

EpicEdge Tips & Tricks

Visualize Home Visit Appointments with Map It

Map It allows you to schedule home visits while using an interactive map to show the locations of existing appointments, appointment requests, and more. This tip sheet assumes that you are opening Map It and selecting a day when you have some appointments already scheduled with providers for both specific times and for TBD times, as well as several appointment request orders that need scheduling.

Open Map It and Review the Layout

- In Hyperspace, click the **Epic** button and select one of the Home Health, Hospice, or Scheduling menus. Select **Map It** from one of those menus. Alternatively, chart search for Map It.
- Map It opens. Observe that there is a:
 - Scheduling grid showing field staff and their current scheduled appointments.
 - Section of the scheduling grid specifically for TBD appointments.
 - Depot showing visit request orders that need to be scheduled.
 - Map that is currently showing pins representing all scheduled visits as well as home care agencies. It can also show appointment requests, staff activities, and field user locations (if available at your organization).
 - Menu of filters that allow you to toggle what appears on the map.
 - Details report about the individual appointment or request you have clicked on. Click a visit request in the depot to see that report.

Map It: HH - Skilled Nurses (Fri 9/30/2022)

Section A: Scheduling Grid

Staff	0700	0800	0900	1000	1100	1200	1300	1400	1500
Blivins, Michele, RN		Rn - Ho...	Rn - Ho...	Rn - Ho...	Rn - Ho...				
Lu, Connor, RN		Rn - Ho...			Rn - Ho...	Rn - Ho...			
Morrison, Betty, RN					Rn - Ho...	Rn - Ho...			
Sims, Preston, RN		Rn - Ho...			Rn - Ho...	Personal A	Pers...	Rn - Ho...	

Section B: Depot

Request ID	Request Notes	Discipline	From Date	To Date	Visit Set Info
0017/2022	<112946> Kerr, Phoebe	Home Health Aide	09/25/2022	10/01/2022	3 to 5 visits every week
0017/2022	<112946> Kerr, Phoebe	Home Health Aide	09/25/2022	10/01/2022	3 to 5 visits every week
08/26/2022	<111206> Welhert, Ann S.	Skilled Nursing	09/25/2022	10/01/2022	3 visits every week
08/26/2022	<111206> Welhert, Ann S.	Skilled Nursing	09/25/2022	10/01/2022	3 visits every week
08/26/2022	<111206> Welhert, Ann S.	Skilled Nursing	09/25/2022	10/01/2022	3 visits every week
08/31/2022	<252484> Baker, Mariah	Skilled Nursing	09/25/2022	10/08/2022	
0031/2022	<252495> Johnson, LaKeith	Skilled Nursing	09/25/2022	10/08/2022	









Section D: Map

Map showing geographic locations of visits and agencies in the Madison, WI area. Pins are color-coded by staff member: MB (Morrison, Betty), CL (Lu, Connor), PS (Sims, Preston), and MB (Blivins, Michele).

Section E: Patient Details

Baker, Mariah
 Demographics: P: 70 yrs; 8/31/1952; MDOB: <252484>; Stage/chart: Inactive
 Selected Request: RN - HOME VISIT; Needs Scheduling; Created: 8/31/2022; Dept: HH
 Active Requests: RN - HOME VISIT; Needs Scheduling; Created: 8/31/2022; Dept: HH
 Upcoming Patient Events: No upcoming patient events

3. Looking more closely at the map, observe the different kinds of pin icons:

	<p>Light-shaded pins with initials indicate a visit or visits with a particular field user. The color and initials are the same as the icon next to the field user's name in the scheduling grid. Pins with a small check icon indicate a documented visit.</p>
 	<p>Pins with a small number next to them indicate multiple pins at a specific location or very close together. If all the pins are of the same type (for example, two visits with one field user), the main icon indicates that type. If they are of multiple types (for example, a department and three visits), the main icon is gray and shows multiple pins. Clicking on the pin brings up a list of each thing at that location. A pin with a small number and a house is if there are multiple clinicians at the same location.</p>
	<p>Pins with a small home icon indicate home visits that have not been documented yet.</p>
	<p>Pins with a clipboard icon indicate an appointment request order.</p>
	<p>Pins with a medical building icon indicate a home health or hospice agency or other medical facility.</p>
	<p>Pins with dark-shaded and white initials indicate a field user's current location.</p>
	<p>A show shows the clinician in transit. This will change when the clinician clicks start transit on Rover.</p>
	<p>Other pins that you might see, but which are not pictured here, include a:</p> <ul style="list-style-type: none"> ▫ Suitcase indicating staff activity. ▫ Sunrise indicating a field user's starting location. ▫ Moon indicating a field user's ending location.

