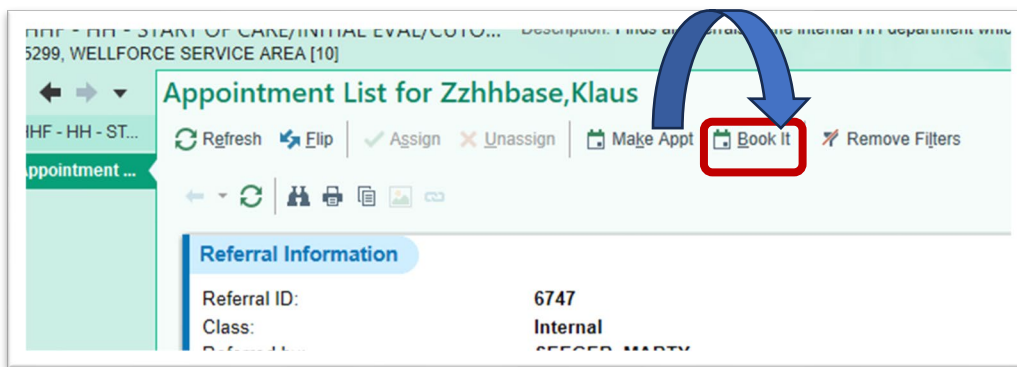# TuftsMedicine

EpicEdge Tips & Tricks

Scheduling with Book It

Book It replaces the Make Appointment and Quick Appointment functions in Hyperspace and offers enhanced features to make scheduling more efficient.

From the Referral SOC WQ users will select **Assign** then **Book It**. In the Appt Requests WQs, users may go directly to Book It.

Enter the Visit Type

Search for the visit type for the appointment by completion matching to narrow down the search or click the magnifying glass. Select, for example, the SN OASIS START OF CARE [19110] and click Accept.
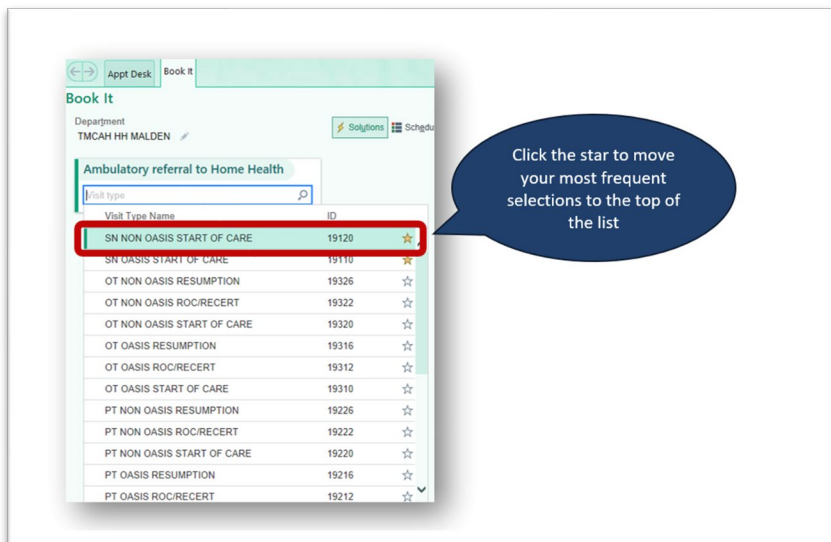
In Book It

On the left

Review information: In Book It you specify visit information in the Visit Card. Here you enter:

- Where the appointment is taking place: Department Verify the scheduling department= TMCAH Scheduling on the top left.
- What is being scheduled: Visit Type
- Why patient needs an appointment: Appt Notes
  Appointment notes display and can be added. Enter appointment notes then select the option to apply to all notes if desired. Press Tab or select the green checkmark when complete.
- With whom the appointment is to be scheduled. Select the team associated with the appt (HH RN Team in this example)
- When the appointment is being scheduled.
- Linked records: opens the referral of the episode that the appointment is linked.

Click on the Team in the appointment card and then the Search Icon and you will see the following options:

- **Any/Provider** gives then entire clinician list
- **Subgroups choices** are based on branch teams and disciplines.

On the right

Limit the time slots available by choosing the filters on the right for a specific day, day of the week or by time of the day. You can also drill down on provider details based on the patient's preferences or needs.

