Order-Based Ticket Scheduling

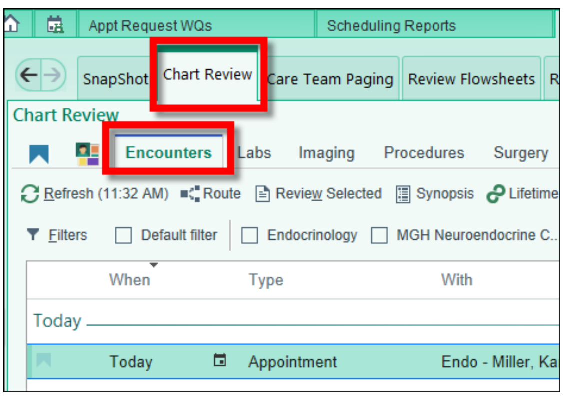
This tip sheet outlines the process for Order-Based Ticket Scheduling. Clinicians/PSCs can create an ambulatory follow-up order in Epic that will generate a scheduling ticket under clinically appropriate designations set by the department. The patient can use this ticket to schedule an appointment through Patient Gateway or the clinic can schedule off the order from the Appt Request workqueue. The patient receives the ticket at a pre-specified timeframe dependent upon the expected date. For example, if the patient needs a follow up in one month, the patient will receive the ticket instantaneously. However, if the expected date is for six months from now, the patient would receive the ticket to self-schedule 60-days prior to the expected date (around the 4-month mark from the day the order was placed). The patient will have until the expiration date to self-schedule.

The order creates a trackable plan for follow-up patients as determined by the patient's provider. This follow-up plan, in the form of an appointment request order, employs a technical safety net for the department's follow-up patients.

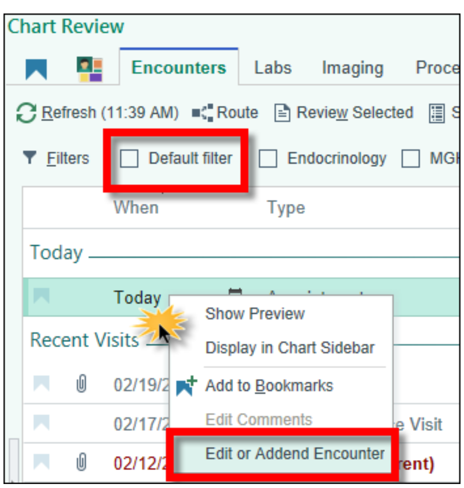
Placing an Order-Based Scheduling Ticket

Both clinicians and non-clinicians can enter an order for ticket scheduling. If a clinician requests a scheduling ticket be entered by PSC, please follow the steps below -

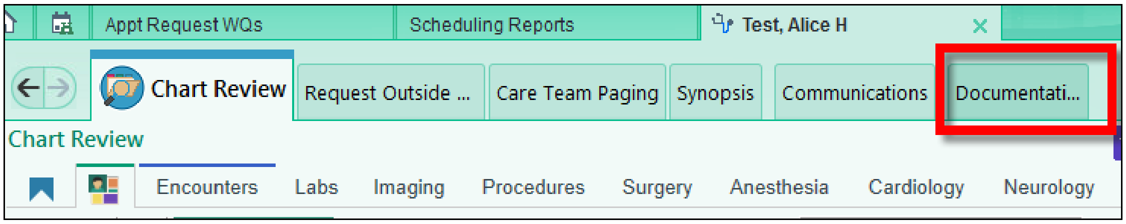
1. From the DAR, click **Review** in the toolbar to access chart review (you may need to click the **More** button first).
2. Click the **Chart Review** activity tab and then select the **Encounters** tab.



3. If the ***Default*** filter checkbox is selected, click to deselect.
4. Right-click on today's appointment and select **Edit or Addend Encounter**.



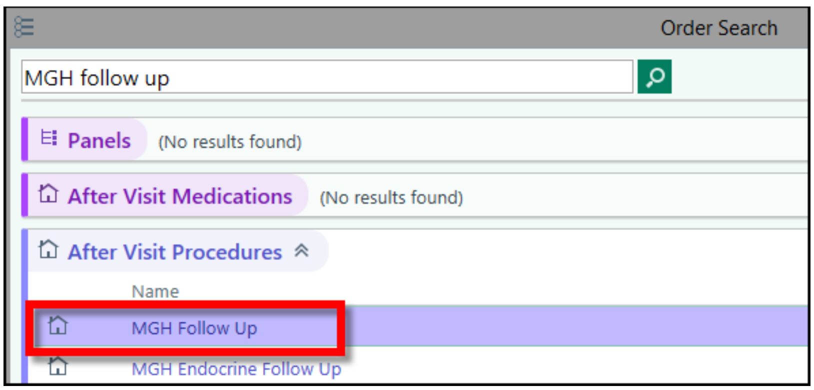
5. Click the **Documentation and Order** activity tab.