Adjust the Snapboard and Depot

1. To see the schedule for a different day, select a different date (A). To show more than one day at a time in the scheduling grid, use the number of days control (B). Note that the map shows a maximum of 24 hours of information, so if you are looking at two or more days in the schedule, the map shows visits and requests only for the first of those days.
2. To change what appointment requests appear in the depot, use the depot selection box or the buttons below the depot (C).

The screenshot shows a scheduling interface with a table of requests and a filter bar below it. Callout A points to the date selection area (9/30/2022), callout B points to the time range selection (1 Day, 3 Days), and callout C points to the filter bar containing 'WI HH Depot - RN' and 'WI HH Depot - All'.

Creation Date	ID	MRN	Patient	Request Notes	Discipline
08/17/2022	1000555312	<112946>	Kerr, P		Home Health Aide
08/17/2022	1000555313	<112946>	Kerr, P		Home Health Aide
08/26/2022	1000598196	<111206>	Weihert, Ann S.		Skilled Nursing
08/26/2022	1000598197	<111206>	Weihert, Ann S.		Skilled Nursing
08/26/2022	1000598198	<111206>	Weihert, Ann S.		Skilled Nursing
08/31/2022	1000611004	<292484>	Baker, Mariah		Skilled Nursing
08/31/2022	1000611041	<292495>	Johnson, LaKeith		Skilled Nursing

Filter bar: WI HH Depot - RN | WI HH Depot - RN | WI HH Depot - All

- To see a separate set of field users, use the Snapboard selection box or the buttons above the scheduling grid.

The screenshot shows a Snapboard titled "Map It: HH - Skilled Nurses (Fri 9/30/2022)". A red box highlights the selection bar at the top, which includes "HH - Skilled Nurses" and other options like "HH - Aides - Screen*", "HH - OT", "HH - PT", and "HH - Ancillary Disc*". Below the selection bar is a scheduling grid for the day of 9/30/2022, showing time slots from 0700 to 1400. A user named "Blevins, Michele, RN" is assigned to the 0800-0900 slot.

	0700	0800	0900	1000	1100	1200	1300	1400
Blevins, Michele, RN WI HOME HEALTH		Rn - Ho... Guerrer...	Rn - Ho... Forrest...	Rn - Ho... Holland...				

Schedule an Appointment from a Depot or the Map

- To schedule an appointment request from the depot, go to the depot, drag a request (A) into an open slot in the schedule grid (B), and drop it.

The screenshot displays a scheduling interface with a grid of time slots (0700-1500) and a list of appointment requests. A red arrow points from request (A) to slot (B).

Creation Date	ID	MRN	Patient	Request Notes	Discipline	From Date	To Date	Visit Set Info	ZIP Cod
08/17/2022	1000555312	<112946>	Kerr, Phoebe		Home Health Aide	09/25/2022	10/01/2022	3 to 5 visits every week	53593
08/17/2022	1000555313	<112946>	Kerr, Phoebe		Home Health Aide	09/25/2022	10/01/2022	3 to 5 visits every week	53593
08/26/2022	1000598196	<111206>	Weihert, Ann S.		Skilled Nursing	09/25/2022	10/01/2022	3 visits every week	53532
08/26/2022	1000598197	<111206>	Weihert, Ann S.		Skilled Nursing	09/25/2022	10/01/2022	3 visits every week	53532
08/26/2022	1000598198	<111206>	Weihert, Ann S.		Skilled Nursing	09/25/2022	10/01/2022	3 visits every week	53532
08/31/2022	1000611004	<292484>	Baker, Mariah		Skilled Nursing	09/25/2022	10/08/2022		53714
08/31/2022	1000611041	<292495>	Johnson, LaKeith		Skilled Nursing	09/25/2022	10/08/2022		53562

