Ambulatory Management

Order-Based Scheduling and Patient Self-Scheduling:
# Creating a Custom Workqueue (WQ) Filter

Filters can be used to customize your view of the workqueue. Any filter set by a user is unique to their Epic login and cannot be shared with another user.

To create a filter by the Ordering Department within an Appt Request Workqueue:

1. In your assigned workqueue, select the right down arrow next to the **Filter** icon. A dropdown menu will appear, select **Set/Edit Filter**.

2. A new window will open. Select the **+ Add** button (1). In the next window, type **"ordering department"** into the search field and then press enter (2). Select the green plus sign to the left of **Ordering Department** (3).
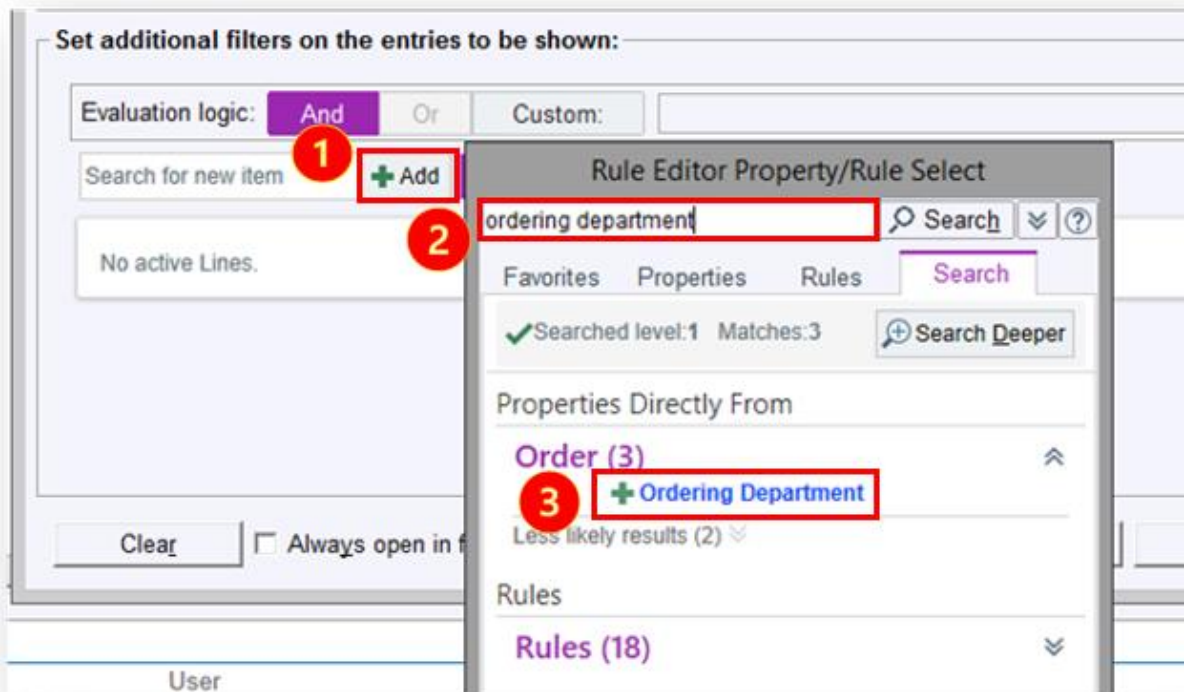
3. In the Operator field, click on the equals sign (=). In the Value field, type in your DEP or click on the +Add button to see possible options. Once your DEP is populated, it will move to the right with a check mark next to it. You can enter as many DEPs as needed.

4. Scroll down, and first click the Accept button within the filter window. Then select the second Accept button. This will save your filter.

5. Your filter is complete. By selecting the check box next to Always open in filtered view, this will apply the filter each time your enter the work queue.
    a. You can always edit the filter or remove the filter by clicking on the Filter icon in the work queue (refer to step 1).

To create a filter by a question on the order within an Appt Request Workqueue:

1. In your assigned workqueue, select the right down arrow next to the **Filter** icon. A dropdown menu will appear, select **Set/Edit Filter**.
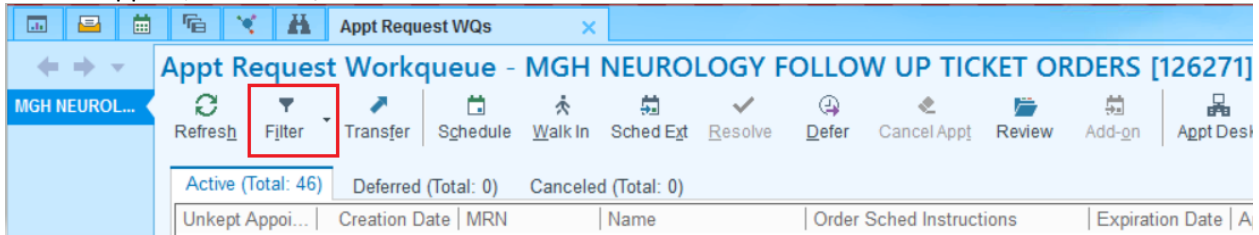
2. In the Search for new item field, enter "Order-specific Question Answer" and click the **+Add** button. Select the blue link for **+Order-specific Question Answer** on the Rule/Editor Property/Rule select window.
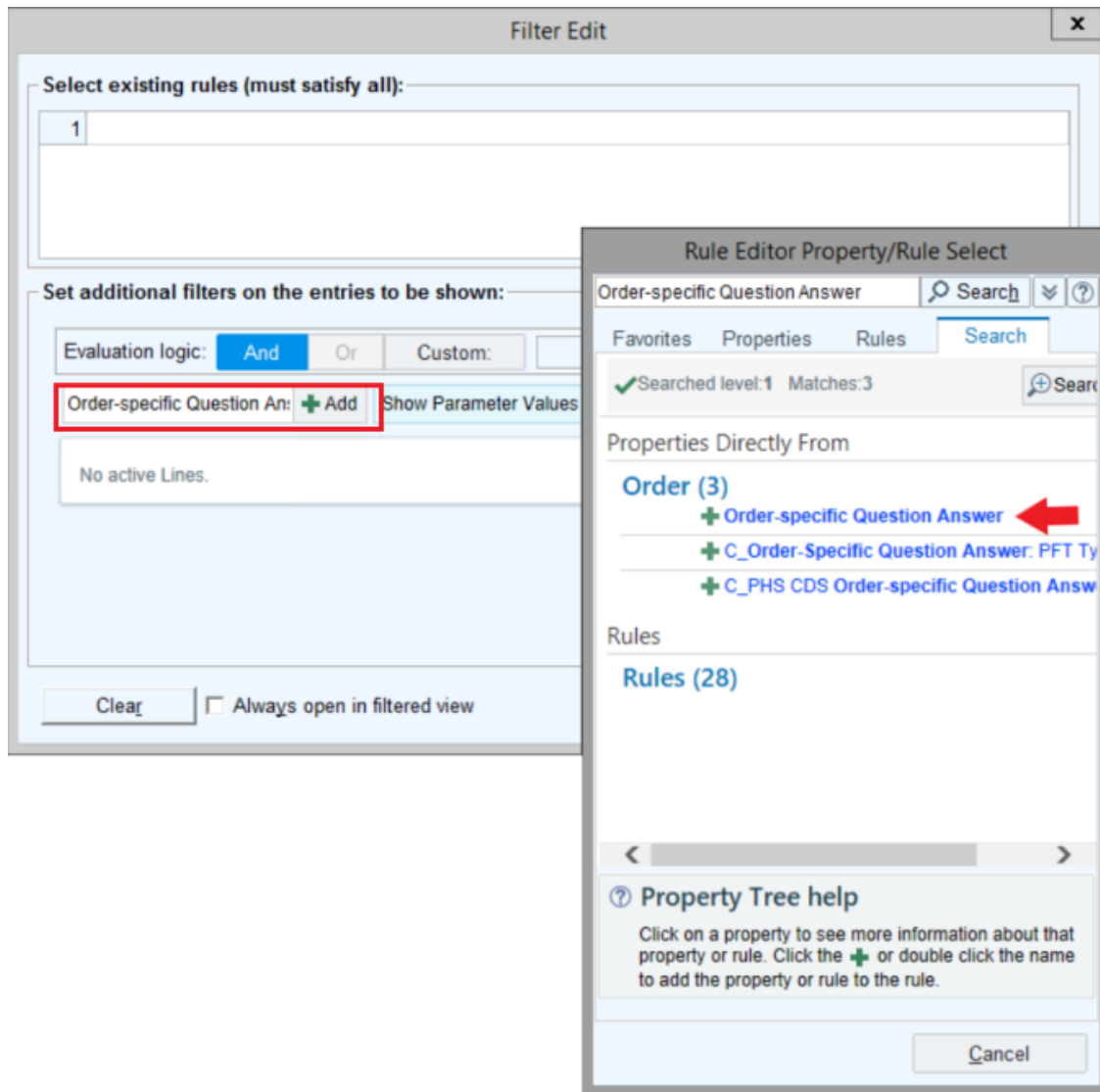
3. In the **Question ID** field, enter your order name. Most orders follow the naming convention 'MGB AMB MGH *<Specialty>* FOLLOW UP.' Click on the magnifying glass to see the possible questions to select from for your filter. Select the appropriate Question Name. Select the "=" button for the Operator, and then scroll down to enter the appropriate division(s) in the Value field. Click Accept to Save the filter.

IMPORTANT: The value entered in the field has to exactly match the formatting (all CAPS vs lowercase) and wording or the filter will not work.

Record Select

Search Recent

NEUROSURG FOLLOW UP

%	Question Name	Question ID
	MGB AMB MGH NEUROSURG FOLLOW UP VISI...	2107577
	MGB AMB MGH NEUROSURG ADD SCHEDULE ...	2107606
	MGB AMB MGH NEUROSURG VIRTUAL IN CLINI...	2107608

3 records total, all records loaded.

✓ Accept   ✗ Cancel

Filter Edit

Select existing rules (must satisfy all):

1	

Set additional filters on the entries to be shown:

Evaluation logic: And Or Custom:

➕ Add   Show Parameter Values

1: Order » Order-specific Question Answer

Question ID MGB AMB MGH NEURO FOLLC 🔍   MGB AMB MGH NEURO FOLLOW UP LOCATION [2

Operator: ❗ 🔍 = <> > < >= <= Str Contain

Clear ☐ Always open in filtered view   Accept   Cancel

Value: ✓ Cognitive Behavioral

---- or ----

Property or Rule: 🔍

< >

✓ Accept   ✗ Cancel

Clear ☐ Always open in filtered view   Accept   Cancel

4. If you no longer wish to filter the workqueue, you can click the **Show All** button on the workqueue toolbar, or **Set/Edit Filter** to adjust or create additional filters for different divisions.