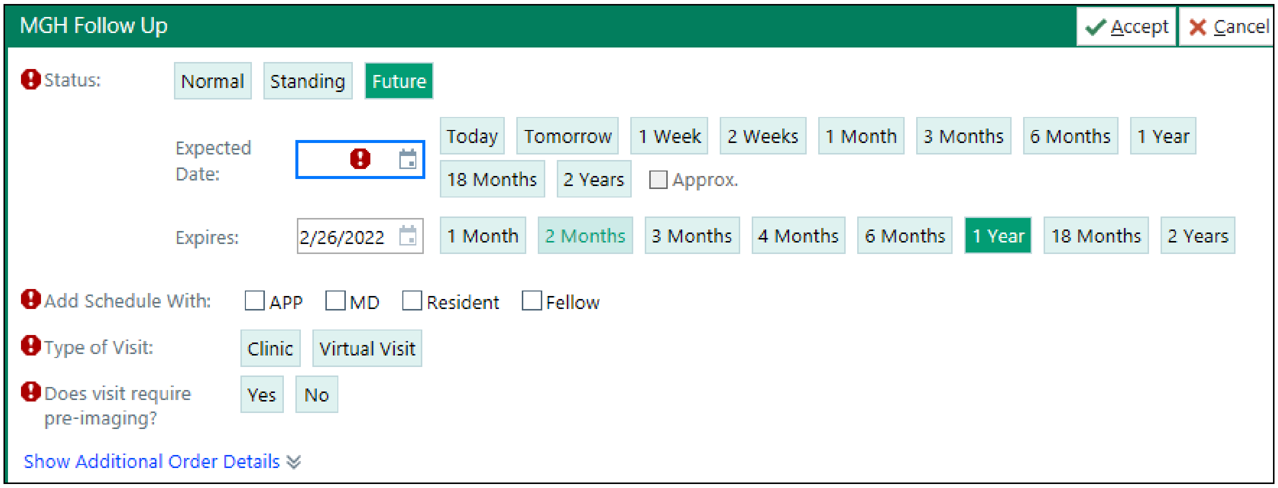
6. In the ***Add Order*** field on the bottom of the screen, type "**MGH <specialty> FOLLOW UP**" and then press **Enter**.

   Note: The department specific order follows the nomenclature of MGH <specialty> Follow Up. Ex: MGH Neurology Follow Up. The generalized "MGH Follow Up" in the following images is for demonstration purposes.

7. Select **MGH Follow Up** and then click **Accept**.



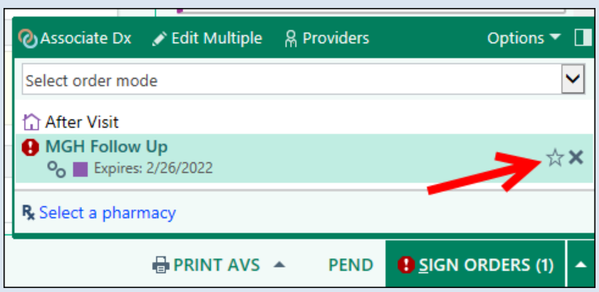
8. Enter the order details (all field with red stop signs must be addressed):
   a. Leave the ***Status*** field set to **Future**.
   b. Enter or select the ***Expected Date*** (target date patient should be scheduled for the follow up) per the clinician.
   c. The ***Expires*** field defaults based on the Expected Date entered but can be edited. This date represents the furthest date the patient could schedule themselves, so if there is a specific timeframe in which the patient to be seen, do not select anything too far into the future.
   d. Select who to schedule with in the ***Add Schedule With*** field.
   e. Select the ***Type of Visit*** per the clinician.
   f. Indicate whether the visit requires pre-imaging or coordination with another pre-visit requirement (NOTE: If pre-visit requirement, included Imaging, is required, a scheduling ticket will not generate for the patient to schedule online).



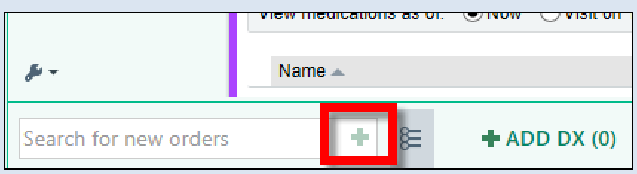
9. Click **Accept**.

