluate Appointments for New Patient Reporting

The system can flag certain appointments to be re-evaluated by end-of-day processing or the batch job the next time it runs. For example, if an appointment is marked as a no-show, it needs to be re-evaluated because it should no longer be counted as a completed appointment. Appointments are always flagged for re-evaluation when an Identity user merges or unmerges a patient's record. You might need to modify the Dirty triggers (I HDF 7745) setting if you customize the rules that identify new patient appointments or don't use rules 31004-31012. For example, if you use rule 31001 for the department level instead of 31006, you would need to add Posted Charges to the Dirty triggers field. If you're using rules 31004-31012, the Dirty triggers field should be set to Appt Create/Change, Appt Incomplete, and Edit Appt Stats.

1. In Chronicles, access the Shared Configuration (HDF) master file.
2. Open your compiled configuration and go to the New Patient Visit Flag Evaluation screen.
3. In the Dirty triggers (I HDF 7745) field, enter the workflows that cause an appointment to be re-evaluated for new patient visit reporting the next time your batch job runs.
    - Appt Create/Change. Flags appointments when they are scheduled or changed.
    - Appt Incomplete. Flags appointments that have a status of No Show, Left Without Being Seen, or Canceled.
    - EOD Processing. Flags appointments when they first go through end-of-day processing.
    - Posted Charges. Flags appointments when charges are posted.
    - Edit Appt Stats. Flags appointments when a Cadence user changes appointment statistics after the appointment has been through end-of-day processing.

Turn Off New Patient Reporting

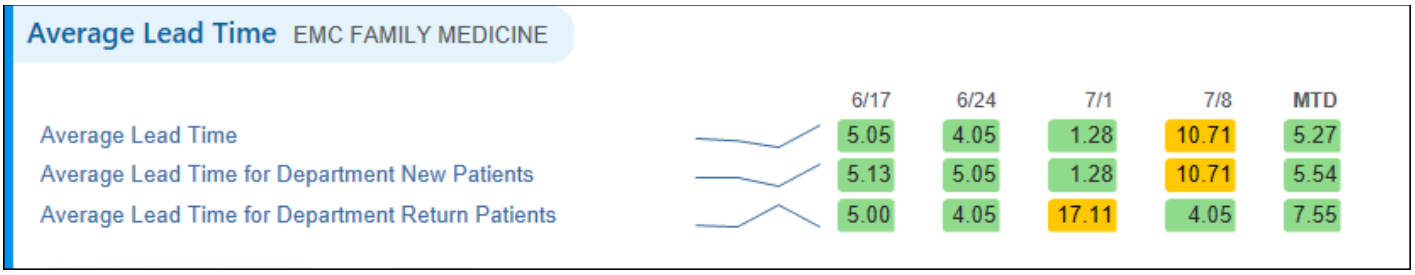
New patient reporting is turned on by default. If you don't want to report on new patient appointments, you can turn this feature off.

1. In Chronicles, access the Shared Configuration (HDF) master file.
2. Open your compiled configuration and go to the New Patient Visit Flag Evaluation screen.
3. In the Enable new patient visit evaluation? (I HDF 7735) field, enter No.

Monitor Average Lead Time on a Dashboard

The average lead time metrics measure the number of days between creation of an appointment and the appointment's date for new and returning patients. A high lead time could mean that patients are having difficulty getting an appointment, which could result in patient dissatisfaction and fewer new patients for your organization.

You can use these metrics to create custom dashboard components for your clinic managers and executives so they can see at-a-glance how quickly patients are able to schedule appointments with your providers.



We used the new average lead time metrics to create component 11710000190-ES Department Average Lead Time (Login Department) in the Foundation System. The component shows the overall average lead, the average lead time for new patients, and the average lead time for returning patients in the user's login department. We added the component to dashboard 11710000004-ES Supervisor Dashboard, which you can see by logging in to the Foundation Hosted environment as the scheduling supervisor (ESSUPER).

You can use the Epic-released average lead time metrics to create a component and then add that component to a dashboard for your users.

Create an Average Lead Time Dashboard Component

Create a custom component to display the average lead time metrics. For more information about creating components, refer to the Create and Edit Metrics topic.

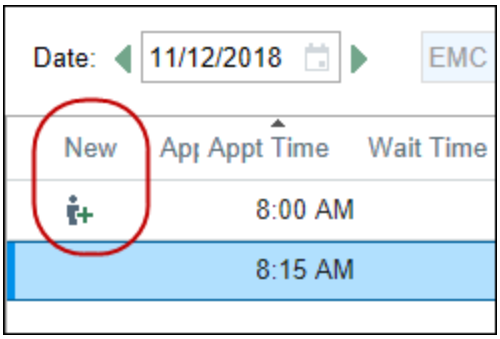
Add the Average Lead Time Component to a Dashboard

After you've created your average lead time component, you need to add it to a dashboard for your users to access. For more information about creating and editing dashboards, refer to the Create and Edit a Dashboard topic.

Call Out New Patients in Reports

Help schedulers and clinicians know when patients are new by adding columns to the following reports as makes sense for their workflows:

- Department Appointments report
- EpicCare Ambulatory Schedule
- Reports based on Reporting Workbench template 55050-ES Appt Search



The following columns are available:

- 5020-Appt New to Facility?
- 5021-Appt New to Department?
- 5022-Appt New to Revenue Location?
- 5023-Appt New to Provider?

- 5024-Appt New to Specialty?
- 5025-Appt New to Service Area?

Refer to the following topics for instructions about how to add columns:

- Design Department Appointments Reports
- Customize the Columns That Appear on the Schedule
- Determine Which Columns Appear in a Report

Appointment Scheduling Setup: Bells & Whistles

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

Define Common Languages for All Providers for Scheduling Purposes

When patients have a scheduling preference for providers who speak a certain language, schedulers can select the Use Patient Preferences button in Book It to search for appointments only with providers who speak the preferred language. If a provider has no languages specified in the Languages (I SER 1350) item in their provider record, they cannot be selected for scheduling. This can be problematic, for example, if all providers at your organization speak English, so you don't specify English in their provider record. In this case, if a patient specifies that their preferred provider language is English and a scheduler selects the Use Patient Preferences button or the Use patient prefs checkbox, no providers can be selected, which makes it difficult to schedule appointments that meet the patient's other scheduling preferences, such as day of week or time of day. To avoid this, you can specify common languages that all providers at your organization speak in Cadence System Definitions. With this setting, providers do not need to have a common language specified in their provider record to be selected during scheduling for patients who prefer providers who speak one of the common languages.

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. In the Common language (I SDF 10790) field, enter the common languages that all providers at your organization speak.

Customize Scheduling Preference Time Ranges for Book It

In Book It, schedulers can select from three default categories for a patient's time-of-day preference instead of manually entering a time range. The default time of day categories for the Preferences section in Book It are listed below. You can customize the time ranges for these categories and also add an additional category for evening or create custom categories if certain locations are open earlier or later.

- Morning: 7:00 AM to 11:00 AM
- Midday: 11:00 AM to 2:00 PM
- Afternoon: 2:00 PM to 5:00 PM

These settings also affect how scheduling preference time ranges appear in Book Anywhere and Order Up.

To create custom categories, add values to the Time Range (I SDF 13110) category list. Refer to the Modify a Category List's Values topic for additional information.

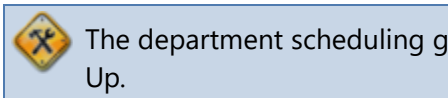
To define the time ranges to use in your system:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).

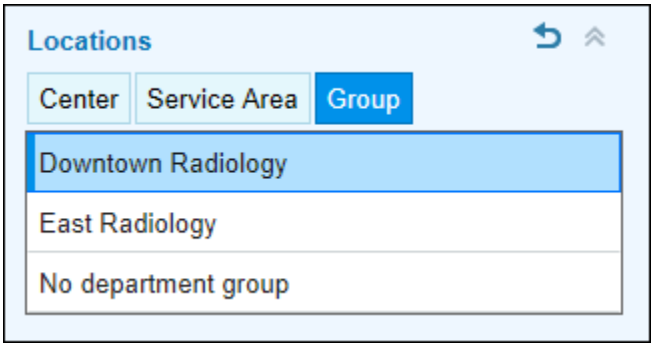
2. Select the Scheduling > Controls Configuration form.
3. Complete the Time Range Configuration table:
    - Time Range (I SDF 13110). Enter the time range you want to define. Choose from Morning, Midday, Afternoon, Evening, or any custom time ranges you created.
    - Start Time (I SDF 13111). Enter the start time for the time range.
    - End Time (I SDF 13112). Enter the end time for the time range.

Define Department Scheduling Groups for Book It

Department scheduling groups allow you to logically group departments for your organization to make it easier for users to schedule appointments in a patient's preferred department. Department scheduling groups are optional; you need to create them only if you want to group departments in this way for Book It and Order Up.



The department scheduling groups you create for Book It also appear in Order Up.



Create Department Scheduling Groups

Create your department scheduling groups by adding values for each group to the Department Scheduling Group (I DEP 103) category list. Refer to the Modify a Category List's Values topic for additional information.

Add Scheduling Groups to Departments

After you've created your scheduling groups, you must add departments to the group by editing the department record.

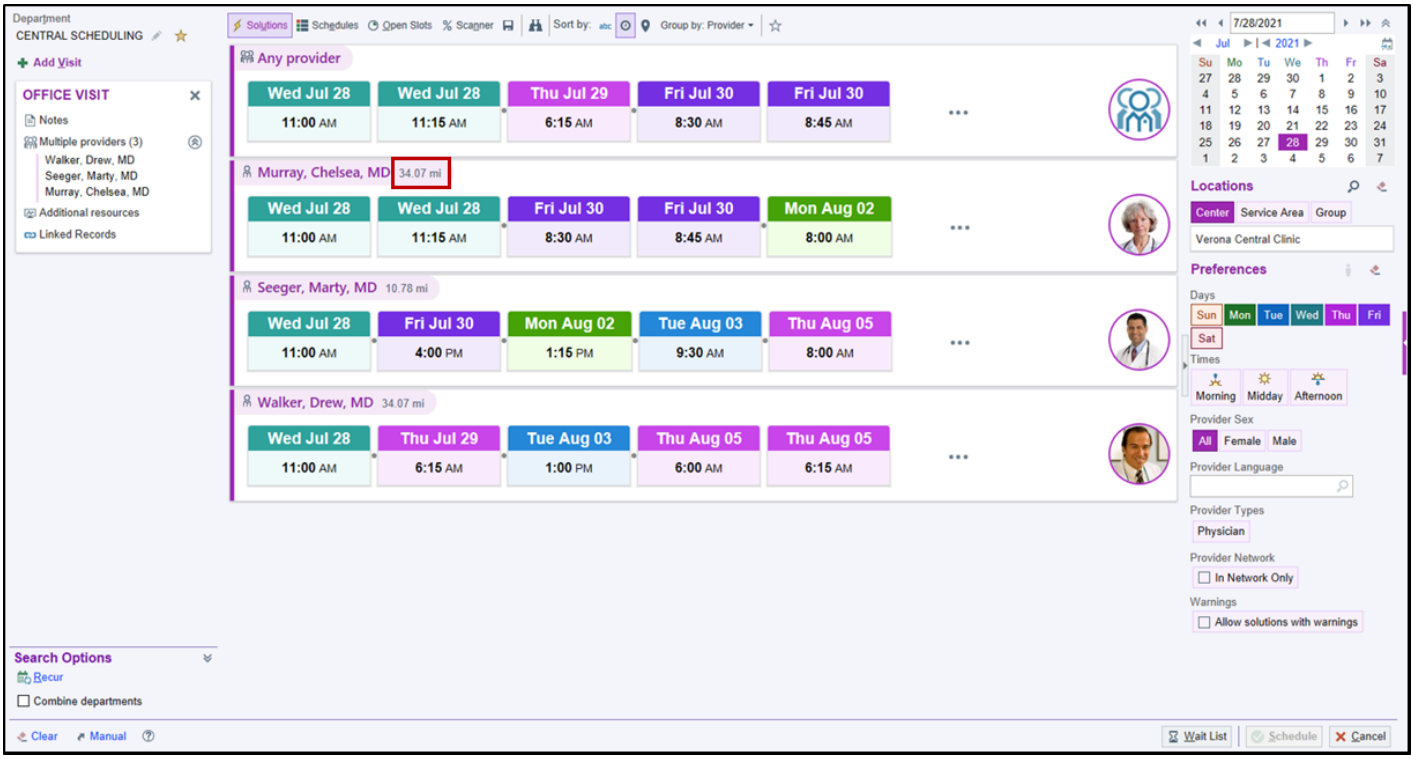
1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Appointment Requests > Scheduling form.
3. In the Scheduling group (I DEP 103) field, enter the scheduling group for the department.

Show Scheduling Groups in Reports

You can add report column 1508-Order Up Scheduling Grouper to Reporting Workbench reports to show the department scheduling group for a department. This column hasn't been added to a released report template, but might be helpful in reports that show department information.

Enable Geocoding for Book It

To help users schedule appointments at locations that are close to the patient, you can enable geocoding for Book It so that users can sort results and providers by distance. For additional information, refer to the Configure Geocoding Thresholds by Workflow topic.



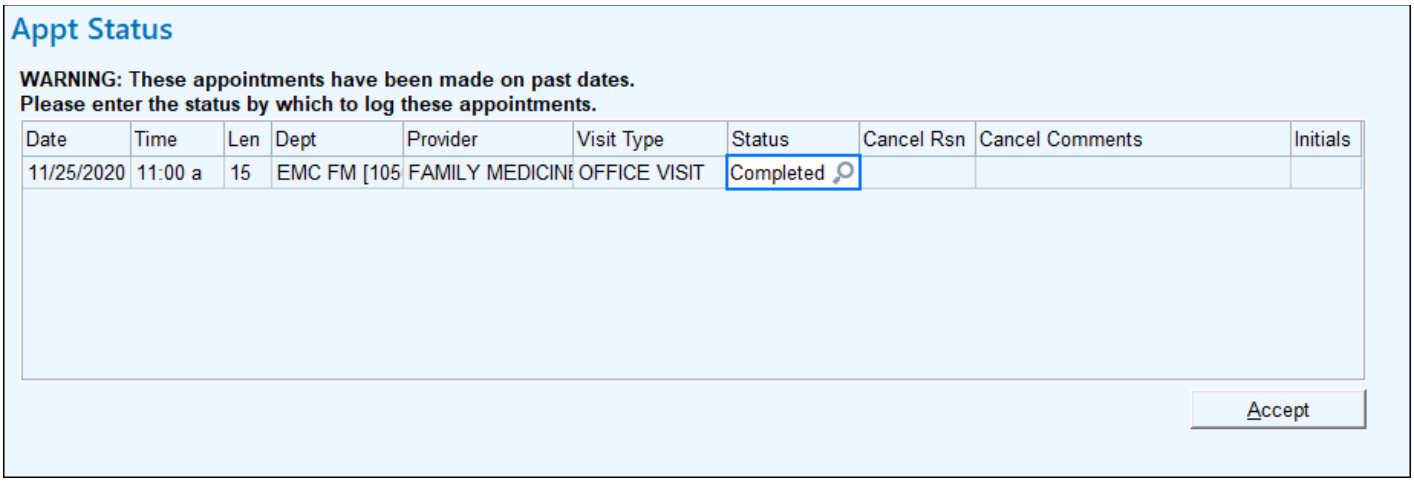
Prevent Scheduling Too Far in the Past

Sometimes schedulers need to schedule appointments for past dates if an error occurs or if a provider sees a patient offsite. However, you might not want them to schedule too far into the past like if your billing schedule doesn't allow it. You decide how far in the past schedulers can make appointments.

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. In the Max past appt days (I SDF 10275) field, enter the maximum number of days in the past, from today, that a scheduler can make an appointment. For example, if schedulers should not be able to schedule appointments before yesterday, enter 1.

Turn Off the Prompt for Schedulers to Set the Appointment Status When They Schedule Appointments in the Past

By default, schedulers are prompted to set the appointment status in the Appt Status activity when they schedule an appointment in the past. If you prefer to have End of Day processing determine the appointment status for appointments that get scheduled on a past date, as described in the Enable the Appointment Status Settings for End of Day Processing topic, you can turn off this feature.



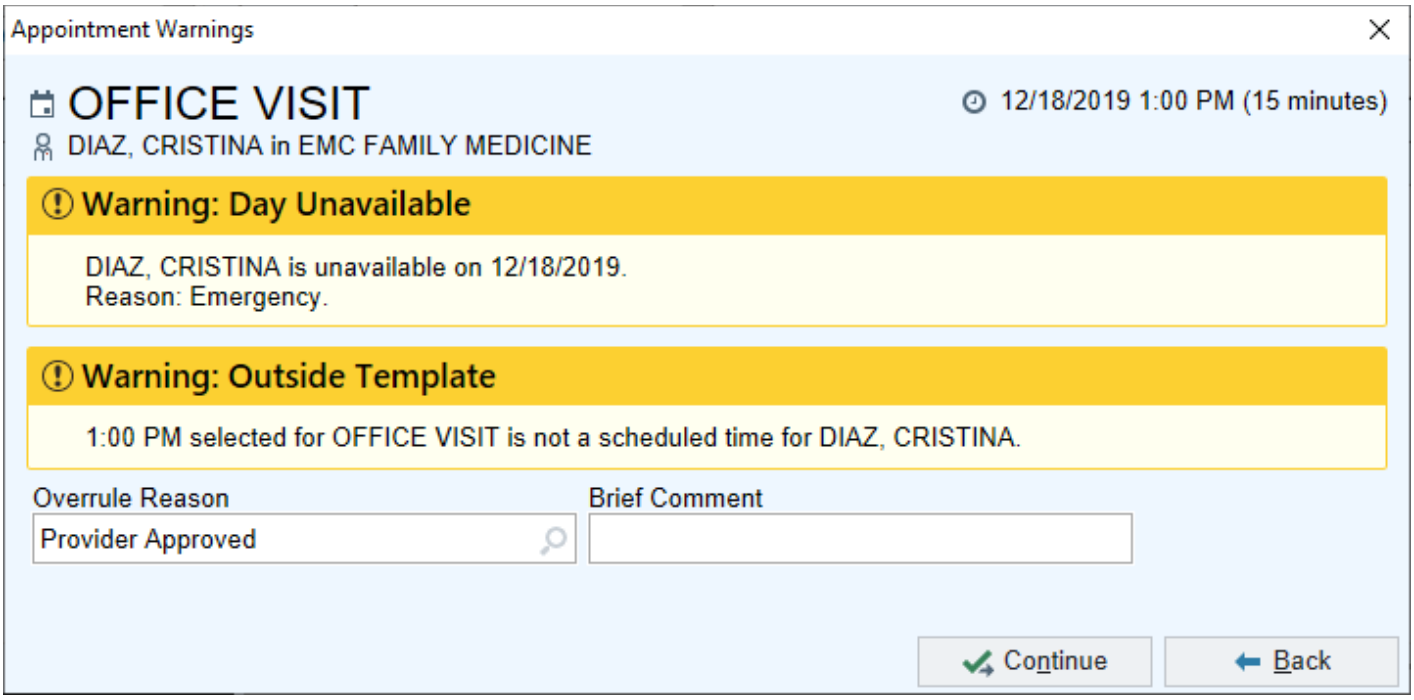
1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > General form.
3. In the Prompt for past appt status? (I SDF 10265) field, enter No.

Allow Scheduling of Past Appointments on Unavailable Days

Sometimes a provider unexpectedly sees a patient on a day that was marked as unavailable on their schedule. If the day has passed and schedulers still need to add the appointment to the schedule, they need one of the following Cadence security points:

- Override (I ECL 5065)
- Edit template (I ECL 5070)
- Edit single day (I ECL 5133)

Schedulers who have one of these security points see an appointment warning when they make an appointment on a past unavailable day. Schedulers who do not have the appropriate security see the same message as an error instead of a warning.



Allow Front Desk Users to Document Telephone Encounters

Patients might call in to your organization with a non-urgent clinical question for a clinician. The Telephone Encounter activity allows front desk staff to take the call and route the question to a specific clinical user or pool. With the Telephone Encounter activity, the encounter is also automatically added to the patient's chart.

1. Go to the Role Editor (search: Role Editor) and open the user role you want to give access to.
2. Add menu MR_IT_QUICKENC_TELEPHONE to the EDUSERTOOLBAR.
3. Set the Override? field to No.

Create Permanent Groups for Group Appointment Scheduling

If schedulers need to frequently schedule a group of patients, they can use group records and group scheduling to save time by scheduling multiple patients at once. You and your scheduling managers can create permanent groups of patients and schedulers can then make appointments for the group, using a specific group Appointment Desk and scheduling workflow.

Prerequisites

The Edit groups (I ECL 5222) security point must be blank or set to Edit in Cadence security classes for you and your scheduling managers to create patient groups.

Users must also have Chronicles security point Create Record (I ECL 14540) set to Yes for the Patient Groups (GRP) master file. Refer to the Chronicles Security Classes topic for information about creating Chronicles security classes and assigning them to users.

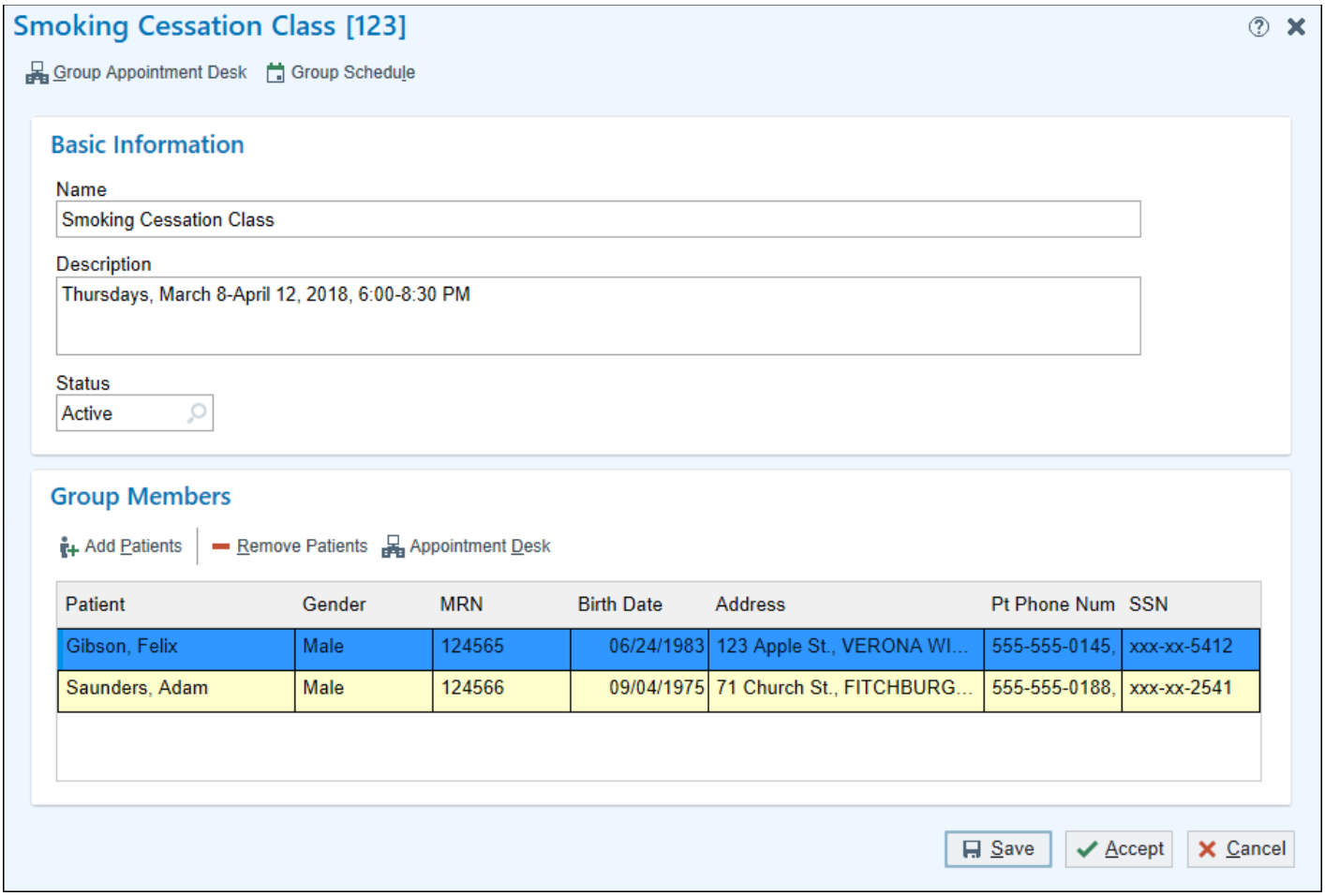
Considerations

This task covers creating permanent groups for group scheduling. Schedulers can also make appointments for multiple patients in other ways.

- Schedulers can create temporary groups using the Temporary Groups tab on the Patient Lookup window. A temporary group is a collection of patients that are grouped together for a one-time scheduling, such as company drug testing. You can't save temporary groups and the group is erased once the scheduling session is over.
- Schedulers can schedule appointments for families using family registration functionality in Prelude. Registrars can group family members in a family record in registration and then schedulers can look up that family to make appointments for multiple family members at once.
- Appointments that are scheduled separately for group session visit types are automatically linked as group appointments when the appointments have the same visit type, are at the same time, are with the same provider, and are in the same department. Schedulers can also make group appointments from separate schedulable orders for the same group session visit type. Refer to the Set Up Group Sessions topic for more information.

Create Permanent Groups

1. In Hyperspace, open the Group Editor (search: Scheduling Group).
2. Create a group.
3. Enter a description of the group. This description helps you remember the purpose of the group and it also appears to schedulers when they are searching for groups in the Patient Lookup window.
4. Enter Active in the Status field to make the group available for use.
5. Click Add Patients to search for and add patients to the group.



Customize the Columns in the Group Editor

By default, columns for the patient name, gender, MRN, birth date, address, phone number, and SSN appear in the Group Editor. You can customize the columns if needed to show other patient details that are important for your organization.

1. In Hyperspace, open the Report Builder (search: Report Builder).
2. Select report template 55040-ES Group Editor Patient Grid.
3. Select the Display tab.
4. Arrange columns in the Selected Columns list as needed for your organization.
5. Save the report settings as public.
6. Open Cadence System Definitions (search: Cadence System Definitions).
7. Select the Reports > Plug-Ins form.
8. Enter your report settings in the Patient group editor display (I SDF 4005) field.

Enable Better Patient Group Searching

You can make it easier for schedulers to search for patient groups by enabling EnROL for the Patient Groups (GRP) master file. This means that fields can search for records using multiple keywords that are ranked and weighted for relevance.

Refer to the Enable EnROL for a Master File topic for detailed instructions.

Allow Schedulers to Schedule Appointments for Deceased Patients

Schedulers might need to schedule appointments for deceased patients to keep the patient's record complete and accurate. For example, a scheduler might need to make post-mortem appointments for the patient. If your organization schedules these types of appointments for deceased patients, you might want to give certain schedulers security to perform these tasks.

Schedulers with security can do the following actions for deceased patients:

- Schedule appointments with in Book It
- Schedule walk-in appointments with the Walk In activity
- Schedule appointments from orders
- Reschedule appointments
- Change appointments
- Edit notes and messages, and open the Appointment Information activity for appointments from the Department Appointments report

To give users security to schedule appointments for deceased patients:

1. In Hyperspace, open a Cadence security class (search: Cadence Security).
2. Select the Appointment Entry form.
3. In the Schedule deceased patients (I ECL 5185) field, enter Yes.

Allow Scheduling for Dismissed Patients in Certain Departments

Patients who have been dismissed from your facility might still need to be seen in certain departments such as the urgent care. Instead of listing this exception for every dismissed patient, you can set this exception at the department level.

1. In Hyperspace, go to Epic button > Admin > Scheduling Admin > Master File Edit > Department and select your department.
2. Go to the Scheduling > General form.
3. In the Allow scheduling of dismissed patients? field, enter Yes to allow dismissed patients to be scheduled in the department, or enter Admitted Patients Only to allow dismissed patients who are registered in the ED or admitted to the hospital to be scheduled in the department. For the purposes of scheduling, dismissed patients who are on a leave of absence are considered admitted and can be scheduled in the department.

Allow Scheduling Based on Pharmacy Preparation Requirements

Starting in May 2025

February 2025 by SU E11303264

November 2024 by SU E11208595

August 2024 by SU E11112167

May 2024 by SU E10915430

You can help infusion center schedulers more efficiently use infusion chairs by factoring in time patients would otherwise need to wait for their medication to be prepared or other preparation considerations into the appointment request. If an appointment is linked to a treatment plan or therapy plan, either through an appointment request order or the decision tree, for a patient who has a medication with special pharmacy preparation considerations, a Pharmacy Prep resource you configure is automatically attached to the appointment, so schedulers using the Solutions view in Book It to find appointment times see suggested times that meet your restrictions. Examples of special pharmacy preparation considerations include, but are not limited to, medications with complex mixtures, medications that must come to room temperature before being administered, and medications that the patient has a high risk of reacting to. If you use this feature to restrict appointment time suggestions for medications with complex mixtures, for example, the system suggests only appointment times that allow time for the pharmacy to prepare that medication in advance, so it's ready when the patient's appointment starts.

To configure this feature, you use property 50052-Treatment / Therapy Plan Order Count in a resource request rule with a grouper of medications you want to check the treatment plan or therapy plan for and associate that rule with a particular resource type. For example, if a complex mixture takes an hour to prepare, you can automatically assign a resource type that limits the available times in the Solutions view to later in the day, so the pharmacist has enough time in the morning to prepare it.

If you do not already have medication groupers for additional or complex pharmacy considerations, work with your pharmacists to identify those medications that can or should impact scheduling considerations and configure medication groupers for them following the steps in the Groupers Setup and Support Guide topic.

Your resource types determine what restrictions the medications from your groupers have. Resource types used for this feature must have a type of Staff. For more information about resources and how to configure times and availability, visit the Create Procedural Resource Types topic.

If you are on the May 25 version or later, it is recommended that you complete the build in the Enable Orders Returning to the Workqueue as Modified When Plan Changes Occur topic at the same time

Configure Rules in the Rule Editor

1. In Hyperspace, create a Treatment Plan Order rule (search: Rule Editor).
2. Add property 73723-Is Medication on Grouper.
3. Add the medication grouper that you previously identified with your pharmacists.
4. Set the operator to = and the value to Yes.
5. Create a Resource Type Request rule and add property 50052-Treatment / Therapy Plan Order Count.
6. Add the previous Treatment Plan Order Context rule in the Order Filter Rule field.
7. Set the operator to > and the value to 0.

Define Settings at the Visit Type or Department Level

The Resource Type Request rule needs to be attached at either the visit type or department level. Attach the rule at the visit type level if the restrictions are the same throughout your facility. Attach the rule at the department level if the restrictions are specific to the individual department’s workflows.

To configure a visit type:

1. In Hyperspace, open the Visit Type editor.
2. Open additional resources in the Visit Type editor.
3. Add your resource type in the Resource Type field.
4. Add the Resource Type Request rule in the Rule field.
5. After updating a visit type to automatically request resource types, also update existing appointments of that visit type with the resource types. Work with your Cadence team and refer to the Update Resource Requests of Scheduled Appointments topic for more information.

To configure a department:

1. In Hyperspace, open the Department Editor.
2. Open Resources in the Department Editor.
3. Add your staff resource in the Resource Type field.
4. Add the Resource Type Request rule in the Rule field.

Enable Orders Returning to the Work-queue as Modified When Plan Changes Occur

Starting in May 2025

You can have orders return to appointment request workqueues for review when changes are made to a treatment plan that affects the required pharmacy preparation considerations. Configuring orders to return to workqueues for review can help schedulers determine if it is appropriate to reschedule a patient who no longer has the same appointment time restrictions based on added or removed medications in their treatment plan. This functionality only applies to treatment plans.

This functionality is toggled on and off by Cadence System Definitions Order based resource type changes (I SDF 12709) and is enabled by default. Resources settings are not enabled by default and require action to return orders to the workqueue. The settings Resource is now missing? (I ORT 702) and Resource is no longer needed (I ORT 703) only function in treatment plans when a Resource Type Request rule Is using property 50052 - Treatment / Therapy Plan Order Count.

It is recommended to do this build at the same time you configure the build to schedule orders based on pharmacy preparation requirements.

Configure Settings in Your Resource Types

1. In Hyperspace, open Resource Types.
2. Open Advanced settings.
3. Set Resource is now missing? (I ORT 702) to Yes to enable orders returning as modified when a medication is added to a treatment plan after the order is scheduled that would initially cause a resource to automatically attach to it while scheduling.
4. Set Resource is no longer needed (I ORT 703) to Yes to enable orders returning as modified when a medication is removed from a treatment plan after the order is scheduled that would initially cause a resource to automatically attach to it while scheduling.

When Resource is now missing? (I ORT 702) is set to Yes, schedulers can be notified to reschedule an appointment so the missing resource type can be added to the appointment.

When Resource is no longer needed (I ORT 703) is set to Yes, schedulers can be notified to reschedule an appointment to remove the no longer needed resource from the appointment. This allows for one of the limited bookings for this resource to be used for a different patient's appointment. Leave this field blank or set to No if you do not want to notify schedulers that an appointment could be rescheduled for a wider array of times.

Require Schedulers to Enter Appointment Notes During Scheduling

You can require or recommend that schedulers enter appointment notes when scheduling an appointment. Requiring or recommending this information ensures that clinical staff and third-party systems have details on why the patient scheduled the appointment.

You can require or recommend appointment notes at the system or department, or algorithm (only for EpicCare Link) level. You can configure this setting for one-click scheduling or for scheduling in Book It, Make Appointment, Quick Appointment, and Walk In. These settings also apply to community users who schedule visits in web applications.

Define Settings at the System Level

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > Entry Defaults/Reqs form.
3. In the Require appt notes in appt entry? (I SDF 1835) field, enter Required or Recommended.
4. In the Require appt notes in one-click? (I SDF 1836) field, enter Required or Recommended.

Define Settings at the Department Level

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Open a department record.
3. Select the Scheduling > General form.
4. In the Require appt notes for scheduling? (I DEP 1835) field, enter Required or Recommended.
5. In the Require appt notes for one-click? (I DEP 1836) field, enter Required or Recommended.

Considerations
Note that I DEP 1836 requires appointments notes based upon login department, not the department that is being scheduled into.

Starting in February 2024

Follow the steps in the Require Users to Enter Appointment Notes When Scheduling Visits topic to require or recommend appointment notes at the search algorithm level for EpicCare Link users.

Use SmartTools in Appointment Notes

Starting in May 2025

Schedulers can utilize SmartTools in appointment notes to standardize note format and remove the need to type out the same phrase in multiple notes each day. Users can create and share their own SmartPhrases or you can release different SmartTools across your organization by adding the relevant Cadence Notes context. There are

two contexts that are supported for appointment notes:

1. Cadence Notes - Encounter Level [3043] which can be used after scheduling is completed to pull in encounter level information specific to the selected appointment.
2. Cadence Notes - Patient Level [3046] which can be used during or after scheduling to pull in patient level information.

To create SmartTools, update contexts, or give users access to create SmartTools other than SmartPhrases refer to the SmartTools Setup and Support Guide. Users can continue to use plain text in appointment notes in addition to SmartTools.

Define Late Cancellations and No-Shows for Your Organization

There are a few different reports you can use to track your no-show appointment rates. When setting up these reports, many organizations choose to include late cancellations when calculating their rates of no-show appointments, because late cancellations and no-shows have similar negative effects on schedule utilization.

You can enter a late cancel lead time in a system setting, within which cancellations are also considered no-shows in certain reports. For example, if you want all appointments canceled less than 24 hours in advance to be counted as no-shows, enter 24. You can set this up so all reports in your facility work this way or so that each service area works in a specific way. You can also override this setting at the report level for certain reports.

The following reports respect the facility-level or service area-level setting, unless they have been configured at the report or metric level:

- Reporting Workbench template 55061-ES Provider Utilization Health Report
  - Reports built from this template must have no value in their Late cancellation hours criterion to respect the setting.
- Reporting Workbench template 55050-ES Appt Search Report
- Metric 42301-ES No-Show Rate. This metric populates the Radar dashboard components 55034-ES No-Show Rate Past 6 Weeks and 55035-ES No-Show Rate Past 6 Months.
  - This metric and its dashboard components count late cancellations as no-shows and respect the setting by default. Copies of the metric must have the Count Late Cancels as No-Shows? parameter set to Yes to also respect the setting.

