Configuring Schedules

Overview/Purpose: To demonstrate the steps for configuring schedules in EPIC in the ambulatory setting. Configuring schedules is useful for providers that go to multiple clinics or those clinicians that float to multiple departments or work in an area that has multiple specialties.

1. From the Schedule view Click on the Create button.

Sched	ule						
🖶 Op	p <u>e</u> n Slo	ots 📄	<u>O</u> rder	Entry	<u> </u>	hart (Show Orders 📋 Enc Summary 😪 Request Outside Reco
2/6/2017				ä	1	oday	PRO PSYCHIATRY Department (All Providers)
•	Feb	ruary	•	•	2017	•	Multistep Med Time Patient Name
Su	Мо	Tu	We	Th	Fr	Sa	
29	30	31	1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28	1	2	3	4	
5	6	7	8	9	10	11	
Dept:	PRO	PSYC	HIATI	RY		9	
🔶 Cr	reate	%	×				
⇒ 🗁 My Schedule							
DE		GOS, I	PAT				
D 🔁	PRO I	PSYCI	HIATR	Y			

2. Name the Schedule AND then click the **Configuration** tab. For this example, we will name the schedule **DAL Training Sched**.

Available Columns			Selected Columns	
(Retired) Framingham Score		Ph Conv	Multistep Tasks	
(Retired) Heart Risk		4 <u>_</u>] 0 <u>0</u> py	Meds Due	
(Retired) Referring		⊨> Add	Time	
24hr?			Patient Name	
ABN		< → <u>R</u> emove	MRN	
ABN Comments			Age/Sex	
ABN Medications			INF	
ABN Ordering Provider Phone			Language	_
ABN Procedure			Туре	
ABN Treatment or Therapy Plan			Notes	
Absormal?			Status	•



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- 3. Click on the appropriate button:
 - a. Department if you want to see the entire department's schedule
 - b. Provider if you only want to see certain provider schedules
 - Note the radio buttons at the bottom of this screen. If you are looking for patients that are scheduled to a resource (i.e. Psych Fellow A, Infusion Chair 2, AUD Hearing Aids) you would select that button. These are generic in nature and are not an actual person but an alias, room, bed, etc.

Schedule		
General Advanced Configuration]	
Search by: Department 	O Provider [All Dep	ts]
Dept: PRO PSYCHIATRY O		
Available Schedules		Selected Schedules
	⊨⊳ A <u>d</u> d	
	4- Demous	
	<u>R</u> emove	
	1	
Provider O Resource		
		Accept Cancel

Once you have the department or provider button selected, change the Department to a *physical* department.

Physical Departments vs PRO Departments

Physical departments contain patient appointments & these department names begin with:

- DAL for Dallas (ex DAL Allergy)
- LGY for Plano (ex LGY ENT)
- SLK for Southlake
- or populate the provider's name

PRO(VIDER) departments are virtual, and appointments are not scheduled to them. PRO departments allow the provider to:

- move from physical location to physical location without changing their login department
- access appropriate tools based on the *patient's* location



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In this example, the **DAL TRAINING** department will be configured.

4. You can select all the providers in this list by clicking on the name in the first row, then holding the shiftkey, select the name in the last row. Once you have made all your selections, click the **Add** button.

Schedule		
General Advanced Configuration]	
Search by: Department 	O Provider [All Dep	ts]
Dept: DAL TRAINING 🔎		
Available Schedules		Selected Schedules
AIRHOCKEY, PAT		
AQUAMAN, JOHN		
BARBIE, PAT		
BATMAN, JOHN		
BATTLESHIP, PAT		
BIGWHEEL, PAT		
BINGO, PAT	Remove	
BIRD, JOHN ANDREW	4 22-00-0	
BULLSEYE, CONNOR		
CANARY, CATHERINE		
CANDYLAND, PAT		
CAPTAINAMERICA, JOHN		
CAPTAINPLANET, JOHN		
Provider O Resource		
		Accent Cancel

To select some of the resources for the department change the radio button on the bottom to **Resource** and follow the same process. When you have completed your selection, click the **Accept** button.

Schedule				
General Advanced Configuration]			
Search by: O Department	O Provider [All Dep	its]		
Dept: DAL TRAINING				
Available Schedules		Selected Schedules		
AUD ABR_DAL		AIRHOCKEY, PAT [DAL TRAINI		
AUD CI_DAL		AQUAMAN, JOHN [DAL TRAINI		
AUD HEARING AIDS_DAL		BARBIE, PAT [DAL TRAINING]		
AUD STUDY_DAL		BATMAN, JOHN [DAL TRAINING]		
		BATTLESHIP, PAT [DAL TRAINI		
	⊢> A <u>a</u> a	BIGWHEEL, PAT [DAL TRAINING]		
		BINGO, PAT [DAL TRAINING]		
	C Remove	BIRD, JOHN ANDREW [DAL TR		
		BULLSEYE, CONNOR [DAL TRA		
		CANARY, CATHERINE [DAL TR		
		CANDYLAND, PAT [DAL TRAINI		
		CAPTAINAMERICA, JOHN [DAL		
		CAPTAINPLANET, JOHN [DAL T		
○ Provider				
		Accent		
		Accept <u>C</u> ancel		



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5. The newly created schedule now displays with the name you selected. For this example, the new schedule is named **DAL Training Sched**.



 To assign a schedule as your default schedule, right-click on the schedule folder and select **Default Schedule**. The folder below is expanded to see all providers/resources that were added are now listed. The schedule for these items will now populate on the right.

Dept: PRO PSYCHIATRY					
🕂 Create 🍇 🗙 🏠 🕂					
√ My Schedule					
DEGOS, PAT					
DAL Training School					
AIRH Properties					
n AQU/ C Default Schedule					
Create Schedule					
Remove Schedule					
AUD HEARING AIDS_DAL [
AUD STUDY_DAL [DAL Auc					
🖁 BARBIE, PAT [DAL ENT]					
🖁 BATMAN, JOHN [DAL ENT]					
A BATTLESHIP, PAT [DAL EN					

You can make one schedule or many for different locations and/or departments. You can modify or delete these as needed. Note: The folder with your name will only display patients that are directly scheduled to you under YOUR name. You can always add Provider/Resource appointments to your folder by left-clicking and dragging the Provider/Resource to your folder name.

