

Order-Based Ticket Scheduling

Clinicians/PSCs can use ambulatory follow-up orders in Epic to generate a scheduling ticket to help schedule follow-up appointments. With this scheduling ticket, patients can use Patient Gateway to schedule their follow-up appointment or clinic staff will schedule from the clinic's Appt Request workqueue.

Scheduling Tickets are made available at a pre-specified timeframe based upon the order expected date. Patients will have until the order expiration date to self-schedule through Patient Gateway.

Expected Date	Ticket Available to schedule
1-2 months	Immediately
>2 months	60-days prior to expected date

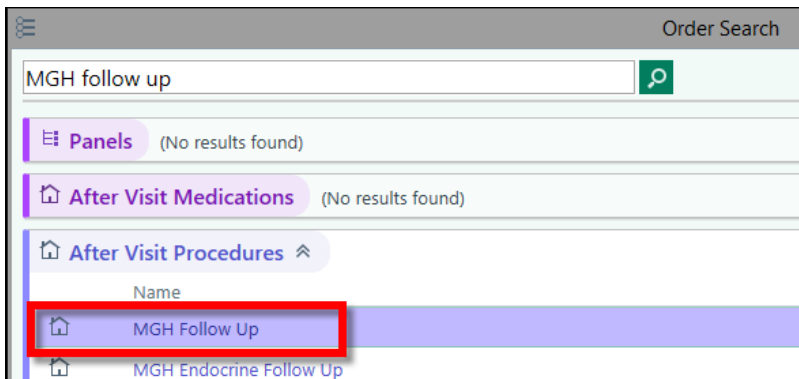
Placing an Order-Based Scheduling Ticket

- From within an encounter, order "MGH <specialty> Follow Up".



Note: Department specific orders follow 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.

- Select **MGH <Specialty> Follow Up** and then click **Accept**.



- Enter the order details:
 - Leave the **Status** field set to Future.
 - Select the **Expected Date** (target date patient should be scheduled for the follow up).
 - The **Expires** field is calculated from the order date (e.g., 3 Months from the day the order is placed). It 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 should be seen, do not select anything too far into the future. The default expiration date will change based on which expected date button is selected.

Update: As of October 2021, if the 1 Week, 2 Weeks, or 1 Month Expected Date speed button is selected, Expiration date will default to 3 Months from the order date (previously defaulted to 6 months).

The screenshot shows the 'MGH Follow Up' form with the following elements:

- Status:** Normal, Standing, Future (selected)
- Expected Date:** 10/25/2021 (calendar icon). Buttons: Today, Tomorrow, 1 Week (selected), 2 Weeks, 1 Month, 3 Months, 6 Months, 1 Year, 18 Months, 2 Years.
- Expires:** 1/18/2022 (calendar icon). Approx. Buttons: 1 Month, 2 Months, 3 Months (selected), 4 Months, 6 Months, 1 Year, 18 Months, 2 Years.
- Buttons: Accept, Cancel

- d. Specify who to schedule with in the **Add Schedule With** field.
- e. Select the **Type of Visit**.
- 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).

The screenshot shows the 'MGH Follow Up' form with the following elements:

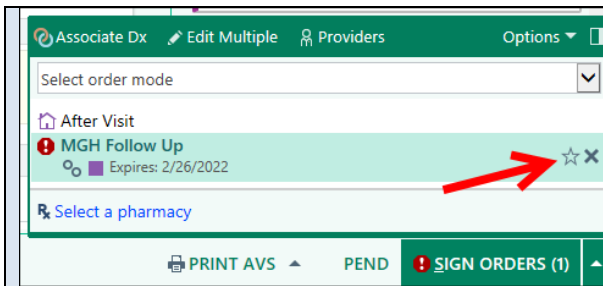
- Status:** Normal, Standing, Future (selected)
- Expected Date:** [Red error icon] (calendar icon). Buttons: Today, Tomorrow, 1 Week, 2 Weeks, 1 Month, 3 Months, 6 Months, 1 Year, 18 Months, 2 Years. Approx.
- Expires:** 2/26/2022 (calendar icon). Buttons: 1 Month, 2 Months, 3 Months, 4 Months, 6 Months, 1 Year (selected), 18 Months, 2 Years.
- Add Schedule With:** APP MD Resident Fellow
- Type of Visit:** Clinic, Virtual Visit
- Does visit require pre-imaging?** Yes, No
- Link: Show Additional Order Details
- Buttons: Accept, Cancel

- 4. Click **Accept** and **Sign Orders**
 - a. Note: APPs and non-authorizing providers will need to enter the ordering provider’s name in the Provider window and click Accept.

The screenshot shows the 'Providers' window with the following elements:

- Authorizing Providers:** For procedures. Search field containing 'DR. ELISE'.
- Cosigners:** For procedures. Cosign required.
- Buttons: Accept, Cancel

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 Order Preference List button next to Add Order to quickly access your favorite orders.

- The patient's follow-up appointment order will immediately appear in the Active Requests tab on the patient's chart. The order also will appear on your clinic's appointment request workqueue once the expected date is within 60 days.

Viewing if Patient Self-Scheduled from a Ticket

To view who scheduled the patient (practice staff or patient), from the Appt Desk (Epic > Scheduling > Appts), 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.