To cause these reports to count late-cancellations as no-shows and use the same late cancellation lead time, first check their individual parameters and set them appropriately. Then, perform the following setup:

To set a late cancellation lead time for multiple no-show reports, perform the following setup:

1. Open Cadence Text, and then:
   - To configure the setting at the facility level, navigate to the Cadence Management > Facility Maintenance > Cadence Report Settings screen.
   - To configure the setting at the service area level, navigate to the Cadence Management > Service Area > Cadence Report Settings screen.
2. In the Late Cancel Lead Hrs (I EAF 55208) field, enter a number for late cancellation lead time.

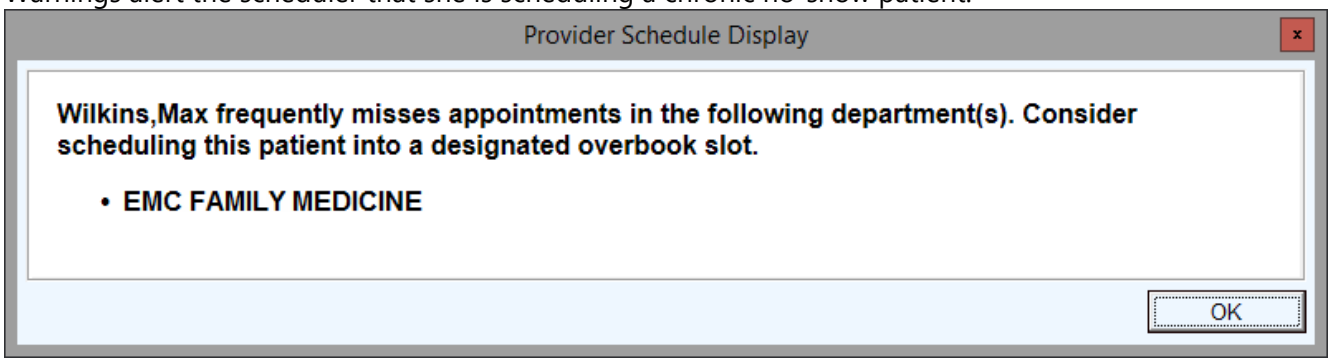
Additional Configuration for Full Appointment Entry

Help Schedulers Identify and Schedule Chronic No-Show Patients

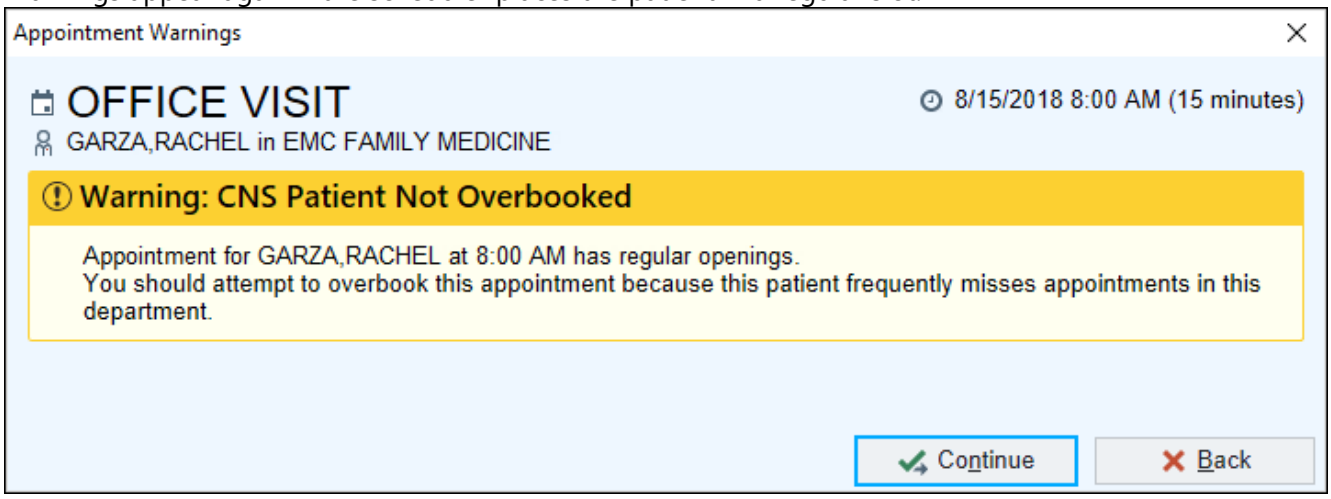
Patients who continuously miss appointments can be frustrating because they cost your organization time and money. If a department in your facility has a problem with no-show patients, they can reduce this frustration by identifying chronic no-show patients in the system to help schedulers make the appointment in a way that minimizes the cost impact of a missed appointment.

When a scheduler manually schedules an appointment for someone who is considered a chronic no-show patient, several things happen:

- Warnings alert the scheduler that she is scheduling a chronic no-show patient.



- Slots with overbooks are highlighted on the Provider Scheduler form. If the patient doesn't show up, the missed appointment has less impact on your staff and providers because another patient is still being seen at that time.
- Warnings appear again if the scheduler places the patient in a regular slot.



To show a patient's chronic no-show status to schedulers in Reporting Workbench reports, the Department Appointments report, or the Future tab of the Appointment Desk, you can add report column 1628-Chronic No-Show?

Prerequisites

You must be using the Did Not Keep Appointment (DNKA) graph on the Appointment Desk in order to collect no-show data for patients.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Desk > General form.
3. Enter Yes in the Record each patient's DNKA totals? (I SDF 8438) field.

Considerations

Even after you set up the scheduling workflow to identify chronic-no-show patients and overbook slots, schedulers need overbook security to schedule in the identified overbook time slots. Refer to the Allow Schedulers to Overbook Appointments section of this guide for more information on overbooks.

You set up chronic no-show scheduling by identifying when a patient is considered as chronic no-show. You can do this at the system or department level.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Display form.
3. In the Max no show percent (I SDF 10555 or I DEP 3555) field, enter the maximum allowable percentage of visits that a patient can miss before being considered a chronic no-show patient. In the Foundation System, we set this field to 59 at the system level. To turn this feature off for a department, set this field to 100. This means no patient is ever considered a chronic no-show in the department.
4. In the Min total appts (I SDF 10556 or I DEP 3556) field, enter how many appointments a patient must have completed or missed before being considered a chronic no-show patient. In the Foundation System, we set this field to 5 at the system level.

Create Provider Teams for Scheduling

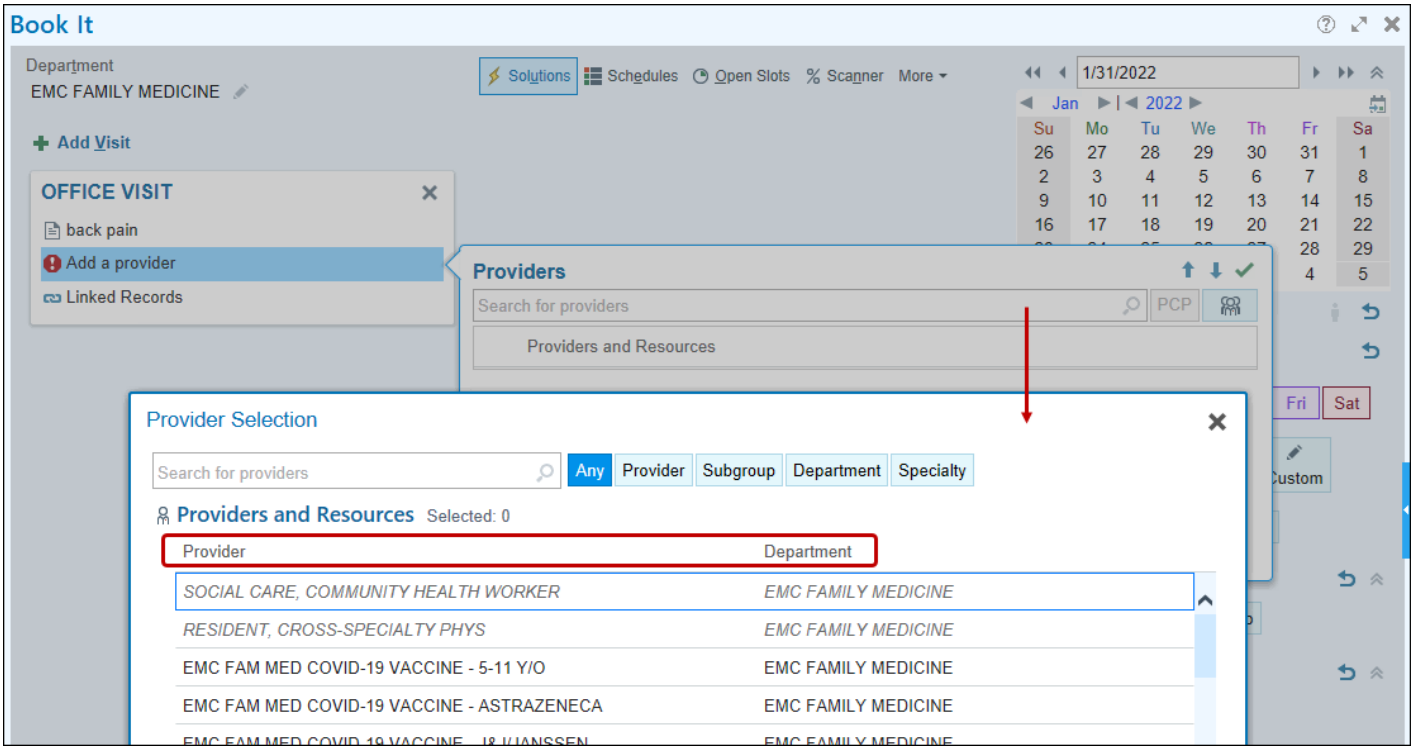
Some organizations have providers who work closely together in teams. If a provider is not available, a scheduler can make an appointment with another provider from the unavailable provider's team to maintain continuity of care for the patient. A provider can have a team in every department where she has a schedule.

Provider teams are based on single department and multi-department subgroups. When scheduling with a single-department team, all providers must have a schedule in the same department as the original provider. When scheduling with a multi-department team, at least two providers on the team must have a schedule in the same department.

1. Create a subgroup record that represents a provider team. Refer to the Create Subgroups of Providers for Scheduling section of this guide for information on creating a subgroup record.
2. In Hyperspace, follow the path Epic button > Scheduling > Templates > Edit Provider and open the provider record.
3. Select the Departments form.
4. Enter the subgroup in the Team Subgroup field. You can enter a subgroup for each department in which the provider is active.

Customize the Columns in Provider Selection for Appointments

When schedulers select providers for appointments, columns for provider name and department ID appear by default. In the Foundation System, provider display name and department name appear. If needed, you can customize the columns that appear so that schedulers have the provider information they need during scheduling.



Provider selection in Book It

1. In Hyperspace, open the Report Builder for template 28-ES Provider Selection Template (search: Report Builder).
2. Select the Display tab and add the columns you want to show. The following columns are available:
    - 1250-Provider Display Name. Shows the provider's name (I SER 1021).
    - 1251-Provider ID. Shows the provider's ID number (I SER .1)
    - 1252-Provider Name. Shows the provider's name (I SER .2).
    - 1253-Department ID. Shows the department's ID number (I DEP .1).
    - 1254-Department Name (DEP). Shows the department's display name (I DEP 7450). If the display name is blank, the record name (I DEP .2) is used.
    - 2947-Department Name - Simple (DEP). Shows the department's name (I DEP .2).
    - 4010-Provider Name. Shows the provider's name (I SER 1021) and credentials (I SER 6001) if available.
    - 5122-Provider Subgroups. Shows the subgroups that contain the provider and department (I SER 50 and I SER 350). Available starting in May 2022.
    - 5230-Provider Accepting New Patients? Shows whether a provider or resource is accepting new patients based on the Accepts New Patients (I SER 26000 and 26001) items. Available starting in August 2023.
    - 17605-Provider Name & ID. Shows the provider's name (I SER 1021) and ID number (I SER .1).

- 44923-Provider Scheduling Status. Shows the provider's scheduling status (I SER 41) for the department.

3. By default, providers are sorted in ascending order by the first column in the display. You can change the sort order if needed on the Criteria tab.
   - Sort Column. Enter the column to sort by.
   - Sort By. Enter the sort direction.
4. On the General tab, enter a name for your report and save it.
5. Open Cadence System Definitions.
6. Select the Reports > Plug-Ins form.
7. Enter your report in the Provider selection (I SDF 4010) field.

Show Schedulers Custom Information During Scheduling

Schedulers at your organization might need to remember unique or organization-specific information when making appointments. You can put these details right in front of them with a custom HTML display on the Make Appointment form. You can customize this HTML display at the department, location/service area, or system levels.

1. In Hyperspace, follow the path Epic button > Admin > General Admin > HTML Display Configuration.
2. Select record 129 and choose whether you want to configure the display for your whole system, a certain service area or location, or a certain department.
3. Customize the display by adding HTML table records. After you add the tables and save the display, the display appears on the Make Appointment form in the same area as the Scheduler Scanner. Refer to the Customize an HTML Table topic for more information on creating and editing HTML tables.

Help Schedulers Evaluate Provider Availability with the Schedule Scanner

The Schedule Scanner and the Utilization Display use percentages and colors to guide schedulers in choosing the most available provider or resource. The Foundation System uses the default system-level settings, but you can change the percentage ranges, date ranges, and colors to meet your policies and aesthetic preferences.

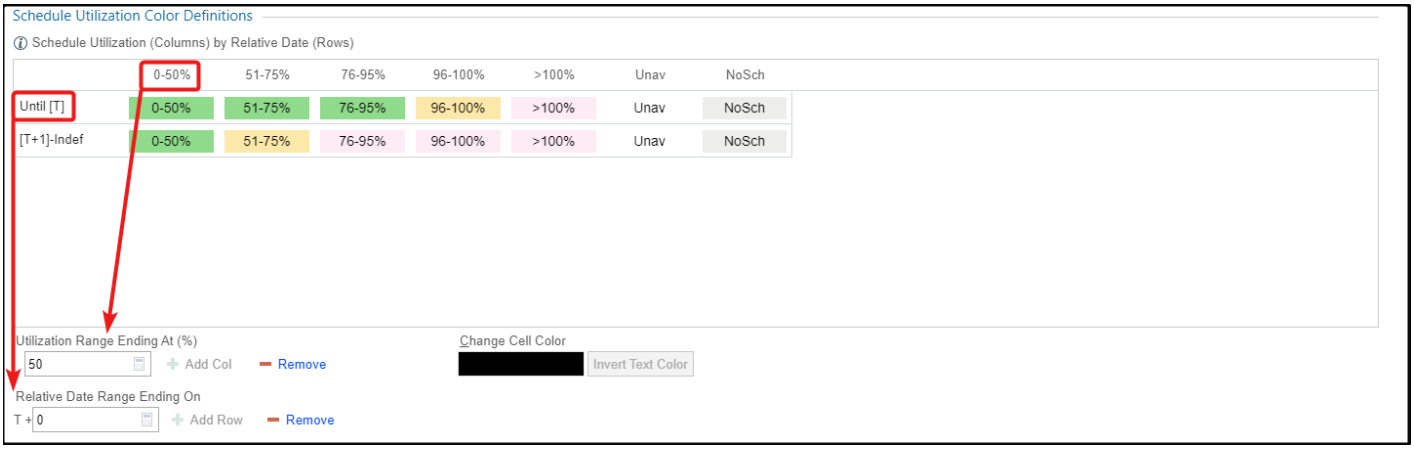
You can configure percentage range and color settings at the department or system levels. The Schedule Scanner supports percentages greater than 100.

Be careful when choosing colors for the Scheduler Scanner. Bright colors and multiple color selections can make the Schedule Scanner hard to read or understand.

Define Percentages for the Schedule Scanner

1. In Hyperspace, open Cadence System Definitions or a department record.
2. Select the Scheduling > Schedule Scanner form.
3. In the Schedule utilization color definitions table, select the top cell in the first column. This is the first percentage range for today. You can change the top of this percentage range by editing the percentage below the table. The next percentage range adjusts accordingly.
   - You can specify percentages in increments of 1 from 0 to 999.
   - You can add and remove columns to adjust the number of percentage ranges.

- You can change how far into the future the colors apply by editing the relative date range below the table. The next date range adjusts accordingly.
- You can add and remove rows to adjust the number of date ranges.



Define Colors for the Schedule Scanner

1. In the Schedule utilization color definitions table, select a cell.
2. Click the Selection button. A color grid appears.
3. Select the color you want to appear when a provider's schedule reaches the percentage range. Be careful to choose colors that are not too distracting or confusing for end users.
4. Click Invert Text Color if you want the text to appear white instead of black, or black instead of white. This helps the text appear more clearly in dark or light colors.

If you want different colors to appear for a different relative date range, select cells in another row.

Enable Scanner and Utilization Display

1. To show schedulers the Scanner view in Book It, enter Yes in the Use schedule scanner on appointment entry? (I SDF 1501 or I DEP 1501) field.
2. To show schedulers the utilization display when they select time slots, enter Yes in the Show utilization display on schedule? (I SDF 1502 or I DEP 1502) field.
3. If you want the Scheduler Scanner to exclude weekends, enter Yes in the Exclude weekends by default on general search restrictions (I SDF 1503 or I DEP 1503) field. Weekends are included by default.

Exclude Overbooks from Schedule Scanner Calculations

You can configure the Schedule Scanner to exclude overbooks when it calculates the percentage of a provider's schedule that is currently utilized. You might do this, for example, if users need to identify only the availability of regular slots in the Schedule Scanner. With this configuration, the Schedule Scanner doesn't show percentages greater than 100%.

1. In Hyperspace, open Cadence System Definitions:
2. Select the Scheduling > Schedule Scanner form.
3. Enter No in the Include Overbooks in Schedule Scanner (I SDF 16020) field. The default value is Yes. Note that this setting does not have a department-level override.

Associate ZIP Codes with Centers for Scheduling Based on Patient Home or Work Location

If you have centers across the city or in several cities, you can organize the centers by ZIP Codes in Cadence System Definitions. This way, when a patient wants an appointment at a clinic close to their home or work, Cadence can match the patient's ZIP Code to the center ZIP Code. You set up ZIP Code scheduling by associating ZIP Codes with centers and determining which patient location is given preference during scheduling.

Prerequisites

You must create centers before you can assign ZIP codes to them. Refer to the Organize Departments into Centers for Easier Scheduling topic for information about creating centers.

Use an Import to Define ZIP Codes for Your Centers

Starting in November 2022

May 2022 by SU E10216234

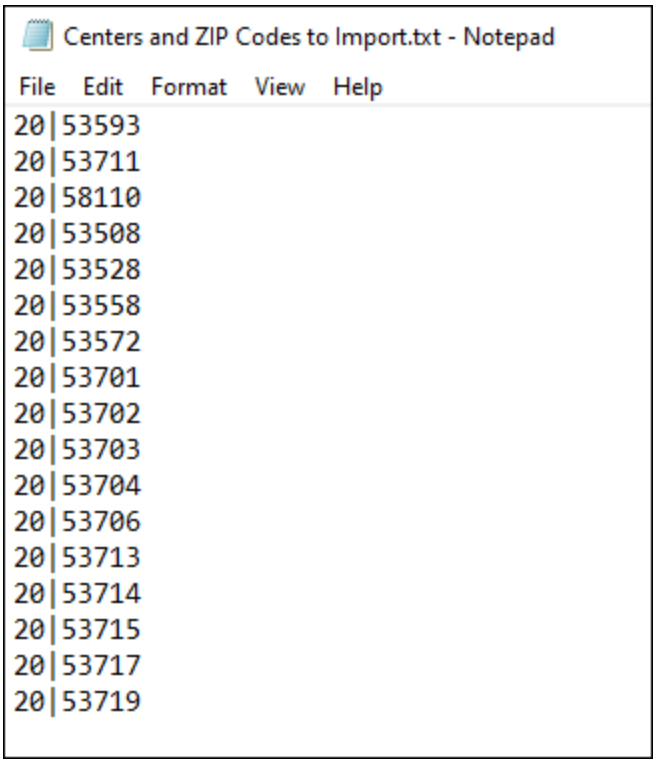
To get a head start on defining ZIP Codes for your centers, you can work with your Epic representative to export a list of centers and ZIP Codes that are already in your system to a spreadsheet. Contact your Epic representative and mention SLG 7170714.

The spreadsheet associates ZIP Codes with centers based on the ZIP Codes for the departments that are in the center. It also includes information about nearby ZIP Codes (as determined by the Nearby Postal Codes (Formatted) (I EZP 400) item), how many appointments were scheduled in the center, and what percentage of patients for those appointments had the same home ZIP Code as the center.

The Suggestion column in the spreadsheet tells you what you might do with each row:

- Consider Adding. This means that you should consider adding the center and ZIP Code pair to Cadence System Definitions because the ZIP Code is nearby (as determined by the Nearby Postal Codes (Formatted) (I EZP 400) item) another ZIP Code that is already used by a department that is part of the center.
- Should Be Added. This means that you should add the center and ZIP Code pair to Cadence System Definitions because the ZIP Code is already used by a department that is part of the center.

If you choose to add a center a ZIP Code pair to Cadence System Definitions, there is a column in the spreadsheet that shows the center and ZIP Code in a format that can be used for importing. Copy the information to a text file to give to your Epic representative to import for you. In the screenshot of a sample text file below, value 20 is a center ID and the values after the pipe character are ZIP Codes that will be imported into the Center ZIP Codes - Center (I SDF 10760) and Center ZIP Codes - ZIP Data (I SDF 10761) items in Cadence System Definitions.



Define ZIP Codes for Your Centers

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > Center ZIP Codes form.
3. Add centers and ZIP codes to the form:
    - Starting in May 2024:
        - Search for a center and click the Add Selected Center button.
        - Click on that center in the table, the row will expand and you can add ZIP Codes.
        - Click Accept on the row to save your changes.
    - In February 2024 and earlier:
        - Click Add. Select a center and enter the ZIP Codes that are close to the center. You can enter the ZIP Codes in any cell in the lower table.
        - Click Apply to see your changes in the upper table.
        - Click Add to select another center. Continue to add centers and ZIP Codes as needed.

Define the Default Search Logic for Centers Closest to Patients

You can define the default search logic to find centers closest to the patient at the System Definitions and department level. Starting in February 2023, November 2022 with special update E10303511, and May 2022 with special update E10221642, you can also set this at the visit type level. You might want to set this at the visit type level if your organizations uses pools with providers in multiple centers for telehealth and in-person visit types. For telehealth visit types, you might want to disable this setting because the patient's and the provider's location might be less important than the patient being seen earlier. For in-person visit types, you might want to set this setting to Home, Work, or Home and Work to more quickly return solutions the patient is likely to want to schedule into.

1. In Hyperspace, open Cadence System Definitions, a department record, or a visit type record.

2. If you are setting this at the System Definitions or department level, select the Scheduling > Auto Scheduler form.
3. In the Default for centers closest to patient (I SDF 10731, I DEP 1731, or I PRC 1066) field, select whether the system automatically uses the center closest to the patient's home address, work address, or both. In the Foundation System, this field is set to Home and Work. If this field is blank, the system uses the Site logic center default (I SDF 10730, I DEP 1733) setting to determine which center is used by default for scheduling.

Combine the Lists of Specialty and General Visit Types in Book It

If you have visit types that do not have any specialty restrictions, Book It shows two lists of visit types: specialty and general. You can choose to combine the lists of specialty and general visit types if it would be easier for your schedulers to choose visit types from one list instead of two.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Entry Defaults/Reqs form.
3. In the Combine specialty and general visit type lists (I SDF 8174) item, enter Yes.

Specify the Initial View for Book It and View Schedules

By default, the Solutions view is selected when schedulers open Book It, and the Schedules view is selected when they open the View Schedules activity. Schedulers can select different views and save their preferences. You can choose to have a different view selected by default, or you can have a specific view always selected when schedulers open Book It and View Schedules, in which case schedulers cannot save their own preference. You can specify the initial view of Book It and View Schedules at either the system or department level.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > General form.
3. Enter a value in the Initial appointment entry view (I SDF 40000 or I DEP 40000) field.
    - 1-Solutions, default. The Solutions view is selected by default when schedulers open Book It, and schedulers are allowed to save their own preference for which view is selected first. The View Schedules activity does not have a Solutions view, so this option works like option 3-Schedule, default for View Schedules. Starting in February 2023, the system uses their last used view the next time they open Book It and View Schedules until the user sets a new default view.
    - 2-Solutions, always. The Solutions view is selected by default when schedulers open Book It, and schedulers are not allowed to save their own preference for which view is selected first. The View Schedules activity does not have a Solutions view, so this option works like option 4-Schedule, always for View Schedules.
    - 3-Schedule, default. The Schedules view is selected by default when schedulers open Book It and View Schedules, and schedulers are allowed to save their own preference for which view is selected first. Starting in February 2023, the system uses their last used view the next time they open Book It and View Schedules until the user sets a new default view.
    - 4-Schedule, always. The Schedules view is selected by default when schedulers open Book It and View Schedules, and schedulers are not allowed to save their own preference for which view is selected first.
    - 5-Open Slots, default. The Open Slots view is selected by default when schedulers open Book It and View Schedules, and schedulers are allowed to save their own preference for which view is selected

first. Starting in February 2023, the system uses their last used view the next time they open Book It and View Schedules until the user sets a new default view.

- 6-Open Slots, always. The Open Slots view is selected by default when schedulers open Book It and View Schedules, and schedulers are not allowed to save their own preference for which view is selected first.
- 7-Schedule Scanner, default. The Scanner view is selected by default when schedulers open Book It and View Schedules, and schedulers are allowed to save their own preference for which view is selected first. Starting in February 2023, the system uses their last used view the next time they open Book It and View Schedules until the user sets a new default view.
- 8-Schedule Scanner, always. The Scanner view is selected by default when schedulers open Book It and View Schedules, and schedulers are not allowed to save their own preference for which view is selected first.

Specify the Default View for Visit Types in Book It Solutions View

Starting in February 2023

November 2022 by SU E10303511

May 2022 by SU E10221642

You can choose to have a certain visit type always use simple or detailed view in Solutions view. The simple view groups and sorts locations by provider, department, or center. The detailed view doesn't group or sort providers or locations and provides the first five available solutions. By default, the System loads Solutions view in Book It based on which view is optimal for the current search configuration. If they click the recur and Manual select one by one is selected from recur, the Schedules view opens by default.

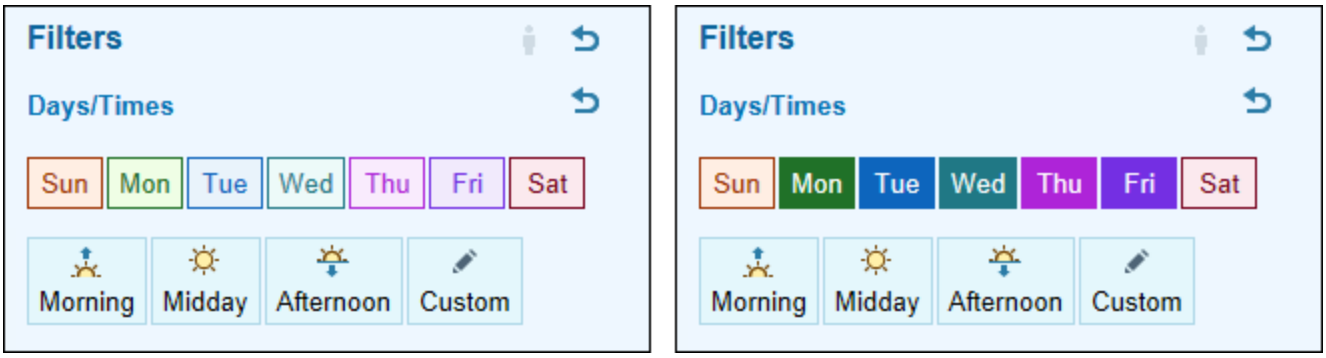
To specify a default view for a visit type:

1. In Hyperspace, open the Visit Type Master File (search: Visit Type) or go to Epic button > Admin > Schedule Admin > Master File Edit > Visit Type and open a visit type record.
2. Enter a value in the Default solutions view (I PRC 1065) field.
   - 1-Simple. The simple view is always used by default to find solutions in Solutions view, unless the scheduler is recurring a visit or selecting from a panel, in which case detailed view is used by default.
   - 2-Detailed. The detailed view is always used by default to find solutions in Solutions view.

Automatically Exclude Weekend Days in Book It and View Schedules

By default, weekend days are included when schedulers search for appointments in Book It or look at provider schedules in the View Schedules activity. If schedulers don't usually want to see weekend days, you can exclude them by default by changing a setting in Cadence System Definitions or your department records. Schedulers can still manually select weekend days when needed.

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 Scheduling > Schedule Scanner form.
3. Enter Yes in the Exclude weekends by default on general search restrictions? (I SDF 1503 or I DEP 1503) field.



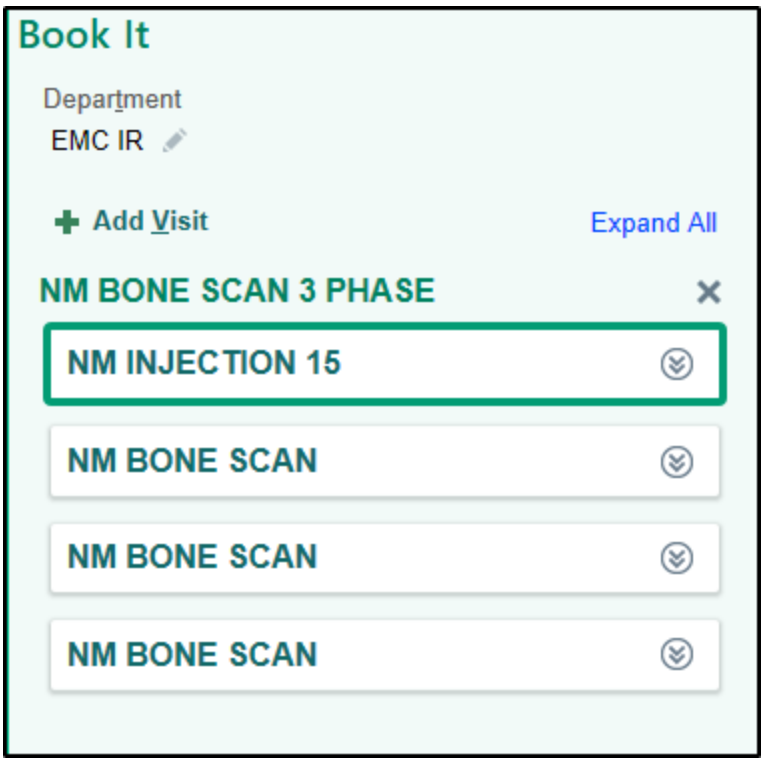
Left: Weekend days are included by default (when no days are selected, all days are included). Right: Weekend days are not selected by default.

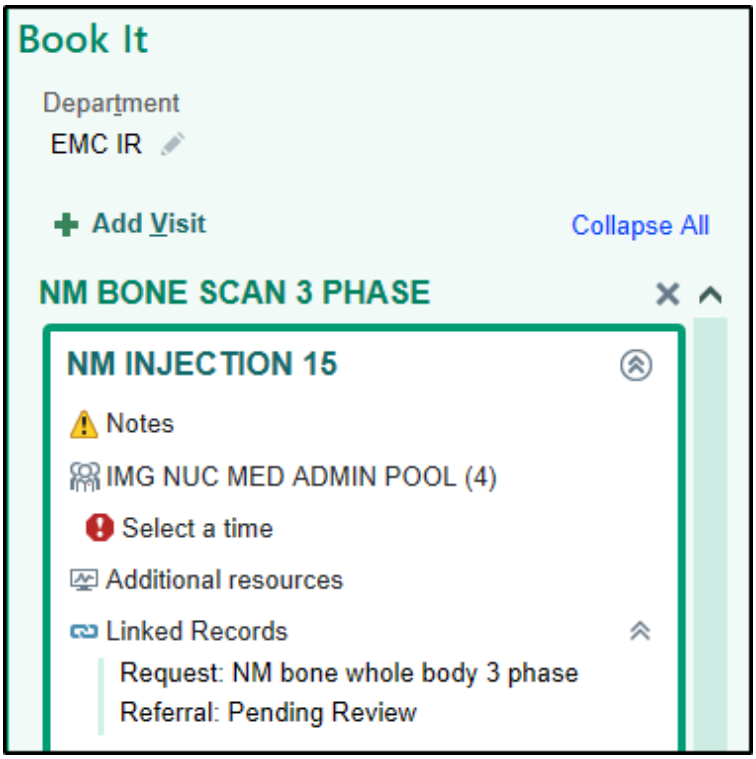
Show Expanded Visit Cards by Default When Scheduling Multiple Visits

Starting in February 2023

By default, when scheduling multiple visits from orders or other records, or if more than one visit is pulled in by a panel or decision tree, all visit cards are collapsed. If schedulers prefer to always see the fully expanded visit cards, you can disable auto-collapsing by changing a setting in Cadence System Definitions or your department records. With this setting, schedulers can still always manually expand or collapse the visit cards when needed.

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 Scheduling > Auto Scheduler form.
3. Enter Yes in the Disable visit card auto collapse? (I SDF 8027 or I DEP 3721) field.



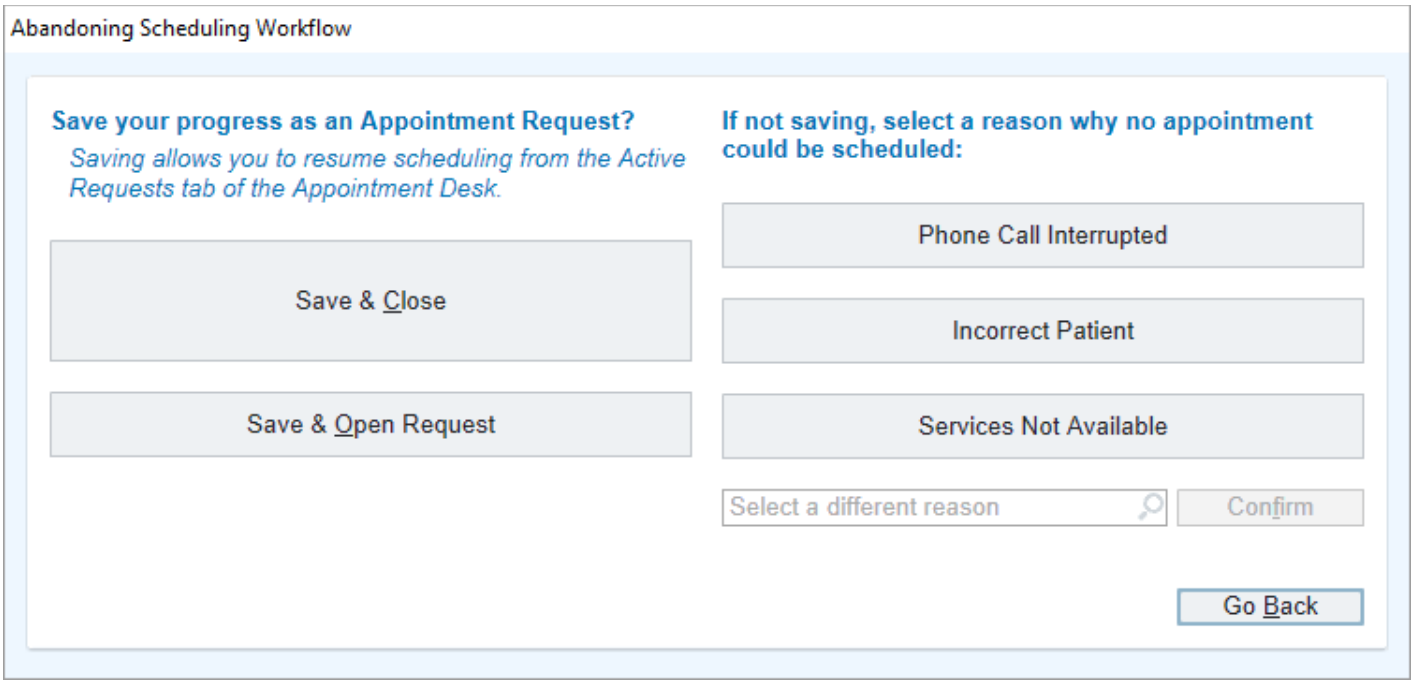


Left: A panel with 4 visit types is collapsed by default. Right: The same panel with the visit cards expanded (requires scrolling to see all visits).