View the calendar and available filters.

- ▪ **Days**
- ▪ **Times:**

**Morning, Midday, Afternoon & Custom**
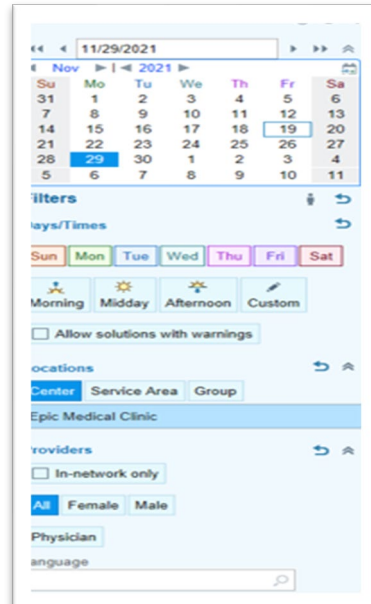
! Note

When a scheduler enters a date in Book It without specifying the year, a future date is used by default. For example, if today is 12/29/2023 and a scheduler enters 1/19, 1/19/2024 is used by default instead of 10/29/2022. Previously, when a scheduler entered a date without specifying the year, a past date was used by default if the date entered had passed for the current year even though the user most likely intended to search for a future date.

Scheduling Options

Along the top you can select an option to view the results.
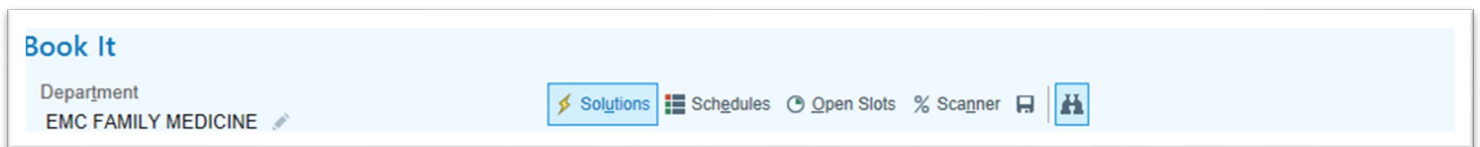
These are four views in Book It that you can switch between and use during your scheduling workflows.

Which View Should You Use?

Book It has four different views to help you schedule efficiently and effectively.

- • ⚡ **Solutions**. See the best available times that the system could find. Use this view whenever possible to let the system quickly recommend times based on your organization's scheduling rules.
- • ▦ **Schedules**. View a provider's entire schedule and find an open time manually. Use this view when you need to schedule into a specific time slot that a provider requested, to overbook, or to schedule according to rules or factors that are not built into the system. This is the same view as the View Schedules activity, so you don't need to leave Book It if you want to view a provider's schedule.

- ⏱ **Open Slots**. See only the open slots in a provider's schedule. Use this view when you quickly want to see where there are open times in a provider's schedule.
- % **Scanner**. See who has the most availability. Use this view if provider utilization is important to consider before choosing a provider, day, and time to schedule.

The Solutions view

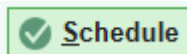Shows solutions from the Auto Scheduler immediately as you enter criteria.   Click "..." to load more times.

Select **Group by** and then **Provider** to see Solutions for providers in that group.

Select a time to hold that time, select: ✅ **Schedule**
to Book the time.

The Schedules View

Shows a single or group of provider's entire schedules. The **Schedules** view allows the user to visualize schedules in a fashion similar to the Snapboard view and may provide the most user friendly option for the scheduler.

Add a subgroup or additional providers to compare schedules and select a clinician for the appointment.

Appointment details do not appear in the Schedules view when there isn't enough room to show the details.

