

# Clinical Scheduler - Schedule Appointments

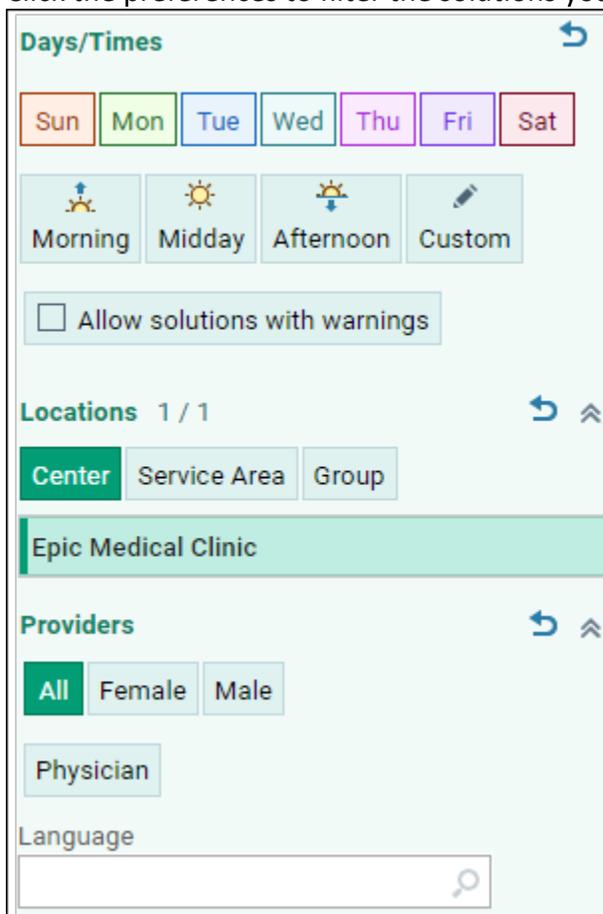
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# Schedule an Appointment with Solutions view

In Solutions view, Book It displays the provider's open time slots in the form of big, colorful buttons, which can then be selected to schedule a patient's appointment easily and efficiently.

## Specify appointment details

1. Click  **Appts** and then search for and select the patient for whom you are scheduling.
2. Click  **Book It**, and then ensure  **Solutions** is selected in the activity toolbar.
  - This view displays the selected provider's open time slots for the date and visit type.
3. In the visit card on the left side of the activity, enter the appointment notes, visit type, and provider the patient will see.
  - The open time slots for the patient's selected provider automatically appear in the middle of the section.
4. Enter your patient's desired appointment date into the **Date** field in the upper-right corner of the activity.
5. If the patient has specific date, time, or location preferences, use the preference pane to select those preferences.
  - a. Click the preferences to filter the solutions you can offer to the patient.



The screenshot shows the 'Days/Times' preference pane. It features a row of seven colored buttons for days of the week: Sun (orange), Mon (green), Tue (blue), Wed (grey), Thu (purple), Fri (pink), and Sat (red). Below this are four time slot buttons: Morning (with a sun icon), Midday (with a sun icon), Afternoon (with a sun icon and a clock icon), and Custom (with a pencil icon). There is a checkbox labeled 'Allow solutions with warnings' which is currently unchecked. Below this is the 'Locations' section, showing '1 / 1' location with a refresh and expand icon. The location is 'Epic Medical Clinic', with buttons for 'Center', 'Service Area', and 'Group'. The 'Providers' section has a refresh and expand icon, and buttons for 'All', 'Female', and 'Male'. Below that is a 'Physician' button. At the bottom is a 'Language' field with a search icon.

## Schedule the appointment

1. After the selected provider's open slots appear, single click a solution to hold that slot for the patient.

2. Click  **Schedule** to open the Appointment Review window.
3. Click  **Schedule** to finish scheduling your patient's appointment.
  - a. If the patient's registration still needs verification, the **Registration** activity will open.

## Schedule an appointment in Schedules view

In Schedules view, you have the ability to easily view and book appointments directly onto your provider's schedule for any given day.

### Specify appointment details

1. Click  **Appts** and then search for and select the correct patient.
2. Click  **Book It**, and then select  **Schedules** in the activity toolbar.
  - This shows you the selected provider's entire schedule, including blocked-off and unavailable time slots.
3. Enter your patient's desired appointment date into the **Date** field in the upper-right corner of the activity.
4. In the visit card on the left side of the activity, enter the appointment notes, visit type, and provider your patient will see.
  - The schedule for the selected provider appears in the middle of the section.



