To ensure providers are being paid correctly, their production days must be captured and recorded accurately in Epic. Prism will update overnight and use the data from Epic to calculate provider ADP by dividing the total adjusted production by the number of days reported in a month.

In order for Prism to record a provider day as "worked," three things must be present:

1. The provider's template is open in Epic.

2. There is an appointment present.

   o Any appointment with the status of Arrived, Completed, Scheduled, and No Show will be counted.

   > ⓘ If a patient was left on the schedule but did not show up to their appointment and the office wants to remove it after the EOD process has run, use **Edit Appointment Statistics** in the **Appt Desk** to update the status. Refer to the *Cancel and Reschedule Appointments SRG* for steps.

3. There is production recorded/recognized for that day.

   o This means not only actual charges for treatment rendered, but also any adjustments that recognize revenue, such as an estimate correction.

It is important to note that:

- Full days are calculated based on more than 5 hours (e.g., 7:00 A.M. – 1:00 P.M. would be counted as a full day).

- Half days are calculated based on 5 hours or less (e.g., 7:00 A.M. – 11:00 A.M. would be counted as a half day).
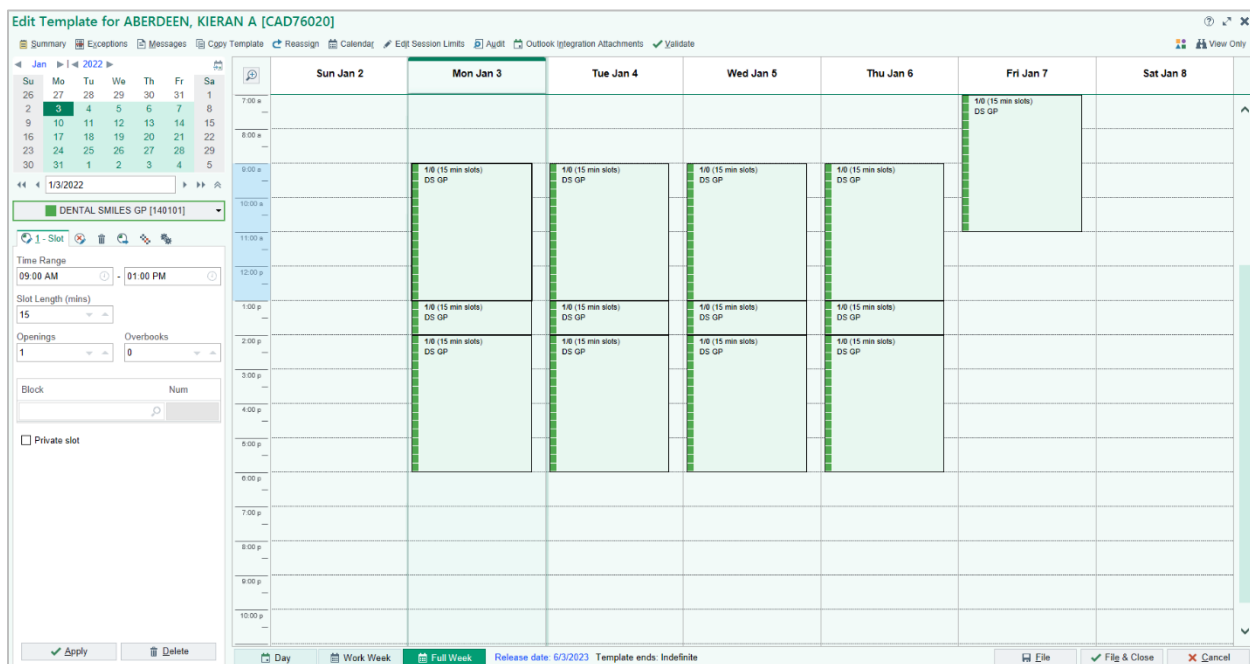
Why does this Matter?

It is important to make sure production days are captured accurately to ensure provider payroll is calculated correctly. Mistakes, missing, or inaccurate days can erode trust and delays proper compensation to the provider. Accuracy is part of the brand promise to our patients, owner dentists, and supported clinicians.

Setting Up Provider Templates in Epic

The first step to ensuring provider days are recorded correctly is to make sure the provider's template is set up, working hours are properly defined, and the template is released. Follow the steps outlined in the *Build Templates* system reference guide on the Epic Learning Home Dashboard.

In Epic, select ⏱ **Templates**> ✎ **Edit Template**.

1. Build/Open a template.

2. Add blocks.

3. Reserve time for lunch.

4. Set a release date.

5. Validate the template.

> ⓘ In the above template, if no additional appointments are present outside of template hours, Monday-Thursday will record full days worked and Friday will record a half day worked on Prism.