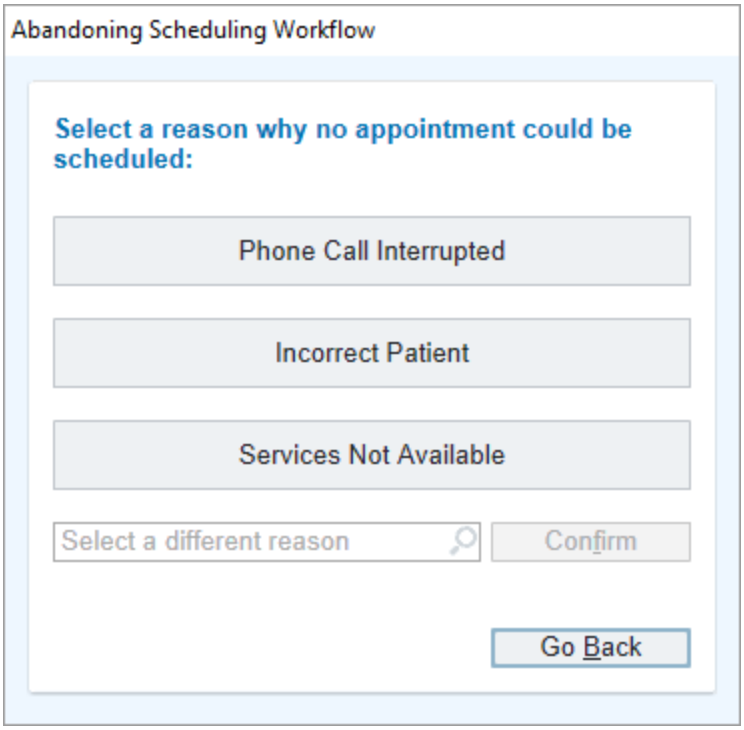
Keep Track of Abandoned Scheduling Attempts

When schedulers back out of Book It without scheduling a visit for a patient, you can keep track of this in the system for reporting on leaked demand, or missed opportunities to care for a patient at your organization, and for helping schedulers pick up scheduling the visit later. You can prompt schedulers to select a reason why they weren't able to schedule the appointment or give them the option to save their scheduling progress in an appointment request that they can schedule later.

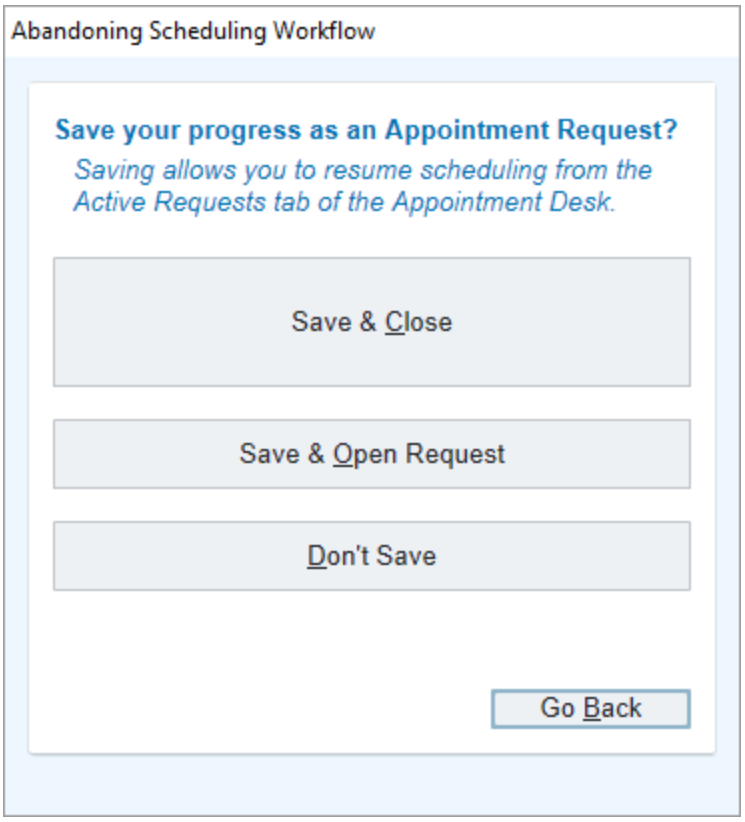
When you enable the abandoned scheduling workflow, the Abandoning Scheduling Workflow window appears to schedulers when they cancel out of a full appointment entry workflow or a quick appointment workflow. The save options appear when schedulers have the security to create appointment requests. The cancel options appear when you define cancel reasons for the abandoned scheduling workflow in Cadence System Definitions.



When users back out of scheduling and they don't intend to schedule the appointment later, you can prompt them to select a reason why they weren't able to schedule the appointment. For example, they might have opened Book It for the wrong patient or they weren't able to find an opening that met the patient's needs. This workflow creates a canceled appointment request behind the scenes, but you don't need to be using appointment requests to use this workflow.



When users back out of scheduling but intend to schedule the appointment later, such as if the call with the patient was dropped, you can prompt them to save their progress as an appointment request. When the patient calls back later, they can pick up scheduling with the same visit types and providers. To use this workflow, you must be using appointment requests and schedulers must have security to create appointment requests as described in the Grant Schedulers Access to Appointment Requests topic.



Allow Users to Save In-Progress Appointment Requests	Allow Users to Capture Cancel Reasons
Enable the abandoned scheduling workflow at the system or department level.	1. Create reasons why scheduling workflows are abandoned. 2. Decide which cancel reasons constitute leaked demand. 3. Map your abandon and cancel reasons in Cadence System Definitions. 4. Enable the abandoned scheduling workflow at the system or department level. 5. Create a report for leaked demand.

To create appointment requests for abandoned scheduling workflows, you must have the Cadence Appointment Requests 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.

Create Reasons to Record Why Scheduling Workflows Are Abandoned

Abandoned scheduling reasons are the reasons a user selects in the Abandoning Scheduling Workflow window when they choose not to save an in-progress appointment request or when you're not using appointment requests. You can report on these reasons to spot trends in leaked demand.

Define your abandoned scheduling reasons in the Abandoned Scheduling - Scheduling Abandon Reason (I SDF 10392) category list. For more information about editing category lists, refer to the Modify a Category List's Values topic.

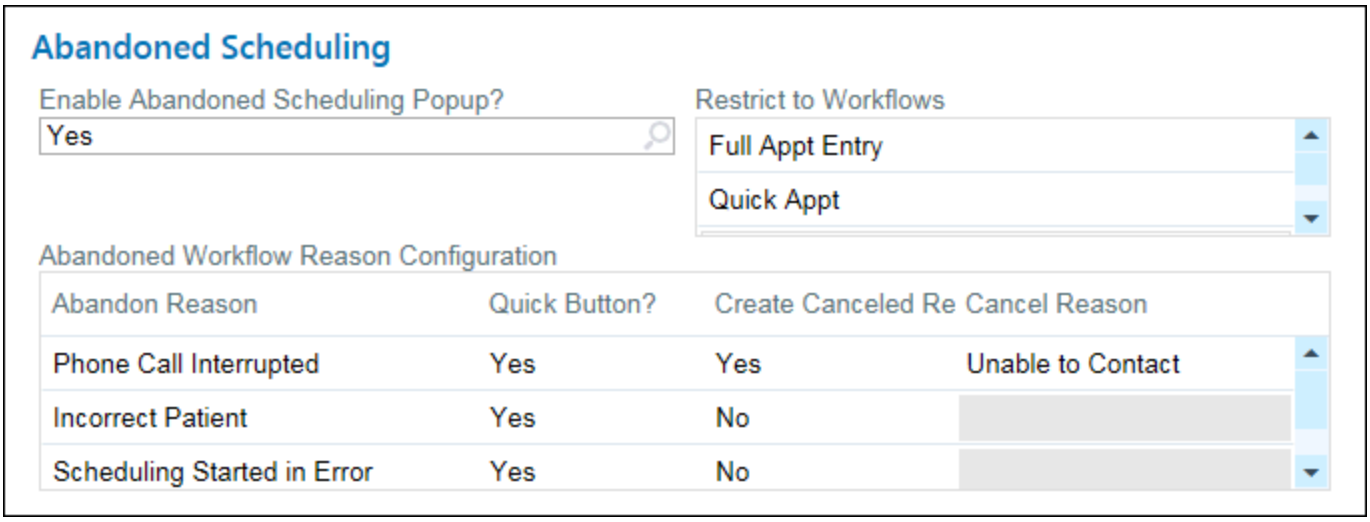
Create Reasons for Canceled Appointment Requests

To report on why schedulers don't finish scheduling appointments, you set up the system to create a canceled appointment request behind the scenes when they select certain abandoned scheduling reasons. To create the canceled requests, you need to specify a cancel reason for the system to store with the canceled request. You define cancel reasons in the Cancel Reason (I ORD 1510) category list and map them to your abandoned scheduling reasons in Cadence System Definitions. If a cancel reason represents leaked demand, enter Yes in the "Is leaked demand?" field when you're editing the category list. For more information about editing category lists, refer to the Modify a Category List's Values topic.

You might already have cancel reasons defined if you collect reasons why schedulers cancel appointment requests as described in the Collect Reasons Why Schedulers Cancel Appointment Requests topic. These reasons might be sufficient for how you want to report on abandoned scheduling workflows and leaked demand. For the purposes of reporting on leaked demand for appointments, you can flag certain cancel reasons as representing leaked demand.

Enable the Abandoned Scheduling Workflow

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Creation form.
3. Enter Yes in the Enable Abandoned Scheduling Popup? (I SDF 10390) field to enable the abandoned scheduling workflow for your entire organization. Alternately, you can enter No in this field, complete the rest of the abandoned scheduling settings here, and enable the workflow only in certain departments.
4. By default, the system prompts users to create an appointment request from Make Appointment and Quick Appointment. To restrict this workflow to only one of those activities, complete the Restrict to Workflows (I SDF 10391) field. Choose from:
    - Full Appt Entry
    - Quick Appt
5. Complete the Abandoned Workflow Reason Configuration table to make your abandoned scheduling reasons available to schedulers and determine which reasons generate canceled requests.
    - Abandon Reason (I SDF 10392). Enter a reason why schedulers might not finish scheduling an appointment from the Abandoned Scheduling - Scheduling Abandon Reason (I SDF 10392) category list. These reasons appear in the Abandoning Scheduling Workflow window for users to select when they decide not to save an in-progress appointment request, or when you're not using appointment requests.
    - Quick Button? (I SDF 10393). Enter Yes to show this reason as a quick button in the Abandoning Scheduling Workflow window. You can have up to three quick buttons in that window.
    - Create Canceled Requests? (I SDF 10394). Enter Yes if this reason represents a missed scheduling opportunity that you want to report on by creating a canceled request behind the scenes. Enter No if you don't want to create a canceled request for the reason, such as if the reason is used when scheduling is started in error.
    - Cancel Reason (I SDF 10395). If you entered Yes in the Create Canceled Requests? column, enter the cancel reason for the request here. If you leave this field blank, the system creates canceled requests without cancel reasons, which isn't useful for reporting.



Turn the Abandoned Scheduling Workflow On or Off for a Department

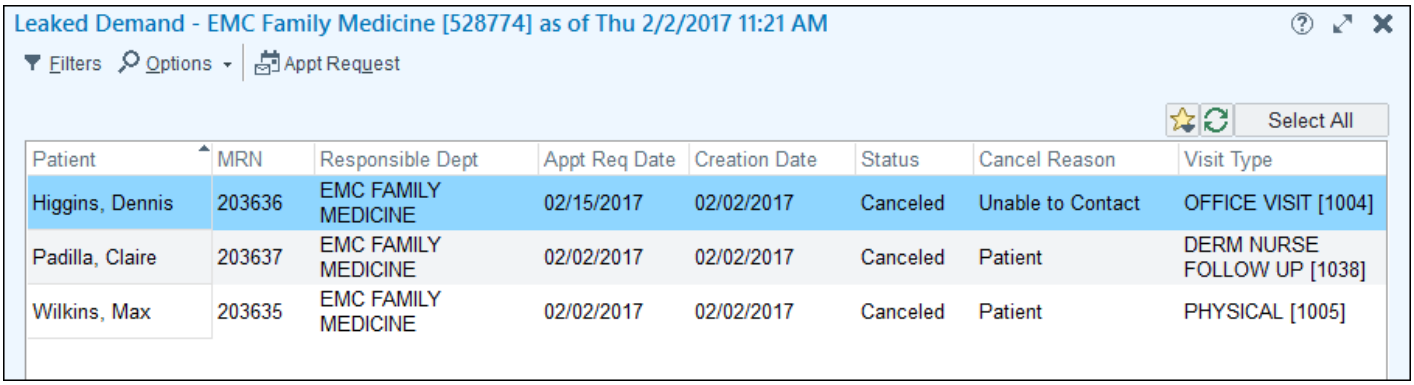
After you turn on the abandoned scheduling workflow at the system level, you can turn it off at the department level if there are certain departments where users don't need to save in-progress appointment requests or you don't want to create canceled requests behind the scenes. Or, if you configured the abandoned scheduling workflow settings at the system level, but left the workflow off, follow these steps to turn it on only for certain departments.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open your department record.
2. Select the Appointment Requests > Scheduling form.
3. Enter Yes or No in the Enable Abandoned Scheduling popup? (I DEP 10390) field.

Report on Leaked Demand for Appointments

Create a report based on Reporting Workbench template 55072-ES Request Search and set the following criteria to report on leaked demand for appointments at your organization:

- Creation date range. The range of dates you want to report on, such as the last month.
- Request status = Canceled
- Responsible department = The login department of the schedulers you want to report on
- Is leaked demand = Yes



Hide Certain Appointment Warnings

You can hide certain appointment warnings from schedulers if a warning isn't a concern for your organization.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Warnings form.
3. In the Appointment Warnings table, enter the warning you want to hide in the Warning (I SDF 11600 or I DEP 1180) column.
4. Clear the Show (I SDF 11605 or I DEP 1181) check box.

Specify Whether Users Can Schedule a Referral which Is Not Valid for the Appointment

You can specify whether schedulers may bypass a warning to schedule from referrals which are invalid for that appointment. This ability applies to warnings for an invalid referral when the appointment is outside of the referral authorized dates, the number of authorized visits has been exceeded, or the number of AP claims counts has been exceeded. Other invalid scheduling warnings such as those for invalid referral status or invalid referral scheduling status are not affected by the security point and can't be bypassed.

You can also specify whether schedulers may bypass a warning when assigning a referral to an existing appointment where the referral is invalid for the above reasons.

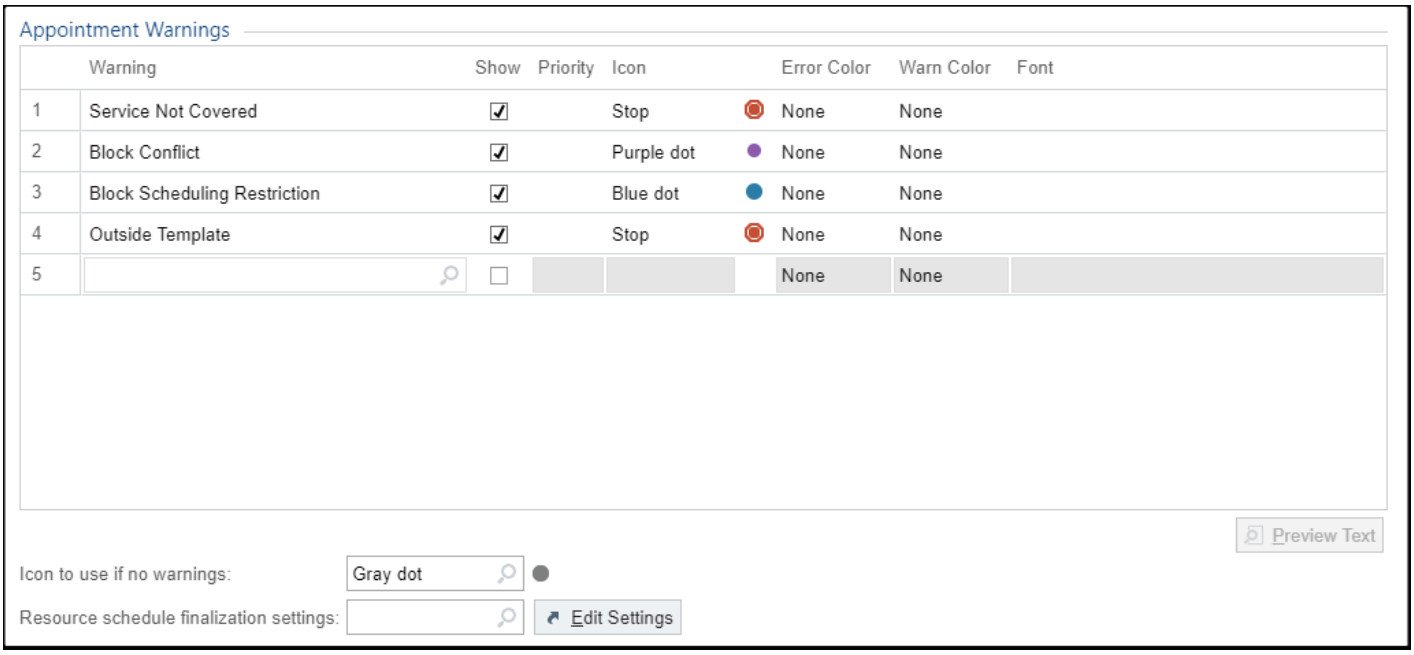
1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Cadence Security and open a security class record.
2. Select the Appointment Entry form.
3. In the Referral assignment override (Scheduling) (I ECL 5064) field, enter Yes to allow the user to bypass this warning when scheduling from a referral. The default value is No.
4. In the Referral assignment override (Assign Referrals) (I ECL 5164) field, enter Yes to allow the user to bypass the warning when assigning a referral.

Help Schedulers Identify Warning Importance in Auto Scheduler Solutions

The Auto Scheduler shows solutions that have associated warnings. For example, the Auto Scheduler notes when the solution has a block or when the provider is outside the patient's insurance network. You can use icons to help schedulers identify solutions with warnings and understand how important the warning is.

You might want to choose icons for just a few of the important warnings for your organization. Icons are pretty but too many can clutter the form and make the solutions hard to read.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Warnings form.
3. In the Appointment Warnings table, select a warning in the Warning (I SDF 11600 or I DEP 1180) column.
4. In the Icon (I SDF 11630 or I DEP 1186) column, choose the icon that appears in the Auto Scheduler when a solution has the associated warning.
5. In the Icon to use if no warnings (I SDF 11631 or I DEP 1187) field, select the icon to use when a solution has no warnings.

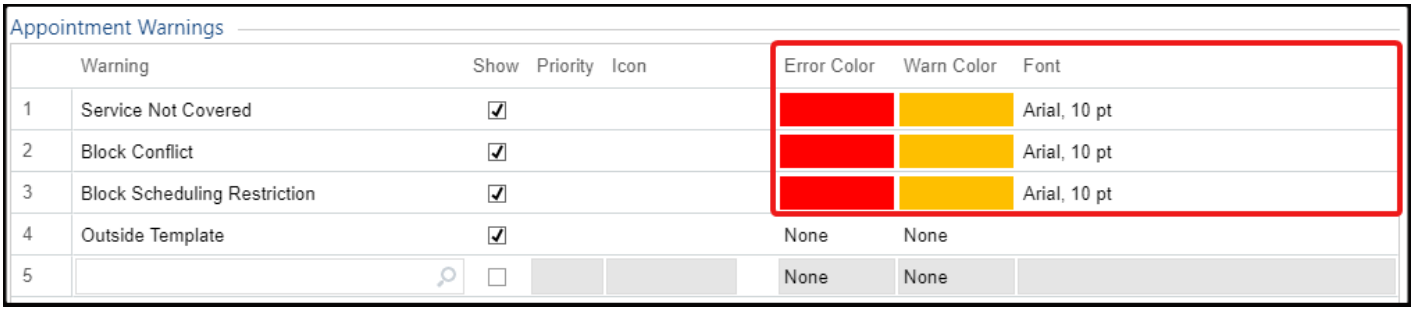


Design Appointment Warnings

You can edit the colors and fonts in most appointment warnings. It's an easy way to convey the importance of a warning or make sure schedulers pay attention to the warning.

> It's fun to play with fonts and colors, but be careful: you want to make sure the warnings are easy to read. Bright colors and decorative fonts can be distracting and take away from the importance of the warning.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Warnings form.
3. Select the warning that you'd like to modify. To see a list of warnings that can be changed, click the Selection button in the Warning column of the table.
4. Enter a priority for the warning, from 1 to 999999. The priority helps the system decide which warnings to show first. 1 is the highest priority and 999999 is the lowest priority.
5. Select the color for the error message text.
6. Select the color for the warning text.
7. Choose your desired font.



Have Schedulers Provide Reasons When They Overrule

Appointment Warnings

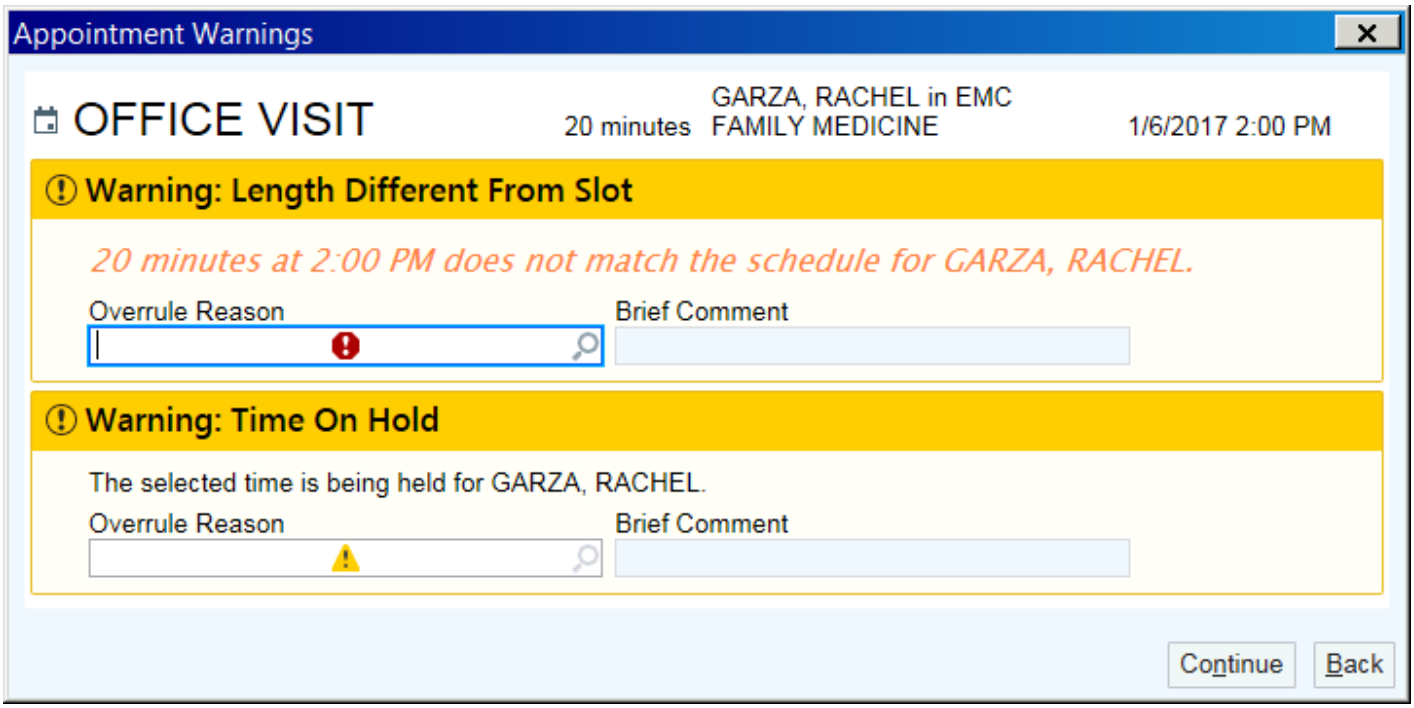
You can have schedulers provide a reason when they overrule an appointment warning to make it less likely that department managers need to follow up separately with the scheduler or clinician to clarify why the warning was overruled. For example, if the clinician gives the scheduler permission to override an appointment warning related to fasting, she can now mark in the Overrule Reason field that the clinician approved the warning overrule. That way, when the department manager later reviews appointment warnings that were overruled for a scheduled appointment, she can quickly see that the clinician approved the warning overrule and therefore doesn't need to follow-up with the scheduler or clinician. Schedulers and managers can review the overruled appointment warnings and reasons in the Expand Appointment window that can be opened from the Appointment Desk.

When the system is determining which appointment warnings can have overrule reasons, it uses a combination of the department- and the system-level settings. If an appointment warning is listed at both levels, the specification (recommended, required, or do not show) at the department level is respected. If an appointment warning is listed at only the system level, the specification is respected alongside any other appointment warnings configured at the department level.

For example, say that the following overrule reason configuration exists:

- An overrule reason is required for the Length Different from Slot appointment warning at the system level.
- An overrule reason is required for the Time On Hold appointment warning at the system level.
- An overrule reason is recommended for the Time On Hold appointment warning at the department level.

If an appointment meets the criteria of both appointment warnings, the scheduler sees a recommended overrule reason for the Time On Hold warning based on the department-level configuration and a required overrule reason for the Length Different from Slot warning based on the system-level configuration. In this example, the department-level configuration takes precedence for the Time On Hold warning because that warning is configured at both the department and system levels. However, the Length Different from Slot warning is configured at only the system level, so the system-level configuration is used for that warning even though department-level configuration exists for other warnings. This is consistent with how appointment warnings are defined, but different from some other areas of the system where system-level configuration is always ignored if department-level configuration exists.



The Foundation System requires an overrule reason for the following appointment warnings:

- Outside Template
- Time Unavailable
- Outside Tolerance
- Agent Rule Conflict
- Provider Has No Schedule For Day

Create Available Overrule Reasons

Define your overrule reasons in the Appt Warning Overrule Reason (I EPT 7563) category list. Refer to the Modify a Category List's Values topic for additional information.

By default, the following values are available:

- Other
- Provider Approved
- Urgent Need

Configure Overrule Reason Settings for the System and Departments

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Warnings form.
3. In the Appointment Warning Overrule Reason section, enter appointment warnings in the Warning (I SDF 11650 or I DEP 1196) column and specify whether an overrule reason is required or recommended in the Reason Requirement (I SDF 11652 or I DEP 1198) column. If you don't enter an appointment warning in this section, the Overrule Reason field doesn't appear for that warning. You can also choose Do Not Show in the Reason Requirement column to prevent the Overrule Reason field from appearing for an appointment warning. You might choose this option if users shouldn't be able to enter an overrule reason for a warning in a certain department, but should be able to do so in other departments.

4. In the Collect a single overrule reason for each appointment? (I SDF 11653) field (available only at the system level), enter Yes if you want to schedulers to enter one overrule reason for all appointment warnings that occur during scheduling. The default value is No. In the Foundation System, this field is set to Yes.

Show Overrule Warning Information in the Expand Appointment Window

Overrule warning information appears in HTML table 62004-AS Appointment Warning Overrules, which is included in standard HTML display 4-AS Appointment for the Expand Appointment window

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

1. In Hyperspace, access the HTML Display Configuration activity (search: HTML Display Configuration) and open your override of HTML display 4.
2. Add HTML table 62004 to the list of HTML tables that appear in the HTML display.

Let Schedulers Select Account Information Manually During Scheduling

If you aren't automatically assigning guarantor accounts to appointments or if you don't open registration after scheduling, you might want to use the Account Selection form during scheduling. For example, if a department sees a lot of workers' compensation accounts, schedulers might want to manually select these accounts so that the correct account is assigned to the appointments. You can also choose when Account Selection appears in Change Appointment workflows, so that it only appears for types of appointment changes that are likely to require schedulers to select a new guarantor account.

Enable Account Selection at the System Level

If you want to enable account selection for schedulers across your organization, you can enable it at the system level.

1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. In the Show account selection? (I SDF 10260) field, enter Yes to show the account selection form during scheduling.

Enable Account Selection at the Department Level

If you want to enable account selection for only certain departments, you can enable it at the department level. Or, if you enabled account selection at the system level but don't want to use it in certain departments, you can turn it off for those departments.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > General form.
3. In the Account select when scheduling? (I DEP 116) field, enter Yes to show the account selection form during scheduling.

Control When Account Selection Appears in Change Appointment Workflows

If you've configured Account Selection to appear during appointment scheduling, you may not always want it to appear in Change Appointment workflows in some situations where it's unnecessary, such as if a scheduler is

making minor adjustments to an appointment's scheduled time.

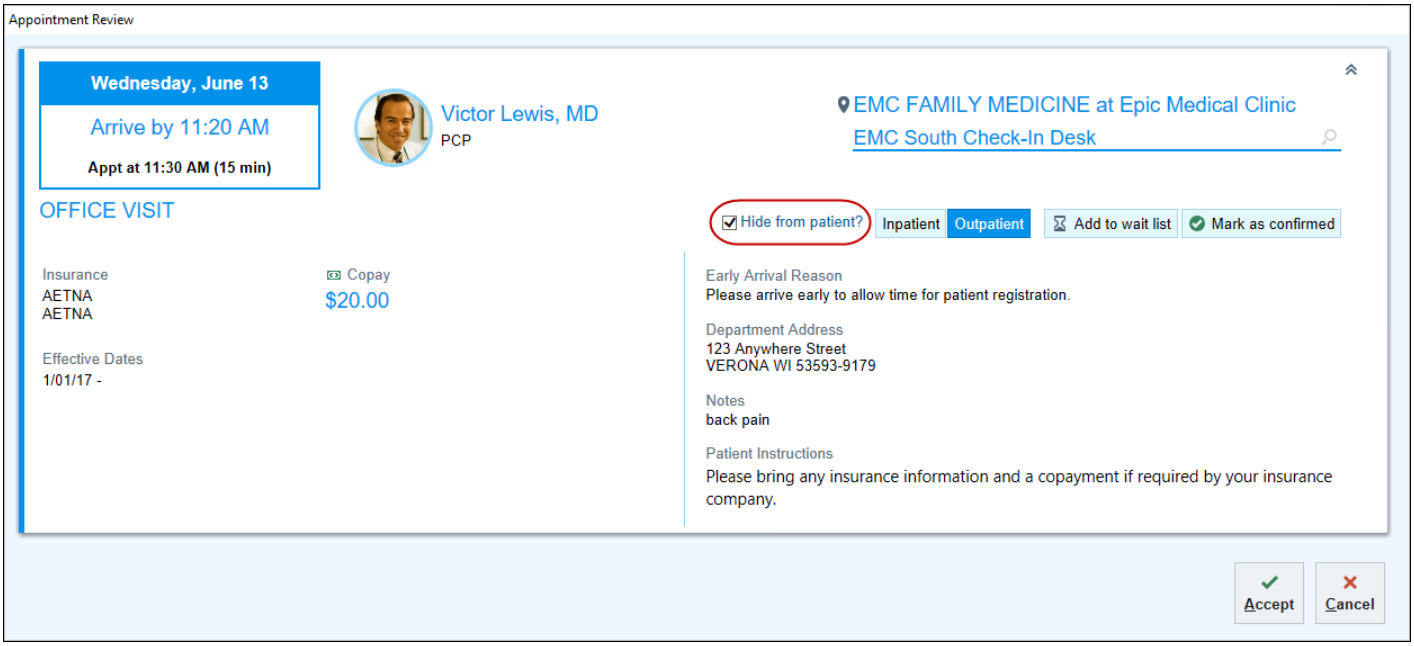
1. In Hyperspace, open Cadence System Definitions.
2. Select the Scheduling > General form.
3. In the Account select in Change Appointment? (I SDF 11705) field, choose from the following options:
    - Suppress: Account Selection does not appear in Change Appointment, even if it's been configured to appear in other scheduling workflows.
    - Suppress unless changing visit type, date, or department: Account Selection does not appear in Change Appointment unless a scheduler changes the date, visit type, or department of the appointment.
    - Allow: Account selection appears in Change Appointment based on your existing settings. This is the default value if I SDF 11705 is left blank.

Hide Appointments in Patient-Facing Materials

When your organization wants to reserve time on the schedule for a patient, but a clinician isn't certain that the visit will be needed or the patient does not need to be present, your schedulers can hide the appointment in patient-facing materials. For example, clinicians might need to meet to discuss a patient's care when the patient does not need to be present.

If you use Cupid to schedule invasive labs or OpTime to schedule surgeries, you can also temporarily hide cases from patients. For more information, refer to the Temporarily Hide Cases in Patient-Facing Materials topic.

When you enable hidden appointments, schedulers can choose to hide and release visits. A Hide from patient? check box appears in the Appointment Review window, and schedulers can change the hidden status of an appointment from the Appointment Desk or the Snapboard.



Considerations

Sometimes, a visit only needs to be hidden temporarily, such as when scheduling a patient for a surgery that they may not yet need. It's important that clinicians and schedulers communicate about when to hide a visit and when to either release the visit if it turns out to be needed or cancel it if it's not needed.

Whenever possible, schedulers should hide appointments at the time they are scheduling them to prevent any automatic notifications from accidentally being sent to patients. They can hide appointments after they have been scheduled, but it's possible that a patient would have already been notified about the visit.

You can allow schedulers to hide appointments at the following levels in Cadence:

- Cadence System Definitions
- Department
- Visit Type

After you've set up the system to allow appointments to be hidden, you need to give schedulers the ability to change the hidden status of an appointment from the Appointment Desk and the Snapboard. You also need to make sure schedulers and clinicians can tell when an appointment is hidden from a patient.

Enable Hidden Appointments at the System Level

If you want to allow schedulers across your organization to hide appointments from patients, you can enable the feature at the system level.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Appt Notification form.
3. In the Allow user to set hidden status? (I SDF 4140) field, enter Yes to show the Hide from patient options for all appointments.

Enable Hidden Appointments at the Department Level

If you want to allow only schedulers in a certain department to hide appointments from patients, you can enable the feature at the department level. Or, if you enabled the feature at the system level but don't want to allow hidden appointments in certain departments, you can turn it off for those departments.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Communications > Appt Notification form.
3. In the Allow user to set hidden status? (I DEP 270) field, enter Yes to show the Hide from patient options for appointments scheduled in this department.

Enable Hidden Appointments at the Visit Type Level

If you want to allow only appointments of a certain visit type to be hidden from patients, you can enable the feature at the visit type level. Or, if you enabled the feature at the system level or department level but don't want to allow hidden appointments for certain visit types, you can turn it off for those visit types. You can also choose to hide a visit type by default.

1. In Hyperspace, open a visit type record (search: Visit Type).
2. Select the General Form.
3. In the Allow user to set hidden status? (I PRC 1081) field, enter Yes to show the Hide from patient options

for this visit type.

4. In the Default to hidden? (I PRC 1080) field, enter Yes if appointments with this visit type are hidden more often than not to save schedulers the time of manually hiding appointments.

Allow Schedulers to Hide and Release Appointments on the Appointment Desk

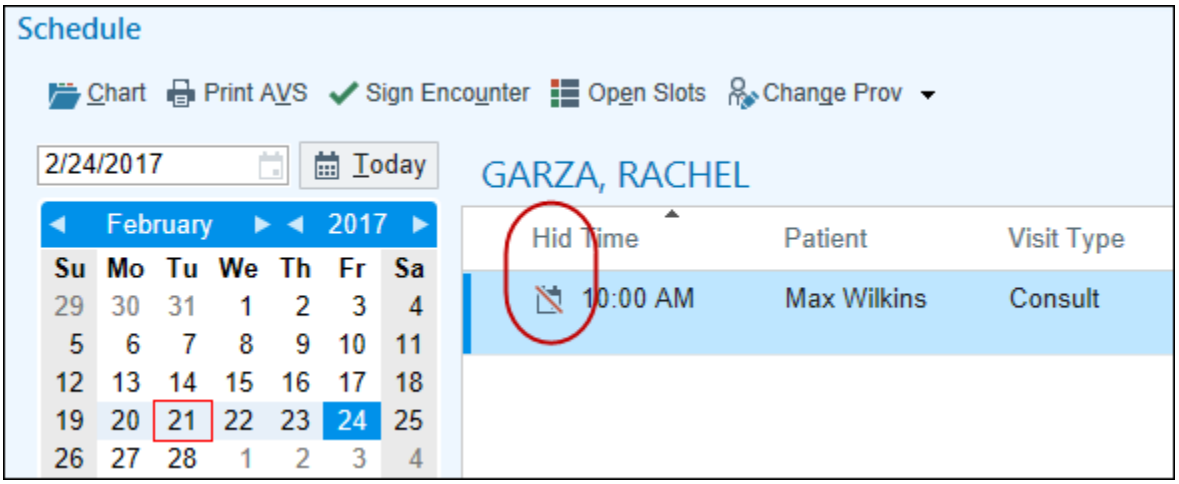
1. In Hyperspace, open your Appointment Desk settings at either the system or department level.
   - System: Search for Cadence System Definitions and select the Appointment Desk > Configuration form
   - Department: Go to Epic button > Admin > Schedule Admin > Master File Edit > Department and select the General > Appointment Desk form.
2. Click the Edit report button for the Future Appts Tab.
3. On the Criteria tab, select the Appointments tab and move the Release/Hide Appt action to the list of right-click and toolbar actions.