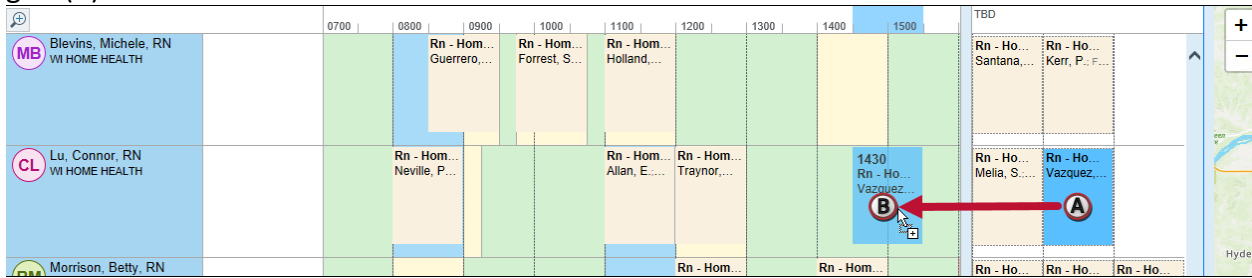
- Continue through the standard scheduling workflow to schedule the appointment.
- Alternatively, to schedule an appointment request from the map, go to the depot and click a request (A). The request appears as a pin on the map (B).
- Right-click the pin and select **the Schedule to open Book It.**

The screenshot displays a scheduling interface with a map view and a schedule grid. A red arrow points from request (A) to slot (B).

Patient	Request Notes	Discipline	From Date	To Date	Visit Set Info	ZIP Code	Epils
Kerr, Phoebe		Home Health Aide	09/25/2022	10/01/2022	3 to 5 visits every week	53593	Horr
Kerr, Phoebe		Home Health Aide	09/25/2022	10/01/2022	3 to 5 visits every week	53593	Horr
Weihert, Ann S.		Skilled Nursing	09/25/2022	10/01/2022	3 visits every week	53532	Horr
Weihert, Ann S.		Skilled Nursing	09/25/2022	10/01/2022	3 visits every week	53532	Horr
Weihert, Ann S.		Skilled Nursing	09/25/2022	10/01/2022	3 visits every week	53532	Horr
Baker, Mariah		Skilled Nursing	09/25/2022	10/08/2022		53714	Horr
Johnson, LaKeith		Skilled Nursing	09/25/2022	10/08/2022		53562	Horr

Schedule a TBD Appointment for a Specific Time

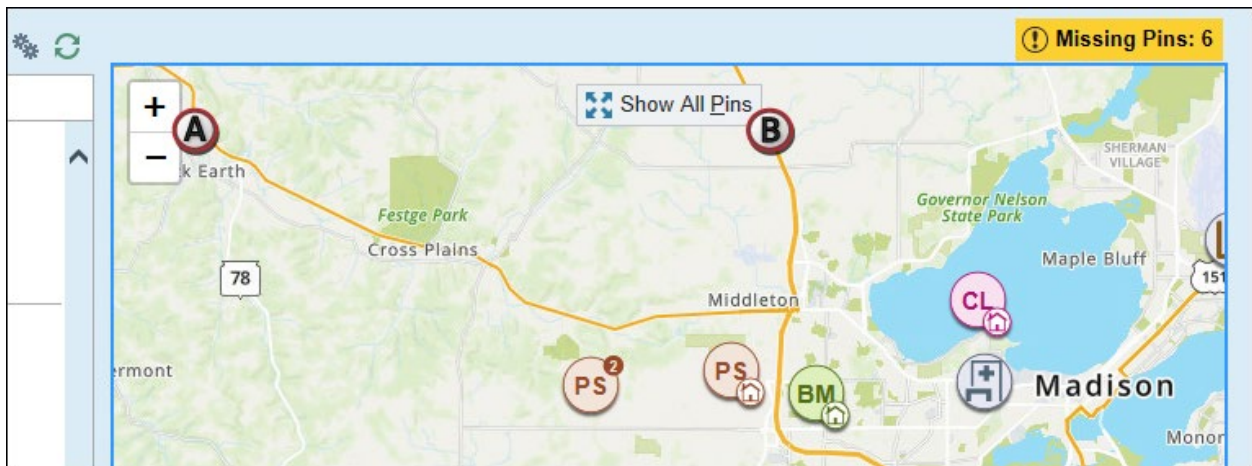
1. If an appointment has already been scheduled but has a TBD time, you can find a specific time for that appointment by dragging it from the TBD column (A) and dropping it into an open slot in the schedule grid (B).