Managing Template Exceptions in Epic

> **!** On a schedule, an exception is specifically used to denote time when a provider is not available for appointments during their normal working hours (e.g., Meeting). Exceptions should not be used for vacation or time off. Refer to the *Manage Provider Schedules* SRG for steps on setting time off for a provider.

> **ⓘ** Adding exceptions will not impact the hours available for a given day (e.g., adding an exception over the whole afternoon will not cause the system to read it as a ½ day.

Set an Exception for a Provider

In Epic, select ⏱ **Templates**> ➕ **Add Exceptions**.

1. Search for and select the provider.

2. Select a reason, select all day or the appropriate time range, and specify a date.

> **!** If there is an existing scheduled appointment, the system will display a warning asking if you would like to continue and if you would like to open the Reschedule report.

> **ⓘ** You can also Add Exceptions by **Ctrl+Click+Drag>** click the **New Unavailable Time** (🕐) **Icon>** select a **Reason>** click the **Accept** (✔) icon.
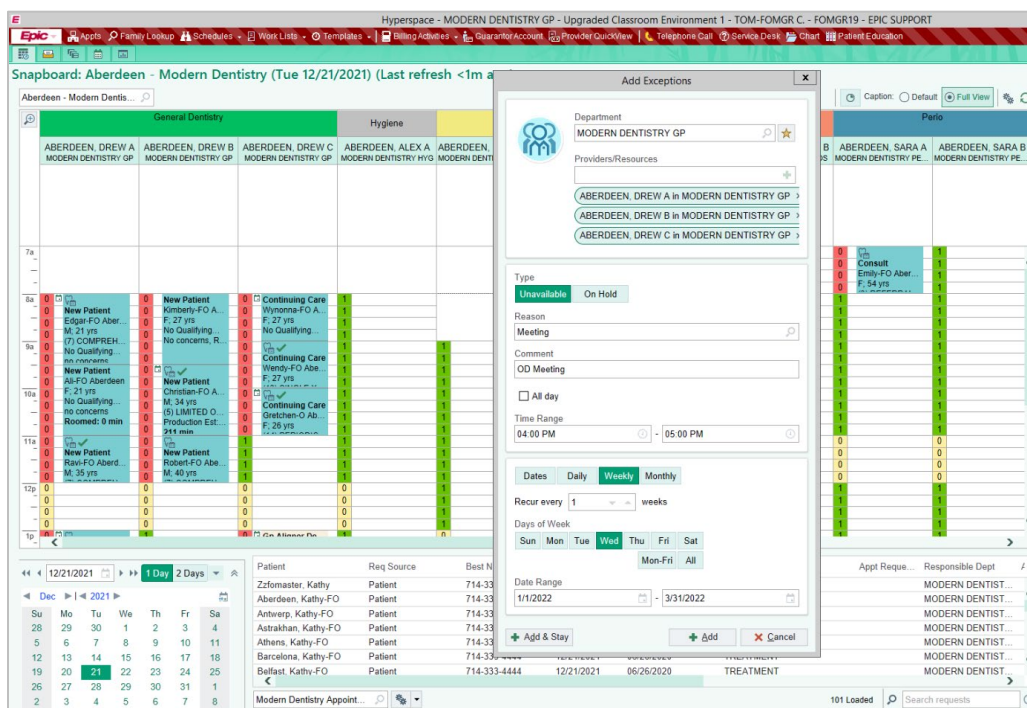
Remove Exceptions for a Provider

In Epic, select 🕐 **Templates**> ➖ **Delete Exceptions**.

1. Search for and select the provider.

2. Select all day or the appropriate time range and specify a date.

> ❗ Exceptions cannot be added or deleted from past dates once EOD has already been run for the date(s).

MY Office Page and Provider Drill Down Report

It's important to check the MY Office page and Provider Drill Down report daily to verify that the information posted accurately reflects the days and hours each provider worked. Payroll uses this information to pay providers. If errors are identified, the OM should correct these immediately in Epic.

> ℹ️ Best practice is to check this page during the morning huddle.

MY Office Page

Office Metrics - #012 - MyTown Quick Reference Guide   Print Monthly KPIs

GP	Goal ADP	Actual ADP	Prod Days	Days Left	$Need	Last Day Total Prod	Today 03/18			Fri 03/19			Sat 03/20		
							Opp	SchProd	C%	Opp	SchProd	C%	Opp	SchProd	C%
ABERDEEN AMALGAM	$4,000	$2,974	13.0	10.0	$5,333	03/17 $2,551	6.4	$591	56%	6.4	$0	65%	1.0	$0	0%
BRIE BUCCAL	$3,500	$3,377	10.0	10.0	$3,623	03/17 $11,872	6.6	$2,755	59%	0.0	$0	-	0.0	$0	-
CHANDRA CUSPID	$2,700	$1,538	13.0	7.0	$4,859	03/17 $2,427	0.0	$0	-	4.7	$122	71%	5.3	$0	29%