Allow Schedulers to Hide and Release Appointments on the Snapboard

1. In Hyperspace, open the Report Builder (search: Report Builder).
2. In the Report template field, enter 61-Snapboard Right-Click Menu Options.
3. Select the right-click menu you want to modify.
4. On the Appts tab, move the Release/Hide Visit option to the list of selected options.

Show Schedulers and Clinicians When an Appointment Is Hidden from a Patient

It's important that schedulers and clinicians know when an appointment is hidden so they can take care when discussing it with the patient. For schedulers, you can add a column to your Cadence reports, such as the Appointment Desk and Department Appointments report, to indicate when an appointment is hidden. For clinicians, you can add a column to the Schedule and Chart Review activities to indicate when an appointment is hidden.



The following columns are available for use in Cadence reports, the Technologist Work List in Radiant, and the Schedule activity in EpicCare Ambulatory:

- 1646-Case/Appt Hidden Indicator (Icon)
- 1647-Case/Appt Hidden Indicator

For more information about adding columns to these activities, refer to the following topics:

- Configure Application Reports

- Configure the Appointment Desk
- Customize the Columns That Appear in the Schedule

The following extensions are available for use as columns for the Encounters tab in Chart Review:

- 42254-Enc/Visit Hidden Icon
- 42255-Enc/Visit Hidden

For more information about adding columns to Chart Review, refer to the Add or Update Columns on a Chart Review Tab topic.

Schedule Procedural Appointments Based on Hospital Capacity Priorities

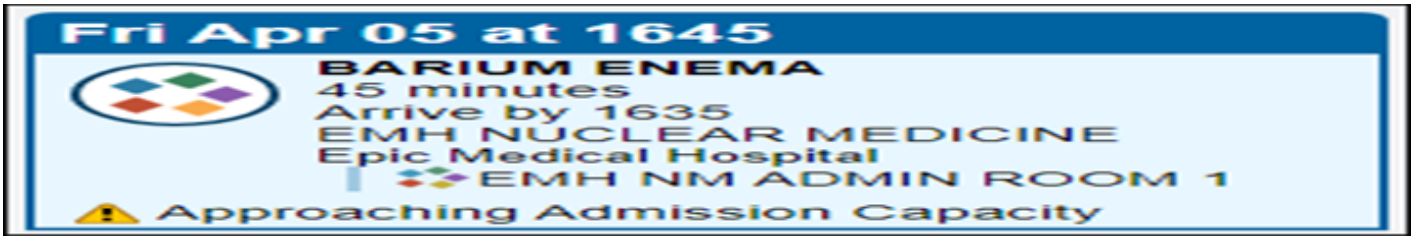
Starting in May 2024

Incorporate planned procedural appointments into your hospital capacity planning and help schedulers schedule procedures on dates when inpatient beds are likely to be available, reducing the chances of placing post-procedure patients in sub-optimal recovery locations or canceling and rescheduling procedures. After you complete setup, schedulers and providers can see when the volume of expected procedures might overwhelm hospital capacity on a particular day, and bed planners and capacity management staff can monitor and update procedural admission capacity directly by overriding default capacity thresholds and using new reporting tools.

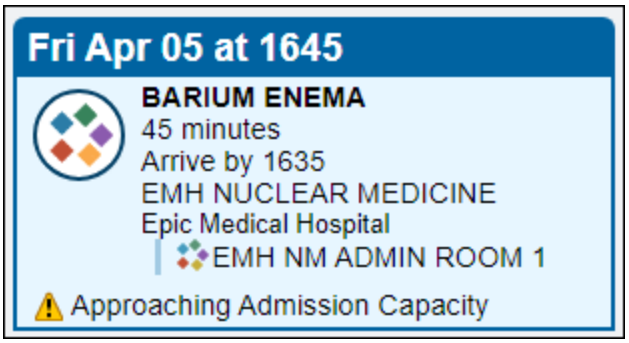
Schedulers can see capacity warning icons when selecting appointment times in Book It. If a new procedural appointment will cause an admission group to exceed capacity thresholds on a date, the Auto Scheduler filters that date out of its results unless users click the Allow solutions with warnings checkbox.

Schedulers can also see capacity warning icons in the Schedules, Open Slots, and Schedule Scanner views of Book It. Hovering over these icons reveals the procedural admission groups that will be impacted by the current appointment if it is scheduled on that day.

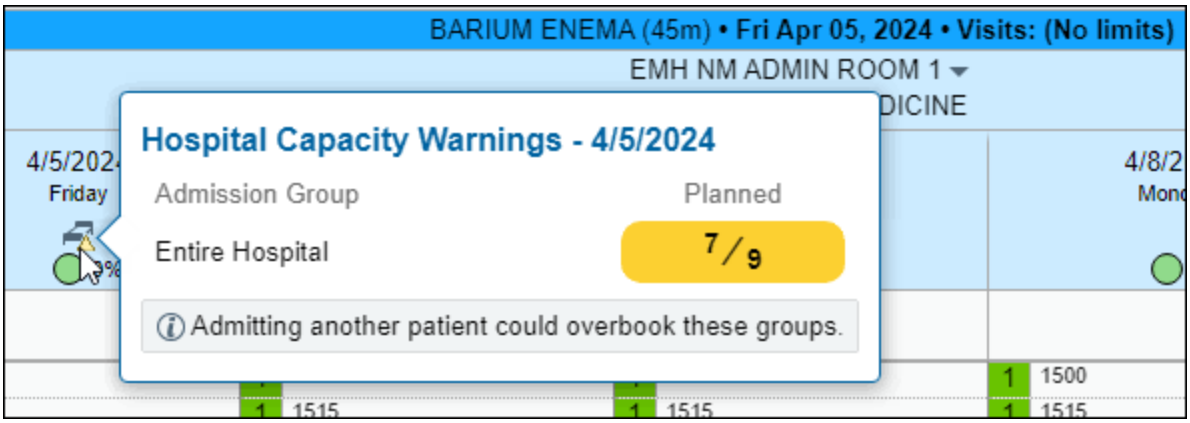
Use Sherlock checklist 1785-Implementing Procedural Admission Capacity Management for help completing the build and training required for this feature. See the Throughput in the OR topic for a broad overview of available tools for procedural admission capacity management, and see the Schedule Cases Based on Hospital Capacity Priorities topic for setup information for cases.



A soft-stop admission capacity scheduling warning.



An admission capacity warning in Auto Scheduler.



An admission capacity warning icon in Book It.

Specify Which Appointments Count as New Procedural Admissions

The first step to setting up appointment scheduling warnings for procedural admissions is to designate which appointments scheduled in HODs are planned new admissions. To do this, you need to identify the questions (LQL) your providers and schedulers use to ask if a patient will be admitted after their appointment.

To specify which patients will be admitted post-procedure on appointments:

1. In Grand Central Text, open your facility record.
2. Go to the eleventh ADT Facility Level Definitions screen.
3. In "Will admit after appointment?" questions that appear on Decision Trees (I EAF 74533) field, enter the questions on decision tree nodes and questionnaires that are used to indicate whether the patient will be admitted post-procedure.
4. In "Will admit after appointment" questions that appear on Scheduling Orders (I EAF 74532) field, enter the questions on procedural scheduling orders that are used to indicate whether the patient will be admitted post-procedure.

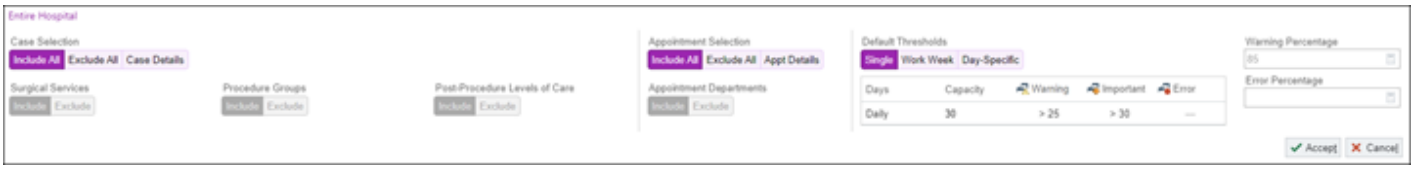
Configure Procedural Admission Groups to Include Appointments

The second step to setting up appointment scheduling warnings for procedural admissions is to configure procedural admission groups to specify when warnings appear for hospital areas that struggle with capacity. To do this, identify which of your HODs lead to admissions in those areas and how many new patient admissions those departments can typically produce before the hospital is overwhelmed.

We recommend creating at least one admission group that represents your entire hospital location, including all cases and all appointments that lead to procedural admissions with an overall threshold for how many new procedural admissions your hospital can manage before experiencing issues. See the Schedule Cases Based on

Hospital Capacity Priorities topic for more information on including cases in your procedural admission groups.

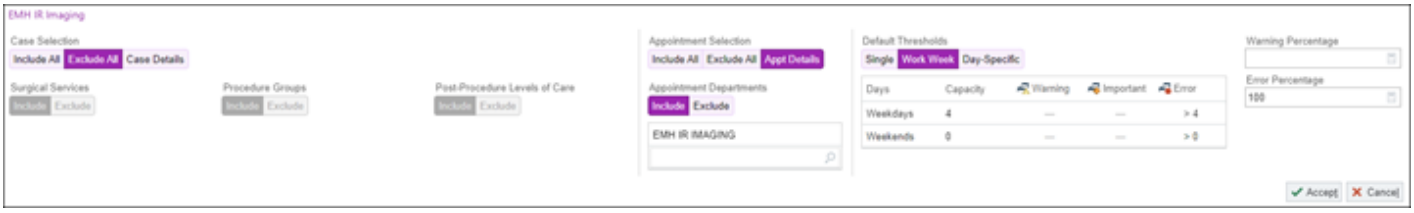
Collapsed group view of the Procedural Admission Group Editor activity.



Expanded group editing view of an admission group that represents an entire hospital's procedural admission capacity.

To configure procedural admission groups that include all procedural admission appointments and cases for your revenue locations:

1. In Hyperspace, open Category List Maintenance for OR Procedural Admission Groups – Admit Group (IEAF 54975).
2. Add category values to represent your admission groups. You should select something like "Entire Hospital." See Modify a Category List's Values for more information on editing a category list.
3. Open the Procedural Admission Group admin activity for your revenue location (EAF).
4. Click Add to add a new admission group from your category list. Select your hospital-wide groups.
5. Select Include All cases. See the Schedule Cases Based on Hospital Capacity Priorities topic for more information on including cases within your procedural admission groups.
6. Select Include All appointments.
7. Enter your typical capacity for new procedural admissions into the Default Thresholds grid (I EAF 54987). This number could be:
    - A single value if the inpatient units to which your cases and appointments are admitted maintain the same capacity throughout the week
    - Work week versus weekend values if these units close or reduce capacity over the weekend
    - Day-specific values if capacity varies for these units throughout the week
8. Edit the warning and error percentages (I EAF 54988 and I EAF 54989) to control when warnings and errors appear for users. By default, soft-stop scheduling warnings appear when planned admission encounters exceed 85% of the defined capacity threshold. To show schedulers hard stops when an admission group exceeds more than 100% of the defined capacity threshold, set an error percentage. By default, no hard stops appear to schedulers.



Expanded group editing view of an admission group that represents a specific scheduling department's procedural admission capacity.

To configure procedural admission groups that include a subset of procedural admission appointments:

1. In Hyperspace, open Category List Maintenance for OR Procedural Admission Groups – Admit Group (I EAF 54975).
2. Add category values to represent your admission groups. These values should reflect the HODs which you've chosen to include in the group or the hospital areas your HODs admit to. See the Modify a Category List's Values topic for more information on editing a category list.
3. Open the Procedural Admission Group admin activity for your revenue location.
4. Click Add to add a new admission group from your category list. Select your scheduling department-specific groups.
5. Select Exclude All cases unless building an admission group that includes both specific cases and specific appointments. See the Schedule Cases Based on Hospital Capacity Priorities topic for more information on including cases within your procedural admission groups.
6. Select Appt Details and list out the appointment scheduling departments (I EPT 7070) whose procedural admissions you want to include in this group. These departments must be HODs.
7. Enter your typical capacity for new procedural admissions into the Default Thresholds grid (I EAF 54987).
8. Edit your warning and error percentages (I EAF 54988 and I EAF 54989) to control when warnings and errors appear for end users.

Grant Ability to Bypass Procedural Admission Hard-Stop Scheduling Errors

If you want some users to be able to bypass hard stops that appear when an expected procedure sends a procedural admission group past its error threshold, you can give them security to do so:

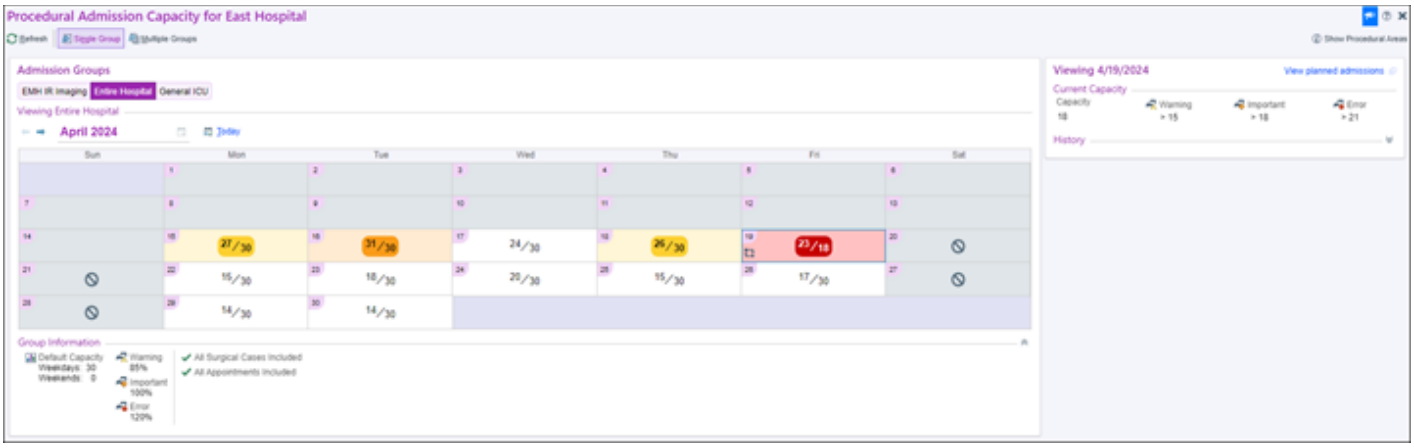
1. In Hyperspace, open Cadence Security for your identified security classes.
2. Go to the Appointment Entry Form.
3. Set security point 5093-Bypass Hospital Capacity Hard Stops to Yes.
4. Repeat for every security class you want to grant bypass access to.

Let Users View and Override Upcoming Procedural Admission Capacity Warnings

The Procedural Admission Capacity activity lets schedulers and bed planners view upcoming volumes of procedural admissions to aid with their schedule planning. Users can monitor future procedural admission volume and capacity warnings across different scheduling areas, and they can open a drilldown report to discover which encounters are contributing to volume on a particular day. From that report, users can open patient charts and use Secure Chat to message providers about moving their procedure to reduce stress on the hospital's available beds if needed.

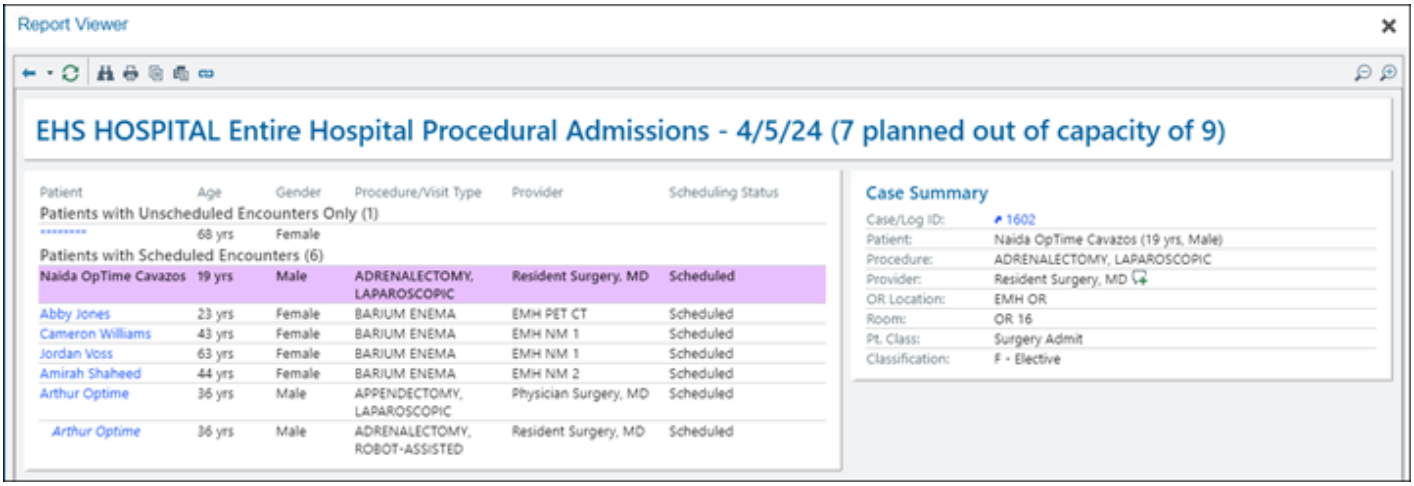
In addition, bed planners can use the activity in their daily bed huddles to update capacity thresholds for specific groups on specific days as needed to account for emergent factors like staffing or surges in census. These overrides are immediately visible to schedulers to provide them with the most up-to-date information about the hospital's capacity.

Access to this calendar is controlled by two Grand Central security points, with a view-only mode for scheduling managers and an edit mode for bed planners and capacity command center staff that lets those users override default capacity thresholds due to emergent issues like staffing or surges in procedural admissions.



The view-only Procedural Admission Calendar activity in Single Group mode.

Scheduling, OR, and capacity management staff and bed planners can also drill down into the procedural encounters currently contributing to an admission group's volume by clicking the View planned admissions link in the sidebar when on Single Group mode, or the Planned capacity link when on Multiple Group mode. From this encounter drill down report, they can use Secure Chat to message encounter providers about moving their procedures if needed.



View of encounter drilldown report when a patient is selected.

To grant your procedural scheduling managers view-only access to the Procedural Admission Capacity activity:

1. Open Grand Central Security for your scheduling security classes.
2. Add security point 6500-May View Capacity for Procedural Admission Groups.
3. Repeat for every security class you want to grant view-only access to the calendar to.

To grant your bed planners and capacity management staff edit access to the Procedural Admission Capacity activity:

1. Open Grand Central Security for your bed planning and capacity management security classes.
2. Add security point 6501-May Edit Capacity for Procedural Admission Groups.
3. Repeat for every security class you want to grant edit access to the calendar to.

Additional Setup for Appointment-Related Labels and

Forms

There are some additional options for printing visit labels and encounter forms during scheduling. You might set up these options if you need to use department-specific templates or prefer to print files at the time of scheduling.

Enable Automatic Printing of Visit Labels During Scheduling

You can set up automatic printing of visit labels at scheduling at either the system or department level.

Prerequisites

Make sure you have mapped your printers to the correct print classification and that you have created your label template. Creating label templates is similar to creating other SmartText records.

Refer to the Create and Edit a SmartText topic for instructions on creating label templates. Cadence label templates are created with a SmartTool activity called the RTF Label Editor, or you can use the SmartText Editor to create Cadence Label Templates.

Also, you need to make sure you have identified the label template to use.

1. In Hyperspace, open Cadence System Definitions or your department record.
   - To open Cadence System Definitions, search for Cadence System Definitions.
   - To open a department record, go to Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Select the Communications > Labels form (In the Hyperdrive client starting in August 2023, Visit Labels form).
3. Under the Default for Printing during Appt Entry heading, decide how the labels print for future, past, and same day appointments.
   - 1-Prompt - Default YES. Prompt the scheduler to choose whether or not to print labels, with the default being to print labels.
   - 2-Never Print - No Prompt. Never prompt the scheduler to print labels and labels are never printed. You might choose this option if you print all your labels in batch.
   - 3-Always Print - No Prompt. Never prompt the scheduler to print labels and labels are always printed.
   - 4-Prompt - Default NO. Prompt the scheduler to choose whether to print labels, with the default being to not print labels.
   - 5-Prompt - Without a default. Prompt the scheduler to choose whether to print labels, with no default set. This is the default option.

Enable Automatic Printing of Encounter Forms During Scheduling

You can set up automatic printing of encounter forms at scheduling at either the system or department level.

Prerequisites

You need to create the encounter form templates before you can associate them with appointment actions. Encounter form templates are created with a SmartTool activity called the RTF Encounter Form Editor.

You also need to build printer classifications and you need to make sure you have identified the encounter form template to use.

1. In Hyperspace, open Cadence System Definitions or your department record.
   - To open Cadence System Definitions:
     - Search: Cadence System Definitions
     - Path: Epic button > Admin > Schedule Admin > Cadence System Definitions
   - To open a department record, go to Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Select Encounter Form.
3. Under the Default for Printing during Appt Entry heading, decide how the encounter forms print for future, past, and same day appointments.
   - 1-Prompt - Default YES - Prompt the scheduler to choose whether or not to print encounter forms, with the default being to print the forms.
   - 2-Never Print - No Prompt - Never prompt the scheduler to print the forms and forms are never printed. You might choose this option if you print all your encounter forms in batch.
   - 3-Always Print - No Prompt - Never prompt the scheduler to print forms and the forms are always printed.
   - 4-Prompt - Default NO - Prompt the scheduler to choose whether to print forms, with the default being to not print forms.
   - 5-Prompt - Without a default - Prompt the scheduler to choose whether to print forms, with no default set. This is the default option.

Print Visit Labels in Batch

If your department prints visit labels for charts or prints labels for every appointment, you might want to print the labels all at once with the Batch Scheduler. By printing the labels ahead of time in batch, your front desk staff can have them ready for the day's appointments and don't need to worry about printing labels for individual appointments.

Refer to the Batch Scheduler Setup: Essentials topic for additional details on setting up batch processes.

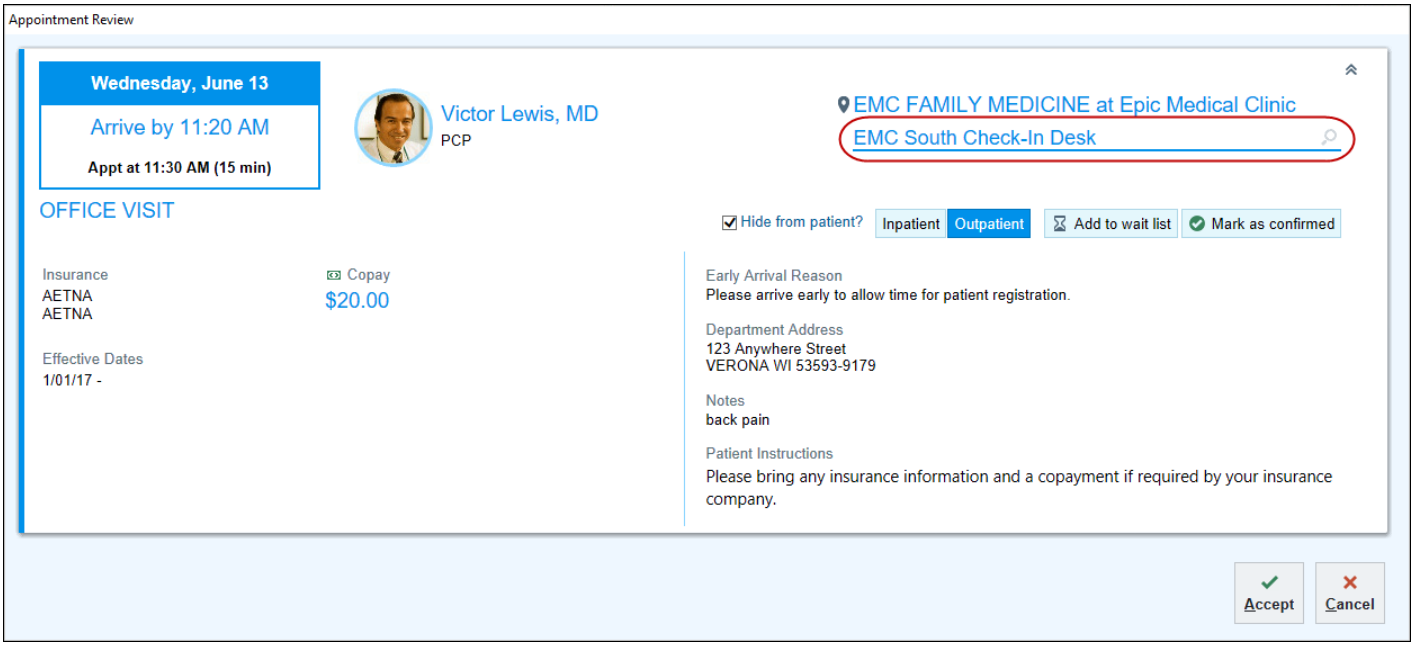
1. In Cadence Text, follow the path Utility Menu > Batch Jobs > Job.
2. Create a new batch job for visit labels. Use batch template 204-Visit Labels by Date and Department. Refer to the Cadence batch template reference content for more information.
3. Add the batch job to a batch and add that batch to a batch run.

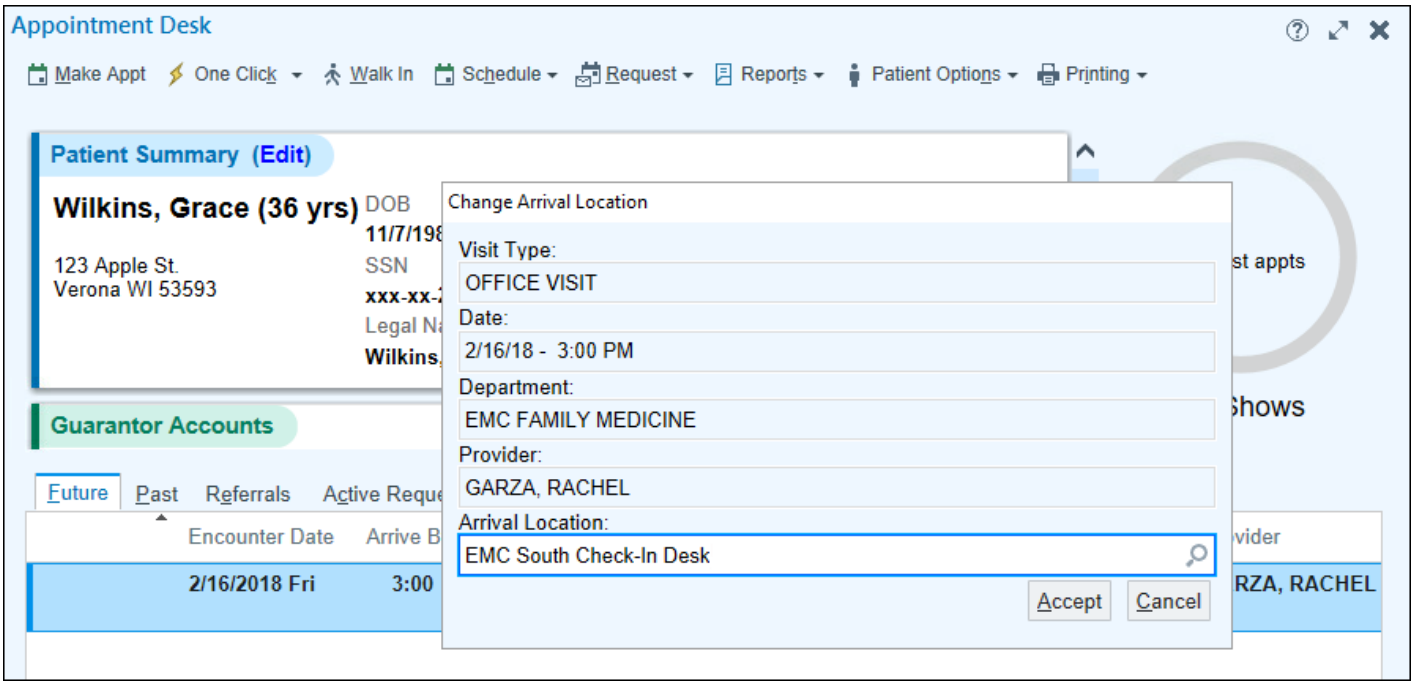
Let Patients Know Where to Check In for Appointments with Arrival Locations

Arrival locations make it possible for you to be more specific about where a patient should arrive for an

appointment at your organization. For departments that have multiple check-in locations, schedulers can specify an arrival location for an appointment so that the patient knows exactly where to arrive. This feature makes it easier for patients to get to their appointments on time by checking in at the right location. For example, say that your ultrasound imaging department has both north and south check-in desks. You can create arrival locations for both check-in desks and then associate the arrival locations with the departments. When schedulers make appointments for ultrasounds, they can choose which arrival location is appropriate for the appointment. This configuration helps patients know which end of the clinic to arrive in and makes sure that they're checking in close to where their appointment actually takes place.

Schedulers can assign the arrival location for an appointment during scheduling in Appointment Review or after scheduling from the Appointment Desk. They can choose from only the specified arrival locations for the department or provider. For joint appointments, the system uses the primary provider's default arrival location, but the scheduler can choose from the arrival locations configured for all the providers on the appointment. For more information about joint provider sorting, refer to the Determine the Order of Providers for Joint Appointments topic.





Information about an appointment's arrival location appears elsewhere in the system to make sure that the patient and other users are fully informed about where the patient needs to go:

- Welcome shows patients their arrival location on the appointment check-in page, the directions page, and the printed itinerary.
- MyChart shows patients their arrival location on the Appointments and Visits page and the Visit Details page for upcoming appointments and surgical cases. Note that arrival location does not appear for preadmissions.
- Patients can review arrival locations for upcoming appointments on their After Visit Summaries and on other documents that show future appointments.
- You can show the arrival location for an appointment in Cadence letters, OpTime letters, and the patient visit guide.
- Users can see the arrival location in the Expand Appointment window accessible from the Appointment Desk.
- Users can sort appointments by arrival location in the Department Appointments report using report column 1970-Appt Arrival Location.

Additionally, you can create Department Appointments reports that filter appointments by arrival location. This allows front desk staff to work from a report that is specific to their location. The arrival location settings do not appear in the report settings by default.

The arrival location feature is also integrated with the Transport module to ensure that transporters who help patients make it to their arrival location know exactly where to go. If a transport request is created for an appointment that has an arrival location, the request automatically uses that arrival location as the destination.

Considerations: Check It Out in the Foundation System

The Foundation System has two arrival locations: 2089-EMC North Check-In Desk and 2090-EMC South Check-In Desk. These arrival locations are linked to several Foundation System departments as an example of one way arrival location functionality can be useful. In this example, some departments (such as EMC CT Imaging and EMC MR Imaging) are located at the north end of the building, while other departments (such as EMC Family Medicine and EMC Physical Therapy) are located at the south end. With this setup, front desk staff scheduling patients in EMC Family Medicine, for example, can inform those patients to go to the south check-in desk when they arrive at the clinic.

You can check out this feature by logging in to the Foundation Hosted environment as your organization's front desk user (ESDESK) and scheduling patients in one of these departments. You can also try filtering the Department Appointments report by one of the arrival locations.

Create Arrival Locations for Departments, Providers, and Visit Types

You can configure arrival locations at the department, provider, and visit type levels, with the visit type-level locations overriding the provider- and department-level locations. At any level, you can specify a default location for appointments scheduled in the department, with the provider, or with the visit type.

If a provider has different arrival locations from those of the department she works in, add her available arrival locations to her provider record. The system uses these arrival locations instead of the department-level arrival locations for appointments scheduled with this provider.

An arrival location can represent a department in your facility or it can be a special arrival location, such as the 2nd Floor West Desk. If you're using patient location tracking, you might already have the department locations in your system. For more information about patient location tracking, refer to the Patient Location Tracking Setup and Support Guide.

An arrival location can also represent a location that a clinician travels to for an appointment, such as a nursing home. Patients need to know that they shouldn't come to the clinic for these types of appointments. In this scenario, you can associate an arrival location with a place of service so that appointments scheduled with the provider at a particular arrival location have a different place of service from appointments that are scheduled with the provider at the clinic. This setup allows the patient visit guide to show the correct location for a patient's appointment and the remote arrival location appears in MyChart's list of upcoming appointments. Note that visit types with remote arrival locations cannot be scheduled through MyChart.

You need to create patient location facility (PLF) records for each arrival location and then associate your department and arrival location patient location records with departments and providers. Starting in May 2023, to quickly see which records are using your arrival locations, select the Linked Records form in the Patient Location Builder.

Prerequisites

You must have Shared security point 2504-May Edit Location Records to access the Patient Location Builder.

Create Arrival Locations

1. In Hyperspace, open the Patient Location Builder (search: Patient Location Builder).
2. In the Location type (I PLF 50) field, enter Arrival Location or Department.
3. If you're creating a location for a department, enter the department in the Department (I PLF 110) field.

4. For an arrival location, set the Census Location? (I PLF 210) field to No. For a department, the system completes the Census Location? field for you based on information from the linked department.
5. In the Patient-friendly name (I PLF 430) field, enter a name for the arrival location that is familiar to patients. This name appears in Welcome and patient letters.
6. On the Appointments form, in the Associated POS (I PLF 530) field, enter a place of service record if appointments scheduled at this arrival location should have a different place of service from those that are scheduled in the same department or with the same provider, but not at this arrival location. The remote arrival location appears in MyChart's list of upcoming appointments. Note that visit types with remote arrival locations cannot be scheduled through MyChart.
7. In the Patient Directions (I PLF 450) field, enter instructions for how the patient should get to the arrival location. If you don't enter a value in this field and the arrival location is associated with a place of service, the system uses the location instructions entered in the Directions (I EAF 495) field in the place of service record. If you don't enter a value in this field and the arrival location is not associated with a place of service, the system uses the location instructions entered in the Location Instructions (I DEP 131) field in the department record.
8. Repeat steps 1-7 for additional arrival locations.

Add Arrival Locations to Department Records

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Arrival Location form.
3. In the Available arrival locations (I DEP 3415) list, enter arrival locations you created. Schedulers can select these arrival locations for an appointment in the department.
4. In the Default (I DEP 3418) field, enter Yes for the arrival location that is applied to appointments in the department by default. In February 2023 and earlier, enter this location in the Default arrival location (I DEP 3410) field.
5. To specify that an arrival location be used as the default for a temporary amount of time, use the Start Date (I DEP 3416) and End Date (I DEP 3417) fields. This setting is available starting in May 2023. These temporary default arrival locations are useful if a department is temporarily relocated or if the normal entry way for the department can't be used so an alternate is needed but will eventually go back to the normal arrival location.
6. In the Require manual selection? (I DEP 3420) field, enter Yes to leave the Arrival Location field blank in Appointment Review and require schedulers to select an arrival location. If the scheduling workflow does not include Appointment Review, the system uses the default arrival location for the department or provider. The default value of this field is No, and the system always selects the default arrival location for the department or provider.

Add Arrival Locations to Provider Records

1. In Hyperspace, open a provider record (search: Provider).
2. On the Departments form, select the magnifying glass in the Arrival Location field for a department.
3. In the Edit Arrival Location window, enter arrival locations for the provider specific to that department in the Available arrival locations (I SER 14010) list.
4. In the Default (I SER 14013) field, enter Yes for the arrival location that is applied to appointments with the provider by default. In February 2023 and earlier, enter this location in the Default arrival location (I SER 14005) field.