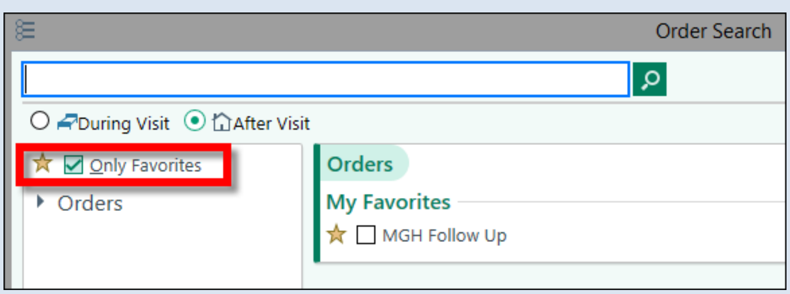
TIP: You can make the order a favorite for easy access in the future.

Click the star icon and then click **Accept** on the Add to Preference List pop-up window.

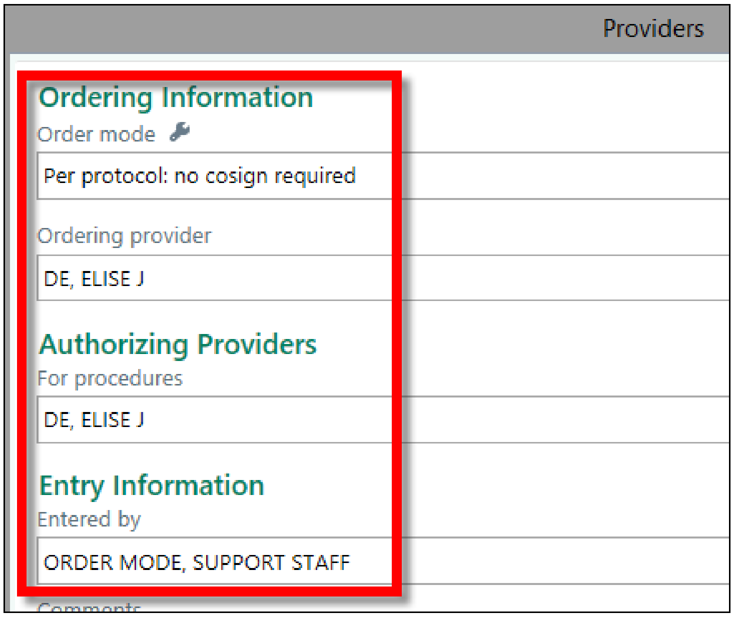


Next time you need to place the order, click the green plus sign in the ***Add Order*** field and select the **Only Favorites** checkbox.





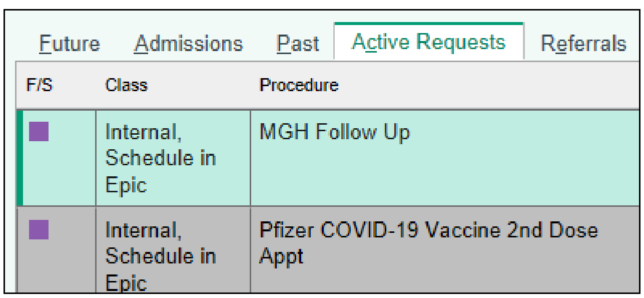
10. Click the **Sign Orders** button.
11. In the Provider window, enter the following:
    a. Order mode – **Per protocol: no cosign required**
    b. Ordering and Authorizing provider – **[name of the ordering provider]**
    c. Entered by – **Order Mode, Support Staff**



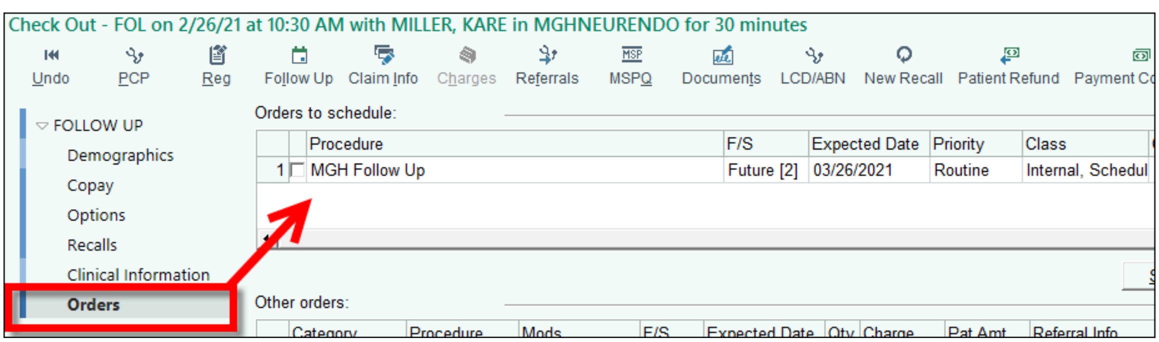
12. Click **Accept**.
13. Click the **X** on the workspace tab to close out of the encounter.

