

EpicEdge Tips & Tricks

Cancellation of Duplicate Visits

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There has been an issue with duplicate appointment requests that are left in place on the appointment request workqueues even when a visit has been documented. We worked with Epic and learned that these can be caused when:

- A clinician's scheduling template has an issue or hasn't yet been created.
- A visit is opened from the Contacts task instead of from the Schedule on the remote client.
- A missed visit is documented after the appointment has already been converted to incomplete status.

Schedulers have been deferring these appointment requests because they couldn't remove them from the workqueues. We are granting permission to the schedulers to cancel these appointment requests.

Instructions:

Click to select one appointment request or use shift + click or Ctrl + click to select multiple requests. Next, click on the Cancel Request button on the toolbar.



Schedulers can also select appointment request(s) and then right-click and select Cancel Request from the menu.

The screenshot shows a table with columns: Defer Reason, MRN, Name, Created on, Last called date, Last Outcome, and # C. The 'Deferred (Total: 17)' tab is active. A context menu is open over a row with 'Waiting on In...' in the Defer Reason column and '12/22/2022' in the Created on column. The menu items are: Undo Defer, Transfer, Assign to Others, Assign to Self, Unassign, Schedule, Walk In, Sched Ext, Send to myTuftsMed, Appt Desk, Edit Notes, New Call, Cancel Request (highlighted in red), and Edit Request. A tooltip for 'Cancel Request' says 'Cancel selected request'. Below the table, a yellow bar indicates '6 selected' and a 'Summary' button is visible.

Next, select a cancellation reason from the dropdown menu, enter a comment if needed, and click Cancel Request(s).

The 'Cancel Appointment Requests' dialog box has a blue header with a close button. It contains two main sections: 'Patients' and 'Requests'. The 'Patients' section shows a redacted name. The 'Requests' section shows '(6) AIDE HOME VISIT'. The 'Information' section has a 'Reason' dropdown menu with a red exclamation mark icon and a search icon, and a 'Comment' text area with a cursor. At the bottom right, there are two buttons: 'Cancel Requests' (with a green checkmark) and 'Go Back' (with a red arrow).