5. To specify that an arrival location be used as the default for a temporary amount of time, use the Start Date (I SER 14011) and End Date (I SER 14012) fields. This setting is available starting in May 2023. These temporary default arrival locations are useful if a department is relocated for a short period or if the normal entry way for the department can't be used so an alternate is needed but will eventually go back to the normal arrival location.
6. In the Require manual selection? (I SER 14015) field, enter Yes to leave the Arrival Location field blank in Appointment Review and require schedulers to select an arrival location. If the scheduling workflow does not include Appointment Review, the system uses the default arrival location for the department or provider. The default value of this field is No, and the system always selects the default arrival location for the department or provider.
7. Repeat steps 2-5 for additional departments in which the provider sees patients.

Add Arrival Locations to Visit Type Records

In the Foundation System, we use this configuration for telemedicine visits in several departments including family medicine, cardiology, obstetrics, dermatology and behavioral health. When patients are scheduled with these visit types, Patient's Home is indicated as the Appt Arrival Location so patients are reminded they do not need to go to the clinic. To see this configuration, log in to the Foundation Hosted environment as your patient access administrator (ESADM) in the Family Medicine department and schedule a patient for an appointment with visit type 9000-Telemedicine Remote Visit.

You can also use this configuration when an appointment with a certain visit type takes place in a different location depending on the provider's location. For example, say that a provider in a remote clinic wants patients to go to a certain telemedicine room in a different clinic for video visits. You can specify the department, provider, and telemedicine room as an arrival location in the visit type record. When an appointment is scheduled using that visit type, the patient is directed to the specified telemedicine room. Work with providers to determine exactly where their patients need to check in and whether they need to check in at different locations depending on the appointment's visit type.

The system determines the visit type-level arrival location based on the following hierarchy:

- If an appointment using the visit type has both the department and provider specified in a line in the Provider and department overrides table, the system uses the arrival location from that line.
- If an appointment using the visit type has only the department specified in a line in the Provider and department overrides table, the system uses the arrival location from that line.
- If an appointment using the visit type doesn't match any lines in the Provider and department overrides table, or the table is blank, the system uses the default arrival location.

To configure arrival locations at the visit type level:

1. In Hyperspace, open a visit type record (search: Visit Type).
2. On the Arrival Locations form, in the Default arrival location (I PRC 1760) field, enter the arrival location that is applied to the visit type by default.
3. In the Require manual selection? (I PRC 1765) field, enter Yes to leave the Arrival Location field blank in Appointment Review and require schedulers to select an arrival location. If the scheduling workflow does not include Appointment Review, the system uses the default arrival location for the visit type. The default value for this field is No, meaning the system uses the default arrival location.
4. Configure the Provider and department overrides table as necessary, specifying values in the Department (I PRC 1770), Provider (I PRC 1775), Default Location (I PRC 1780), and Require selection? (I PRC 1785) fields to identify the arrival location for a specific provider and department when an appointment uses the visit

type, and whether to require schedulers to select an arrival location in Appointment Review. Starting in May 2023, use the Start Date (I PRC 1781) and End Date (I PRC 1782) fields to make an arrival location override only apply at certain times. These temporary default arrival locations are useful if a department is relocated for a short period or if the normal entry way for the department can't be used so an alternate is needed but will eventually go back to the normal arrival location.

5. In the Appointment Location Settings section, optionally enter a provider type in the Provider type to use for appointment location (I PRC 1750) field. If you enter a provider type in this field, the first provider on an appointment with a matching provider type is used for all arrival location calculations. For example, you might enter a Telemedicine Equipment provider type in this field for a Telemedicine visit type so that those visits automatically use the telemedicine location instead of the video visit clinician's location, while leaving the clinician as the primary provider.

Show Arrival Locations Throughout the System

You can configure arrival locations to appear in the Department Appointments report, the Expand Appointments window, and in appointment reminders.

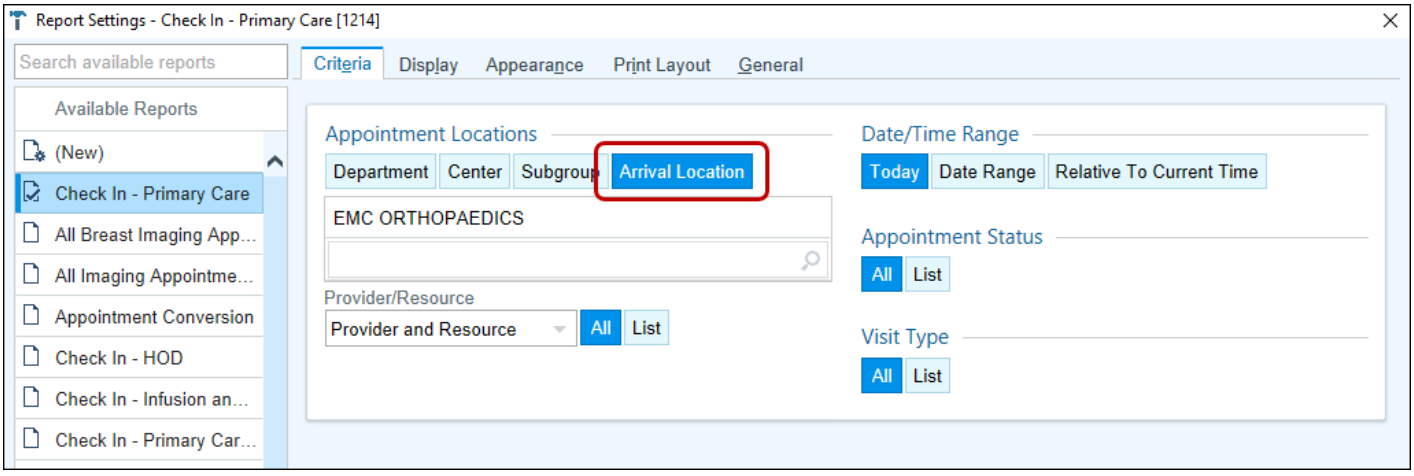
Customize Arrival Location in the Expand Appointment Window

The arrival location for an appointment appears in HTML table 10000-AS Appointment Information in the Expand Appointment window (HTML display 4-AS Appointment). If you use a custom copy of this table, you can add extension 40209-ES Appt Arrival Location HTML Display to it to show arrival locations. By default, the record name of the arrival location appears. You can show the patient-friendly name (I PLF 430) instead by creating a copy of extension 40209 and setting the first parameter to 0. Refer to the Customize the Expand Appointment Window topic for additional information.

Filter the Department Appointments Report by Arrival Location

The Arrival Location mode does not appear by default in the report settings for the Department Appointments report. Follow these steps to make it available:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Reports > General form.
3. Enter Yes in the Show arrival location settings? (I SDF 9520) field.



Show Arrival Locations in Cadence and OpTime Letters

To have arrival locations appear in your Cadence and OpTime letters, you can add SmartLink 60570-Visit Arrival Location (mnemonic: .VISARRLOC) to SmartTexts that have the functional type 3000-Cadence Letter Template or 905-OR Letter Template. Refer to the following topics for more information:

- Set Up Appointment-Related Letters, Labels, and Printed Forms
- Patient Visit Guide Setup and Support Guide
- Remind Patients About Upcoming Cases

Update the Arrival Location for a Large Number of Appointments

In certain situations, you might need to modify the arrival location for a large number of appointments. For instance, a facility's arrival location might change temporarily due to construction or other factors, or appointments that were changed from in-person visits to telehealth visits might need different arrival instructions. In scenarios like this, you can use the Arrival Location Update utility to update the arrival location for a subset of appointments, rather than having to update arrival location information manually for each encounter. Note that past appointments, canceled appointments, and appointments that have been checked-in will not be updated with this utility.

1. Access the utility in Cadence Text by going to Utility Menu > Arrival Location Update.
2. On the General Utility Menu screen, you can set the Mode to Report, which generates a report of encounters to be updated with the new arrival location, or Fix, which directly updates the arrival location (I EPT 7029) for the chosen encounters. Report is selected by default.
3. You can use the Exception File and the Exception Subset to store a list of exceptions, that is, the contacts that the utility isn't able to update. Enter a file path or the name of a subset where the utility should store a list of all encounters with exceptions. Use the Exception Subset if you want a list of patient IDs and encounters that aren't updated by the utility. Use the Exception File if you also want to see the exception type and exception description for each contact.
4. On the Change Method screen, you can choose Set Default Arrival Location or Select Arrival Location. When you choose Select Arrival Location, you can enter a new arrival location manually. Set Default Arrival Location is selected by default. When Set Default Arrival Location is selected, the system determines a default arrival location based on a hierarchy that starts with the most specific setting and works its way back to the least specific setting:
    - Visit Type override table row, for a specific provider and department combination
    - Visit Type override table row, matching only for a department
    - Visit Type default settings
    - Provider default settings
    - Department default settings
5. On the Record Selection screen, you can use the Patient Contacts option to limit the arrival location change to patient contacts you choose. If you've created a subset of patient contacts, you can enter it formatted as "set <subset name>."
6. You can use the Success File Path option to specify a location for the output file created by running the utility. This is required for Report Mode.
7. When you run the utility, the report output shows a list of records that will be changed and includes the following information:
    - Patient appointment CSN, which can be used with the Subset Import Utility to create additional subsets if necessary.
    - Old arrival location
    - New arrival location

Calculate Travel Time Between Appointments

You can automatically factor in travel time when scheduling appointments for patients across your organization. This travel time helps keep patients on time for their appointments. You can specify travel time between centers or between travel time groupers that you can assign to departments and arrival locations. For example, you might create a travel time grouper for arrival locations and departments that are in the same building. The system warns schedulers about scheduling an appointment without allowing enough travel time for the patient to get there from his previous appointment.

The system calculates the travel time between two appointments as shown in the tables below, evaluating each row in the table until it finds a match.

Both Appointments Have an Arrival Location with a Travel Time Grouper

	Scenario	Travel Time
1	The appointments have the same arrival location.	0 minutes
2	The grouper-to-grouper travel time has been defined.	Use the grouper-to-grouper travel time.
3	The center-to-center travel time has been defined.	Use the center-to-center travel time.
4	No travel time has been defined.	0 minutes

All Other Appointments

	Scenario	Travel Time
1	The appointments are in the same department.	Use the department's internal lag time (I DEP 180).
2	The appointments are in different departments and the departments have travel time groupers defined.	Use the grouper-to-grouper travel time.
3	The center-to-center travel time has been defined.	Use the center-to-center travel time.
4	No travel time has been defined.	0 minutes

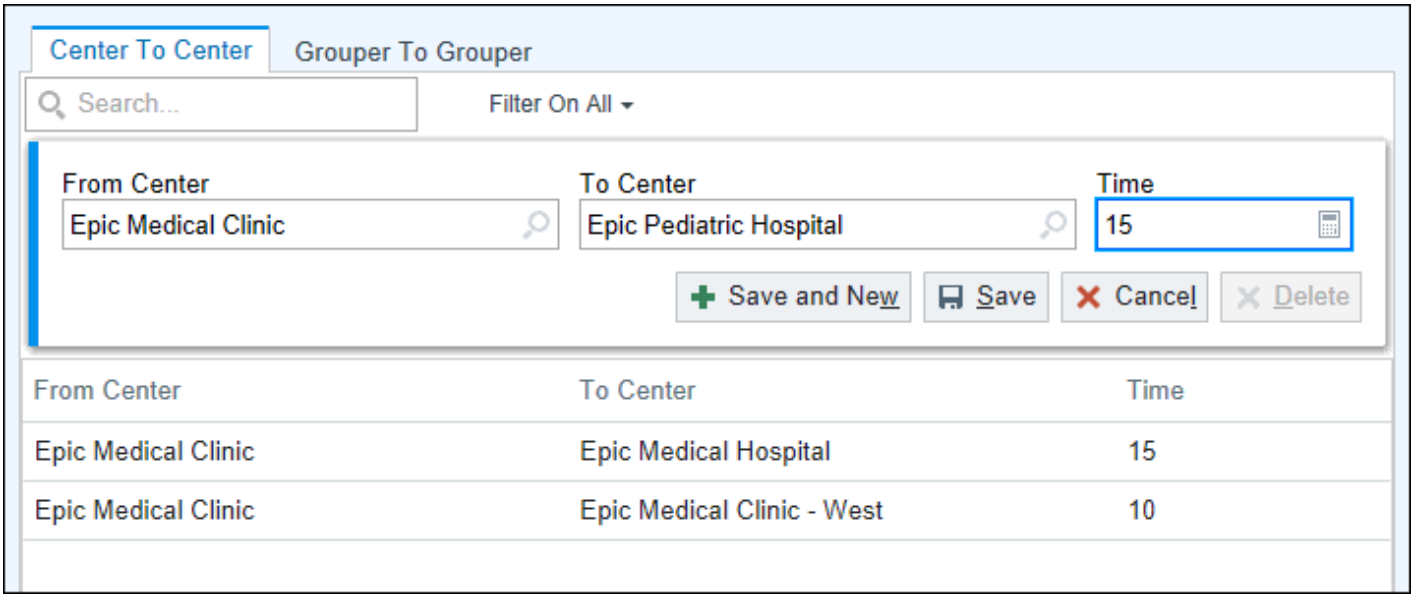
Define the Travel Time Between Centers

You must create centers and link your departments to them before you can define the travel time between centers. For more information, refer to the Link a Department to a Center topic.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Travel Time form and make sure you're on the Center to Center tab.
3. In the Center to Center table, enter your centers and how many minutes it takes patients to travel between them.
    - The system assumes that it takes the same amount of time for a patient to return from the To Center to the From Center, unless you enter this pair of destinations in reverse with a different

travel time.

- Enter the same center in the From Center and To Center to allow travel time between departments in the same center.



Define the Internal Lag Time for a Department

When two appointments do not have a travel time grouper and are scheduled in the same department, you can ensure a patient has enough time to get to his next appointment by defining an internal lag time for the department.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the General > Dept Type/Offsets form.
3. In the Internal lag time (I DEP 180) field, enter the number of minutes to keep between appointments for the same patient in the department.

Define the Travel Time Between Travel Time Groupers

Travel time groupers allow you to define the travel time between appointments at a more granular level than centers. You can assign travel time groupers to departments and arrival locations. For more information about arrival locations, refer to the Let Patients Know Where to Check In for Appointments with Arrival Locations topic.

Complete the following tasks to start using travel time groupers:

- Create your travel time groupers
- Assign the groupers to your arrival locations and departments
- Define grouper-to-grouper travel time in Cadence System Definitions

Prerequisites
You must have Shared security point 2504-May Edit Location Records to access the Patient Location Builder.

Considerations: Try It Out in the Foundation System

The Foundation System uses travel time groupers for its two example arrival locations: 2089-EMC North Check-In Desk and 2090-EMC South Check-In Desk. You can see how travel times affect the scheduling workflow by trying it out for yourself in the Foundation Hosted environment:

1. Log in as your organization's front desk user (ESDESK) to the EMC Family Medicine department.
2. On the Appointment Desk, schedule an office visit for a patient.
3. Transcribe an MRI order for the patient.
4. Log out or change contexts to the EMC MR Imaging department.
5. On the Appointment Desk, schedule the MRI order to begin at the time that the consult from step 2 ends. For example, if the consult is scheduled for Monday from 8:00 AM to 8:30 AM, schedule the MRI for Monday at 8:30 AM.

Because the travel time between the appointments' arrival locations is ten minutes, appointment errors appear, notifying you that the patient wouldn't make it to her second appointment on time.

Create Travel Time Groupers

Create your travel time groupers in the Travel Time Grouper (I PLF 1300) category list. For more information about working with category lists, refer to the Modify a Category List's Values topic. Consider the layout of your organization when you create groupers.

- If several arrival locations or departments are in the same building, create a travel time grouper for the building.
- If several buildings are close together, you might alternatively create a travel time grouper for the arrival locations or departments in those buildings.
- You might also consider creating a travel time grouper for a department so that all of the arrival locations in that department use the department's internal lag time (I DEP 180) between appointments instead of a grouper-to-grouper travel time.
- Keep in mind that you can assign only one travel time grouper to each arrival location and department, so don't create groupers thinking that you can include certain arrival locations or departments in more than one grouper.

Assign Travel Time Groupers to Arrival Locations

1. In Hyperspace, open an arrival location in the Patient Location Builder (search: Patient Location Builder).
2. Select the arrival location's travel time grouper in the Travel time grouper (I PLF 1300) field.

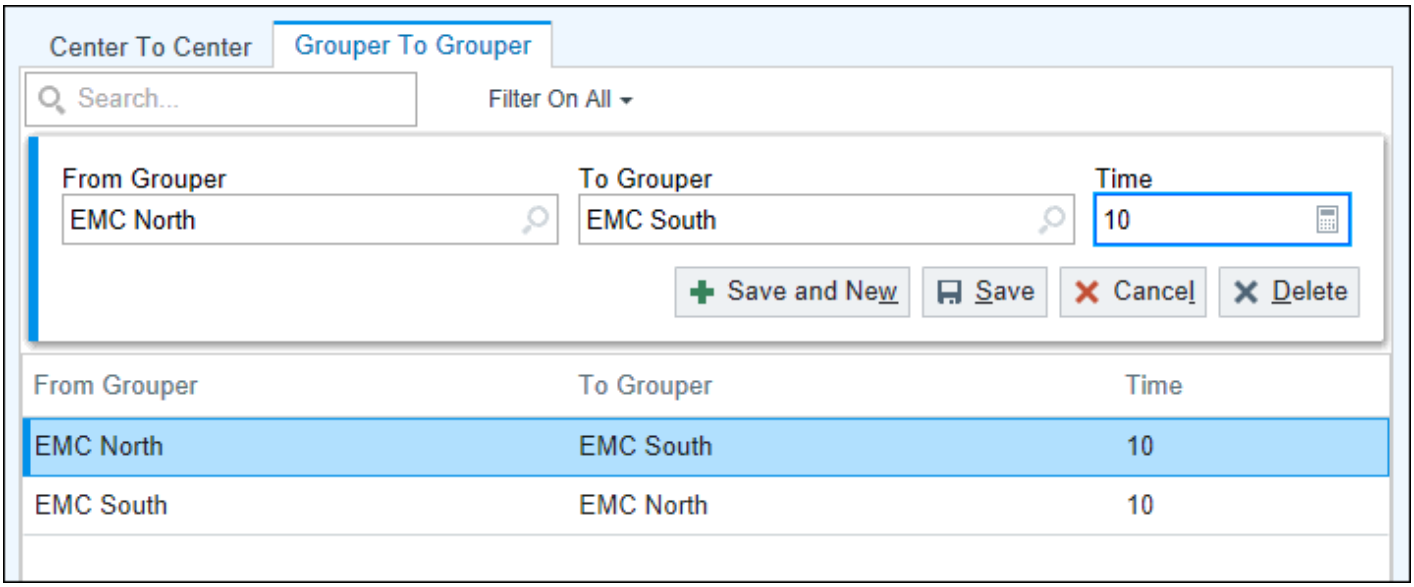
Assign Travel Time Groupers to Departments

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. On the General > Dept Type/Offset, select a travel time grouper in the Travel time grouper (I DEP 3425) field. You can also specify the internal lag time for the department on this form if needed.

Define the Travel Time Between Groupers

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Travel Time form.
3. Select the Grouper to Grouper tab.

4. Complete the Grouper to Grouper table. Enter travel time groupers in the From Grouper (I SDF 9500) and To Grouper (I SDF 9505) columns and enter a corresponding travel time in the Travel Time (I SDF 9510) column. Keep the following in mind as you configure lines in the table:
    - You can specify travel times only in multiples of five. For example, you can use five and 10 minutes, but not 12 minutes.
    - If the travel time from grouper A to grouper B is 10 minutes and the travel time from grouper B to grouper A is 15 minutes, you can accommodate this difference by adding two lines to the table for both directions. The system assumes it takes the same amount of time for both directions if there is only one line in the table for the groupers.
    - If there is a travel time within a travel time grouper, such as if the grouper includes arrival locations in several buildings, you can enter the same grouper in both the From and To columns and assign a travel time.



Show Schedulers Information for Cases Related to Appointments

There are often cases associated with particular appointments. For example, a pre-op appointment is usually related to an upcoming surgery.

You can create a custom report column to show information about these related appointments and cases on appointment reports, like the Department Appointments report. Specifically, you can display information about cases included in the same episode as an appointment.

Extension record 48746-OR Linked Case (Via Episode) Info allows you to show this information in your application reports. This records includes the following configurable parameters:

- 3-Episode Type List. Required. Determines the episode types to check. Enter the appropriate type or types. If this parameter is set to null (""), no episode types are used.
- 4-Episode Status List. Optional. Determines the episode status to check. Enter a status from the Status (I HSB 50) item. Set this parameter to 1, as released, to use a status of Active. Set this parameter to null to include all statuses.
- 5-Info Delim. Optional. Determines the delimiter that separates pieces of information in the column. As

released, this parameter is set to null, and a comma is used.

- 6-PAF ID. Required. Determines the column that is used to display information. Enter a column (PAF) record.

1. In Chronicles, enter LPP at the Database Initials prompt to access the Extensions master file.
2. Select Enter Data > Duplicate Extension and duplicate extension record 48746.
3. Open your duplicate record and access the Parameters screen. Enter the appropriate value for each parameter in the Value column.
4. In Hyperspace, open the Column Editor (Epic button > Tools > Column Editor).
5. Select the Create new column option.
6. Enter a name for your duplicate column and fill out other information as appropriate.
    - In the Field type field, enter Extension.
    - In the Master File field, enter EPT.
    - In the Text Ext field, enter your copy of the extension record from step 2.
7. Enter other column information as appropriate and click Accept.
8. Add your duplicate column to a column-based appointment report.

Show Schedulers Provider IDs before Names

Starting in February 2025

If you have generic provider (SER) records with similar lengthy names, you might want to add the provider record (SER) ID to the display name in scheduling workflows. This can help schedulers distinguish between records more easily. You can choose which provider types include the record ID for your entire organization, or you can set different provider types for individual service areas.

To set up this feature for your organization, complete the following steps:

1. In Hyperspace, open Cadence System Definitions.
2. Go to the Scheduling > General form.
3. In the Provider Types with Prefixed IDs (I SDF 16030) table, list the provider types you want to add the record ID to.

If you want to turn this feature off or customize the list for individual service areas, complete the following steps:

1. In Text, go to Cadence Management and open the service area you want to edit.
2. Go to the Cadence Scheduling Options 2 screen.
3. If you want to turn off the feature, set the Enable prefixing provider IDs (I EAF 55231) field to No. The default value is Yes.
4. To use a different list of provider types in the service area, in the Provider Types to prefix ID (I EAF 55230) table, list the Provider Types you want to add the record ID to. Leave this table blank to use the same provider types you entered at the facility level.

Require Schedulers to Enter Reasons When Moving or

Changing Appointments

You can require schedulers to identify why they move or change appointments. You might want to require reasons if you are tracking this info. Schedulers move appointments with the Move Appointments activity or the drag-and-drop functionality on View Schedules.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Scheduling > Cancel/Reschedule form.
3. In the Change reason required for Change Appt? (I SDF 10248) field, enter Yes if a change reason is required when schedulers change an appointment.
    a. Starting in November 2024, this can also be set at the department level (Department Edit > Scheduling form > General form > Change Reason Required for Change Appointment (I DEP 3130) field).
4. In the Change reason required for Move Appts? (I SDF 10249) field, enter Yes if change reasons are required when schedulers move appointments between providers.

Reduce the Time it Takes Schedulers to Move Appointments

Because of the dynamic nature of their schedules, departments like therapy often use the drag-and-drop feature on the Snapboard or Provider Schedule form to move appointments between providers on the same day. You can save time for schedulers in these departments by turning off the Appointment Review and the change reason windows when moving appointments. These windows might get in the way because schedulers in these departments don't usually need to review the appointment with the patient. You can also select a default change reason for moving appointments since the change reason is usually the same each time.

When a scheduler moves an appointment to a different day by dragging and dropping it, the original appointment is canceled and a new appointment is scheduled rather than changed. Starting in November 2023, you can set a default cancel reason to record for the original appointment for this action. Refer to the Assign Default Cancel Reasons to Scheduling Events topic for more information.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) or go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Scheduling > Display form.
3. Enter No in the Show appt review when moving appts? (I SDF 14093 or I DEP 1132) field.
4. Enter No in the Prompt for change rsn when moving appts? (I SDF 14094 or I DEP 1133) field.
5. Select a change reason in the Default change rsn (I SDF 14095 or I DEP 1134) field.

Control What Information Template Managers See When Rescheduling Appointments from the Template Editor

When template managers change a provider's template, a report shows the appointments that need rescheduling because of the change. The system configures this report automatically, but you can change the column order and appearance of the report. You might want to do this if your template managers need to see specific

appointment information when rescheduling.

1. In Hyperspace, follow the path Epic button > Admin > General Admin > Report Builder and enter 52-ES Reschedule Report Jump From Edit Template in the Report template field.
2. Select the General tab and enter a name for your report settings in the Name field.
3. Click Save.
4. Use the Display and Appearance tabs to configure the report settings. When you are finished, click Accept. Refer to the Reporting Workbench Setup and Support Guide for instructions on working with these tabs.
5. Open Cadence System Definitions (search: Cadence System Definitions).
6. Select the Reports > Plug-Ins form.
7. Enter your saved report setting in the Reschedule jump from Edit Template (I SDF 4022) field.

Let Schedulers See the Best Time to Call

Phone calls to patients are most effective if the scheduler directly talks to the patient rather than leaving a message. The scheduler has the best chance of reaching the patient during times identified in the patient's preferences. You can make it easy for schedulers to see this info by customizing reports to show these best times.

The following report columns show extended contact information. Schedulers double-click these columns to see and edit the patient's contact information as entered in the patient's preferences:

- 1117-Patient Callable Status. Shows an icon that represents the current status for calling the patient.
  - A house appears when the patient prefers your organization call them at home and now's a good time to call.
  - A cell phone appears when the patient prefers your organization call their mobile phone and now's a good time to call.
  - A yellow phone appears when the patient doesn't have a preferred number and now's a good time to call.
  - A phone with a red slash appears when the patient prefers not to be called for appointments.
- 1122-Best Call Number. Shows the best number to reach the patient for the current time.
- 1123-Best Call Time. Shows the best time to call the patient.

You might want to use all three columns together so schedulers can see the status, times, and phone numbers all in one place. You can add these columns to any of the following reports and work lists:

Appointment-Related Reports and Work Lists	Orders-Related Reports and Work Lists
Confirm Appointments work list	High Priority Orders report on the imaging Front Desk activity. Note: Schedulers can't double-click the columns in this activity to edit the patient's contact information.
Follow-up work list	Orders report on the scheduling Front Desk activity
Move Appointments report	Orders report on the imaging Front Desk activity
Reschedule work list	Schedule Orders work list
Wait List	

To add columns to a report or work list:

1. In Hyperspace, open the Report Settings window for a report or work list.
2. Select the Display tab.
3. Add one or more columns to the report. If you add multiple columns, you might want to keep them close together so schedulers can see all the columns at once.

Let Schedulers Fax Appointment Information

You might want to fax appointment information to affiliates or providers outside Epic if they frequently request information. This allows those clinics and providers to stay informed of the patient's healthcare activity.

Prerequisites
These instructions assume that you are using a Biscom fax server and that you have two printer device records created at your facility, one for the Biscom attachment and one for the Biscom environment. For more information about creating these device records, refer to the Create a Printer Device for BISCOM Faxing topic.

There are two steps to setting up faxing of appointment information: set up faxing and add the activity button a toolbar. You can set up faxing using an EPS device or a Perl script. If you fax notes through EpicCare Inpatient, you must use the same configuration for Cadence.

Set up Faxing with an EPS Device

1. Access the Categories (ECT) master file in Chronicles. Create one printer class (I ECT 97) category value.
2. Edit shared configuration record 1-Compiled Configuration. Navigate to the Printer Selection screen. In the Device Information table, add your print classification to the Printer Classifications column and give it an Override Output Format of Rich Text.
3. Access the Extension (LPP) master file. Duplicate extension 52601-Imaging Route Fax to Biscom Via Server Printing. Update the routine in the Code field, routePrint^RISFAX.
    - Set the tenth parameter to your custom print class.
    - Set the nineteenth parameter to 1.
    - Set the twenty-second parameter to the UNC directory into which EPS should place the envelope file. Make sure that this directory's name is enclosed in quotation marks. Note that EPS must have read and write permissions for this folder for the routing to succeed.

- Set the twenty-third parameter to the UNC directory into which EPS should place the attachment file. Make sure that this directory's name is enclosed in quotation marks. Note that EPS must have read and write permissions for this folder for the routing to succeed.

4. Add the routing extension that you configured to the Default Routing table, as described in the Configure Faxing Settings for the System or Department topic.

Add Faxing Activity Button to a Toolbar

The Itinerary Fax activity is accessed from the ES_ITINERARY_FAX_WEB button. Update your user roles to include this button so that users have access to the Itinerary Fax activity. Refer to the Modify a User's Options on an Existing Menu or Toolbar topic for information about editing user roles.

Customize the Itinerary Fax Report

Report 62043-ES Itinerary Fax is used by default when faxing appointment information. This report includes print group 62115-ES Itinerary Fax New and includes basic patient identification and demographic information followed by a list of the patient's future appointments. For each appointment, you'll see the date, time, and duration of the visit, as well as the visit type and department in which it's scheduled. Any patient instructions associated with that type of visit are also included. If needed, you can customize a copy of print group 62115 to use a different font, or to send a plain text version of the report if required by your fax vendor. You can also choose to use print group 62104-ES Itinerary Fax instead of print group 62115. You can customize a copy of print group 62104 to send a plain text version of the report if required by your fax vendor, to set the report header as the column header if your vendor is RightFax, and to use a different font.

Use Print Group 62104 Instead of Print Group 62115

1. In Cadence Text, go to Cadence Management > Reports, Print Groups > Dup Reports and create a copy of report 62043.
2. Edit your copy of report 62043 and replace print group 62115 with print group 62104.
3. In Hyperspace, open Cadence System Definitions.
4. Select the Communications > Letters form.
5. Enter your copy of report 62043 in the Fax Extension (I SDF 19101) field.

Customize Print Group 62115 or 62104

1. In Cadence Text, go to Cadence Management > Reports, Print Groups > Dup Print Groups and create a copy of print group 62115 or 62104.
2. Modify the parameters as needed. Refer to the help text or Data Handbook for information about each parameter.
3. Return to the Reports, Print Groups menu.
4. Select Dup Reports and create a copy of report 62043.
5. Edit your copy of report 62043 and replace print group 62115 with your copy of print group 62115 or 62104.
6. In Hyperspace, open Cadence System Definitions.
7. Select the Communications > Letters form.
8. Enter your copy of report 62043 in the Fax extension (I SDF 19101) field.

Change the Default Number of Days Included in the Report

Thirty days of appointments are included in both print groups by default. If you needed, you can specify a different number of days in the new Fax default days (I SDF 19102) item in Cadence System Definitions. Users can

also select the dates to use in the Itinerary Fax activity.

1. In Hyperspace, open Cadence System Definitions.
2. Select the Communications > Letters form.
3. Enter a value in the Fax default days (I SDF 19102) field. The default value is 30.

Automatically Cancel Appointments

Depending on your organization's appointment confirmation policies, you might treat appointments that haven't been confirmed by a certain date as available slots for other patients. Whether you confirm appointments through automated calling or other communication methods, you can configure your system to automatically cancel appointments that haven't been confirmed, so that schedulers can immediately see those slots are open. Or, your organization might want to automatically cancel confirmed appointments related to a patient's hospital admission after the patient is discharged. You can also automatically cancel confirmed appointments starting in May 2022. This configuration includes the following steps:

- Creating a unique cancellation reason for automatically canceled appointments.
- Deciding which criteria define an unconfirmed appointment that should be canceled, and creating a Reporting Workbench report to find those appointments.
- Linking your Reporting Workbench report to an action pack that cancels appointments.
- Including the Reporting Workbench report in a batch job that we suggest you run nightly.

These steps are explained in more detail below.

Prerequisites

Before you begin, your organization should decide what defines a non-confirmed appointment that should be automatically canceled—if, for example, you want to cancel unconfirmed appointments one day before they're scheduled, or two, or three. You should then decide how many days before that scheduled appointment to begin contacting patients for confirmation.

Starting in May 2022, your organization can change the parameters to skip the check for a communication tracking database record. If your organization doesn't link a communication tracking database record to all appointments, this means you can easily cancel a wide range of appointments.

To protect against accidental mass cancellations, work with your Epic representative to configure the maximum appointment count threshold. This is the maximum number of appointments that are canceled at once when the report runs. Contact your Epic representative and mention parent SLG 3479799.

Create and Set a New Cancellation Reason for Automatically Canceled Appointments

Creating a unique cancellation reason for automatically canceled appointments that applies across your organization ensures that any reports you run on cancellations can consistently identify these appointments. Action pack 40254-ES Cancel Unconfirmed Appointments uses this reason by default.

1. In Hyperspace, open Category List Maintenance (search: Category List Maintenance) and create a value for automatically canceled appointments in the Reason for Cancellation (I EPT 7300) category list. Refer to the Modify a Category List's Values topic for more information.
2. In Hyperspace, open Cadence System Definitions and navigate to the Scheduling > Cancel/Reschedule

form. In the For Action Pack cancel (I SDF 20040) field, enter the cancellation reason you created for automatically canceled appointments.

Customize How Appointments Are Canceled by the Action Pack

Starting in May 2022

If you want to customize how appointments are canceled, you can customize a copy of action pack 20002-ES Cancel Unconfirmed Appointments and extension 40254-ES Cancel Unconfirmed Appointments:

1. In Chronicles, open the Extension (LPP) master file and create a copy of extension 40254-ES Cancel Unconfirmed Appointments.
2. Go to the Parameters screen and edit the parameters. You can determine what is canceled by changing the following parameters in your copy of the extension:
   - Cancellation Reason. Enter the cancellation reason to use when canceling appointments. If this parameter is left blank, the cancellation reason specified in Action Pack Cancel (I SDF 20040) field is used.
   - Skip linked CAL record? If this value is set to 0-No or left blank, the action pack only cancels appointments without a communication tracking database (CAL) record. Set to 1-Yes to cancel appointments regardless of whether the appointment has a linked CAL record.
   - Skip Confirmed Appt Check? If this value is set to 0-No or left blank, the action pack only cancels unconfirmed appointments. Set to 1-Yes to cancel confirmed appointments.
3. In Chronicles, go to the Action Pack (HGA) master file and create a copy of action pack 20002-ES Cancel Unconfirmed Appointments.
4. In Hyperspace, open your copy of action pack 20002 (search: Report Action Editor).
5. In the Action extension (I HGA 50) field, enter your copy of extension 40254.

Create a Reporting Workbench Report to Use with the Action Pack

This report identifies unconfirmed appointments that should be canceled based on your criteria. You need to link it to the cancellation action pack to automatically cancel those appointments.

1. Create a report using template 55050-ES Appt Search. In the From and To date fields, enter the date range of scheduled, unconfirmed appointments to search for. Set the other criteria to include:
   - Department - Enter departments using automatic cancellation.
   - Confirmation Status - Enter Not Confirmed.
   - Status - Enter Scheduled.
2. In Hyperspace, open Reporting Workbench System Definitions and select the Actions tab.
3. In the Actions on Reports table, enter your report in the Report (I EAF 49540) field, and 20002 – ES Cancel Unconfirmed Appointments in the Report Action field (I EAF 49550) or your custom copy that you built in the Customize How Appointments Are Canceled by the Action Pack topic.

Run a Batch Job for Maintenance

Create a batch job to run your report regularly, to find and cancel the unconfirmed appointments that meet your criteria. We suggest you do this on a nightly basis.

Configure a batch job to run nightly, using template 1000-RW Batch Template. For full instructions on creating, scheduling, and running batch jobs, refer to the Batch Scheduler Setup: Essentials topic. The user specified in the batch must have proper security to access the action pack or the action pack must be configured to not require

security, refer to the Provide Users with Access to Actions topic for setup instructions.

Notify Staff About Appointments with Appointment Notifications

Cadence can send appointment notification reports to staff when patients schedule new appointments or make changes to existing appointments. The example below is of an Appointment Notification In Basket message. Appointment notifications can also be sent to staff by email.

Considerations

You can also send appointment notifications to patients by email or MyChart. Patient notifications and staff notifications use the same framework. For more information, refer to the Patient Appointment Notifications topic.

Automatically Send Messages to Notify Staff of Appointments

This section describes the tasks you need to complete to send automatic emails or In Basket messages to your staff when patients schedule new appointments or make changes to existing appointments.

> **!** Keep in mind that the settings you specify for internal staff, such as assigning a staff member or generic user to appear as the sending user and choosing the information that appears in notification messages, also affect the notifications your organization sends to patients.
>
> For additional information about patient messages, refer to the Patient Appointment Notifications topic.