    Result:

    - The patient is now tracked in the system and will appear on your department's appointment request workqueue once the expected date is within 60 days.
    - The order can also be viewed via the Appt Desk > Active Requests tab.

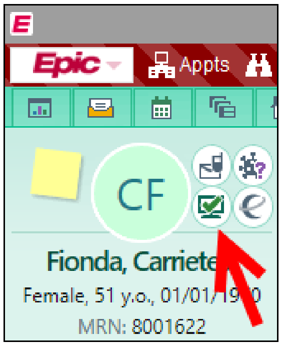


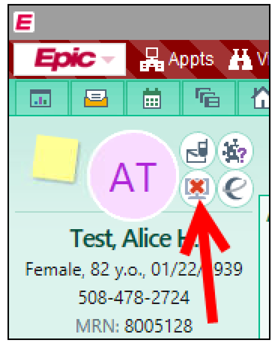
    - The order can also be viewed via the Check Out activity in the Orders form.



14. When checking out the patient, if the patient has an active Patient Gateway account and pre-imaging is not required, say to the patient –

Active PG Account *Inactive PG Account*





Great. We have a new process to find the best appointment for you.

- We want to make sure you are scheduled for a date and time that works for you and your provider.
- We have found that when we schedule too far in advance, patients and providers are more likely to have a need to reschedule.
- Instead, we have you select your appointment about 2 months prior to the visit.
- Here is how it works. Today is __________, so I have programmed the scheduling system for you to receive a link in your email and in Patient Gateway the week of __________ (2 months prior to expected appointment month).
- You can click on the link in your email, which will take you to Patient Gateway.
- The link allows you to select a date and time in the month of _________ .

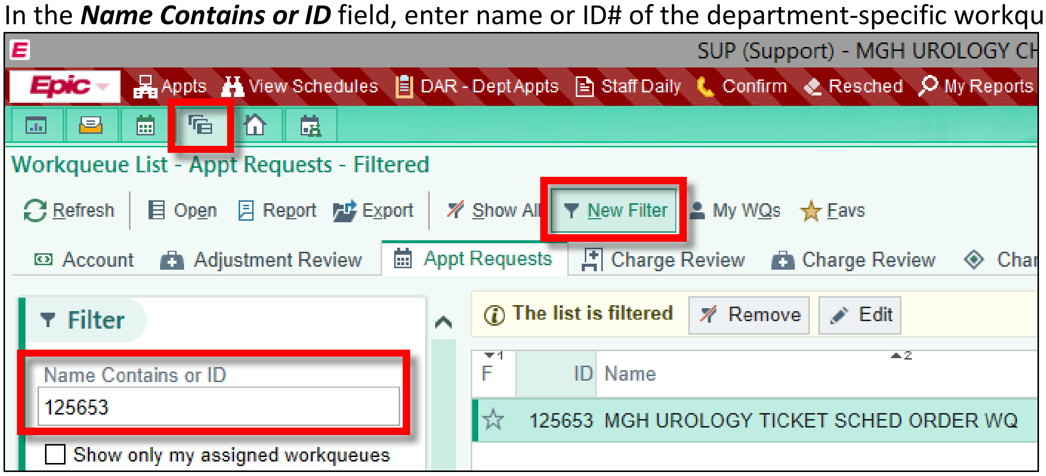
Do not worry — your spot is reserved.

- In addition to sending you the email, we monitor the scheduling system daily.
- We will call you if we see you have not picked your preferred appointment day and time and will ensure that you are scheduled.

If after going through the scripting, the patient still wants to schedule at the point of check-out, you may schedule them. Always use your discretion in order to provide the best patient experience.

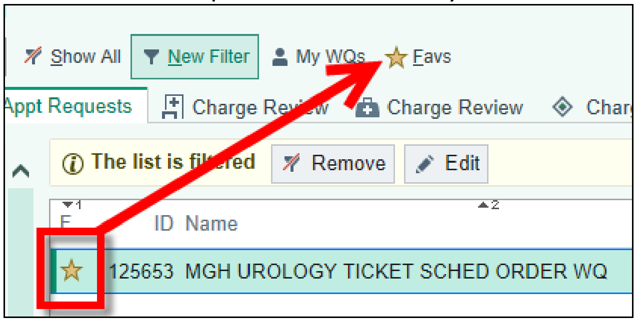
Accessing an Order-Based Scheduling Workqueue

1. Click the **Workqueue List** tab.
2. Click the **Appt Requests** tab.
3. Click **New Filter** on the toolbar.
4. In the ***Name Contains or ID*** field, enter name or ID# of the department-specific workqueue.