You can use relative dates to search for an appointment. Book It defaults to "t" for "today," but you can also use "t+1" (tomorrow), "w+1" (one week from today), "m+1" (one month from today), and others.

5. Just like in Solutions view, you can use the preferences pane to filter the appointment times you can offer to the patient.

### Schedule the appointment

1. After the provider's schedule opens, double-click on any open time slot to hold it for your patient.
2. Click  **Schedule** to open the Appointment Review window.
3. Click  **Schedule** to finish scheduling your patient's appointment.
  - If your patient's registration still needs verification, the **Registration** activity will open.

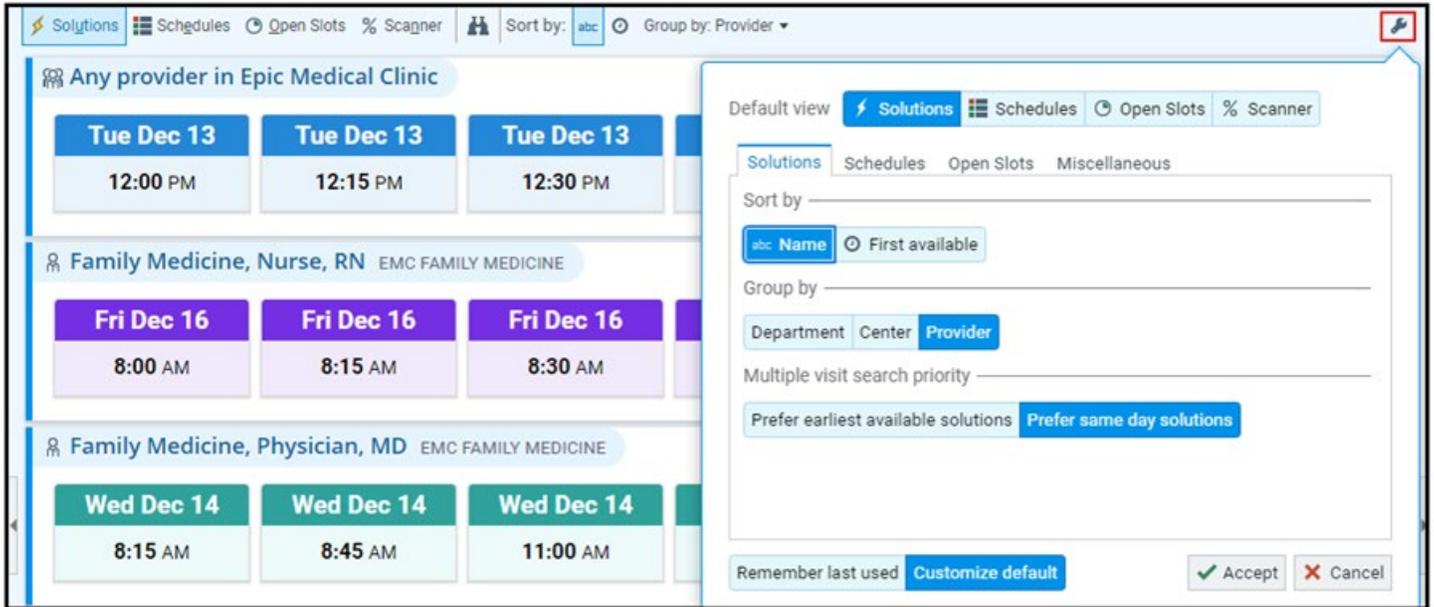
## Adjust your default view in Book It

You can save a default view in Book It. Saving a default allows you to view appointment solutions for a patient in a way that works for you and the way you schedule in your department or specialty.

1. Open a patient's  **Appointment Desk**.
2. Click  **Book It**.
3. Click the wrench in the upper right corner of the Solutions pane.
  - Use the **Default view** field to set your default view upon entering Book It.

- Use the tabs beneath **Default view** to create unique, default settings for any of the available views: **Solutions**, **Schedules**, **Open Slots**, and **Miscellaneous**.
- Select **Customize default** at the bottom of the customization bubble to use the default settings that you configured.

4. Click  **Accept** to save changes.



## Keep track of patient preferences

If a patient has scheduling preferences, such as any days they're regularly unavailable, you can enter them in the system. When you schedule for that patient in the future, you'll only see appointment slots that match the patient's preferences.