You can zoom in or select a slot to see details or view fewer schedules at a time. Warnings may appear regarding other appointments on the patient schedule.
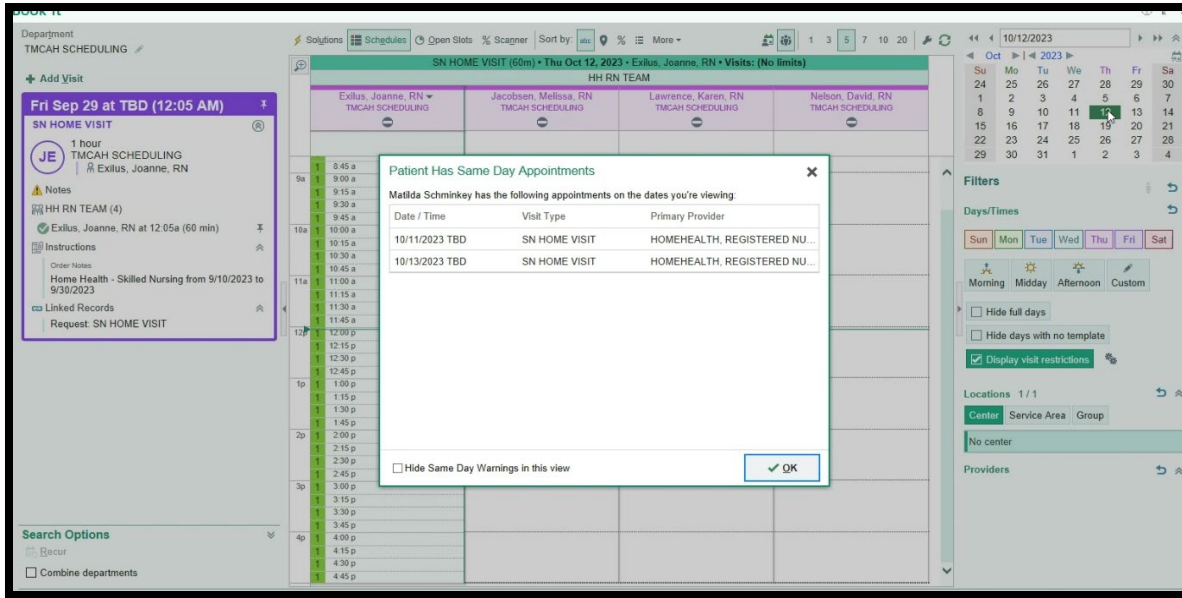
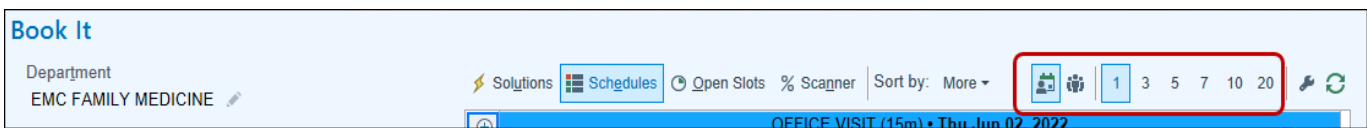## View Schedules for Multiple Providers or Days

In the ⊞ **Schedules** view, you can view schedules for multiple providers or days.

View One Provider's Schedule for One Day

In Make Appointment, you selected the **All Times, Single Provider** option:
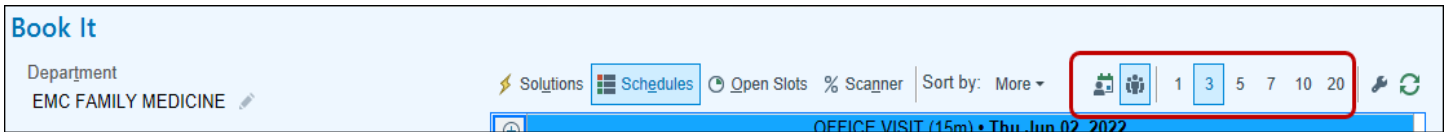

In Book It, select 📅 **View multiple dates for a single provider** and 1 day:

View Schedules for Multiple Providers on the Same Day

In Make Appointment, you selected the **All Times, Multiple Providers** option:

In Book It, select 👥 **View a single date for multiple providers** and how many providers you want to view:

View One Provider's Schedule for Multiple Days

In Make Appointment, you selected the **All Times, Multiple Dates** option and the number of days you wanted to view in the lower right corner (not pictured):
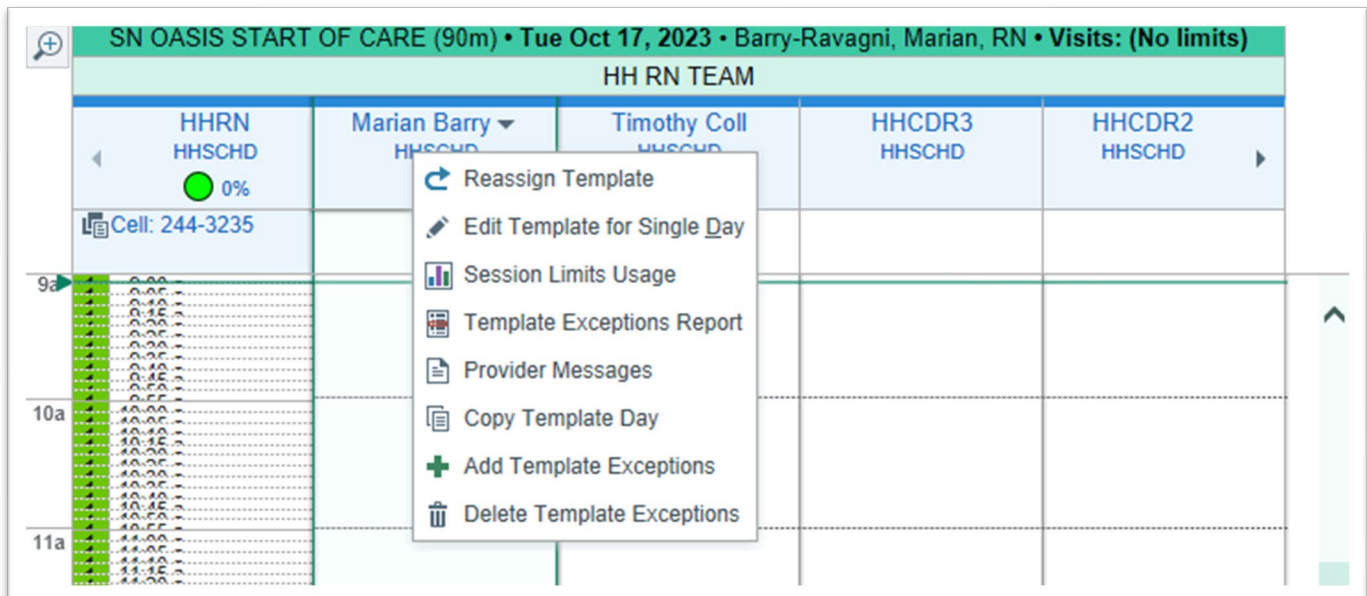

In Book It, select 📅 **View multiple dates for a single provider** and the number of days you want to view:
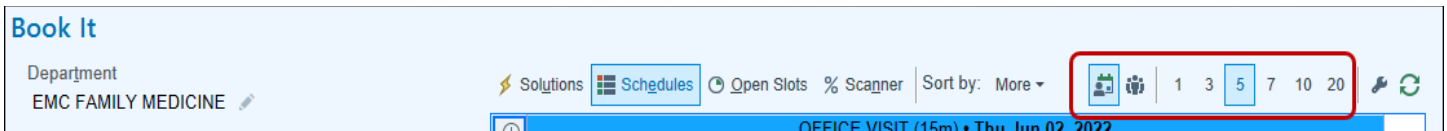
Accessing Scheduling Templates from the Schedule

If a provider is missing a template or you need to add or delete an exception, right click on the Provider's name, and select the desired option to update the template.

Change the provider viewing in a Slot

Select the dropdown men to the right of the Provider's name to select a different Provider to view in that Slot.

Use the Calendar Icon to view a single provider and the People Icon to view more than one Provider. Use the numbers to control the number of Days or Providers in the view.

Booking the Appointment

1. On the right side of the activity, enter the date to start searching on, or select the date on the calendar.
2. Select an open time to hold that appointment time. The visit information on the left side of the activity is updated to show that you're holding that time.
3. Click ✔ **Schedule** in the bottom right corner.

Need to remove a held time? Select the Push Pin on the appointment to remove a held time.
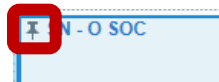
4. In the Appt Information, select the Care Team and Select Add Appointment Provider to add that provider to the Care, enter a start date Team, then Accept and accept again on the bottom right.

Sort Providers by Utilizations

In Schedules view, you can sort providers by utilization (lowest to highest).

- Providers are rearranged when you select a different date that has different utilization percentages (Click Sort by and choose % Utilization)

Open Slots

View a Provider's Open Time

You don't need to leave Book It to see what times a provider has available. In Book It, select the ⊙ **Open Slots** view.