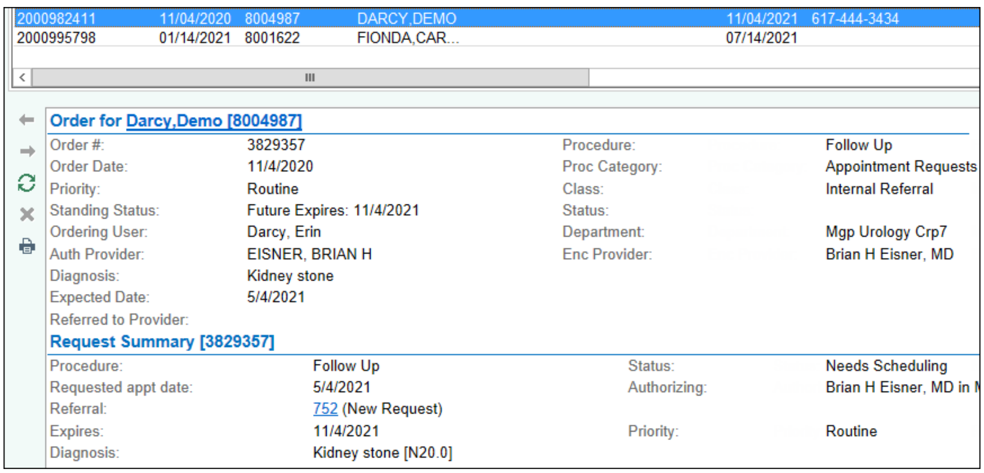


5. Click **Apply**.

   Tip: To make the workqueue easy to access in the future, you can make it a favorite by clicking the star next to the workqueue ID. Next time you need to access the specific workqueue, click Favs on the toolbar.



6. Double-click on the workqueue to open.
   - This workqueue displays anyone with a follow up order that has not been scheduled with an expected date in the next 60 days. If the order has an expected date of more than 60 days in the future, it will not appear on the workqueue immediately.
   - The Order details display on the bottom half of the workqueue.



Managing an Order-Based Scheduling Workqueue

Patients with an active Patient Gateway account can view and schedule their own appointments off a scheduling ticket. Practices can allow patients with active Patient Gateway accounts time to schedule their own appointment (recommendation is to allow 30 days). Patients without an active Patient Gateway account will not be able to schedule their own appointment and will require outreach from the practice to schedule.

NOTES:

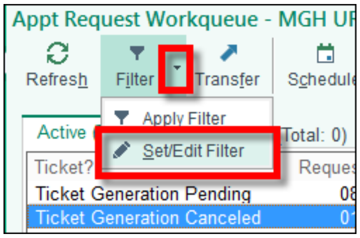
- Orders that have already been scheduled by patients or schedulers do not appear on the workqueue. If a patient cancels or no-shows, the ticket will repopulate to the workqueue and the patient will be sent another ticket to self-schedule or a PSC can schedule off the order on workqueue, if this occurs prior to the expiration date.

- Not all follow up orders will generate scheduling tickets for patients, including but not limited to, inactive PPG accounts. For example, if pre-appointment Imaging is required prior to an appointment, it will prevent a scheduling ticket from being generated. Please check with your department leadership on the active visit types that will generate scheduling tickets.

Workqueue Filtering

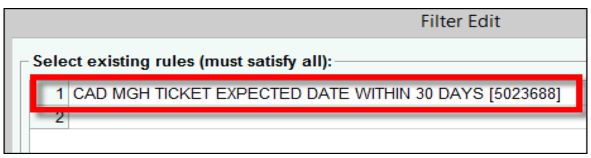
Two filters have been created to help efficiently manage the workqueue. These filters ensure you contact patients within an appropriate timeframe to schedule. You must apply the filters manually.

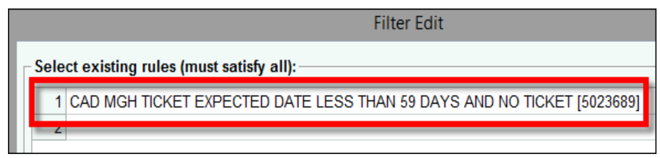
1. Click the **drop-down arrow** next to the Filter button on the toolbar and select **Set/Edit Filter**.



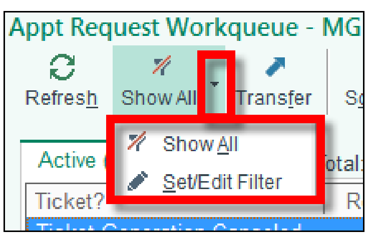
2. In the Filter Edit window, enter one of the below filters and then click **Accept**.