You can also record patients' communication preferences to help make sure they can easily receive important information.

## Record scheduling preferences

1. Click  **Apts** in the toolbar.
2. Search for and select the patient.
3. Click  **Patient Options** and select  **Scheduling Preferences**.
4. Enter the patient's preferences into the provided fields. These can include:
  - Days of the week they would like to be seen.
  - Times of the day they would like to be seen.
  - Locations in which the patient likes to be seen.
  - The patient's provider's sex and language.
  - Providers the patient prefers to see.
5. Click  **Accept**. The next time you schedule an appointment for this patient, their preferences are factored into in the scheduling process.

## Record communication preferences

1. Click  **Appts** in the Hyperspace toolbar.
2. Search for and select your patient.
3. Click  **Patient Options** and open the  **Comm Prefs** activity.
  - To see which preferences are not yet on file for a patient, click **Show missing preferences** in the yellow notification bar at the top of the activity.
4. Update the patient's preferences by selecting or deselecting the icons under each category.
  - To allow patients to opt in or out of text messages entirely, toggle the **Send text Messages?** setting on or off.
5. When you're finished, click  **Mark as Reviewed** to indicate that the patient's preferences are up to date.
6. Click  **Accept** to close.

## Schedule using One Click

You can schedule common visits quickly using the One Click search option. With One Click, you select the visit you need to schedule from a list of preset options, enter an appointment note, and click the time you want without needing to enter any other visit details.

1. Open your patient's Appointment Desk.
2. Click the arrow next to  **One Click** and select the type of visit you want to schedule.
3. Enter the reason for the visit.
4. To schedule the appointment, click the box with the desired time.



Click  **More** to see additional times if necessary.

## Schedule a single appointment with multiple providers

A single appointment scheduled with more than one provider is called a joint appointment. We can schedule a joint appointment using Solutions view or Schedules view.

### Use Solutions view to schedule a joint appointment

1. Begin scheduling your patient's appointment with  **Solutions** selected in the Book It toolbar.
2. After adding a visit type and multiple providers to your patient's appointment, select the **Joint visit with all providers** check box in the **Providers** bubble.
  - Notice how each solution now shows the list of providers you added to the visit.
3. Select one of the open time slots after entering your patient's appointment date.
4. Click  **Schedule** and finish scheduling the appointment in the Appointment Review window.

### Use Schedules view to schedule a joint appointment

1. Open Book It and select  **Schedules** in the Book It toolbar.

2. After adding a visit type and multiple providers to your patient's appointment, select the **Joint visit with all providers** checkbox in the **Providers** bubble.
  - This checkbox must be selected in order to schedule a single appointment with more than one provider.
3. In the Book It toolbar, select  **View a single date for multiple providers** to the left of the **Date** field.
  - The selected providers' schedules appear side by side in the middle of the activity.
4. Double-click the same open time slot on each provider's schedule.
5. Click  **Schedule** and finish scheduling the appointment in the Appointment Review window.

## Schedule recurring appointments

1. Begin scheduling your patient's appointment in **Book It**, entering the appropriate appointment notes, visit type, and a provider.
2. In the lower left corner of Book It, click  **Recur** to open the Recur Settings window.
3. At the top of the window, select whether you want to recur on a **Daily**, **Weekly**, or **Monthly** basis.
4. Enter the number of appointments in the **Occurrences** field.
  - You can also select **Recur until** to schedule indefinite occurrences until specified date.
5. Click  **Accept** or move under the **Advanced Options** header to further specify the appointment's recur settings.
  - If **Daily** is selected, you can choose to include weekends, specify the number of appointments per day, and specify the number of days between each occurrence.
  - If **Weekly** is selected, you can choose which days of the week you want occurrences to fall on, specify the number of appointments per week, and specify the number of weeks between each occurrence.
  - If **Monthly** is selected, you can choose which day of which week the occurrences should fall on (for example, the second Monday of each month) and specify the number of months between each occurrence.



If the patient's appointment recurrences vary in frequency over time, you can add additional periods to account for that variation and specify the recurrence details for each period. Click **+Period** to enter the details for the new period.

6. Review and select a solution that matches your desired recurrence schedule.
  - The schedule should appear as the  **Solution 1: [Visit Type] at [Center]** card.
  - Book It automatically selects open time slots for each appointment.
7. If necessary, select an occurrence on the visit card to schedule it in a different time slot.
8. Click  **Schedule** and finish scheduling your patient's appointments.