Hygiene	Goal ADP	Actual ADP	Prod Days	Days Left	$Need	Last Day Total Prod	Today 03/18			Fri 03/19			Sat 03/20		
							Pat#	SchProd	C%	Pat#	SchProd	C%	Pat#	SchProd	C%
DAMON DENTITION	$1,400	$1,156	12.0	8.0	$1,766	03/17 $2,169	8	$669	63%	6	$0	33%	7	$0	43%
ELENOR ENAMEL	$1,400	$949	12.0	8.0	$2,077	03/17 $472	8	$1,478	88%	5	$170	80%	0	$0	-
CLARICE CLEAN	$1,200	$1,483	12.0	8.0	$1,200	03/17 $1,449	8	$1,190	25%	5	$0	60%	0	$0	-

Specialty		Goal ADP	Actual ADP	Prod Days	Days Left	$Need	Next Working Day				2nd Working Day				3rd Working Day			
							Day	SchProd	Cons	C%	Day	SchProd	Cons	C%	Day	SchProd	Cons	C%
FARAH FILLINGS	Endo	$15,000	$12,533	2.0	1.0	$19,934	03/23	$0	1	0%	04/06	$0	0	0%	04/20	$0	0	0%
GRACE GINGIVAL	OS	-	-	-	-	-	04/12	$0	1	0%	04/25	$0	0	0%	-	-	0	0%

1. Ensure the number under **Prod Days** is accurate.
2. Click on the hyperlinks under **Prod Days** to review the detailed breakdown by day.

> ❗ Ensure the number under **Days Left** is accurate. Inaccurate days here affects the Projection to Goal % and the hourly team bonus potential. The OM should work with the RM to correct inaccurate provider days in the goal system.

Provider Drill Down Report

1. From the MY Office page, click the number under **Prod Days** to launch the Provider Drill Down report.
2. Check each reported day for accuracy in the **Prod Days** column. If there is an error, follow the steps below.

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Correcting an Error

1. If a provider is reporting a half day but it should be a full day:

   a. Check the hours the schedule is open in Epic. If it does not exceed 5 hours, update the template using the following workflow within the 72-hour timeframe.

      ▪ Access the **Edit Template** for Single Day activity to add slots to the day.

2. If a provider is reporting a full day but it should be a half day:

   a. Check the hours the schedule is open in Epic. If it exceeds 5 hours, update the template using the following workflow within the 72-hour timeframe.

      ▪ Access the **Edit Template** for a Single Day activity to remove slots from the day.

Provider Drill Down

Office Provider Start Date End Date

08/01/2021 08/31/2021

Day of Week	Date	Sched Hours	PtCount	TtlProd	ProdPt	TtlUCR	Prod Days
Sunday	08/01/2021	0.00	0	6,883.53	0.00	0.00	0.00
Monday	08/02/2021	8.50	14	1,680.00	120.00	3,420.24	1.00
Tuesday	08/03/2021	5.25	0	-32.40	0.00	0.00	0.00
Thursday	08/05/2021	0.00	0	0.00	0.00	136.11	0.00
Friday	08/06/2021	0.00	0	294.50	0.00	0.00	0.00
Sunday	08/08/2021	0.00	0	0.00	0.00	180.56	0.00
Monday	08/09/2021	0.00	0	-295.00	0.00	180.55	0.00
Tuesday	08/10/2021	0.25	0	0.00	0.00	207.09	0.00
Wednesday	08/11/2021	8.50	16	4,829.00	301.81	7,473.52	1.00
Thursday	08/12/2021	8.00	14	4,404.00	314.57	7,101.41	1.00
Friday	08/13/2021	8.00	15	7,562.50	504.17	13,266.00	1.00
Monday	08/16/2021	8.00	13	4,547.50	349.81	8,452.00	1.00
Tuesday	08/17/2021	4.75	8	1,396.00	174.50	2,740.00	0.50

> **!** Prism will update overnight, so the corrections with need to be re-verified for accuracy the next day. All corrections will need to be made prior to the 72 Hour Epic Payroll Lockdown period to avoid inaccurate reporting and pay.

72 Hour Timeline to Update Provider's Schedule

In Epic, it is essential that you identify any discrepancies within 72 hours and correct them by adjusting the provider's template. Any changes not made in this 72-hour timeline cannot be updated in Epic or in My Office/Prism, therefore a Payroll help ticket is required to ensure accurate provider pay.

Date of Service	Last Day to Make Template Updates
Monday	Thursday
Tuesday	Friday
Wednesday	Saturday
Thursday	Sunday
Friday	Monday
Saturday	Tuesday
Sunday	Wednesday

Refer to the *Cancel and Reschedule Appointments* SRG for more information about the end of day (EOD) process and canceling appointments for past dates.