To send these messages, you need to:

- Enable the system to send appointment notifications by email or to In Basket.
- Enable printing of appointment notifications as a backup when staff don't have the right email or In Basket settings.

- Optionally create rules to identify appointments that users should receive notifications for.
- Determine the appointment events that staff are notified about. You have the following options:
  - At the department level, determine which appointment events your staff should be notified about.
  - At the department level, determine which events for appointments that are linked to schedulable orders should trigger a notification to an In Basket pool for the ordering department.
  - At the provider level, determine which appointment events a given provider should be notified about.
- Show the appointment notification history to schedulers in the Appointment Desk.

Send Appointment Notifications to Staff by Email

If you're sending appointment notifications by email, the sending user is listed as the "From:" person on all notifications, including those sent to patients. 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.

For example, if several staff members might respond to patients, you might want to use a generic sender. This way, the patient will not respond to a staff member who is not involved in her care or assume that a different staff member has been assigned to her 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 (I EMP 20340) field to format a message routed to an external email address.
5. In the Account (I EMP 20330) 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 who will serve as the sending user.

Send Appointment Notifications to Staff by In Basket

To send notifications through In Basket, you need to set up the Appointment Notification message type and turn on In Basket for each user who should receive appointment notifications.

1. In Hyperspace, go to Epic button > Admin > In Basket > Epic-wide Settings > Message Type Defaults.
2. Add a new line to the table. In the Message Type column enter 46-Appointment Notification.
3. Enter 46-Appointment Notification in the Definition column.
4. Enter 1-Staff in the Registry column.
5. Click Accept to save your changes.

Complete these steps for each user who should receive appointment notification In Basket messages:

1. In Hyperspace, go to Epic button > Admin > User Security.
2. Select a user who will be receiving appointment notification messages.
3. Go to In Basket > Mail Settings/Access form. In the Mail system field, enter In Basket.

4. Go to the Cadence > Settings form. In the Provider ID field, enter the user's provider record.
5. Click Finish to save your changes.

Enable Printing of Appointment Notifications

When the system can't find an email address or In Basket to send an appointment notification to a staff member, it can print the appointment notification. To do this, map printer class 6001-ES Appointment Notification to default devices. For more information, refer to the Use Printer Class Mapping to Send Print Jobs to Printers topic.

By default, the system prints report 51005-Appointment Notification Report for Printing (HTML). For instructions about changing this report, refer to the Customize the Appointment Notification Messages Sent to Your Staff topic.

Create Rules to Identify Appointments That Should Receive Notifications

If you don't want to send appointment notifications from a department in all scenarios, you can use a rule to identify appointments for which recipients should receive notification. For example, you can create a rule to send appointment notifications to the referring provider only when his patient cancels a new patient visit and not when the patient cancels appointments for other visit types.

To do this, create a rule in the 5025-Appointment Notification Filter context. For more information about creating rules, refer to the Create or Edit a Rule topic. You enter this rule in your department in the next task when you determine the staff members who receive notifications for certain appointment events.

Determine the Appointment Events for Which Staff Receive Notifications for Your Department

You can configure which staff members are notified when a patient schedules, cancels, reschedules, changes, or misses an appointment in a department. You can do this for a type of staff member, such as all physicians, or for individual staff members. You can also send appointment notifications to an In Basket pool and specify a rule for the system to evaluate before sending an appointment notification.

For example, you might want to notify the appointment provider for all appointments in your department when a same-day appointment is scheduled. Or, if a provider sees patients in your department but has an office at another location, you can notify him whenever his patients cancel or reschedule appointments, so he can better manage his schedule.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open your department record.
2. Select the Communications > Appt Notification form.
3. Add rows to the Appointment Notification table:
    - Notification Class (I DEP 3031). Select a notification class for the staff you want to send appointment notifications to. Notification classes are types of users that receive notifications. Choose from:
        - Special Contact. Allow the system to identify the provider who should receive a notification for an appointment, such as the referring or ordering provider.
        - User. Send notifications to a specific user.
        - Provider. Send notifications to a specific provider.
        - Referring Provider. Send notifications to a specific referring provider.
        - In Basket Pool. Send notifications to an In Basket pool.
    - Rule (I DEP 3042). Optionally enter a 5025-Appointment Notification Filter context rule for the system to evaluate before sending an appointment notification to the recipient.

- Recipient. Depending on your choice in the Notification Class column, the options available in the Recipient columns change.
  - If you selected Special Contact, specify the particular role for the appointment (I DEP 3032). The choices include PCP, Appointment Provider, Referring Provider, Case Supervisor, and Ordering Provider.
  - If you selected User, enter a user from the User (EMP) master file (I DEP 3033).
  - If you selected Provider, enter a provider from the Provider (SER) master file (I DEP 3034).
  - If you selected Referring Provider, enter a referring provider from the Provider (SER) master file (I DEP 3035).
  - If you selected In Basket pool, enter a pool from the Registry (HIP) master file (I DEP 3043).

4. Use the check boxes to select which events you want to trigger an appointment notification for the selected user, provider, role, or pool:
   - Sch (I DEP 3036): Scheduling an appointment
   - C/R (I DEP 3037): Canceling or rescheduling an appointment
   - Chg (I DEP 3038): Changing an appointment
   - Mss (I DEP 3039): Missing an appointment
   - SDS (I DEP 3040): Scheduling a same day appointment
   - SDCR (I DEP 3041): Canceling or rescheduling a same day appointment.

Determine the Appointment Events for Which an In Basket Pool Receives Notifications for a Department's Schedulable Orders

You can use appointment notifications to help staff in ordering departments follow up with patients who cancel or no-show for appointments linked to orders. In the ordering department record, you can specify an In Basket pool to receive notifications for appointments that are linked to orders that were placed in the department. You can also specify an optional rule for the system to evaluate whether a notification should be sent for a given order and you can choose to send notifications only for appointments that are scheduled in a certain department.

To send appointment notifications to ordering departments, you must have the Cadence Appt Notif to Ordering Dept 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.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open your department record.
2. Select the Communications > Appt Notification form.
3. Add rows to the Receive Notifications for My Orders table:
   - In Basket Pool (I DEP 3160). Enter the In Basket pool to receive appointment notifications.
   - Rule (I DEP 3161). If needed, enter a 5025-Appointment Notification Filter context rule for the system to evaluate before sending an appointment notification to the In Basket pool.
   - Filter Department (I DEP 3162). If you want to send notifications only for appointments in a specific department, enter the department here.
   - Use the check boxes to select which events you want to trigger an appointment notification for:
     - Sch (I DEP 3163): Scheduling an appointment
     - C/R (I DEP 3164): Canceling or rescheduling an appointment

- Chg (I DEP 3165): Changing an appointment
- Mss (I DEP 3166): Missing an appointment
- SDS (I DEP 3167): Scheduling a same day appointment
- SDCR (I DEP 3168): Canceling or rescheduling a same day appointment

Determine the Appointment Events for Which Providers Receive Notifications

If the department-level settings are too broad because only certain providers want to receive appointment notifications, or if some providers have different appointment notification preferences from those of the department, you can configure appointment notification settings at the provider level. Appointment notifications that are defined at the provider level are always sent to In Basket and not email. If the provider is not set up for In Basket, the system can print a report.

If an In Basket recipient has been specified at the department and provider levels, the recipient receives only one notification about the patient's appointment. If an In Basket recipient is part of an In Basket pool that is specified at the department level and is also specified as a recipient at the provider level, the recipient receives duplicate notifications about the patient's appointment.

1. In Cadence Text, go to Cadence Management > Provider and open a provider's record.
2. Go to the Appointment Notifications screen.
3. In the Notification Contact column, enter the role the provider must have for a given appointment to receive the selected notifications about the appointment. Choose from:
    - PCP
    - Appointment Provider
    - Referring Provider
    - Case Supervisor
    - Ordering Provider
4. Enter Yes in the remaining columns to select which events you want to trigger an appointment notification for the selected provider:
    - Sched: Scheduling an appointment
    - Can/Re: Canceling or rescheduling an appointment
    - Change: Changing an appointment
    - Miss: Missing an appointment
    - SD Sch: Scheduling a same day appointment
    - SD C/R: Canceling or rescheduling a same day appointment

Show the Appointment Notification History in the Expand Appointment Window

The standard HTML display for the Expand Appointment window, 4-AS Appointment, includes information about the appointment notification history for an appointment. This HTML display appears when a user double-clicks an appointment or right-clicks an appointment and chooses Expand on the Appointment Desk.

If you do not use the standard HTML display, you can add HTML table 10060-Appointment Notification Audit Trail Info to your custom display to show the appointment notification history. For additional information, refer to the Add an HTML Table to a Hyperspace Screen topic. If you're not sure whether you have overridden HTML display 4, refer to the Use Record Viewer to Find HTML Display Overrides topic for instructions about searching for overrides.

Customize the Appointment Notification Messages Sent to Your Staff

You can also specify different reports for staff who receive email notifications versus In Basket messages.

The system uses the following reports by default. Complete the steps below if you want to use a different report.

Type of Appointment Notification	Default Report
Staff In Basket notification	62024-ES Appointment Notification IB Report
Staff email notification	62011-Appointment Notification Report - External
Printed notification	51005-Appointment Notification Report for Printing (HTML)

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Communications > Appt Notification form.
3. In the Staff In Basket notification (I SDF 8186) field, enter the report staff members should see when receiving notification messages in In Basket.
4. In the Staff e-mail notification (I SDF 8187) field, enter the report staff members or affiliates should see when receiving notifications in an external email system.
5. In the Appointment notification print (I SDF 8945) field, enter the report that is printed for notifications.

Customize Cadence Workflows with SmartForms

You can use SmartForm records to create custom forms for Cadence workflows. This allows schedulers and front desk staff to collect custom patient and clinical data during their usual scheduling and patient arrival workflows.

There are three main steps to do this: create the SmartForm record, create a menu record that uses the SmartForm record, and add the menu to an advantage activity record.

After the SmartForm menu is created, if you want to add it to an after scheduling or appointment demographics advantage activity record, you need to customize an additional menu record to link the SmartForm menu with the other menus used in the activities.

Prerequisites
You need shared security point 140-SmartForm Design to access the SmartForm Designer and create these forms.

Considerations

When developing a SmartForm for Cadence, certain kinds of components require that you link them to an item in the Patient (EPT) master file. Care must be taken in deciding which items should connect to the component.

- It's very easy to use the SmartForm Designer to link a field to an incorrect item, which can result in data loss or corruption.
- Some standard items require special handling and should not be used in SmartForm records.
- Custom items can be used to store data.

You should consult with your Epic representative before developing your SmartForm.

For additional information on creating SmartForm records, refer to the SmartForms Setup and Support Guide in your online documentation.

Build a Smart Form Record

1. In Hyperspace, open the SmartForm Designer (SmartForm > Tools > SmartForms > SmartForm Designer).
2. On the Form Selection window, select Create and enter a class of 200-Cadence Advantage Activity. Enter a name for the form, and click Accept.
3. Configure the SmartForm record as needed. Make sure to set it to release.

Refer to the Cadence Advantage Activity Classification SmartForms topic in your online documentation for additional information on creating SmartForms for Cadence advantage activities.

Create a Menu Record to Hold the SmartForm

1. In Chronicles, select the Menus (E2U) master file. Select Enter Data, then Duplicate Menu.
2. For the menu to duplicate, enter 1635. Assign the new record an ID and new name and complete the copy.
3. Back at the Enter Data Menu, select Edit Menu and enter the ID or name of the menu you just created.
4. On the second screen, change the Run Parameters to be the ID of your SmartForm record.

Add the SmartForm Menu to a Custom Menu Record

1. In Chronicles, select the Menus (E2U) master file. Select Enter Data, then Edit Menu.
2. Enter the ID or name of a custom Menu record used by a custom advantage activity record.
3. On the second screen (Node Information), enter the SmartForm menu along with any other menus you want to include in the activity under the Nodes heading.

Add the SmartForm Menu to an Advantage Activity

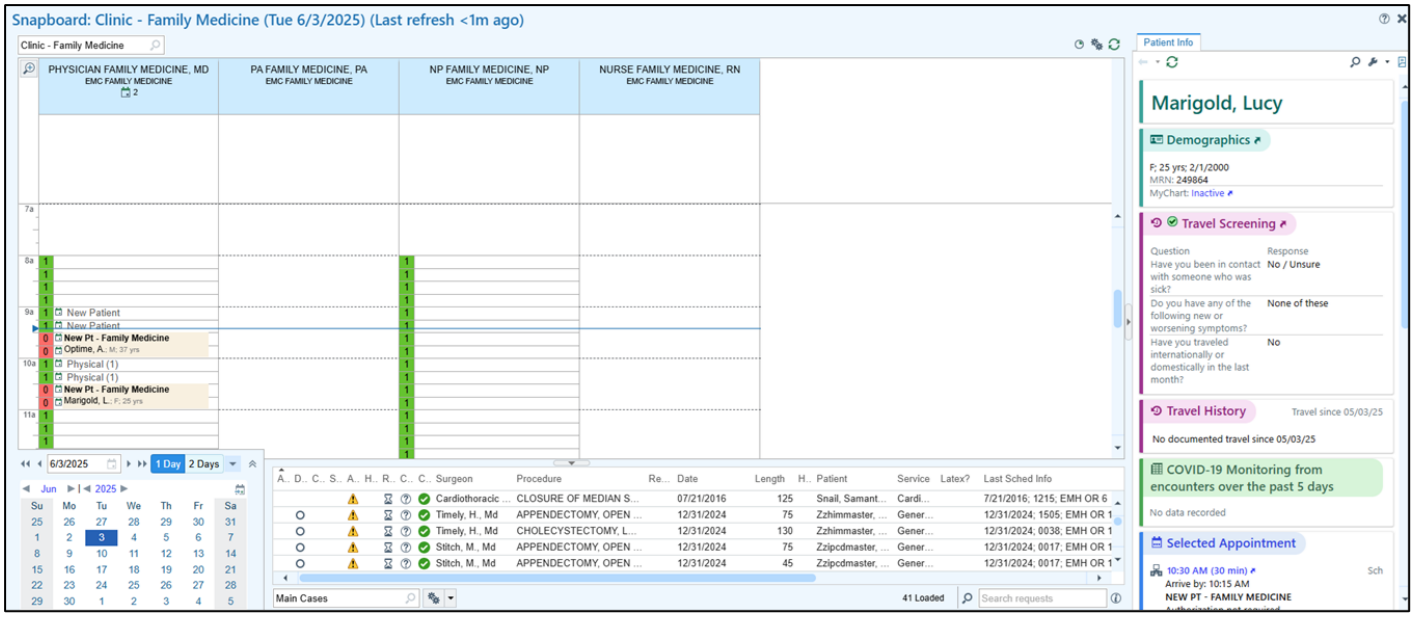
In Chronicles, access the Advantage Activity (HAA) master file and open your advantage activity record.

1. If you're adding the form to an after appointment entry or appointment demographics advantage activity:
   - In the Menu field, enter the second menu (E2U) record that you created (where you added the SmartForm menu to the other menus used in the advantage activity).
2. If you're adding the form to a check-in, check-out, or sign-in advantage activity record:
   - Press PAGE DOWN to access the Tree Nodes screen.
   - In the Node field, add the menu record for the SmartForm you want to appear in the activity. This is the first menu record you created (which holds just the SmartForm).

- If you want different forms to appear when the appointment is marked as inpatient, enter those forms on the bottom half of the screen.

Design the Patient Sidebar

Schedulers and coordinators can see details for a selected case, order, or appointment in the Patient sidebar during Snapboard, Appointment Desk, and Appointment Entry workflows. For example, a user can review a patient's future appointments to make sure the appointment the user is scheduling is correct.



The Patient sidebar is always available but users can collapse and expand it as needed. The system remembers whether the sidebar was last open or closed when the user opens the workflow. However, if you are using lower resolution monitors, the Patient sidebar is closed when a user opens a workflow. Users can change what they see in the sidebar using the standard report toolbar at the top.

To show a variety of info in the Patient sidebar, you can use the Epic-released reports or build your own. The sidebar uses reports of the type 1010-ES Patient Sidebar Report.

We've released the following standard reports for the Patient sidebar. By default, a user can select any of these whenever the Patient sidebar appears:

- 63200-Patient Sidebar Details
- 63201-Patient Sidebar Summary
- 63202-Patient Sidebar Summary Plus
- 63203-Patient Sidebar Appointment Desk

To speed up any report configuration, you might want to copy a standard report and then edit the copied report as needed.

Considerations

If you want to present a custom report as the default report or prevent certain reports from appearing to some users (for example, to prevent schedulers from seeing isolation and infection information), you can use profiles.

A profile is a collection of configuration options that define the general character and behavior of the system for a particular user or users.

Profiles can be designated at four levels: user, security classification, department, and system default. Because it can be confusing to determine at what level a profile is designated, exercise extreme care when working with profiles. Work closely with your EpicCare Ambulatory project team or contact your Epic representative and mention parent SLG 868279.

Create Reports for the Patient Sidebar

The following standard reports are available for the sidebar. If you want to use the standard reports, no setup is necessary. You can see the print groups the reports contain in the Foundation Hosted environment.

- 63200-Patient Sidebar Details
- 63201-Patient Sidebar Summary
- 63202-Patient Sidebar Summary Plus
- 63203-Patient Sidebar Appointment Desk

To create custom reports for the sidebar and add them to user profiles, refer to the Patient Sidebar Report Setup topic, or contact your Epic representative and mention parent SLG 868279. For more information about the print groups in these reports and their available parameters, refer to the print group documentation in the Data Handbook.

Reduce Scheduling and Documentation Requirements for Appointments Needing Recovery Time and Billing

You can configure the system to create a surgical log record behind the scenes when a scheduler or clinician is working with an appointment that requires recovery documentation and billing. For example, this is useful if your organization performs non-surgical procedures that require sedation, such as certain GI and imaging procedures. The log is automatically created when clinicians document recovery-related information by opening a navigator built just for these appointments or when they assign a case tracking status to the appointment from the Status Board.

Appointments linked to logs can be canceled and rescheduled like any other appointment. The log is not voided when the appointment is canceled and any billable actions are preserved. A new log, with none of the previous log's documentation, is created when the appointment is rescheduled.

Filter Surgical Logs from Logs Linked to Appointments Requiring Recovery Time

You must create and configure a location that functions as the sole location for non-surgical procedures that require recovery time and billing. Creating a separate location allows users to filter surgical logs from the logs linked to appointments associated with non-surgical encounters. The configuration for locations dedicated to these types of procedures is also incompatible with typical surgical locations. In Hyperspace, go to Epic button > Admin > OR Administration > Location Definitions > Create tab to create a location as you normally would and follow the steps below to configure it for use with non-surgical procedures that require recovery time and billing:

1. Starting in February 2024, go to the Timeouts and Counts Settings form. In November 2023 and earlier, go to the Intra-op Settings form. Enter No in the Link procedures to timeout (I EAF 54710) field.
2. On the Log Relinking form, enter No in the Enable relinking when opening encounter (I EAF 53085) field.

Generate Charges for the Location

You can set up the charging for the location you use for procedures logs as you would any other OR location, with the following requirements:

1. Enter Surgery/Procedure/Anesthesia Encounter in the Associate charges with this encounter field in the Charge Settings record.
2. Enter Warning or None in the Missing both times field in the Charge Settings record.

For additional information on configuring charging, generally, for a location, refer to the OpTime Charges Setup and Support Guide.

Associate the Location with the Scheduling Department

You must associate the location you created with the scheduling department. Enter the location in the OR location for non-surgical procedures field (Cadence Management > Departments > Procedural Settings Screen).

Create Separate Visit Types for Procedures Requiring Recovery Time and Billing

Your schedulers need to be able to select the appropriate visit type for an MRI that requires sedation versus for an MRI that doesn't. To help them schedule the correct visit types, create or designate visit types that are only to be used for non-surgical procedures that require recovery time and billing. Enter these visit types in EMR System Definitions to distinguish them from visit types that don't require recovery time and billing.

For additional information about creating visit types, refer to the Visit Types Setup and Support Guide and the Visit Types Strategy Handbook.

Specify the Visit Types for Which a Procedure Log Can Be Attached

To further distinguish appointments with logs from those without logs, you need to specify the visit types for which a log can be created. Enter the visit types you created in the previous step in EMR System Definitions on the Anesthesia Linking Options screen.

1. In Clinical Administration, follow the path Management Options > Edit System Definitions (LSD) > Specialties, Other Modules > Anesthesia > Anesthesia Linking Options screen.
2. In the Visit Types to Allow Links table, add the visit types for which a log should be created.

Modify or Create an Intra-op Navigator

To help your clinicians document these appointments efficiently, you can create or modify an Intra-op Navigator to include these surgical-specific navigator sections:

- Verify
- Timeout
- Supplies
- Pre-op/Post-op Nurses
- Events
- Charge Capture
- Charges to be Sent

The above sections are the only sections that you can use for this workflow. To configure your navigator, refer to the Intra-op Navigator Setup and Support Guide.

Modify Your Workflow Engine Rule to Open the New Navigator

To ensure that your new navigator opens when a clinician accesses one of these appointments and that a log is created when the appointment is accessed in the navigator, you must edit your Workflow Engine rules to open the navigator you created when the appointment type is HOV or Outpatient.

For additional information on editing your Workflow Engine rules, refer to the Edit Your Workflow Engine Rule Build topic in your online documentation.

Ensure Schedulers Can't Access Logs Linked to Appointments

To ensure that your schedulers don't have access to logs created for appointments requiring recovery time and billing, verify that your schedulers don't have access to Clinical Patient Station. Users who open Clinical Patient Station from the Appointment Desk and select an encounter can access the linked log. If necessary, replace schedulers' access to Clinical Patient Station with Patient Station in their profiles. Refer to the Patient Station Setup and Support Guide for more information.

Show Custom Warnings Based on Rules During Scheduling

You might want an extra warning to appear during certain scheduling workflows, or you might have workflows where none of the standard scheduling restrictions work. For example, you might want to:

- Remind procedure schedulers to schedule far enough in advance to obtain preauthorization.
- Prevent certain schedulers from scheduling certain types of patients.
- Prevent patients from scheduling appointments using MyChart in certain situations.

Using rules and extensions, you can determine when these scheduling situations occur and then show these warnings or messages to schedulers or prevent patients from scheduling matching appointments.

Considerations

If you want to use rules to prevent patients from scheduling certain types of appointments in MyChart and open scheduling, create an extension that uses the MyChart AppMode, which applies the same rules both to patients scheduling while logged into MyChart and to patients using open scheduling. Note that patients cannot see warning messages in MyChart, so MyChart simply prevents them from scheduling appointments if they would otherwise see a warning.

If you want to check the department or visit type of an appointment in your rules, we strongly recommend using the Departments or Visit Types parameters in the extensions you configure whenever possible, as described in the Create Extensions to Run During Scheduling topic. Limiting departments and visit types using these parameters significantly improves performance.

Depending on your desired warning configuration, you might be able to use these parameters instead of entering any departments or visit types in your rules.

For example, if your custom warnings apply only to a single visit type, enter that visit type in the Visit Types parameter of your extension instead of as a property in your rules. Users see the same warnings either way, but any users scheduling appointments with other visit types won't cause those rules to run.

Similarly, you might use these parameters in conjunction with department or visit type properties in your rules.

For example, if you want to show a different custom warning in each of five specific departments, enter those departments in the Departments parameter of your extension. Then, configure your rules. Users still see your custom warnings in those departments, but any users scheduling appointments in other departments won't cause those rules to run.

There are three pieces to this setup:

1. Create rules to identify appointments and record the message.
2. Create extensions to run during scheduling.
3. Add extensions to Cadence System Definitions.

Sections in this topic describe each of these three pieces of setup. The last section explains how you can use this build to prevent schedulers from scheduling same-day appointments more than one day in advance. You can replicate this build from the Foundation System or use the information as general guidance for creating your own rules and extensions.

Create Rules to Identify Appointments and Show Warning Text

Use the Rule Builder to create rules to identify appointments where the warning or message should appear during scheduling. Enter the text for the warning or message in the Error message field. Refer to the Create or Edit a Rule topic for more information.

- Create rules in the 5005-Appt Entry Custom Check context if you are basing the warning on basic information about the appointment. Build all your rules in this context to start. Depending on what you include in your rules, you might need to recreate them in one or both of the other listed contexts to support the Auto Scheduler.
- Create rules in the 5006-Appt Entry Provider Check context if you are basing the warning on the provider for the appointment. You don't need to build any rules in this context unless the steps in the Create Extensions to Run During Scheduling tell you to do so.

- Create rules in the 5007-Appt Entry Date Check context if you are basing the warning on the date for the appointment. You don't need to build any rules in this context unless the steps in the Create Extensions to Run During Scheduling topic tell you to do so.

Create Extensions to Run During Scheduling

1. In Chronicles, open the Extension (LPP) master file.
2. Copy extension 40033-ES Appointment Entry Custom Message (TEMPLATE).
3. Open your duplicate extension. On the Parameters screen, fill out the parameters as needed.
    - 1-Rules. Required. Enter the rule records to check. The rules you enter here must use context 5005-Appt Entry Custom Check. When an appointment meets these rules, the system shows the error message from the rule to the user. Note that patients cannot see error messages from these rules in MyChart.
    - 2-Hard Stop. Optional. Enter Yes if you want to prevent the user from scheduling the appointment when the rule is true. Enter No if the user or patient should be able to continue making the appointment. The default value is No.
      Note that this parameter behaves differently when patients attempt to schedule appointments in MyChart:
        - If you enter Yes, the rule is always obeyed by MyChart, and patients cannot schedule appointments that match the rule.
        - If you enter No, the rule is also obeyed by MyChart. However, if you've set the Allow overruling in MyChart (I WDF 847) item to 2-Allow overrule when required (on the System Manager Menu > Scheduling Configuration > Scheduling Options 1 screen in Patient Access System Definitions), patients can see and select appointment times that violate your rule at the end of the open times list in MyChart.
    - 3-Auto Scheduler. Optional. Enter Yes if you want the Auto Scheduler to evaluate the rule in its search for possible appointment slots. Enter No if you don't want the auto Scheduler to evaluate the rule in searches. If you enter No, then the warning or message still appears but the Auto Scheduler doesn't evaluate the rule when looking for available time slots. The default value is Yes.
    - 4-AppModes. Optional. Enter the list of AppModes for which you want this extension to run. An AppMode is a way to control what checks are run when an appointment is made from certain places. Each AppMode corresponds to an activity used to schedule or change an appointment. The default option is Blank-No special AppMode, which includes basic appointment entry, Snapboard scheduling, and almost all scheduling from other Cadence activities. Press Shift+F5 to see a list of all available AppModes.
    - 5-Departments. Optional. Enter a list of departments. The rules in this extension are run only when scheduling in these departments. For joint appointments, the rules are run if any department being scheduled into matches a department listed here. When this parameter is blank, the rules run in all departments.
      Note that if you want to consider departments when determining which warnings to show, we recommend configuring department logic using this parameter whenever possible for performance reasons. Refer to the Considerations topic for more information.
    - 6-Visit Types. Optional. Enter a list of visit types. The rules in this extension are run only when scheduling one of these visit types. When this parameter is blank, the rules run for all visit types.
      Note that if you want to consider visit types when determining which warnings to show, we recommend configuring visit type logic using this parameter whenever possible for performance

reasons. Refer to the Considerations topic for more information.

4. Next, depending on how you configured your rules, you might need to copy and modify one of these additional extensions to ensure that the Auto Scheduler continues to perform accurate and efficient searches.
   If you copy one of these extensions, set the matching parameters to the same values you entered in your copy of extension 40033:
   - If one or more rules you created for extension 40033 has provider-related criteria but not time- or date-related criteria, duplicate extension 40109-ES Custom Provider Check (TEMPLATE). This extension ensures that the Auto Scheduler continues to perform accurate searches with the new warning.
     Replicate those rules in the 5006-Appt Entry Provider Check context and enter them in the Rules parameter of your copy of extension 40109.
   - If one or more rules you created for extension 40033 has date-related criteria, duplicate extension 40126-ES Custom Date Check (TEMPLATE). This extension ensures that the Auto Scheduler continues to perform searches efficiently with the new warning.
     Replicate those rules in the 5007-Appt Entry Date Check context and enter them in the Rules parameter of your copy of extension 40126.
   - You don't need to replicate any other rules, including those with length- or time-related criteria, in a copy of another extension.
5. Repeat these steps to create additional copies of these extensions, if necessary. For example, if you want to use certain rules as hard stops and certain rules to show messages, you would use two copies of extension 40033 with different values in the Hard Stop parameter.
   Contact your Epic representative and mention parent SLG 2631075 if you have questions about when to use additional extensions.

Add Extensions to Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Custom Extensions/EOD > Appointment Entry form.
3. In the Appointment schedule custom check (I SDF 20002) field, enter your extensions based on extension 40033.
4. In the Before auto scheduler provider check (I SDF 20003) field, enter your extensions based on extension 40109.
5. In the Auto scheduler date check (I SDF 20004) field, enter your extensions based on extension 40126.

Prevent Schedulers from Scheduling Same-Day Appointments in Advance

One use case for rule-based warnings is to prevent schedulers from scheduling same-day appointments more than one day in advance. This way, same-day slots remain open on provider schedules for urgent appointments that must be scheduled on the same day.

1. Create a rule in the 5005-Appt Entry Custom Check context with the following property. You can use Foundation System rule 687942-ES Appt >1 Day In Future as a model for your build.
   - Property: Appointment Date
   - Operator: Greater than (>)
   - Value: Today
2. Copy extension 40033-ES Appt Entry Custom Message (TEMPLATE) and modify the following parameters.

You can use Foundation System extension 1174003301-ES Limit Same Day Appointments as a model for your build.

   a. Change the 1-Rules parameter to the ID of the rule you created in step 1.
   b. Change the 2-Hard Stop parameter to 1-Yes.
   c. Change the 3-Auto Scheduler parameter to 0-No.
   d. Change the 6-Visit Types parameter to your organization's same day visit type.

3. Enter the extension in the Appointment schedule custom check field in Cadence System Definitions.
4. Create a rule in the 5007-Appt Entry Date Check context with the same property, operator, and value that you used in step 1. You can use Foundation System rule 687944-ES Appt >1 Day In Future as a model for your build.
5. Copy extension 40126-ES Custom Date Check (TEMPLATE) and modify every parameter except parameter 3-Auto Scheduler to match the extension you created in step 2. Leave the Auto Scheduler parameter blank.
6. Enter the extension in the Auto scheduler date check field in Cadence System Definitions.

Notify Staff of a Patient's Gestational Age When Scheduling Appointments

Meaningful Use 2014 EH quality measure CMS 113-PC-01 Elective Delivery Prior to 39 Completed Weeks Gestation and core measure PC-01: Elective Delivery look at the number of patients who have elective deliveries before reaching a gestational age of at least 39 weeks. You can configure a warning to remind users to schedule patients who have not reached 39 weeks for an induction of labor only if the patient has an appropriate medical indication. The warning message appears to users when they attempt to schedule inductions for pregnant patients if the patient will be at less than 39 weeks gestation on the date of the appointment.

The warning message includes the patient's gestational age on the proposed date of the induction and the date when the patient will reach 39 weeks gestation.

To set up this warning so that it appears when patients are scheduled in departments that perform inductions, you need to duplicate the released rule and released extension.

1. Open the Rule Editor in Hyperspace by following the path Epic button > Tools > Rule Editor Tools > Rule Editor and create a new rule.
   - In the Context field, enter 5005-Appointment Entry Custom Check.
   - In the Copy from field, enter 34715-OB Appt < 39 Weeks GA.
2. Open your copy of rule 34715.
   - Modify the Visit Type parameter so that it includes any visit types where a patient might be scheduled for an induction of labor. As released, the parameter is set to null and the warning doesn't appear.
   - Modify the Departments parameter so that it includes all departments where your organization schedules inductions. As released, the parameter is set to null and the warning doesn't appear.
3. Open the Extensions (LPP) master file in Chronicles. Go to Enter Data > Duplicate Extension and create a copy of extension 40033-ES Appointment Entry Custom Message (Template).
4. Open your copy of extension 40033 and go to the Parameters screen. Enter your copy of rule 34715 in the Values field for the Rule parameter.

5. Modify the other parameters, if needed.
6. In Hyperspace, open Cadence System Definitions.
7. Go to the Custom Extensions > Appointment Entry form
8. In the Appointment schedule custom check field, enter your copy of extension 40033.

Similarly, you can set up a warning message to alert staff when they schedule surgeries for pregnant patients if the patient will be at less than 39 weeks gestation on the date of the surgery. Refer to the Alert Staff to Not Schedule Patients for C-Sections at Fewer Than 39 Weeks topic for instructions.

You might also want to set up an OurPractice Advisory to remind clinicians to schedule patients who have not reached 39 weeks for c-sections only if the patient has an appropriate medical indication for delivery prior to 39 weeks, such as a prior uterine surgery or HIV. Refer to the Notify Providers When a Patient's Gestational Age Is Less Than 39 Weeks topic for more information.

Warn Schedulers When a Patient's Medications Might Run Out Before the Selected Appointment Date

You can warn schedulers that one or more of a patient's medications will deplete its supply by the time the appointment slot they've selected occurs, allowing them to select an earlier appointment for the patient if possible.

This feature was developed specifically for organizations in Singapore and works only in specific contexts and situations. Contact your Epic representative and mention parent SLG 4336992 to review the capabilities of this feature before implementing it.

To use this warning, configure a copy of Appointment Schedule Custom Check extension 40369-ES Appointment Entry Meds Check (Template):

1. In Hyperspace, access the Rule Editor and create a rule with a context of 5005-Appointment Entry Custom Check.
2. Configure your rule to return true when the warning should appear. Consider using property 98151-Number of Same Upcoming Appointments, which allows you to do the following:
    - Leave the Date Range parameter of the property blank to search from the current date until the selected appointment date.
    - Use the other parameters to determine whether to search for appointments with the same department, department specialty, provider, or visit type.
3. Enter an appropriate error message for the warning that includes property 19262-Current Medication Orders Relevant to Appt, which shows information about the medications that are at risk of running out.
4. In Chronicles, access the Extension (LPP) master file and create a copy of extension 40369.
5. Enter your rule in the first parameter.
6. In the second parameter, specify whether the warning should be a hard stop. By default, it is not.
7. In the fourth parameter, enter a caret-delimited list of AppModes for which you want this extension to run. An AppMode is a way to control what checks are run when an appointment is made from certain places. Each AppMode corresponds to an activity used to schedule or change an appointment. The default option is Blank-No special AppMode, which includes basic appointment entry, Snapboard scheduling, and almost all scheduling from other Cadence activities. Press Shift+F5 to see a list of all available AppModes.

8. In the fifth and sixth parameters, specify grouper records that contain the departments and visit types for which the warning should appear. Refer to the Build a General Grouper topic for instructions on creating and configuring grouper records.
9. In the seventh parameter, enter any warning text or instructions that should appear after the warning message specified in your rule but before the list of medications.
10. In the eighth parameter, specify how the medications are grouped:
    - Leave the parameter blank to show medications in a single list.
    - Enter 1-Visit Type to group medications by the visit type they were ordered in.
    - Enter 2-Authorizing Provider to group medications by the providers who authorized them.
11. In the ninth parameter, specify whether visit type and authorizing provider information appears under each medication's name. If this parameter is left blank, only the name and end date appear. Enter one or both of the following values in a caret-delimited list if you want either piece of information to appear:
    - 1-Visit Type
    - 2-Authorizing Provider
12. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions) and go to the Custom Extensions/EOD > Appointment Entry form.
13. Enter your copy of extension 40369 in the Appointment schedule custom check (I SDF 20002) field.

Sort Appointment Providers by Department Specialty or Department ID

If you need a more granular appointment provider sort order than provider type, as described in the Determine the Order of Providers for Joint Appointments topic, you can choose to sort providers for some appointments based on department specialty or department ID. This ability is especially helpful in multi-disciplinary areas where appointments are often scheduled with multiple providers of the same type but there is still a primary provider for a certain specialty.

You need to use a combination of report groupers, extensions, and visit types to achieve this sort order.

Identify Available Report Groupers

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Visit Type.
2. Open the visit type for which you want to restrict the provider sort order.
3. Select the Report Groupers form.
4. Under the Category Groupers heading, find an available report grouper for the department specialty and another for the department ID. Use Ctrl+Click to look up the item number for the report grouper fields. The fields will have an item number between 4505 and 4519. Write down these item numbers for later.