Filter Name/ID	Description
CAD MGH TICKET EXPECTED DATE WITHIN 30 DAYS [5023688]	Filters workqueue based on tickets with an expected visit date within the next 30 days.
CAD MGH TICKET EXPECTED DATE LESS THAN 59 DAYS AND NO TICKET [5023689]	Filters workqueue based on tickets with an expected visit date less than 59 days and no ticket generated in Patient Gateway for patient to schedule from.

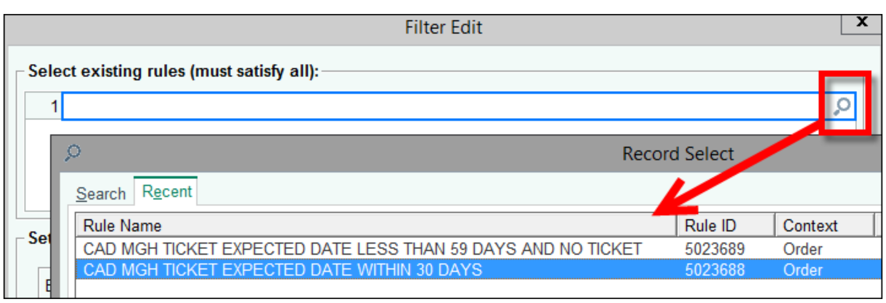




- To switch between the filters or remove all filters, click the drop-down arrow and select ‘Show All’ or ‘Set/Edit’ Filter.



- After applying the filters once, you can click the magnifying glass in the Filter Edit window to view your recent filters and easy switch between them.

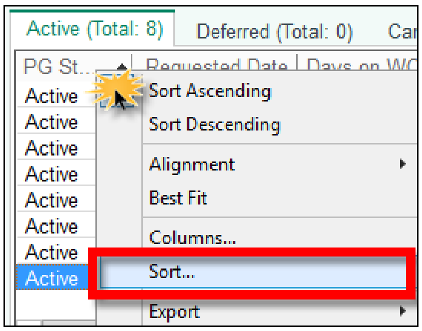


Workqueue Column Arrangement

In addition to applying the above filters, the columns on the workqueue can be rearranged to optimize workflow. It is important to sort the workqueue so you can effectively manage patient scheduling before an order expires. Follow the below steps for recommended column arrangement and sorting.

1. To change the order of columns, click and hold on a column header and drag the column to the desired location. Recommendation is to order as follows:

2. Right-click on a column header and select **Sort**.



3. In the Sort window, select the following:

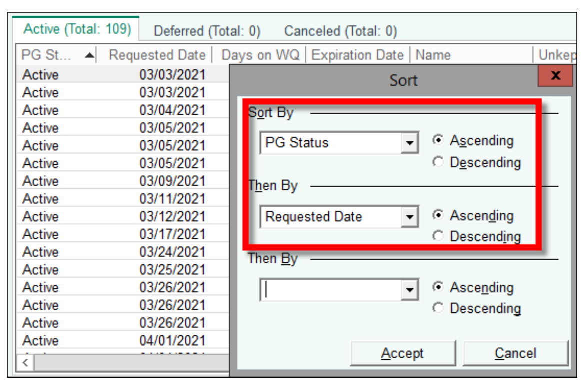
   a. Sort By – PG Status / Ascending (indicates Active/Inactive Patient Gateway status. Give patients with active Patient Gateway accounts 30 days to schedule themselves, when applicable).

   b. Then By – Requested Date / Ascending (indicates the target date the appt should be scheduled)

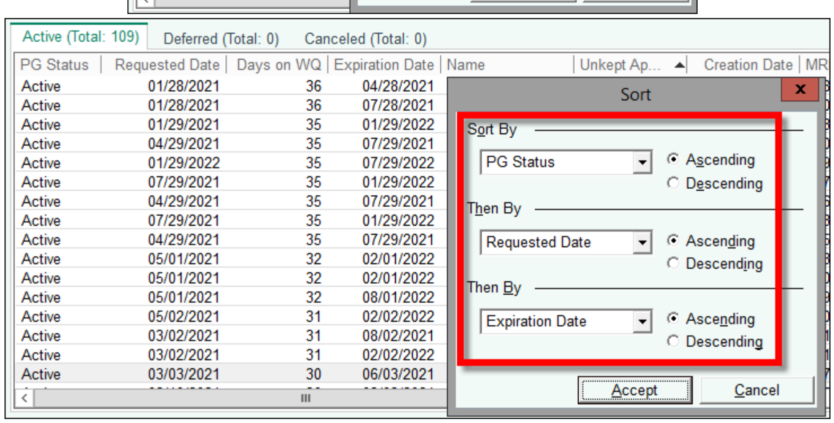
   c. Then By – Expiration Date / Ascending (indicates date ticket is set to expire).