The Open Slots view shows only the slots that are available in a provider's schedule.
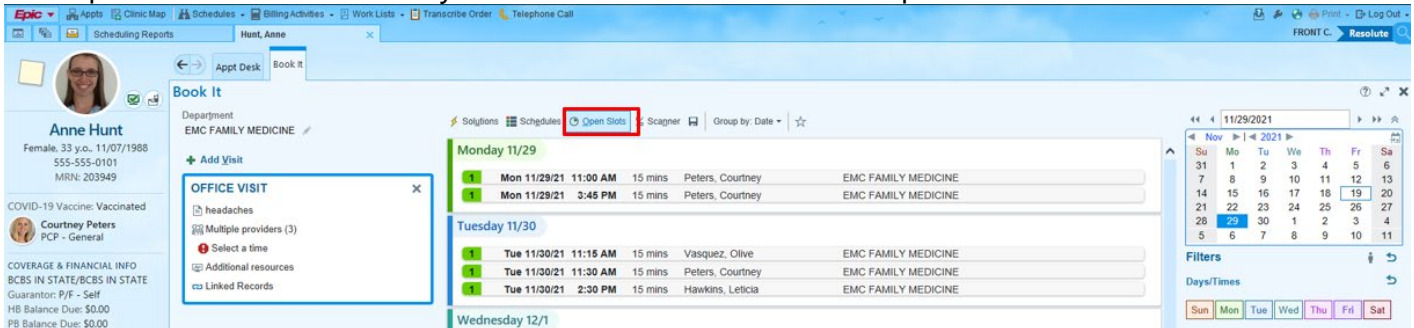
This view shows all open slots, regardless of length. If you want to see only slots that match the visit length you're scheduling, click the ⚙ gears icon in the Filters pane and enter a value in the **Minimum Opening (mins)** field.
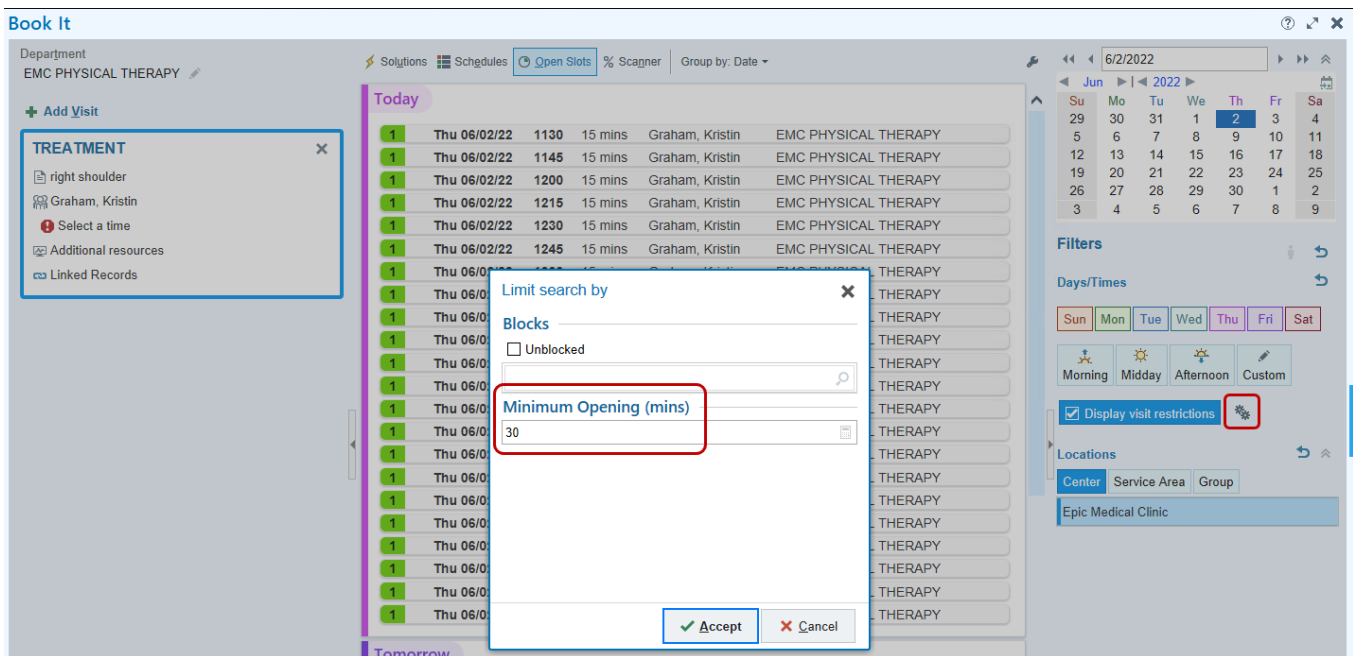
Scanner view

The Scanner view shows the Schedule Scanner so you can see who has the most availability.