Duplicate Extension for Provider Sort Order

1. In Chronicles, open the Extensions (LPP) master file.
2. Duplicate extension 43130. Write down the ID of the copied record for later.
3. Open your copied record. On the Parameters screen, edit the parameters as needed.
    - In the DEP SPEC VT GRP ITM parameter, enter the report grouper item number you want to use for your department specialty. Providers in this department specialty are sorted first and are the primary provider for appointments.

- In the DEP ID VT GRP ITEM parameter, enter the report grouper item number you want to use for your department IDs. Providers in this department are sorted first and are the primary provider for appointments, as long as the providers don't match the department specialty listed in the DEP SPEC VT GRP ITM parameter report grouper.

Assign Report Groupers to Identify Department Specialties and Department IDs

1. In Hyperspace, go to Epic button > Admin > General Admin > Category List Maintenance.
2. In the Category Editor window, enter PRC for the INI. Enter the item number for your selected report grouper field.
3. Click Accept. The Category List Maintenance activity opens. The item's existing categories are listed on the top half of the activity.
4. Enter an ID in the Add/Edit category field that matches the department specialty category value and click Go. Write down the IDs of these report groupers for later.
5. In the Create New Category section, enter title, synonym, and abbreviation information for the new category value.
6. Repeat steps 1 through 5 for the department ID grouper field.

Add Report Groupers to Visit Types

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Visit Type.
2. Open the visit type for which you want to restrict the provider sort order.
3. Select the Report Groupers form.
4. Under the Category Groupers heading, enter your report grouper category values in the applicable grouper field.

Add Custom Extension to Cadence System Definitions

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Custom Extensions/EOD > Appointment Entry form.
3. In the Provider sort ext for joint appointment field, enter your custom extension.

Automatically Designate EpicCare Patients When an Appointment Is Scheduled or Checked In

If your organization shows specific information to clinicians, such as Health Maintenance information, depending on whether a patient is an EpicCare patient, you can save time and frustration for clinicians by automatically marking EpicCare patients when they first schedule or check in for an appointment. To do this, you can add the following extensions to Cadence System Definitions:

- Extension 3303-Set EpicCare Patient on Check-In marks EpicCare patients when they check in for their first appointment at your organization. You might want to use this extension if you want to send Health Maintenance reminders only to patients who have actually met with a clinician, not just scheduled an appointment.
- Extension 3304-Set EpicCare Patient After Scheduling marks EpicCare patients when they schedule their first appointment at your organization. As released, the extension marks EpicCare patients when they schedule an appointment in any department with any provider. If needed, you can customize the extension to mark EpicCare patients only when they schedule an appointment in EpicCare departments or with EpicCare providers.

To customize extension 3304:

1. In Chronicles, access the Extension (LPP) master file.
2. Go to Enter Data > Duplicate Extension and create a copy of extension 3304.
3. In your copy of extension 3304, go to the Parameters screen and modify the following parameters:
    - Omit EpicCare provider check? Enter No to mark EpicCare patients only when they schedule an appointment with a provider who has the EpicCare Provider? (I SER 8020) item set to Yes.
    - Omit EpicCare department check? Enter No to mark EpicCare patients only when they schedule an appointment in a department that has the EpicCare Department? (I DEP 17001) item set to Yes.

To automatically mark patients as EpicCare patients at check-in:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Custom Extensions/EOD > Check In/Out form.
3. In the After check in (I SDF 20016) field, enter extension 3303.

To automatically mark patients as EpicCare patients at the time of scheduling:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Custom Extensions/EOD > Check In/Out form.
3. After schedule (I SDF 20006) field, enter extension 3304 or your copy.

Conflict Check Inpatient Tasks and Events During Scheduling

When scheduling inpatient appointments, it's helpful to know what tasks and events a patient has going on so that schedulers don't make appointments that conflict with these tasks and events. For example, schedulers wouldn't want to schedule a therapy visit when a patient has time held to meet with her family or when a nurse has a set of educational tasks scheduled for a patient.

You can now enable scheduling to conflict check against inpatient tasks and patient events from MyChart Bedside (which are also based on inpatient tasks). You determine which task records need to conflict check against scheduling. When a scheduler selects an appointment time that overlaps with these tasks and events, a warning appears to let the scheduler know about the task or event. The scheduler can then decide if he wants to continue scheduling the appointment or select a different time.

Schedulers with security can also view these tasks and events in patient-based reports and activities, including the Week at a Glance report, the Patient Itinerary, and the Patient Calendar. Schedulers can also see upcoming tasks and events in the Patient sidebar, so they can see the patient's tasks before scheduling appointments.

Enable Tasks and Events to Conflict Check with Scheduling

You need to work with your EpicCare Inpatient team to determine which tasks should appear to Cadence users and which tasks should conflict checking against possible appointment times.

Prerequisites
To edit task records, you need an EpicCare Inpatient security class with security point 305-Edit Task & Task Template.

1. In Hyperspace, follow the path Epic button > Tools > Patient Care Tools > Task Editor.
2. Open the task you want to edit.
3. In the Task Editor, enter Yes in the Show to patient? field if you want patients to be able to see when this task is scheduled. Schedulers can see patient tasks in scheduling activities.
4. In the Show to schedulers? field, enter Yes if you want schedulers to be able to see when a patient has this task.
5. In the Appointment conflict check? field, enter Yes if you want this task to conflict check against appointment scheduling.

Allow Schedulers to View and Edit Tasks and Events in Scheduling Activities

Cadence users need security to view and edit tasks and events in the following activities:

- Patient Sidebar
- Week at a Glance
- Patient Appointments

Users need this security in addition to the task record being enabled for patient or scheduler viewing.

Considerations
Cadence users can't view completed or skipped tasks in these activities. Only in progress tasks appear.

Users with either of the following security points can view patient events and tasks:

- Inpatient security point 546-View and Complete Tasks
- Users with the View tasks (I ECL 5150) field in their Cadence security class set to Yes

Users with either of the following security points can edit patient events and tasks:

- Dorothy security point 151-MAY Add/Edit Patient Events
- Inpatient security point 70-Add/Edit Task

Starting in August 2024, users with the following security points in their Shared security class can view and edit patient events and tasks:

- 163-Add/Edit Patient Events. Users with this security point can view, add, and edit patient events.
- 167-View Patient Events. Users with this security point can view patient events but not add or edit them unless they also have security point 163-Add/Edit Patient Events.

Customize Scheduling Warnings for Tasks and Events

You can design the look of the warnings that schedulers see when a task or event conflicts with an appointment.

On the Appointment Warnings form, you can design the look and feel of the task and event conflict warning. You can also set the icon to use for the warning in the Auto Scheduler.

Refer to the Design Appointment Warnings and Help Schedulers Identify Warning Importance in Auto Scheduler Solutions topics for more information.

Customize How Tasks and Events Appear in the Patient Sidebar

Starting in August 2024

You can customize how upcoming tasks and events appear on the Patient Sidebar.

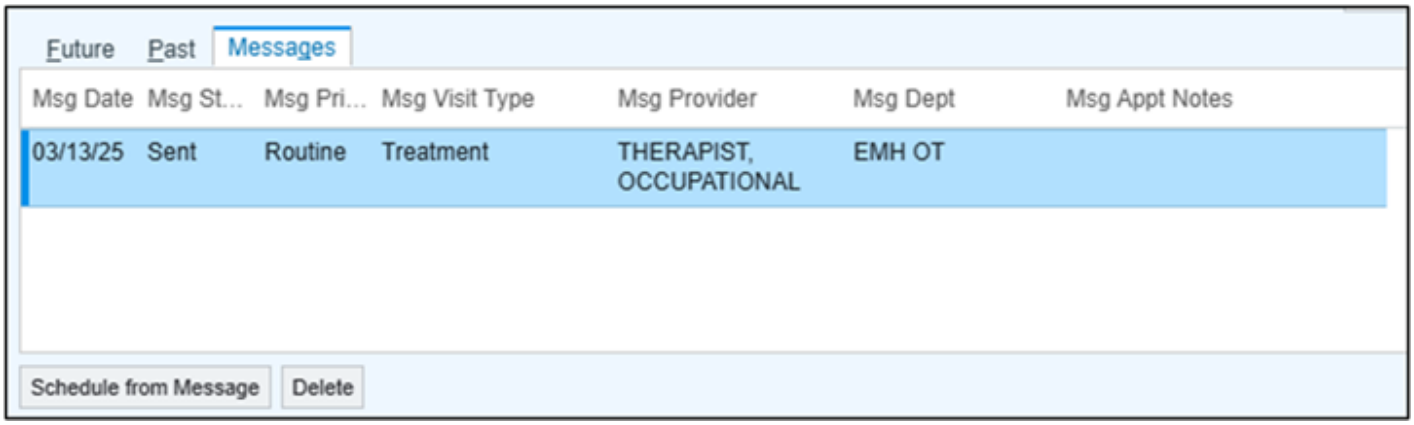
You can copy print group 63222-ES Sidebar Patient Events and IP Tasks and adjust some elements of the print group, including the header text and whether patient tasks appear in the print group. You can also specify whether the print group shows only inpatient events, only events that take place outside the patient's admission, or all events.

Refer to the Design the Patient Sidebar topic for more information on customizing the Patient sidebar

Considerations
Once tasks are completed or skipped, they no longer appear in the sidebar report.

Allow Schedulers to Schedule Appointments from In Basket

Schedule messages in In Basket are sent to scheduling staff pools for appointments that need to be scheduled in a certain department. The message sender can specify a visit type, provider, department, patient, phone number, appointment notes, and scheduling notes within the message. Distribution schemes can be created that route schedule messages based on the department, provider, or visit type. When a Schedule message is sent, a scheduler in the pool can make an appointment for the patient directly from the message. These messages also appear on the Messages tab in the patient's Appointment Desk.



Schedule messages can be sent directly from In Basket or when a user clicks Reschedule in the No Show List (Epic button > Tools > Patient Care Tools > No Show List).

To allow your staff to send Schedule messages, you need to:

- Perform essential In Basket setup to give users access to In Basket. For more information, refer to the Control Users' Access to In Basket topic.
- Set up the Schedule List message type for your organization.
- Create an In Basket class for the users who receive scheduling messages for a department, provider, or visit type.
- Create an In Basket pool registry for the users who receive scheduling messages for a department, provider, or visit type.
- Enable scheduling messages for a department, provider, or visit type.

Create an In Basket Scheduling Class

An In Basket class is similar to an email list. Create a class to define the users who receive messages sent to the scheduling pool. For more information about this setup, refer to the Set Up Classes topic.

In the Foundation System, we created class 4000-Scheduling Tickler Pool in the Classifications (I EMP 450) category list.

Create an In Basket Scheduling Pool

Create an In Basket pool to define the group of recipients who share the work of resolving Schedule messages. All members of a pool are treated as a single recipient, so that if one member resolves an In Basket message sent to that pool, the message disappears from all other members' In Baskets. For more information about this setup, follow the steps in the Send Messages to Pools topic. Be sure to include the following values on the Registry Summary form:

- In the Send messages to field, enter EMP to indicate these messages are sent by users.
- In the Message received by field, enter EMP to indicate these messages are received by users.
- In the Selection values field, enter the class you created for scheduling.

In the Foundation System, we created registry 140400001-Scheduling Messages.

Route Messages Based on Department, Provider, and Visit Type

You can use optional distribution schemes to distribute scheduling messages based on provider, department, or visit type. This is useful if, for instance, you have multiple departments with front desk pools receiving Schedule List messages. To enable this feature:

1. In Hyperspace, open the Distribution Scheme Editor (search: Distribution Schemes) and either choose an existing scheme to modify or create a new one.
2. In the Comparison Value field, enter the appropriate extension and complete your scheme. For example, add a new row that routes all Schedule List messages where the scheduling provider is Pat Granite to a pool. The available extensions are:
    - 12587-MR - Scheduling Provider. Returns the scheduling provider for a message.
    - 12588-MR - Scheduling Department. Returns the scheduling department for a message.
    - 12589-MR - Scheduling Visit Type. Returns the scheduling visit type for a message.
3. If necessary, open Epic-wide Settings (search: Epic-wide Settings) and add your distribution scheme to the Schedule List message type on the Message Type Defaults form.

For more information about creating and editing distribution schemes, refer to the Route Messages to the Correct Recipients topic.

Set Up Schedule Messages

To set up Schedule messages, you'll need to copy the Epic-released message type definition and enter your copy in Epic-wide Settings:

1. Create a copy of message type definition 3-Schedule Messages. Refer to the Copy an Existing Message Type Definition topic for more information.
   In the Foundation System, we created message type definition 2100000024-Schedule Messages. This message type definition uses different reports from those used in message type definition 3.
2. To use this message type definition by default, enter it in the row for message type 3-Schedule List on the Message Type Defaults form in Epic-wide Settings:

- In the Definition column, enter your copy of message type definition 3.
- In the Registry column, enter 1-Staff.
- In the Default Pool column, enter the scheduling pool you created.
- If you have created a distribution scheme as described in Route Messages Based on Department, Provider, and Visit Type, add your scheme to the Schedule List message type.

Enable Schedule Messages for a Department

1. In Hyperspace, follow the path Epic button > Admin > Schedule Admin > Master File Edit > Department.
2. Open the department for which you want to enable Schedule messages.
3. Select the Reports > In Basket/General form.
4. In the Scheduling message pool (I DEP 800) field, enter the scheduling class you created. This determines the InBasket pool to which Schedule messages for this department should be sent. This is different than the Default Scheduling Pool (I DEP 53000) setting, which determines the providers who can respond to a patient's MyChart message. Refer to the Use Appointment Request Messages in Addition to Direct Scheduling topic for more information on this MyChart setting.

Skip the Appointment Review Window in Full Appointment Entry

The Appointment Review window is an important part of the scheduling workflow. The window shows information about the appointment about to be scheduled and gives users a chance to make sure the information is correct before making the appointment. To prevent other users from scheduling into the selected time slots, the system locks the time slots while this window is open. Appointments are not scheduled until users click Accept in the Appointment Review window.

If schedulers at your organization are consistently being locked out of time slots in full appointment entry because other schedulers have the Appointment Review window open, you can configure the system to skip the window when scheduling in certain departments. If all departments being scheduled have the Show appointment review? (I DEP 1138) field set to No for full appointment entry, users do not see the Appointment Review window after clicking Schedule in appointment entry.

Considerations

We do not recommend implementing this feature for most organizations. If schedulers need to select Inpatient or Outpatient for visits in a particular department, or if schedulers need to see patient instructions, you must show the Appointment Review window. Skipping the Appointment Review window in full Appointment Entry creates inconsistencies with other scheduling workflows where the Appointment Review window still shows up. This setting only controls the Appointment Review window, so other windows might still appear after schedulers click Schedule in appointment entry.

If schedulers at your organization have consistently high workloads and you've determined that the Appointment Review window is impeding their workflows, consider skipping the Appointment Review window for the departments where these schedulers are making appointments.

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Workflow Definitions > Adv Activities Add'l form.

3. Under the Full Entry heading, enter No in the Show appointment review? (I DEP 1138) field.

Stop Showing the Option to Mark a Patient As Needing an Interpreter in Appointment Entry Workflow

You can determine whether the "No interpreter" check box appears in the appointment entry workflow for patients who are flagged as needing an interpreter. In addition to removing a superfluous decision point for users at organizations where most patients need an interpreter, removing the check box can also avoid situations where it is inappropriately selected, resulting in interpreters not being assigned to appointments to which they should have been assigned.

The default behavior is for the check box to appear for patients who are flagged as needing an interpreter in the appointment entry workflow.

This behavior can be configured at both the system definition level and the department level. If a setting is specified at both levels, the department-level configuration is respected.

To stop showing the "No interpreter" check box at the system definitions level, perform the following steps:

1. In Hyperspace, open Cadence System Definitions (Epic button > Admin > Schedule Admin > Cadence System Definitions).
2. On the Interpreter Scheduling form, set the "Show No-Interpreter checkbox in Appointment Entry?" (I SDF 10834) field to No.

To stop showing the "No interpreter" check box at the department level, perform the following steps:

1. In Hyperspace, open the department you want to configure in Department Edit (search: Department Edit).
2. On the Interpreter Scheduling form, set the "Show No-Interpreter checkbox in Appointment Entry?" (I DEP 1534) field to No.

Set Up a FNA and Bone Marrow Procedure Scheduling Workflow

If your organization orders and performs fine needle aspiration (FNA) and bone marrow procedures, you can configure a scheduling workflow that uses the Snapboard as a central hub from which scheduling staff can schedule the procedure, assign a room, and schedule resources such as pathology staff.

Prerequisites
Before you configure the Cadence build, you must first work with the provider resource (SER) management team at your organization to create or update your pathology resource records. Ensure you have created the resources you use for pathology labs. For example, make sure you have created resource records for your pathology residents, pathology techs, and procedure rooms. Also, be sure to create a generic resource that can be used to schedule procedures. The procedure room and pathologist must have resource records so they can be scheduled on the Snapboard.

Considerations

If your organization also uses Beaker and OpTime, you can configure an OpTime specimen navigator from which the pathologist can document specimen collection while performing the procedure. To set up the Beaker build, refer to the Build an FNA and Bone Marrow Procedure Workflow topic. To set up the OpTime build, refer to the Allow Users to Perform FNA and Bone Marrow Procedures topic.

To set up the FNA and bone marrow procedure scheduling workflow:

1. First, create or update your visit type records for Fine Needle Aspiration and Bone Marrow Collection. Refer to the Create Simple Visit Types topic for more information. Make sure that you do the following for both visit types:
    a. On the General form, set the status to Active.
    b. On the Restrictions form, add Lab to the Specialty column, In the Can schedule column, select Allowed.
2. Make sure your Fine Needle Aspiration and Bone Marrow Collection visit types are linked to the appropriate procedures. Refer to the Enable a Procedure for Scheduling topic for more information about linking visit types to procedures.
    - Starting in February 2024, you can prevent the automatic release of child orders when you check in a procedure. This allows lab services to release the order themselves after they confirm that they can perform the ordered procedure that day. For more information on this configuration, refer to the Build Lab Procedures topic.
3. Give your front desk users the security to assign resources:
    a. Open the Cadence security class for your front desk users (search: Cadence Security).
    b. On the Reports/System Administration form, set the Assign resources and Resource request overbook fields to Yes. Set the Resource request super ovb and Resource request override fields to No.
4. Create a new rule to catch all active pathology orders placed in the last 30 days. Set the Evaluation logic to AND. Add the following three properties:
    a. Ordering date >= T-30
    b. Order Has Not Expired = True
    c. Procedure = Biopsy Bone Marrow, Fine Needle Aspiration, Bone Marrow Exam
5. Create a new Schedule Orders workqueue for pathology orders:
    a. Go to Epic button > Admin > Schedule Admin > Orders Workqueue Maintenance. Click New.
    b. Give the workqueue a name, such as Pathology Procedure Orders and an Owning area of Schedule Orders. You can use Foundation System workqueue 1026-Pathology Procedure Orders as a guide.
    c. In the rules section, add the rule you created to catch active pathology orders. Set the rule to active.
6. Create a new Snapboard depot report for pathology orders.
    a. Go to Epic button > Scheduling > Snapboard. Right-click the gear icon in the bottom right corner and open Edit Order Settings. Select your Pathology Procedures report. On the Criteria tab, enter the Schedule Orders workqueue you created as the workqueue used for criteria.
    b. Use the Foundation System Snapboard report 193011-Pathology Procedures as a guide to configure the Snapboard report columns.

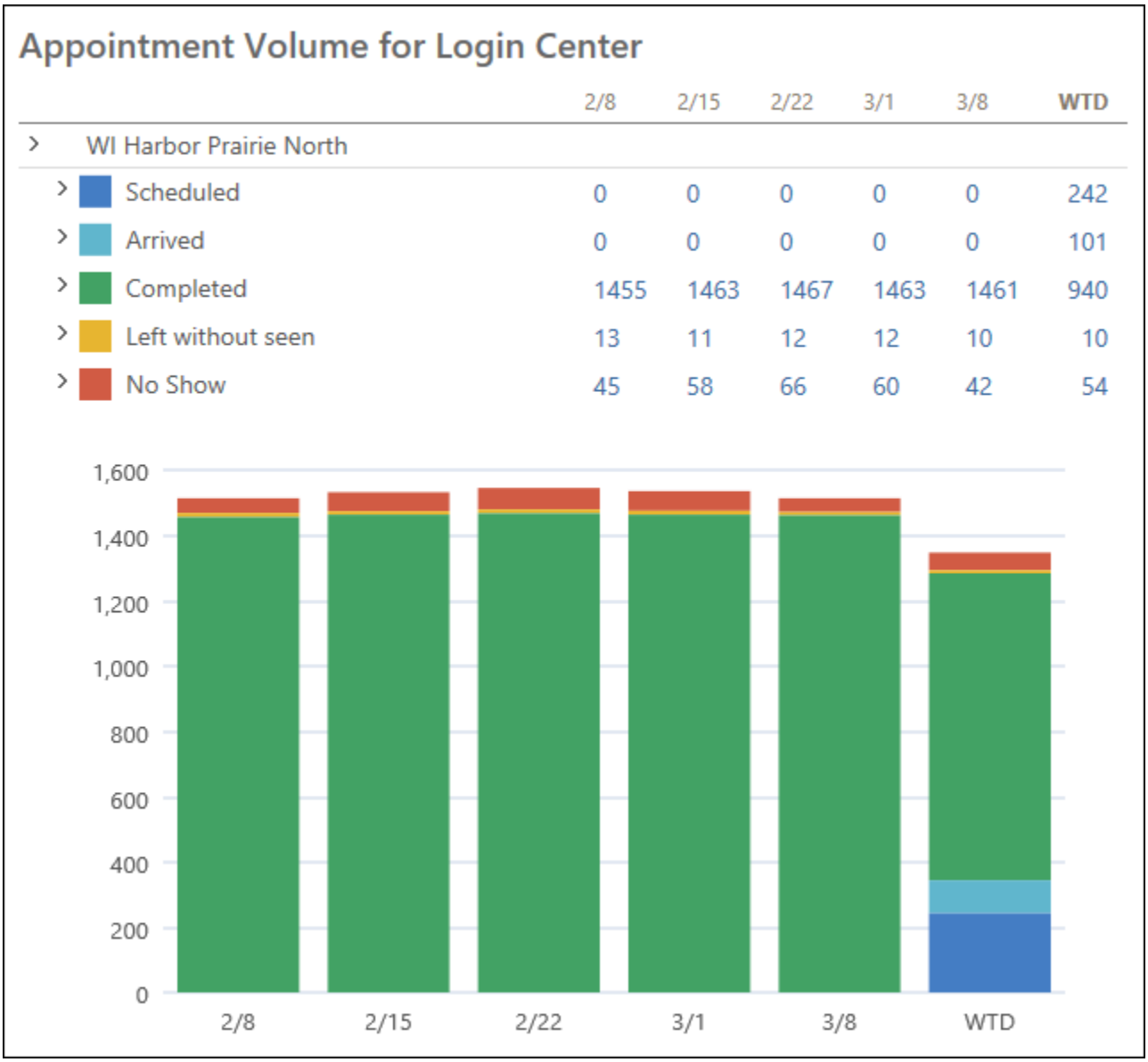
7. Modify your OR Pathology report to show the lab procedure room, the provider, and resource types:
    a. Open the Snapboard.
    b. Go to Actions > Settings.
    c. In the Available Settings window, select your OR-Pathology report. On the Criteria tab, under Provider/Resource, enter your lab procedure room.
    d. On the Resources tab, add any new resource types you created.

Monitor Visit Volume Using a Dashboard

Executive-level stakeholders can use the Visit Volume dashboard to monitor your organization's hospital, ambulatory, and home care visit volume; identify reasons for low revenue; and review trends so you can adjust staffing accordingly.

There are also two components for clinic managers and patient access directors to monitor appointment volume at the center or department level:

- 55060-ES Appointment Volume by Center and Status
- 55061-ES Appointment Volume by Department and Status



Before you give users access to the Visit Volume dashboard, you need to determine which encounter types to include in the visit volume metrics and also categorize your service areas, locations, and departments as hospital, ambulatory, or home care. After you've completed this setup, refer to the Radar Setup and Support Guide for information about customizing the dashboard if needed and making it available to users.

Specify the Encounter Types Counted By the Visit Volume Metrics

The visit volume metrics use the Face-to-Face Encounter Types (I EAF 82100) setting and the Additional Visit Volume Encounter Types (I EAF 15750) setting to determine the encounter types that are counted in the metrics. Work with your EpicCare Ambulatory team to determine your organization's face-to-face encounter types as they are used by other metrics.

If your organization doesn't maintain the Face-to-Face Encounter Types item, you can customize the Visit Volume dashboard to use released metrics that don't filter encounter types.

1. In Clinical Administration, go to Facility Structure > Facility/Service Areas (EAF) and select service area 1.
2. Go to the Face-to-Face Encounter Types screen by fast-forwarding (Home+F9) to S EAF 72525.
3. Work with your EpicCare Ambulatory team to determine the face-to-face encounter types for your organization. This item is also used by the encounter cycle time metrics.

4. Enter any additional encounter types you want to include in the visit volume metrics.

Create Custom Clinical Context Values

The default clinical context values released by Epic and used by the visit volume components are Hospital, Ambulatory, and Home Health. If your organization needs additional clinical contexts by which to count visits, you can create custom clinical context values in the Clinical Context (I EAF 15700) category list. For more information, refer to the Modify a Category List's Values topic.

After you create your custom clinical contexts, you can specify the value in your service area, location, and department records as described below. You'll also need to create custom copies of the released dashboard components to use your custom clinical context and add your custom components to a custom dashboard. For additional information, refer to the Create and Edit a Component topic.

Specify the Clinical Context for Your Service Areas and Locations

The default clinical context for service areas and locations is Hospital. Follow these steps if you need to change the clinical context for a service area or location:

1. In Cadence Text, go to Cadence Management > Location.
2. On the Demographics screen, enter the clinical context for this location in the Clinical Context field.
3. Repeat these steps for each location you want to include in the visit volume metrics.

Override the Clinical Context for a Department

If a department's clinical context is not the same as the location or service area it belongs to, you can specify an override clinical context for the department:

1. In Cadence Text, go to Cadence Management > Department.
2. Go to the Cadence Department Information screen by fast-forwarding (Home+F9) to S DEP 2.
3. Enter the clinical context override for this department in the Clinical Context Override field.

Rebuild the Visit Volume Metric Data

You can run a utility to backfill the data for the metrics on the Visit Volume dashboard. This utility is useful if you have found and corrected some corrupt data and want to rebuild the metrics for the Visit Volume dashboard or any custom components you created to reflect the corrected data, or if you change your visit volume metrics and want to see how the change affects your previous data.

1. In Cadence Text, go to Utility Menu > Rebuild Visit Volume Metrics.
2. At the prompt, determine which metrics you want to rebuild:
    - 1-Appointment Volume Metrics, which rebuilds the following metrics:
        - 42002-ES Completed Appointments
        - 42003-ES Appointment Volume by Status
        - 42029-ES Completed Appointments - Face-to-face Encounters Only
        - 42030-ES Appointment Volume by Status - Face-to-face Encounters Only
        - 42034-ES Completed Appointments - All Encounter Types
        - 42035-ES Appointment Volume by Status - All Encounter Types
        - 42196-ES Completed Telehealth Appointment Volume
    - 2-Non-Appointment HOV, Encounter, and Unique Patient Volume Metrics, which rebuilds the following metrics:

        - 42025-ES Unique Patient Volume
        - 42026-ES Encounter Volume
        - 42027-ES Non-Appointment HOV Volume
        - 42031-ES Unique Patient Volume - Face-to-face Encounters Only
        - 42032-ES Encounter Volume - Face-to-face Encounters Only
        - 42036-ES Unique Patient Volume - All Encounter Types
        - 42037-ES Encounter Volume - All Encounter Types
        - 42195-ES Telehealth Encounter Volume
        - 42197-ES Non-Appointment HOV Telehealth Volume
    - 3-All, which rebuilds all of the metrics listed above and in turn populates the following dependent metrics:
        - 42028-ES Visit Volume
        - 42033-ES Visit Volume - Face-to-face Encounters Only
        - 42038-ES Visit Volume - All Encounter Types
        - 42198-ES Telehealth Visit Volume
        - 42199-ES Telehealth Visit Volume Percentage
3. At the Start date and End date prompts, enter the date range for which you want to rebuild data in the dashboard.
4. At the Rebuild metrics prompt, enter Yes.

Collect Department Organization Units for Patient Visits

 Applies only to organizations in Singapore

To help ensure that revenue routing based on Department Organization Units (also known as sub-specialties) functions as expected for organizations in Singapore, you can configure visit types to be associated with certain sub-specialties, and can then configure the system to automatically store that sub-specialty value to the patient visit when an appointment that uses the visit type is scheduled.

To implement this feature, you first need to add sub-specialties to the Hospital Service (I EPT 18886) category item. For more information about modifying category items, refer to the Add a Value to a Category List topic. Additionally, ensure that this item appears as a field in the Registration activity. Refer to the Record Singapore-specific Information During Registration topic for more information.

The system uses the sub-specialty in the visit type based on the ID type of the MPI ID of the visit location. You need to associate MPI IDs with locations for this to work:

1. In Hyperspace, go to the MPI Context activity (search: MPI Context) and create a new context. Enter a descriptor for the context. In the Subject List Settings section, enter Master File in the Type field and EAF in the Master file field.
2. Then, go to ID Types (search: ID Types) and create a new ID type that uses the context you just created.
3. In the Used by INI field, enter PRC.
4. In the Service Areas/Locations Using this ID Type, enter the locations and service areas where each visit

type will be scheduled.

5. Repeat steps 2-4 for each location or service area that where each visit type will be scheduled.
6. Now, go to the ID Maintenance activity (search: ID Maintenance) and open a visit type.
7. In the Identifier Type column, enter the MPI ID you created. Enter the sub-specialty associated with the visit type as the ID.

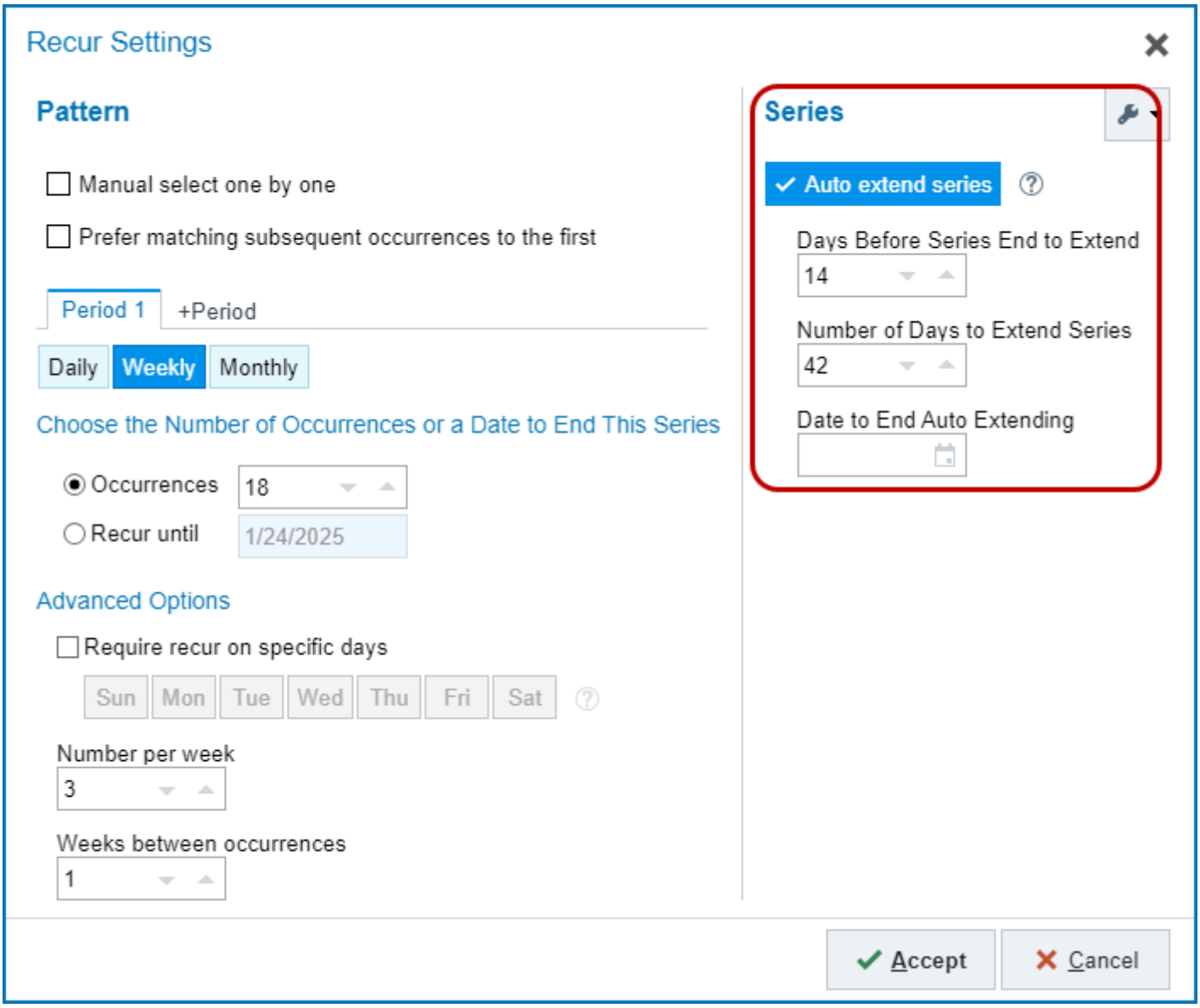
Finally, you need to specify a workflow begin extension for the registration workflow. This extension pulls the sub-specialty from the visit type into the Hospital Service item in the Registration activity.

1. In Hyperspace, go to the Extension Editor (search: Extensions) and create a copy of extension 16679-Reg Flow Begin - Singapore Sub-Specialty Default.
2. In the MPI Context Descriptor parameter, enter the descriptor of the MPI context you created above.
3. Open the Workflow Editor (search: Workflow Editor) and open your registration workflow.
4. In the workflow properties section on the left, click the Edit Properties link. The Flow Properties window appears.
5. In the Flow beginning extension (I HFL 150) field, enter your copy of extension 16679. If an extension already appears in this field, create an extension that uses template 310222-Reg Workflow Begin Execute Multiple Extensions and use it to combine extension 16679 with the other extensions in the field.

Allow Schedulers to Automatically Extend Recurring Appointment Series

Starting in February 2025

When schedulers create recurring series in areas with frequent and long-lasting care, such as dialysis, inpatient behavioral health, or home health, it can be cumbersome to have to manually extend those recurring series every few weeks or months. Schedulers can skip this manual work by configuring the system to automatically extend recurring series based on settings in the recurring pattern and an associated appointment request. Schedulers can do this during scheduling in the Recur Settings window in Book It or in the appointment request editor in the Auto Extend Recur section.



Auto extend series settings in the Recur Settings window of Book It

To ensure the auto-extend feature can run behind the scenes, you need to complete the following steps:

1. Configure a user record with appropriate Cadence security for scheduling. Security needs vary by department, but because the scheduling happens automatically with the auto-extend feature, we recommend that you not allow the user to override warnings to avoid appointments being scheduled when the patient can't be seen.
2. Enter the user you configured in the User for Auto Extending Recurring Series (I SDF 3590) field in the Appointment Requests section on the Scheduling form of Cadence System Definitions. If this setting is not configured, the nightly scheduling process always fails, even if a recurring series is configured to auto extend.

If the auto-extend process fails to schedule one or more occurrences, a Failed Occurrence task is added to the associated appointment request for the recurring series. Note that this task type is only created in the system by a nightly process after the User for Auto Extending Recurring Series field is set. If you intend to create an appointment request workqueue using the new task type, make sure to have time to wait for the nightly process. This also impacts when workqueues can be moved with Content Management. To move the workqueue with Content Management:

1. Move the Auto Extending Recurring Series field.
2. Update the community IDs (CIDs) of the Failed Occurrence task type to match the CIDs in the source environment, as described in the Synchronize CIDs and UCIs Between Environments Starting in February 2024 topic.
3. After the task is generated by the nightly process, you can move the workqueue using Content Management.

For additional details about appointment request workqueue build, refer the Build Appointment Request Workqueues topic.

Appointment Scheduling Support: Ongoing Tasks

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

Process Appointments with End of Day

Cadence end-of-day processing maintains the status and data of appointments for you to keep appointments up-to-date.

Refer to the End of Day Setup and Support Guide to learn how to set up end-of-day processing.