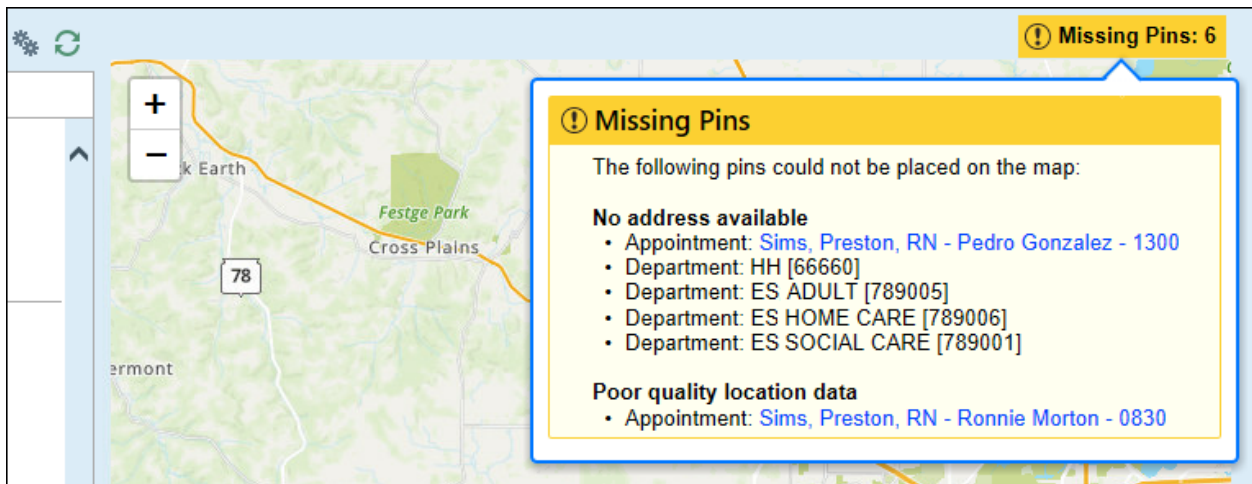
2. Enter a reason for changing the appointment and click **Move**.
3. Continue through the standard scheduling workflow at your organization.

Adjust the Map and Review Missing Pins

1. To zoom in or out on the map, use the + and - buttons (A), the + and - keys on your keyboard, or the scroll wheel on your mouse. To zoom out so that the map shows all pins, click **Show All Pins** (B).



2. If there are pins that cannot appear on the map, either because they have no address or because the provided address does not include enough information for the system to plot it, a **Missing Pins** notice appears. Click that notice to see a list of those pins and a reason they are not on the map.