An **R** next to the appointment on the **Future** tab of the Appointment Desk indicates that an appointment is part of a recurring series.

## Schedule sequential appointments

1. Begin scheduling your patient's appointment in Book It.
2. Enter appointment notes, the visit type, and your patient's provider for the first appointment.
  - If you would like the same appointment notes for each visit, select the **Use same notes for all visits** checkbox in the **Notes** bubble.
3. Click **+Add Visit** to add however many more appointments your patient requires.
  - Notice that the **Notes** field has been automatically filled with the appointment notes from your first visit.
4. Enter the visit type and provider for each remaining appointment.



The **Any order** option is automatically selected. If you want to schedule the visits in a certain order, unselect the option. If your organization has defined rules that keep the visits in a certain order, Book It will automatically schedule the visits in that order.

5. Enter your patient's desired appointment date in the **Date** field.
6. Click on one of the provided solutions in the middle of the activity.
  - If you want to change the time slot for one of your appointments, click **Schedules** in the activity toolbar and then click your target appointment in the leftwards sidebar.
  - Double-click any open slot on the provider's schedule to change the appointment's time.
7. Click **Schedule** and finish scheduling the appointments in the Appointment Review window.



An **S** next to the appointment on the **Future** tab of the Appointment Desk indicates that an appointment was scheduled sequentially.

## Schedule a walk-in appointment

1. Click **Schedules** and then select **DAR – Dept Appts** in the Hyperspace toolbar.
2. From the Department Appointments Report, click **Walk In**.
3. Search for and select your patient.
4. Enter the appropriate visit type in the **Visit Type** field.
5. Enter the patient's provider in the **Provider** field. When you leave the field, the system automatically selects the next available time slot.



If the next available time slot is blocked, double-click an open time slot to manually schedule the patient's appointment.

6. Click **Schedule**.
7. Review the appointment information with the patient and click **Schedule**.
8. If any questionnaires appear, complete them.

9. Check in and register the patient.

## Cancel, reschedule, or change an appointment

If something comes up that prevents your patient from making their scheduled appointment, you can use the Appointment Desk to quickly and easily cancel or reschedule it.

### Cancel an appointment

1. Click  **Appts** to open your patient's Appointment Desk.
2. Select their appointment that needs to be canceled.
3. Click **Cancel/Reschedule** on the bottom toolbar.
4. Select the reason you're canceling the appointment in the **Cancel/Reschedule Reason** field.
  - a. You can also enter a comment with additional details in the **Cancel/Reschedule Comment** field.
5. Click  **Cancel Appts**. The window automatically closes, and the canceled appointment moves to the Past tab.
  - a. On the Past tab, you can identify a canceled appointment by its status, **CAN**.



You cannot undo an appointment cancellation. If you cancel an appointment in error, you must create a new appointment to replace it.

### Reschedule an appointment

1. Click  **Appts** on the toolbar to open your patient's Appointment Desk.
2. Select the appointment that needs to be rescheduled.
3. Click **Cancel/Reschedule** on the bottom toolbar.
4. Select the reason you're canceling the appointment in the **Cancel/Reschedule Reason** field.
  - a. You can also enter a comment with additional details in the **Cancel/Reschedule Comment** field.
5. Click **Reschedule** to open Book It and schedule a new time for the appointment.

### Reschedule a canceled appointment

1. Click  **Appts** to open your patient's Appointment Desk.
2. Select the **Past** tab and select the canceled appointment.
3. Click **Reschedule** on the bottom toolbar.
4. Click  **Reschedule** in the Reschedule Appointments window to open Book It and schedule a new time for the appointment.

### Cancel an appointment for a deceased patient

If your patient passes away before a scheduled appointment, you can cancel their appointments from the Appointment Desk.

1. Click  **Appts** to open your patient's Appointment Desk.
2. Select the appointment that needs to be canceled.
3. Click **Cancel/Reschedule** on the bottom toolbar.

4. Select "Patient: Deceased" as the reason you're canceling the appointment and enter a comment with additional details.
5. Click  **Cancel Appts**. The window automatically closes, and the canceled appointment moves to the Past tab.
  - Canceling an appointment with the reason of Patient: Deceased does not mark the patient as deceased anywhere else in the system. [<Notify your manager that they need to flag the patient as deceased.>](#)
  - You cannot schedule appointments for a patient who is flagged as deceased.