   Note: Steps a and b above should occur independently, and step c is a separate workflow for "catching" orders before they expire.

a and b (PG Status & Requested Date)



A, b, and c (PG Status, Requested Date, Expiration Date)



4. Click **Accept**.

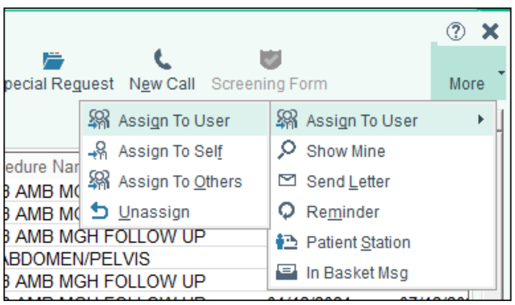
Ticket Generation Statuses

There are a few ticket statuses that display in the workqueue –

Status	Description
Ticket Generation Canceled	If the patient had a ticket generated, but then it was canceled (for example, prior to the Epic upgrade, if a patient no-showed, the ticket would not regenerate, and the status would be Ticket Generation Canceled). Or if the ticket is canceled but the order is not canceled.
Ticket Generation Pending	If the order does not meet the ticket generation rule, or if the appointment does not meet the criteria of the regeneration rule or if it meets the criteria of the regeneration rule but not the initial ticket generation rule.
Ticket Generated	Order meets the ticket generation rule and the patient gets the ticket.

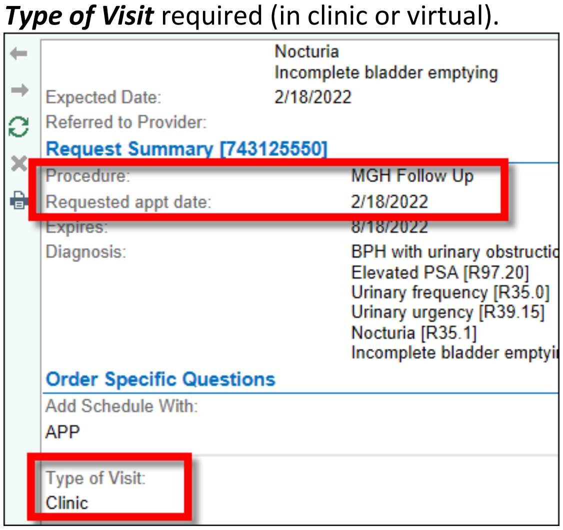
Assigning tickets to staff

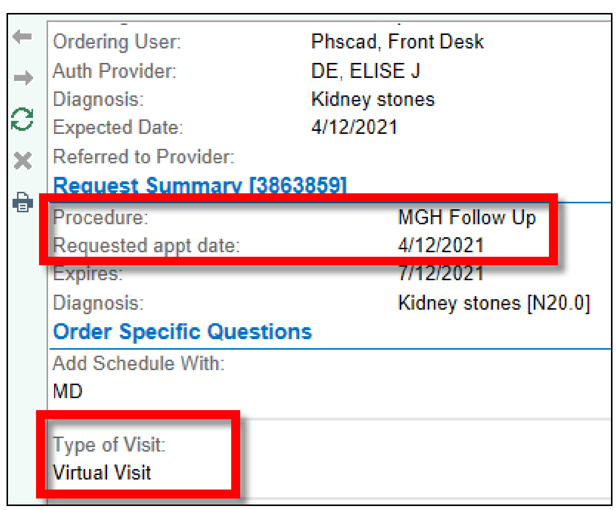
It is possible to assign staff specific tickets within a workqueue, for instance, if a patient's spoken language is Spanish, you can assign to Spanish speaking staff or assign to oneself. To assign, click Assign to User and then choose the appropriate option (you may need to click the More button first).



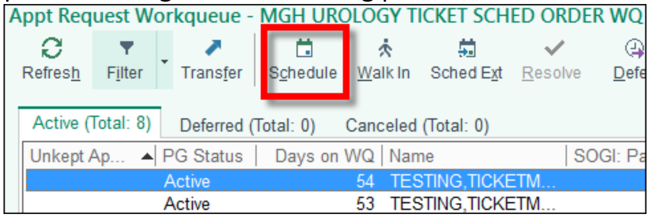
Scheduling via a Ticket Workqueue (Patient has not self-scheduled)

1. Before beginning the scheduling process, from the workqueue, scroll down within the order details section on the bottom of the screen to view the ***Procedure*** (visit type), the ***Requested appt date*** and the ***Type of Visit*** required (in clinic or virtual).