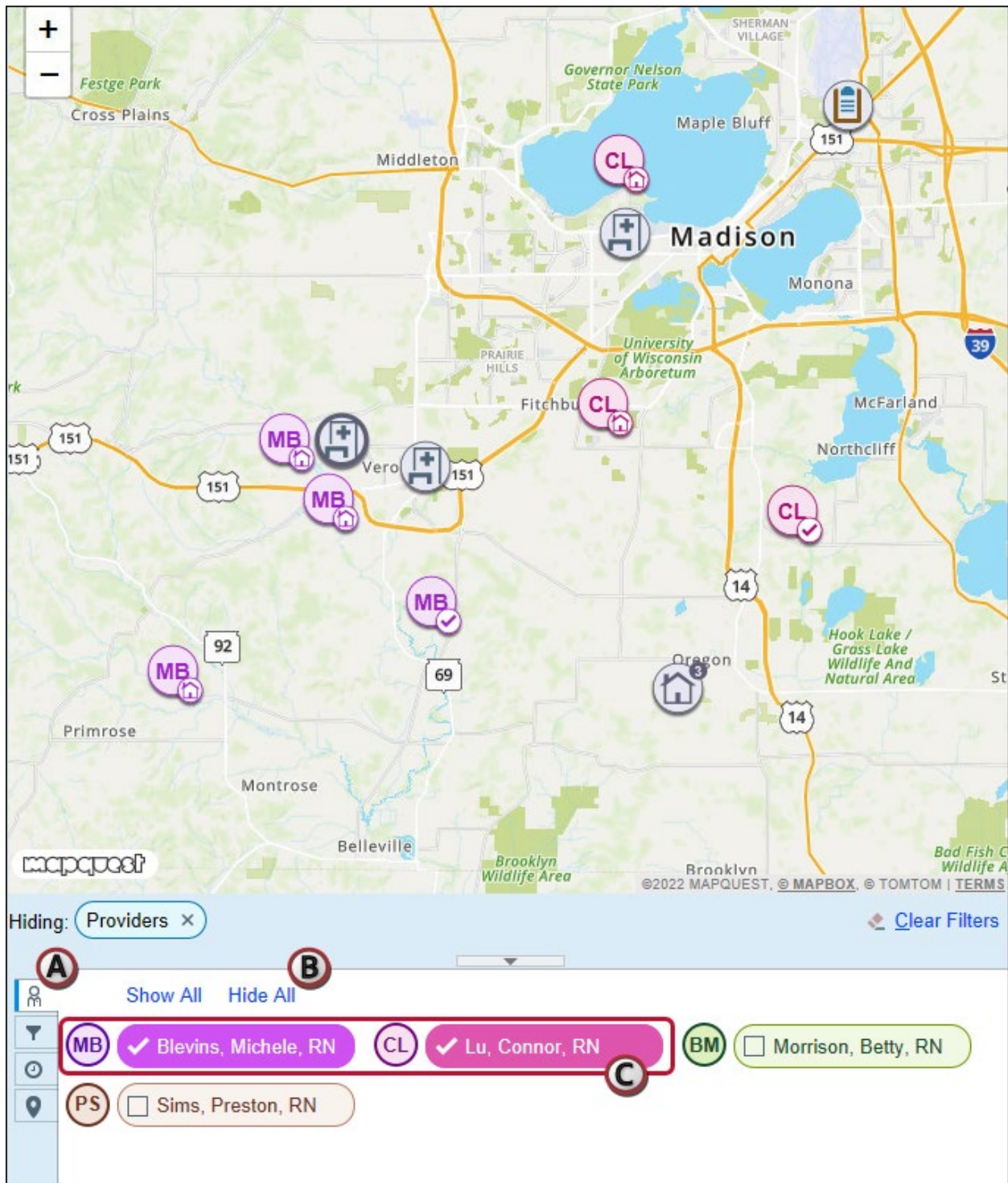


Filter What's on the Map

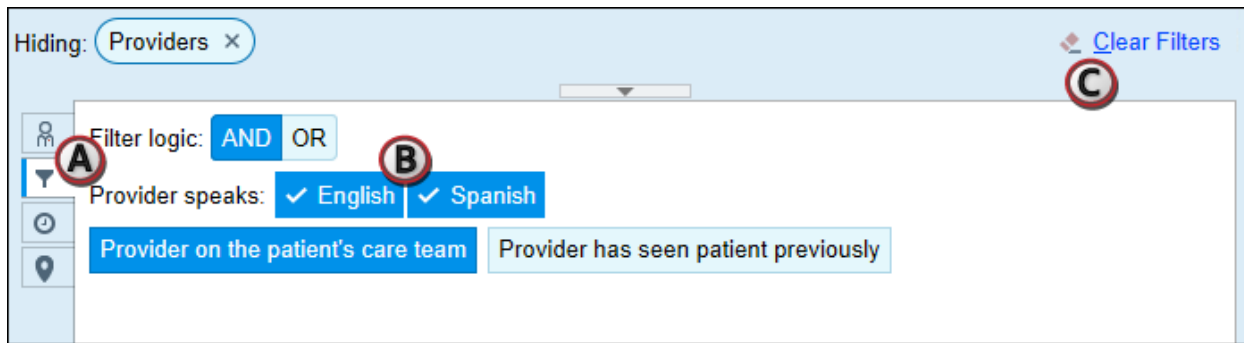
1. To see the appointments for just one field user, click anywhere in the row for that person in the scheduling grid (A). Observe that the pins for other staff are now translucent (B) and that only the pins for the selected staff member are solid color (C).