## Use the Snapboard to schedule appointments

### Schedule an appointment by double-clicking

1. Click  **Schedules** and then select  **Snapboard**.
  - To open a different Snapboard, click the magnifying glass in the search field at the top of the screen. If the Snapboard you want doesn't appear, click  **Edit Report Settings** to choose a different report.
2. Each provider's schedule is one column in the Snapboard. To schedule an appointment with a provider, double-click an available time in that provider's column.



Use the calendar or date and time fields in the bottom-left corner of the screen to view the Snapboard for a different day.

3. Search for and select the correct patient.
4. Enter the visit type and accept the appointment.

### Transfer or reschedule an appointment

Switch an appointment to a different provider by dragging and dropping the appointment to an open slot on another provider's schedule.

Cancel or reschedule an appointment by right clicking the appointment and selecting **Cancel/Reschedule** from the menu.

### Schedule an appointment request on the Snapboard

1. Click  **Schedules** and then select  **Snapboard**.
  - To open a different Snapboard, click the magnifying glass in the search field at the top of the screen. If the Snapboard you want doesn't appear, click **Edit Report Settings** to choose a different report.
2. In the order depot at the bottom of the screen, find the request you want to schedule.



You can filter this list to show only a specific type of order (therapy, for example) using the  search field at the bottom of the screen.

3. Find the column on the Snapboard that belongs to the provider with whom you want to schedule the appointment.
4. Click on the request and drag it to the time you want to schedule. Answer any questionnaires that appear.
  - If the request you are scheduling is a referral requiring preauthorization, the Preauthorization Required window appears. Enter any required information and click **Continue**.
  - If no preauthorization is required, the Appointment Review window appears.
5. Review the appointment information. If the department you're scheduling in is a hospital outpatient department (HOD), indicate whether the patient is an inpatient or outpatient.
6. Accept the appointment.

## Schedule multiple appointment requests at one time on the Snapboard

Shorten the time it takes to schedule appointments for a patient with multiple procedures by dragging and dropping all of the patient's appointment requests at once onto the Snapboard. Press and hold **Ctrl** while clicking to select all of the requests before dragging them onto the Snapboard.

The Snapboard schedules the requests based on the procedure setup, but you can adjust the patient's schedule on the Snapboard by moving the appointments around.

## Schedule from an Appt Request Workqueue

Once in Epic, a patient's appointment request falls to an Appt Request workqueue. You can use this list to call patients and schedule appointments directly from the appointment request. After scheduling the appointment, the request will fall off of the workqueue.

1. In an Appointment Request workqueue, select the order that you want to schedule.



To open an Appointment Request workqueue, click  **Workqueue List** and select the  **Appt Requests** tab.

2. Click  **Schedule**.
3. When Book It opens, some details will pull in from the appointment request. Finish scheduling the appointment.
  - Depending on the type of appointment request, you may see a window with questions appear. This is called a decision tree. See the next section for more details about scheduling with a decision tree.
4. Once you have scheduled the appointment request, it will fall off of the workqueue.

## Scheduling with a Decision Tree

Decision trees can direct you to schedule the appropriate appointment for the patient's needs. They can appear based on the visit type being scheduled or the department in which you are scheduling. The answers to the questions will guide you to schedule the appropriate visit type(s) and provider(s) for the patient.

1. Open **Book It** and begin scheduling as usual.

2. If necessary, a decision tree will appear.
3. Answer the questions based on the patient or situation.
4. Click **✓ Apply** to save the responses.
  - The details in the Visit Card might be updated based on the answers you submitted to ensure the patient receives the right kind of care with the right provider at the right time. Keep any changes and continue scheduling.

**Decision Tree for CONSULT - CARDIOLOGY** ✕

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What is the reason for visit?

Cardiac Electrophysiology
Heart Failure and Transplant
Other

---

**Results - Continue Scheduling**

Visit: CONSULT - CARDIOLOGY

Replace the original visit type.

Provider/Subgroup

CARDIOLOGY CONSULT POOL: Subgroup Cardiology - Accepting New Patients will be added in place of the original providers.

✓ Apply
Discard Tree

5. Finish scheduling the appointment for a time that works for the patient.
  - The rest of the scheduling process is the same.

## Schedule with MyChart

MyChart patients have three methods to make an appointment.