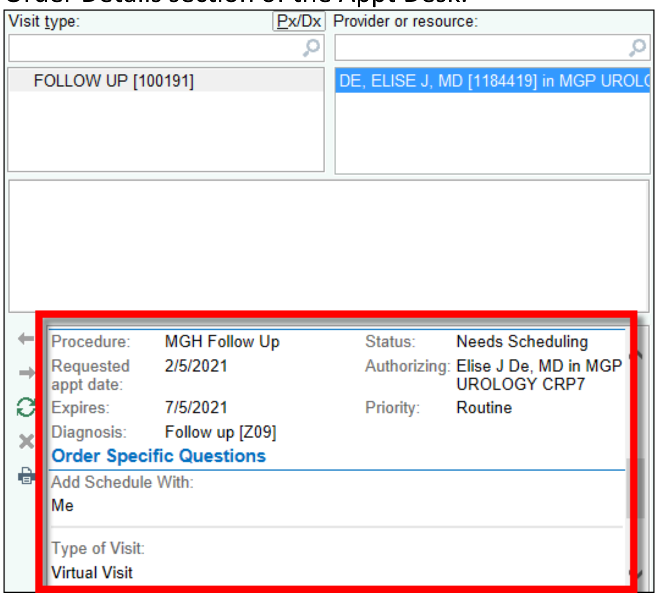




2. To schedule, select the patient and then click **Schedule** on the toolbar. You can also double-click on the patient to begin the scheduling process.



3. Delete the ***Visit type*** of **MGH TICKET DECISION TREE** by selecting it and pressing the **Delete** key.
4. Enter the appropriate ***Visit type*** listed on the order.
5. Complete the scheduling Decision Tree.
6. Select an appropriate Provider/resource.
7. Select the Requested date to schedule the appointment. This information can also be viewed from the Order Details section of the Appt Desk.

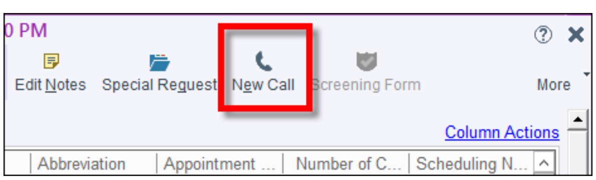


8. Complete the normal scheduling process, complete registration, and verify all items on the Checklist.

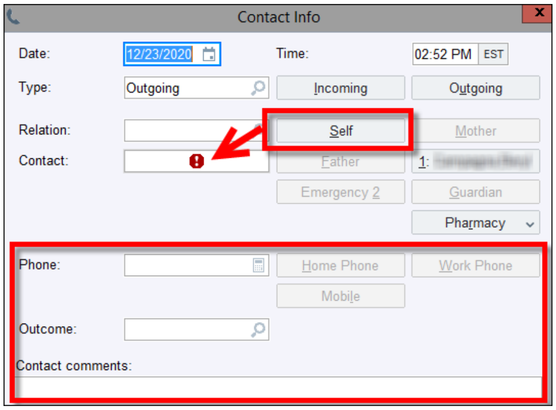
Documenting Patient Outreach

If you are unable to reach a patient, you will need to document your call attempt.

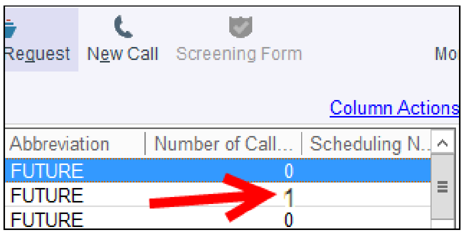
1. Click **New Call** on the toolbar.



2. Enter the details about the call attempt, including any additional comments (e.g., left voicemail, etc.).



Result: The ***Number of Calls to Schedule*** column updates with the number of call attempts made. In the future, you can sort this column to target patients you may have called once, twice, etc.



Deferring a Scheduling Ticket

The Defer feature allows you to move appointment requests from the Active tab to the Deferred tab for a specified period of time. This is particularly helpful for times when the patient may be going away and will not be contacted again until they return or to give patients a chance to call the office after leaving them a message.

1. Select the appointment request and then click **Defer** on the toolbar (you can also right-click on the patient and select **Defer**).
2. Select a ***Defer reason*** and then enter an appropriate ***Defer until date and time***.
    - It is recommended to enter “6am” in the time field. This way, when the date approaches in which the patient should no longer be deferred, the patient appears in the Active tab as soon as you begin your work day.
3. Add any ***Comments*** in the free text field.

Viewing if Patient Self-Scheduled from a Ticket

To view who scheduled the patient (practice staff or patient), from the Appt Desk, double-click on the appointment to open the Expand window. You can also access the Expand window from the DAR and numerous reports. If the ***By*** field is PHS, PARTNERS PATIENT GATEWAY, then the patient self-scheduled the appointment.