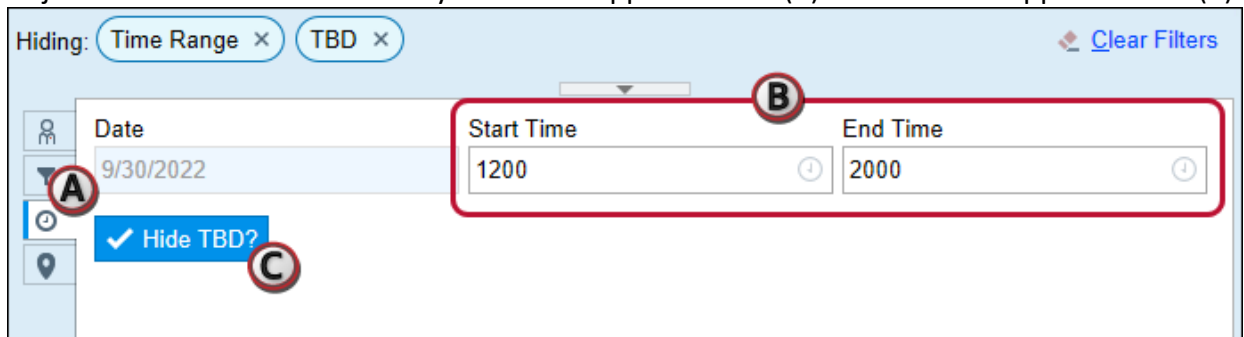
2. You can also filter the map to show only particular field staff using the filter section underneath the map. The person icon (A) indicates that this is the field staff filter. Click the **Hide All** link (B), which unselects all the field staff and removes their pins from the map. Select a couple of field staff (C) to show only their appointments.



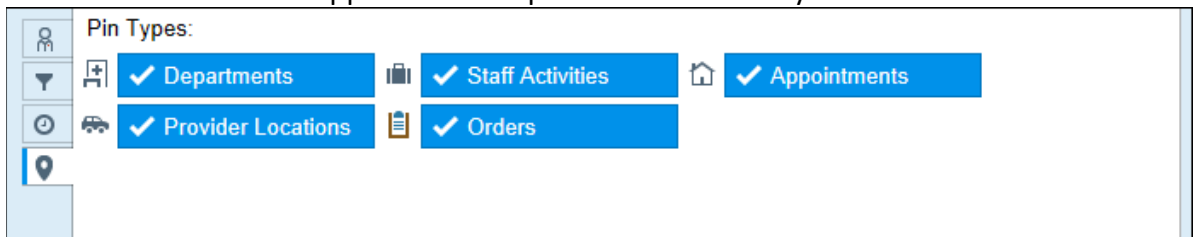
3. You can filter the map to show only field staff who meet certain criteria relative to the patient. Click the funnel icon (A) to see those filters. Toggle the checkboxes and buttons to see staff members who speak both English and Spanish and are on the patient's care team (B). Click **Clear Filters** (C) to remove those filters.



4. You can filter the map to show only appointments within a certain time range or, if you are viewing multiple days of appointments, within a certain date range. Click the clock icon to see those filters (A). Adjust the start time to show only afternoon appointments (B) and hide TBD appointments (C).



5. You can filter the map based on the type of pin. Click the pin icon. Click:
- Departments** show or hide physical locations such as home health agencies, hospitals, or clinics.
 - Staff Activities** to show or hide scheduled events other than appointments (such as lab drops, meetings, or meals).
 - Appointments** to show or hide appointments.
 - Provider Locations** to show or hide the recent location of field staff (if your organization uses the staff location feature).
 - Orders** to show or hide appointment requests that have not yet been scheduled.



6. To clear the filters, just click the **X** next to them within the filter area at the top.

In Summary, you can see a clinician's real time with an icon that is darker filled in color and white initials. When the clinician starts transit time in Rover, a car icon will show up next to their initials, when they arrive at the house, the icon will change to a house, and finally when the visit is complete the icon will be a check mark.