- Green shows provider is mostly free, red shows already booked
- Percentages quantify how much of the day is booked

Double-click a utilization value to open the Schedules view for the provider.

Customize your View

In the toolbar of Book It View Schedules, users may click a wrench button to save their preferences for how the activities appear. This window allows users to:

- Set a default view upon opening Book It or View Schedules at the top of the window.
- Set default preferences for each view from the window.
- Set Provider Messages to appear by default in Solutions and Open Slots views.
- Choose to not have default settings or a default view and use the Remember last used option.

Schedule Recurring Appointments in Book It

Book It has intuitive options for scheduling recurring appointments and returns solutions that respect your organization's scheduling rules.

Schedule a Daily Recurrence

1. Click ➕ **Add Visit** and enter the appointment notes, visit type, and provider for the visit.
2. Click 📅 **Recur**.
3. In the Recur Settings window, select **Daily**.
4. Enter the number of occurrences to schedule or enter an end date for the recurrence.
5. Use the **Number per day** field to specify the number of appointments to schedule on a given day. If you're scheduling multiple appointments on one day, use the **Minimum hours between** field to specify the minimum number of hours that there must be between appointments. You cannot specify a time range or minutes between visits for multiple appointments on the same day.
6. Use the **Days between occurrences** field to specify the number of days between occurrences. For example, to schedule an appointment every other day, select **2** in this field.
7. Click ✔ **Accept** to view the recommended appointment times. You are taken to the ⚡ **Solutions** view, or depending on how your system is set up, you can select times manually from your current view.
8. Select a set of appointments to hold them and add them to the visit card.
9. Click ✔ **Schedule** to continue scheduling the appointments.

Schedule a Weekly Recurrence

1. Click ➕ **Add Visit** and enter the appointment notes, visit type, and provider for the visit.
2. Click 📅 **Recur**.
3. In the Recur Settings window, select **Weekly**.
4. Enter the number of occurrences to schedule or enter an end date for the recurrence.
5. To recur appointments on specific days of the week, select the **Recur on specific days** checkbox and select the days.

- Specify days here only if you want to require the appointments to be on those days. If specific days are preferred but not required, do not set this option. Instead, use the day preferences filter on the right side of Book It after you finish setting up your recurrence.

6. To schedule more than one appointment each week, change the number in the **Number per week** field.
7. Use the **Weeks between occurrences** field to specify the number of weeks between occurrences. For example, to schedule an appointment every other week, select **2** in this field.
8. Click ✔ **Accept** to view the recommended appointment times. You are taken to the ⚡ **Solutions** view, or depending on how your system is set up, you can select times manually from your current view.
9. Select a set of appointments to hold them and add them to the visit card.
10. Click ✔ **Schedule** to continue scheduling the appointments.

Schedule a Monthly Recurrence

1. Click ➕ **Add Visit** and enter the appointment notes, visit type, and provider for the visit.
2. Click 📅 **Recur**.
3. In the Recur Settings window, select **Monthly**.
4. Enter the number of occurrences to schedule or enter an end date for the recurrence.
5. To recur appointments on specific days of the month, such as the second Tuesday, select the **Recur on specific days** checkbox and select the days.

    - Specify days here only if you want to require the appointments to be on those days. If specific days are preferred but not required, do not set this option. Instead, use the day preferences filter on the right side of Book It after you finish setting up your recurrence.

6. Use the **Months between occurrences** field to specify the number of months between occurrences. For example, to schedule an appointment every other month, select **2** in this field.
7. Click ✔ **Accept** to view the recommended appointment times. You are taken to the ⚡ **Solutions** view, or depending on how your system is set up, you can select times manually from your current view.
8. Select a set of appointments to hold them and add them to the visit card.
9. Click ✔ **Schedule** to continue scheduling the appointments.