Update Providers in Subgroups and Provider Teams

When providers move or change departments, you might need to update subgroup records or provider teams.

Update Subgroups

Open the subgroup record and remove or add providers as needed. Refer to the Create Subgroups of Providers for Scheduling topic for additional information.

Update Provider Teams

1. Open the subgroup record for the provider team. Remove or add providers as needed. Refer to the Create Subgroups of Providers for Scheduling topic for additional information.
2. Open the provider record and select the Departments form. Remove or add provider teams as needed. Refer to the Create Provider Teams for Scheduling topic for additional information.

Update Single Department Subgroups for One Provider

If you need to add a provider to or remove a provider from several subgroups you can do this from one screen in Cadence Text.

1. In Cadence Text, go to Cadence Management > Provider and select your provider record.
2. Access the Single Department Subgroups screen.
3. Update the list of Single Department Subgroups (I SER 50) that your provider should be included in.

Indicate in Book It Whether a Provider Is Accepting New Patients

Starting in August 2023

You can show schedulers in Book It whether or not a provider is accepting new patients to help new patients get appointments with providers who have room to take them on. To do this, you set items in the provider's record that indicate whether or not they're accepting new patients or are accepting new patients in certain departments. When a provider has these fields set, a checkbox appears in Book It to filter solutions to providers who are accepting new patients.

If the items are not configured, their default behavior depends on whether it is a Person or Resource provider:

- Resource providers use a default value of Yes for both items.
- Person providers use a default value of No for both items.

To use this filter, items Accepts New Patients (I SER 26000) and Accepts New Patients In This Department (I SER 26001) need to be configured in a provider record:

1. Open the Provider record.
2. Go to the Provider Finder Settings form (starting in August 2024) or the Departments form.
3. Set Accepts New Patients (I SER 26000) to Yes.
    a. If the provider only accepts new patients in specific departments, use Accepts New Patients (I SER 26001) in the Department grid and leave Accepts New Patients (I SER 26000) empty.

This filter appears to schedulers in Book It when both of the following criteria are met:

- At least one selected provider has Accepts New Patients and/or Accepts New Patients In This Department explicitly set
- At least one selected provider doesn't accept new patients.

These items are also used as part of MyChart's Provider Finder. In Provider Finder, patients can also filter on whether a provider is accepting new patients, and an "Accepting new patients" badge also appears on providers' bio pages. For more information about Provider Finder, refer to the MyChart Provider Finder Setup and Support Guide.

Update Departments for Automated Calling

If you roll out automated appointment calling by department, or if you add a new department, you need to update batch job records to include each additional department.

Refer to the Batch Scheduler Setup: Essentials topic in your online documentation for more information on creating batch processes.

Move Appointments and Cadence Build from One Department to Another

Considerations
You need to work with your Epic representative to access the Department Move Update utility. This requirement helps ensure that your use of the utility doesn't cause any unintended changes in the system. Contact your Epic representative and mention SLG 4671494 for help using the utility.

Use the Department Move Update utility in Cadence Text to move your Cadence build from one department to another. For example, a department in your organization might move to a different revenue location, so you need to create a new department and move appointments, provider templates, and other Cadence things from the old department to the new department. The Department Move Update utility can move the following:

- Provider held time, held days, and days off
- Provider templates, template release dates, and appointments
- Wait list entries, recalls, and prerequisites
- Report (HRX) records
- Pool (PLS) records
- Patient messages and dismissals

- Provider messages

To access this utility in Cadence Text, select Utilities > Department Move Update.

You can use the Department Move Update utility to move Cadence build between multiple departments rather than from one department to another. This option requires you to specify a flat file that contains the source departments and target departments.

The Department Move Update Utility allows you to move templates for which the indefinite end date check box has been selected. It also moves all template exceptions, removing the need for a second utility to move certain template exceptions.

Data Courier Considerations

The utility cannot move provider templates from one department to another in an environment where certain items use Data Courier item protection. The affected items are listed below and are organized by the prompt in the utility that won't work when the items are protected.

If you use item protection for these items, run the utility in your build environment and use Data Courier or a Content Management ticket to send the changes to production. If you don't have these items protected, you can still run the utility in your build environment and use Data Courier or a Content Management ticket to send the changes to production, or you can run it directly in production.

- Do you want to update SER 40 settings?
  - Use Provider Level Security (I DEP 590)
  - Departments (I SER 40)
  - Inactive Cadence Dept (I SER 41)
  - Outlook Link (I SER 42)
  - Team Subgrp (I SER 43)
  - Security Classes for Schedule (I SER 1155)
  - Sec Classes for Template (I SER 1156)
- Do you want to move provider level block settings?
  - Blocks (I SER 60)
  - Block Dept (I SER 65)
  - Block Change Time (I SER 140)
  - New Block Type (I SER 145)
- Do you want to move provider time release of slots settings?
  - Slot Length to Match (I SER 1161)
  - Slot Block to Match (I SER 1162)
  - Number of Openings to Match (I SER 1163)
  - Number of Overbooks to Match (I SER 1164)
  - Number of Days Before Split Slots (I SER 1165)
  - New Slot Length (I SER 1166)
  - Operator for Adjust Number of Openings (I SER 1167)
  - Number of Openings Adjustment (I SER 1168)
  - Operator for Adjust Number of Overbooks (I SER 1169)
  - Number of Overbooks Adjustment (I SER 1170)
  - Related Departments When Split Slots (I SER 1171)

Move Held Time, Held Days, Days Off, Templates, Release Dates, and Appointments

Complete the following tasks in order to ensure that providers' templates are complete for the new department.

Make Providers Schedulable in the New Department

Add the new department to the Departments (I SER 40) item for your providers to make the providers schedulable in the new department before you move templates, release dates, and appointments. You can do this manually if you have just a few provider records to update or use the utility if you have many records to update.

To do this manually:

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Provider and open a provider's record.
2. Select the Departments form.
3. Add a new row to the table for the new department.

To use the utility:

1. In Cadence Text, select Utility Menu > Department Move Update.
2. Select Move templates, release dates, appointments and follow the prompts:
    a. What is the source department? Enter the name or ID of the department you want to move data from.
    b. What is the target department? Enter the name or ID of the department you want to move data to.
    c. Do you want to update SER 40 settings? Type Yes and press Enter.
    d. For now, enter No at the rest of the prompts until you get to the Do you want to continue? prompt, and enter Yes there to start the utility.

Move Held Time, Held Days, and Days Off

Run the Department Move Utility to move held time, held days, and days off from the providers' templates in the source department to their templates in the target department.

1. In Cadence Text, select Utility Menu> Department Move Update.
2. Select Provider Held Time, Held Days, and Days Off Update and follow the prompts:
    a. What is the source department? Enter the name or ID of the department you want to move data from.
    b. What is the target department? Enter the name or ID of the department you want to move data to.
    c. What is the start date? Select the start date for moving data from templates.
    d. Do you want to continue? Enter Yes to start the utility.

Move Templates, Release Dates, and Appointments

Run the Department Move Update utility to move release dates, provider-level block release settings, and provider-level slot release settings, to reassign templates, and to move appointments to the target department:

1. In Cadence Text, select Utility Menu> Department Move Update.
2. Select Move templates, release dates, appointments and follow the prompts:
    a. What is the source department? Enter the name or ID of the department you want to move data from.
    b. What is the target department? Enter the name or ID of the department you want to move data to.
    c. Do you want to update SER 40 settings? Type No and press Enter. You already did this in the Make Providers Schedulable in the New Department topic.
    d. Do you want to move release dates? Type Yes and press Enter if you want to set the release date for

the providers' schedules in the target department to be the same release date as their schedules in the source department.

e. Do you want to move provider level block settings? Type Yes and press Enter if you want to add the target department to the provider-level block release settings for all providers who already have the source department listed in their provider-level block release settings.

f. Do you want to move provider time release of slots settings? Type Yes and press Enter if you want to add the target department to the provider-level slot release settings for all providers who already have the source department listed in their provider-level slot release settings.

g. Do you want to reassign provider templates and appointments? Type Yes and press Enter if you want reassign provider templates and appointments from the source department to the target department. If you choose Yes for this option, you are also prompted to enter:

   i. What is the start date? Select the start date for moving templates and appointments.

   ii. Enter End to move the whole template including indefinite end dates. What is the end date?

h. Do you want to save updated records to a Data Courier load file? This prompt appears only when Data Courier is enabled in your environment. Enter Yes to create a file for the updated records that you can load into Data Courier. Enter No to write the updated records to the screen.

i. Do you want to continue? Enter Yes to start the utility.

Move Wait List, Recalls, and Prerequisites

1. In Cadence Text, select Utility Menu> Department Move Update.
2. Select Move wait list, recalls, and prerequisites and follow the prompts:
   a. What is the source department? Enter the name or ID of the department you want to move data from.
   b. What is the target department? Enter the name or ID of the department you want to move data to.
   c. Do you want to move Wait List entries from. Verify that you have selected the correct source and target departments, type Yes, and press Enter.
   d. What is the start date? Enter the date to start updating wait list entries with the target department. The system changes the department for any entries in the source department that have a "remain on list until" date (I EPT 7290) that is later than the start date you specify here. The start date should most likely be the date you're opening the new department and starting to schedule appointments.
   e. Do you want to move Recall and Prerequisite records from. Type Yes and press enter if you also want to move recalls and prerequisites for the departments you selected.
   f. Do you want to continue? Verify the information you've entered and then type Yes and press Enter to move the data.

Move Reports

This utility makes certain Cadence, Grand Central, and Referrals reports available in the new department by replacing the source department with the target department or appending the target department in the following items:

- Departments (I HRX 240). Append. Used by many Cadence application reports such as the Department Appointments report and the Reschedule Appointments work list.
- Belong To Which Department (I HRX 430). Append. Used to determine which public reports are available to which departments.

- Wait List Department (I HRX 620). Replace. Used by the Wait List work list.
- Units (I HRX 621). Append. Used by the Department Inpatient Appointments report and Unit Schedule report.
- Referred By Department (I HRX 19505). Append. Used by the Referrals report.
- Referred To Department (I HRX 19513). Append. Used by the Referrals report.
- Today's Patients Report Appt Departments (I HRX 20301). Append. Used by the Today's Patients report.
- Today's Patients Report Admission Units (I HRX 20307). Append. Used by the Today's Patients report.

To run the utility:

1. In Cadence Text, select Utility Menu> Department Move Update.
2. Select Move reports (HRX) and follow the prompts:
    a. What is the source department? Enter the name or ID of the department you want to move data from.
    b. What is the target department? Enter the name or ID of the department you want to move data to.
    c. Do you want to save updated records to a Data Courier load file? This prompt appears only when Data Courier is enabled in your environment. Enter Yes to create a file for the updated records that you can load into Data Courier. Enter No to write the updated records to the screen.
    d. Do you want to move HRX Reports from the source department(s) to the target department(s)? Verify that you have selected the correct source and target departments, type Yes, and press Enter to move the data.

Move Pools

1. In Cadence Text, select Utility Menu> Department Move Update.
2. Select Move pools (PLS) and follow the prompts:
    a. What is the source department? Enter the name or ID of the department you want to move data from.
    b. What is the target department? Enter the name or ID of the department you want to move data to.
    c. Do you want to save updated records to a Data Courier load file? This prompt appears only when Data Courier is enabled in your environment. Enter Yes to create a file for the updated records that you can load into Data Courier. Enter No to write the updated records to the screen.
    d. Do you want to move PLS Pools from the source department(s) to the target department(s)? Verify that you have selected the correct source and target departments, type Yes, and press Enter to move the data.

Move Patient Messages and Dismissals

1. In Cadence Text, select Utility Menu> Department Move Update.
2. Select Move patient messages and dismissals and follow the prompts:
    a. What is the source department? Enter the name or ID of the department you want to move data from.
    b. What is the target department? Enter the name or ID of the department you want to move data to.
    c. Do you want to update patient messages? Type Yes and press Enter if you want to update patient messages for the source department to also include the target department you selected.
    d. Do you want to move patient dismissals? Type Yes and press Enter if you want to append the target

department to the list of departments a patient is dismissed from when the patient is already dismissed from the source department.

e. Do you want to continue? Verify the information you've entered and then type Yes and press Enter to move the data.

Move Provider Messages

1. In Cadence Text, select Utility Menu> Department Move Update.
2. Select Provider Messages Update and follow the prompts:
   a. What is the source department? Enter the name or ID of the department you want to move data from.
   b. What is the target department? Enter the name or ID of the department you want to move data to.
   c. What is the start date? Select the start date for moving messages from templates.
   d. Provider/Resource. Select the provider records for which you want to move data.
   e. Do you want to save updated records to a Data Courier load file? This prompt appears only when Data Courier is enabled in your environment. Enter Yes to create a file for the updated records that you can load into Data Courier. Enter No to write the updated records to the screen.
   f. Do you want to continue? Enter Yes to start the utility.

Monitor Work List Usage Trends

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

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

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

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

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

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

Define a Batch Job to Collect Work List Data

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

We recommend you run this batch job weekly.

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

Add the Dashboard Component to Dashboards

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

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

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

Measure Schedule Accessibility

An accessibility search measures how soon a patient can be seen by a provider, or how accessible a schedule is. This measurement is the number of days into the future it takes to find the next available time for a scheduling situation, such as a certain visit type or a new patient appointment. You can use the accessibility search results to determine whether additional staff are needed in certain departments or if you need to increase openings for certain visit types.

Accessibility searches that search by visit type do not evaluate appointment schedule custom check extensions by default. You can configure your extensions to allow accessibility searches to use them, but we do not recommend doing this for extensions that evaluate patient-level data because accessibility searches do not contain patient data. For more information, refer to the Show Custom Warnings Based on Rules During Scheduling topic.

To measure accessibility, you need to create an accessibility search record to define what you are looking for and create a batch job to run the search. Then, you extract this data to Clarity and use reports to view and analyze the results.

In general, an accessibility search record searches for openings based on the criteria of a slot in a schedule or based on criteria for scheduling a particular visit type. You can further define your visit type accessibility searches using:

- Groups of related visit types. For example, your organization might have multiple visit types that are all used for new patients. Instead of creating an accessibility configuration for each visit type, you can create a grouper that includes all visit types used with new patients, and perform searches using that grouper instead. For more information on setting up a visit type grouper, refer to the Build a General Grouper topic.
- Patient demographics. If your organization uses different appointment slot lengths for particular visit types based on visit type modifiers for patients' sex or age, you can configure your accessibility searches to respect those modifiers.

Create Accessibility Records

There are several accessibility configuration records in the Foundation System. Log in to the Foundation Hosted environment to see these records.

The steps below summarize the process of creating an accessibility search. Refer to the Accessibility Search reference for additional information about all the fields in the Accessibility Configuration (SNR) master file.

1. In Cadence Text, follow the path Cadence Management > Accessibility Config. You can edit an existing

accessibility configuration record or create a new one. Remember the name and number of the configuration record so you can identify it for later steps.

2. On the Search Targets screen, specify the departments in which you want the search to take place.
3. In the Search by field, choose whether you want to search by slot or by visit type.

```
EPIC HEALTH SYSTEMS          Edit Accessibility Config              Date: 1/08/18
EMC FAMILY MEDICINE                                                 Time: 2:42
Configuration: FS ES UNBLOCKED 3RD AVAILABLE                ID: 1170002202
 ------------------------------- Search Targets --------------------------------
              Display Name:
   Search All Departments: Yes
       Search Departments:



 Find Occurrence For:
           All Departments: Yes
           Each Department: Yes
             Each Provider: Yes

     Search How Many Days: 180
                Search By:

                Occurrence: 3
        Start Date Offset:
 ------------------------------------------------------------------------------
```

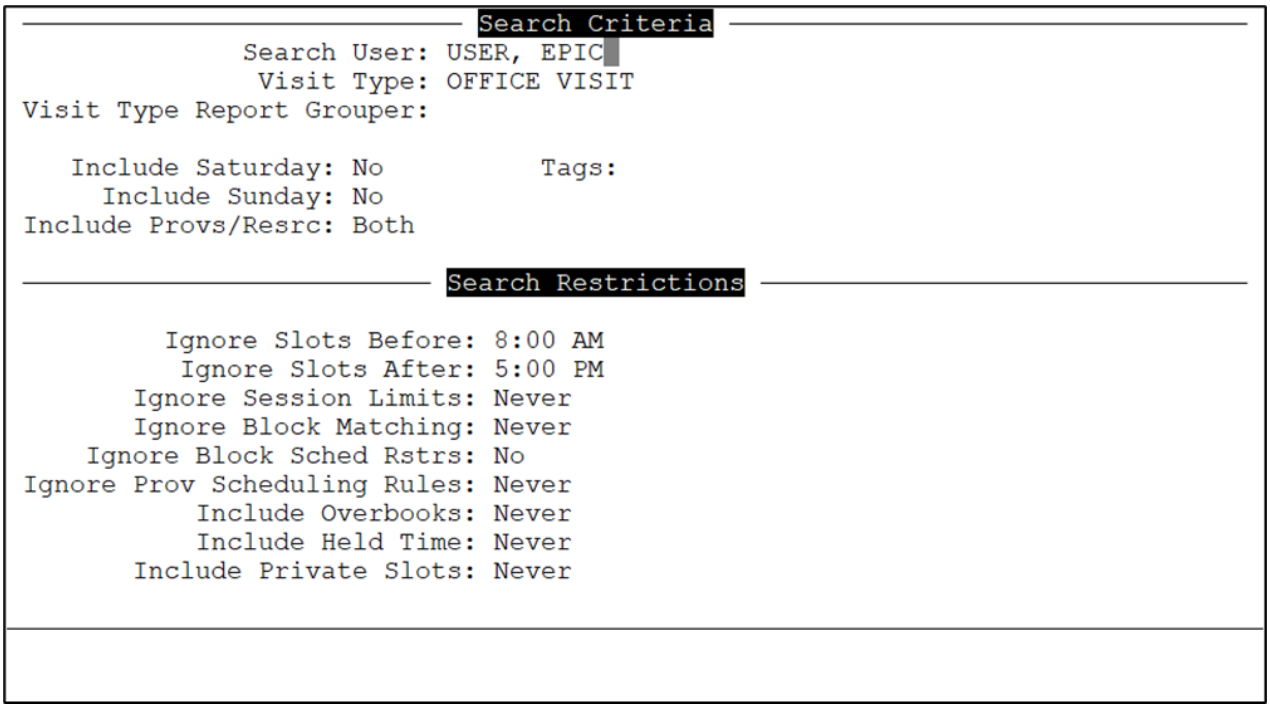
4. If you chose to search by slot, on the Search Criteria and Slot Restrictions screen, specify criteria for the search and any slot restrictions you want the search to respect.

```
EPIC HEALTH SYSTEMS          Edit Accessibility Config              Date: 1/08/18
EMC FAMILY MEDICINE                                                 Time: 2:42
Configuration: FS ES UNBLOCKED 3RD AVAILABLE                ID: 1170002202
 ------------------------------- Search Criteria -------------------------------
       Minimum Length: 15                Use Slot Mult Times:
     Include Saturday: No                      Include Sunday: No
   VT For Adj Min Len:                      Include Holidays: No
VT For Session Limits:                    Include Resources: No
 ------------------------------ Slot Restrictions ------------------------------
   Include Overbook Slots: No
  Include Unavailable Time: No
         Include Held Time: Yes
      Public/Private Slots: Both Public and Private Slots

 Minimum Slot Length:                    Maximum Slot Length:
 Ignore Slots Before:                     Ignore Slots After:

   Include Unblocked Slots: Yes
        Block Restrictions:
                Block List:



 ------------------------------------------------------------------------------
```

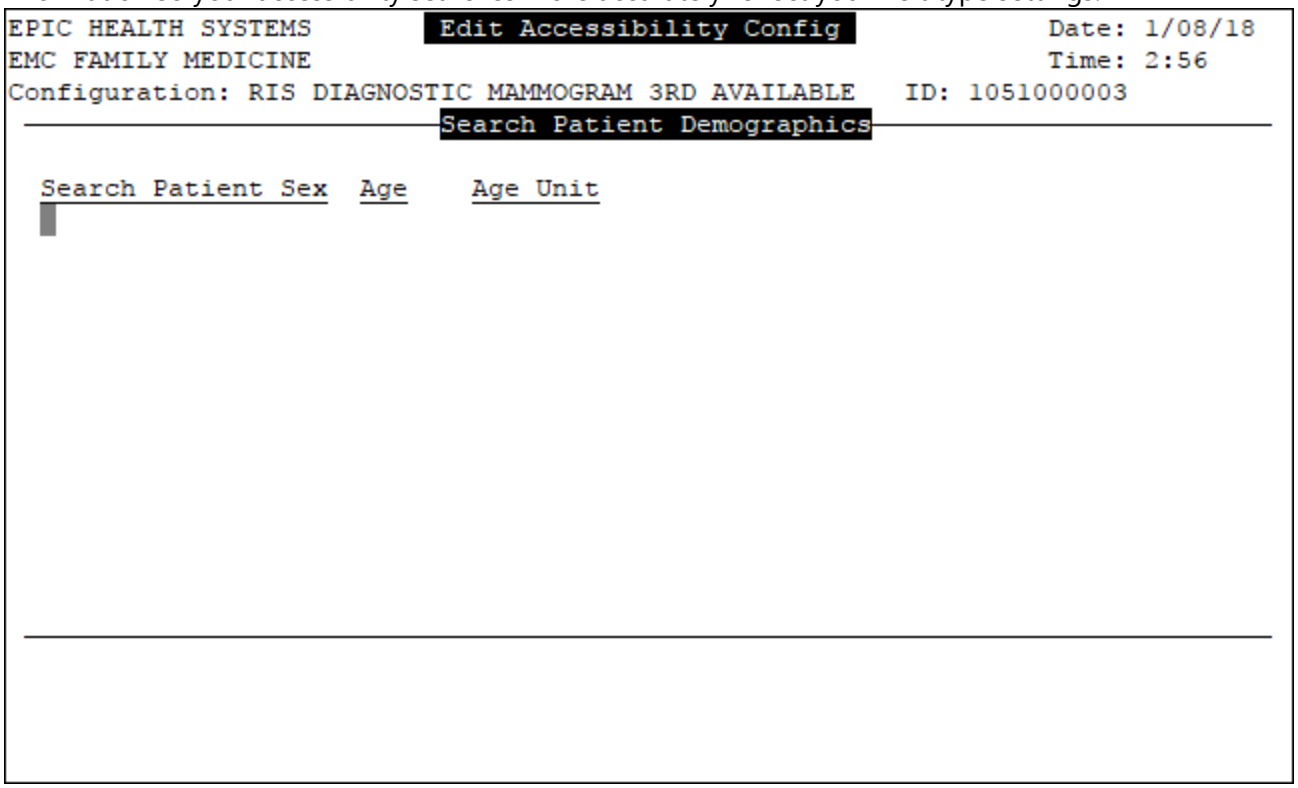
5. If you chose to search by visit type, on the Search Criteria and Search Restrictions screen, specify a user

whose security is used for searching. We recommend specifying a user who has all Cadence security points and who has access to schedule in all departments and service areas.

6. Enter a visit type or visit type grouper to use for the search as well as any search restrictions. For example, your organization might have multiple visit types that are all used for new patients. Instead of creating an accessibility configuration for each visit type, you can create a grouper that includes all visit types used with new patients, and perform searches using that grouper instead.

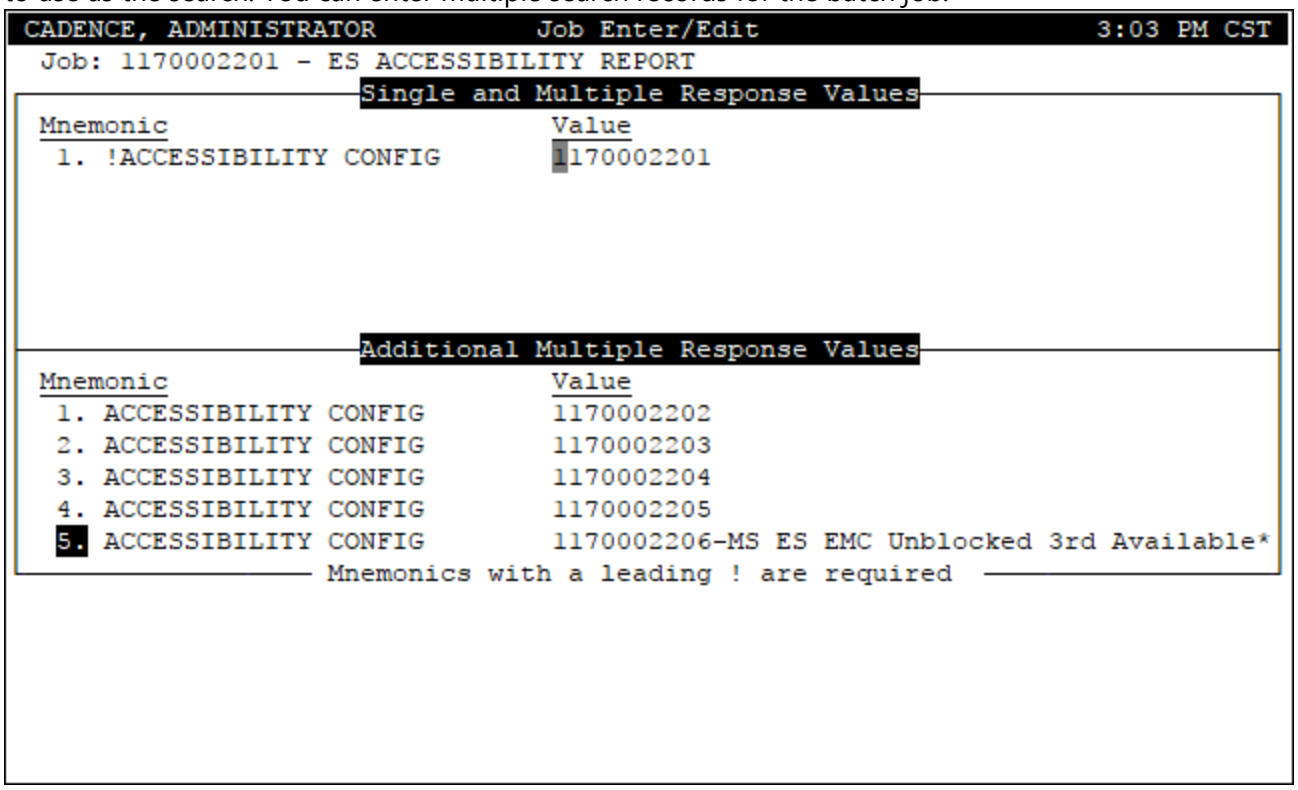
7. 

8. If your organization uses visit type modifiers based on patient sex or age, you can enter that demographic information so your accessibility searches more accurately reflect your visit type settings.



Set Up a Batch Job to Collect Accessibility Data

1. In Cadence Text, follow the path Utility Menu > Batch Jobs > Job Enter/Edit and create a batch job based on template 22-Accessibility Report. To duplicate the configuration of the Foundation System, refer to batch job 1170002201-ES Accessibility Report in the Foundation Hosted environment.
2. In the Accessibility Config mnemonic, enter the record ID of the accessibility configuration record you want to use as the search. You can enter multiple search records for the batch job.



3. Add your job to a batch and a run. For more information about working with the Batch Scheduler, refer to the Batch Scheduler Setup: Essentials topic.

View Accessibility Data in a Dashboard

If you use Radar, there are several components that display accessibility data.

- ES Provider Accessibility
- ES Department Accessibility

Refer to the Radar Setup and Support Guide for more information on creating Radar dashboards.

Measure Scheduler Productivity

As managers and project team members, you need to help schedulers be productive and efficient. Cadence automatically tracks how long it takes schedulers to perform scheduling workflows in all departments. You can use this information in reports to see whether schedulers need more training or if you need to adjust a scheduling workflow.

By default, the system records productivity data by login department for the following workflows:

- Book Anywhere
- Book It Group Appointment
- Book It Full Appointment

- Change Appointment
- Check In
- Check Out
- Class Schedule
- Full Appointment Schedule
- Full Walk In Schedule
- Group Appointment Schedule
- Mixed Book It Book Anywhere
- One Click
- Order Up
- Quick Appointment
- Sign In
- Snapboard Schedule
- View Schedule
- Walk In

You can choose to track productivity by action department (where an appointment is scheduled) instead or turn off productivity tracking if you're certain that you'll never want to use it for a department, which we do not recommend.

When a scheduler is logged in to a different department from where an appointment is scheduled, the system uses the workflow productivity settings for the department that the scheduler is logged in to. So if a scheduler is logged in to department A and schedules an appointment in department B, the workflow productivity settings for department A apply.

Set Up a Department to Track Productivity Data

1. In Hyperspace, follow the path Epic button > Admin > Master File Edit > Department and select your department.
2. Select the Reports > Productivity Tracking form.
3. In the Workflow (I DEP 665) column, select the workflow you want to track. All workflows are enabled for productivity tracking by default. List a workflow only if you want to change how it is tracked. Any unlisted workflows are tracked by login department.
4. In the Tracking (I DEP 666) column, select the type of tracking you want for the associated workflow:
    - Disabled. Select this option to turn off tracking.
    - Track by Action Department. Select this option to associate users' productivity data with the departments for the appointments on which they are taking action. You might want to select this for workflows where the configuration varies by department. This allows you to focus on which departments are taking the longest to complete or have the most difficult workflows, and allows you to compare departments.
        - For example, let's say you select this option for Full Appointment Entry. If a scheduler logs into a central scheduling department and schedules appointments in the family practice, pediatrics, and radiology departments, information is tracked separately for all three

departments.

- For joint appointments scheduled across multiple departments, this type of tracking counts the productivity steps once for each appointment department.

- Track by Login Department. Select this option to associate users' productivity data with their login departments. This option collects workflow data across departments, without differentiating between departments, so it is helpful for departments where workflows are similar and you want to focus on end user performance.
  - For example, let's say you select this option for Check In. If a front desk staffer logs into the family practice department, and checks in appointments for the family practice and pediatrics departments, information for all check-ins are tracked as part of the family practice department.
  - For joint appointments scheduled across multiple departments, this type of tracking counts the productivity steps once for the login department.

Create Productivity Reports

Create reports from Reporting Workbench template 55051-ES Workflow Productivity Tracking to view productivity data.

Report on How Schedulers Use Book It

This option applies only to Book It and not other scheduling activities such as the Snapboard and MyChart.

Book It has three scheduling views: Solutions, Schedules, and Open Slots. You might be curious to know how often schedulers use each view to schedule an appointment. For example, if you trained schedulers to use the Solutions view most of the time, are they actually using it, or are they switching to a different view? This information is stored in the Appt Scheduling Mode (I EPT 7089) item, which can be reported on in Clarity and in reports based on Reporting Workbench template 55050-ES Appt Search. In Reporting Workbench, use column 5089-Appointment Scheduling Mode Abbreviation.

Appointment Scheduling Support: Common Issues

This section describes some of the common issues that occur during the build and setup of appointment scheduling, and the solutions to those issues.

The Auto Scheduler is Showing Warnings Right Away

Solution

The Auto Scheduler might show times with warnings in the third or fourth pass. If you are reaching those passes early, you might need to extend the number of days for the base search range. This gives the Auto Scheduler more time in the first and second passes so it can find solutions without warnings. Refer to the Configure the Auto Scheduler section on this guide for more details on passes.

Schedulers with Overrule Block Security Can't Override Blocks in the Auto Scheduler

Solution

This result is correct. Block security is different in the Auto Scheduler. Schedulers with override security can't select unblocked slots if the visit type requires a matching block.

An Incorrect Activity Appears Before or After Scheduling

Solution

Check your login department and your appointment department. Make sure the correct advantage activity is in use based on system and department settings. The system looks to the activity set in Cadence System Definitions if a department doesn't specify an activity.

Remember:

- The after appointment entry activity is based on the appointment department.
- The before appointment entry activity is based on the login department.
- The appointment information activity is based on the appointment department.

Patients Aren't Receiving Automated Calls for Appointments

Refer to the Enable Automatic Appointment Confirmation at Your Department in Automatically Call Patients to Notify Them of Appointments for more information regarding all solutions to this problem.

Solution

Verify that the department can use automatic calling by checking the department record. The department-level must be set to Yes for the department to use automated appointment calling. If left blank, the default is No.

Solution

The date range you specified might be too small or use past dates. Check the department record or the report criteria.

Solution

Is the appointment on a weekend? If so, is the appointment department set up to skip weekends? Some of your departments might see patients on Saturdays or Sundays. If this is the case, you should not exclude weekends from your automatic calls.

Solution

- Check the provider record to see if the provider is disabled for automated appointment calling. Refer to Prevent the System from Automatically Calling a Provider's Patients.
- Check the department record to see if the provider is excluded from calling in the appointment department. Refer to the Enable Automatic Appointment Confirmation at Your Department in Automatically Call Patients to Notify Them of Appointments.

The sidebar is always collapsed, even though I leave it open when I close the activity or log out.

Solution

If your monitor resolution is too low, the sidebar is always collapsed by default. You can open the sidebar at any time, but the system will not remember your settings when your monitor resolution is too low.

Epic recommends using monitors that are at least 1280x1024 and that are ideally 1680x1050 for Cadence activities that use the Patient sidebar, such as the Snapboard and Book It. Users shouldn't use the Patient sidebar if monitor resolution is lower than this recommendation.

I Can't Figure Out Why an Appointment Isn't in my Automated Appointment Confirmation Extract.

Solution

This page contains information on how to troubleshoot issues relating to the automated appointment confirmation (sometimes abbreviated in the system as AAC) process with the third-party vendor Televox. If you don't use Televox, some of these troubleshooting tips might still be helpful for you.

General Checks

- Check the Run History for the extract. When was the last run? Was your appointment made after the file was created?
- Is automated appointment calling turned on in Cadence System Definitions? Check the Implement automated appt confirmation? (I SDF 8520) field on the Automated Confirmation form.

Department-Level Checks

- Is the appointment department enabled for automated appointment calling? Check the Implement automated appt confirmation? (I DEP 650) field on the Automated Confirmation form.
- Is the appointment within the department begin day and end day range? Check the Begin day (I DEP 651) and End day (I DEP 652) fields on the Automated Confirmation form. If you are using reports based on Reporting Workbench extract template 55054-ES Automatic Notices, check the Search range criteria group in the report settings.
- Is the appointment on a weekend? Are your settings set to skip weekends? Check the Skip weekends? (I DEP 658) field on the Automated Confirmation form.

Provider-Level Checks

- Providers are enabled for automated appointment calling by default. Is the appointment provider disabled?
- Is the appointment provider excluded at the department level? Check the Providers to exclude (I DEP 663) field on the Automated Confirmation form. If you are using reports based on Reporting Workbench extract template 55054-ES Automatic Notices, check the Department and provider and Department and provider to exclude criteria groups in the report settings.

Appointment- and Patient-Level Checks

- Is the appointment visit type suppressed for the appointment provider?
- Is the appointment visit type suppressed for the department?
- Is the appointment already confirmed or is it canceled?
- Is there an appointment-level block for calls? This is set in the Block calls field (I EPT 7905) on the Demographics form in your Appointment Information activity.
- Is there a patient-level block for calls? Check the patient's preferences.
- Does the patient have a phone number? Is the phone number in the correct format? Check the patient's demographics.
- Is the patient deceased or inactive?
- Is the appointment already in the file?
- Is the visit type disabled for automated calling? Check the Auto confirmation call? field (I PRC 1055) on the General form of the visit type record in Hyperspace.
- Is the visit type excluded at the department level? Check the Visit types to exclude (I DEP 664) field on the Automated Confirmation form. If you are using reports based on Reporting Workbench extract template 55054-ES Automatic Notices, check the Visit type criterion in the report settings.
- Is the appointment an inpatient appointment? Are you excluding inpatient appointments from your file? Check the Include inpatient appointments? (I SDF 8549 or I DEP 659) field on the Automated Confirmation form. If you are using reports based on Reporting Workbench extract template 55054-ES Automatic Notices, check the Inpatient appointments criteria grouper in the report settings.

I made a change to Cadence System Definitions, but nothing has changed in my system

Many settings in Cadence System Definitions (SDF) are cached when users log into Hyperspace. When you modify a setting in Cadence System Definitions, users need to restart Hyperspace (log out and exit Hyperspace and then log back in) for the change to take effect. For example, if you change which report settings are used for an Appointment Desk tab, users won't see the new report settings until they restart Hyperspace. Consider making changes to Cadence System Definitions when most users are logged out to prevent users from needing to restart Hyperspace. You can schedule your changes to take place at a convenient time using Data Courier or a Content Management ticket.