1. **Direct Scheduling:** Directly schedule their own appointment
  - Patients choose their appointment day and time without any interaction from staff. Direct scheduling allows patients to choose a location and provider, view a list of available times, and schedule an appointment on their own.
2. **Appointment Requests:** Request an appointment time and an Epic user makes the appointment
  - The patient fills out the appointment request form on MyChart, which sends a message to an In Basket pool of users. The scheduler at the clinic then makes the appointment based on available dates and times.
3. **Ticket Scheduling:** Receive a digital ticket to schedule a specific appointment
  - The patient receives a ticket to schedule their own appointment in MyChart. A provider can send a ticket by sending a MyChart message or creating an appointment request. A ticket can also be sent automatically from an order.

## Schedule an Appointment Request in MyChart

1. When a patient requests an appointment in MyChart, the request goes to the appropriate scheduling pool. To see MyChart appointment requests for pools you belong to, open **In Basket**.
2. Open the **Pt Schedule Request** folder, located in the left sidebar.

- If the sidebar is collapsed, click the arrow on the left side of the screen to expand it.
- 3. Open a message by clicking on it once.
- 4. Read the message.
- 5. To schedule the appointment, click **Appts** on the Activity Toolbar.
- 6. This opens the patient's Appointment Desk. Schedule the appointment as usual.

## Indicate that an appointment was scheduled elsewhere

When a patient has scheduled an appointment for an order at another organization, you can record that information in the system so that the order falls off your workqueue.

1. In an Appointment Request workqueue, select the order that was scheduled externally.



To open an Appointment Request workqueue, click **Workqueue List** and select the **Appt Requests** tab.

2. Click **Sched Ext**.
3. Enter information about the appointment, including when it is scheduled, why it was scheduled elsewhere, and with whom it is scheduled.
4. If necessary, enter a comment.
5. Click **Accept**.

## Enter orders written outside of Epic

Providers working in Epic place orders electronically, so schedulers don't get them on paper. However, you might need to transcribe orders coming from doctors outside of your organization, or from doctors in your organization that are not using Epic yet. If you receive incoming paper or fax forms, you need to transcribe the order into Epic so that the procedure can be scheduled.

1. Click **Transcribe Order**.
2. Search for and select the correct patient.
3. Click **Create an Encounter**.
4. Enter the date of the order and the name of the ordering provider.
  - If the provider doesn't have a record in your system, enter Outside, Provider.
5. Enter the department to which the patient is being referred and click **Accept**.
6. Click **Scan/Import Outside Order** to scan the paper order into the system.
7. Fill in information about the order, such as the received date and time and the status and click **Accept & Scan**.
  - Scan and save the order and then close the window.
8. Click **Add Order** and enter the procedure listed on the order.
9. Select the procedure that most closely matches the order and click **Accept**.
10. If the order details do not automatically open, click the name of the order you just opened in the lower left corner of the screen. Verify the order details in Epic match the outside order. Update fields and click **Accept** to save your changes.



If the procedure you're looking for doesn't appear on the Preference List tab when you enter a new order, you can expand your search by looking at the Facility List tab.

## Associate the order with a diagnosis

1. Click **Dx Association**.
2. Enter the diagnosis in the **Search for diagnosis** field and press **Enter**.
  - If the diagnosis does not automatically pull in, you will see a Diagnosis search window. Select the appropriate diagnosis and click **Accept**.
3. Click the check box where the procedure and diagnosis intersect.
4. Click **Accept**, and then click **Sign Orders**.
  - If the Providers window opens, enter the procedure's authorizing provider.



When transcribing orders, clicking **Sign Orders** does not indicate that you're the provider responsible for the order. It simply completes the transcription process. You already entered the ordering provider into the system, and the order form will be scanned or linked to the Epic order per your organization's policies.

## Associate an encounter with a research study

When patients are enrolled in research studies, it's important to link research-related visits for those patients to the appropriate study. Associating a visit with the relevant research study is vital for accurately billing research studies and helps staff more easily identify research-related encounters in Chart Review.

1. Schedule an appointment as you normally would.
2. From the patient's Appointment Desk, select the appointment you want to link.
3. Right-click the appointment and select **Link Research Study**. The Link to Research Study window opens.
4. Select the **Linked** checkbox for the appropriate study.
5. If necessary, select the appropriate treatment day for the encounter and click **Accept** to close the pop-up window.
6. Click **Accept**.

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