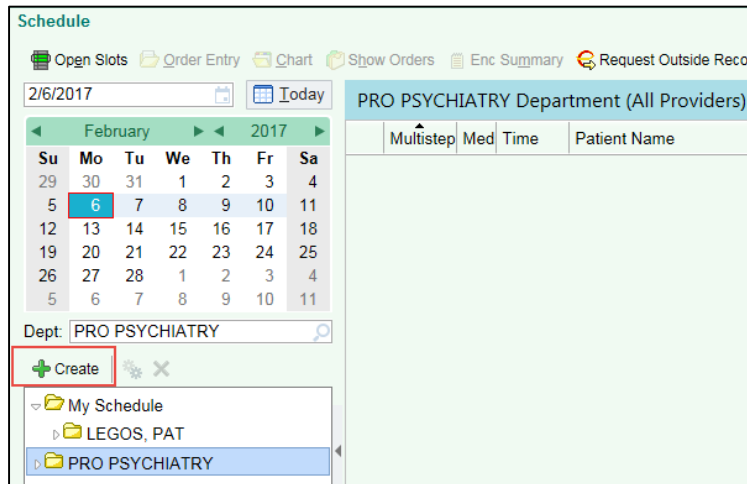# Epic for Ambulatory Providers/Clinicians
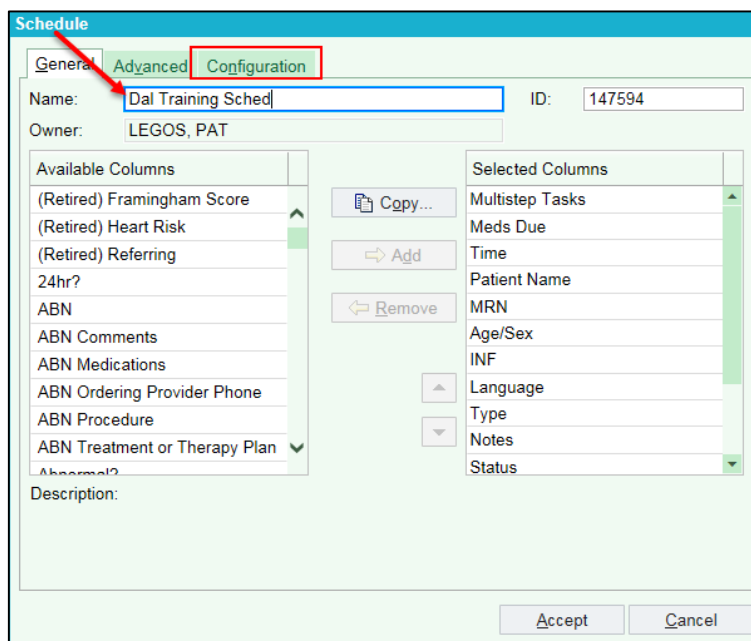
Configuring Schedules

> **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.

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

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.

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

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 shift-key, select the name in the last row. Once you have made all your selections, click the **Add** button.
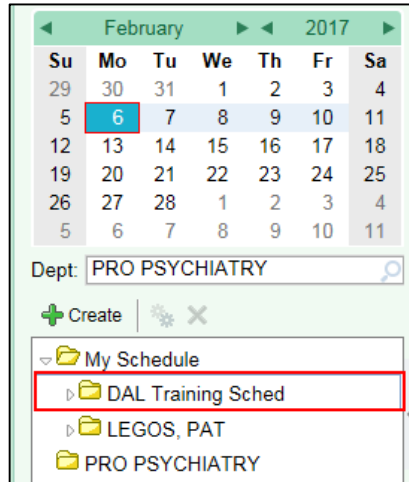

To select some of the resources for the department change the radio button on the bottom to **Resource** and follow the same process. When you have completed your selection, click the **Accept** button.

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

6. 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.
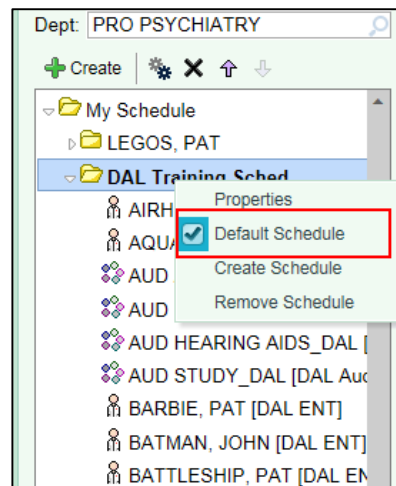
❖ You can make one schedule or many for different locations and/or departments. You can modify or delete these as needed. **Note:** The folder with your name will only display patients that are directly scheduled to you under YOUR name. You can always add Provider/Resource appointments to your folder by left-clicking and dragging the Provider/Resource to your folder name.