

UPDATING VISIT TYPE LIMITS TIP SHEET

In EPIC, Visit Type Limits allow users to assign a maximum number of visits allowed within a given period (session).

- 1. Open and log into EPIC.
- 2. In EPIC, navigate to your tool bar, located at the top of the page, and select

Epic>Scheduling>Templates>Edit VT Limits. 📕 🗾 🖌 Edit Template 🔓 Appts 📋 DAR - Dept Appts 👫 View Schedules 🛽 Work Lists 💱 <u>1</u> Referral Entry 2 Registration 3 ₽ 3 Patient Lists ж ™≘ <u>4</u> Workqueue List Ŧ 📅 Moved Appts Recent 🖁 Display Template 🖋 Edit VT Limits 2 Provider Calendar A My Reports 🛗 Departmental Calendar 🛱 Front Desk I Display VT Limits Miscellaneous Reports E Template Audit Trail Column Search I Template Build Report Patient Care - Delete Template Scheduling 🛱 Appts Rel Date/Defaults HIM H View Schedules Copy Template ► → Arrived Enterprise Billing 📲 Move Template Reg/ADT DAR - Dept Appts 🖋 Edit VT Limits Staff Daily Surgery S. Edit Pattern Class Roster CRM/CM R Provider Pattern Referrals Scheduling Group Ċ Reassign Template 🕨 🛱 Front Desk Reports 🖌 庙 Workqueue List Move Provider Appts Report Management Provider Messages Snapboard Tools 🕨 🖹 Status Board (Full Screen) 🛛 🕈 Add Messages 🛗 Schedule Admin Template Exceptions Pt Reports Help Add Exceptions Work Lists My Settings O Templates X Delete Exceptions MGB Applications D Point of Service Change Context... 🛹 Inpatient Request Correction 🔛 Clinic Management Schange Job... Exit 🖋 Modify This Menu

Alternatively, you can select Edit Template from your toolbar (or Epic>Scheduling>Templates>Edit Template).



Then select **Edit VT Limits** from the Edit Template toolbar.

Define Template for POTTER, HARRY MD [19876001] & Provider Summary — Delete Exceptions Attachments 🗸 Validate

3. Search for the provider in the Select Provider window, click Accept.

Select Provider						
Department:	MGH TEST DEP [12345000001]	9				
Provider:	•	ò				
	<u>A</u> ccept <u>C</u> ancel					



_1

4. Session limits can be applied either daily, weekly or monthly.

Please note, if the provider works in multiple departments, ensure that you are in the correct department using the drop-down menu on the bottom left of the page.

Edit Visit	Type Limits: POTTER, HARRY	Y MD						? ×
.11	/ -	ନ 📃		đ	H 🔝			
Di <u>s</u> play	Edit Template Delete Templat	e De <u>f</u> aults E <u>x</u> ceptions	Messages C <u>o</u> py	Reassi <u>a</u> n	Tem <u>p</u> late C <u>a</u> lenda	ar		
Visit Typ	pe Limits - Daily							-
Se	ssion	Visit Type	Visit Type Group	Overbook	Day of Week	From Date	To Date	Maximum
1								
Visit Typ	be Limits - <u>W</u> eekly							-
Se	ssion	Visit Type	Visit Type Group	Overbook	#/Weeks between	From Date	To Date	Maximum
1								
Visit Typ	e Limits - Monthly							_
Se	ssion	Visit Type	Visit Type Group	Overbook	#/Months between	From Date	To Date	Maximum
1		tion type	tion type block					
Current d	department: MGH TEST DEP	P [12345000001]	-				File Undo	Cancel
(_

To add a limit, enter a Session, Visit Type, Day of the Week, From Date, To Date and Maximum (max number of the visit type for the session). See example below: Visit Type Limits - Daily

• • • • •									
	Session	Visit Type	Visit Type Group	Overbook	Day of Week	From Date	To Date	Maximum	
	MORNING	PHYSICAL			Monday	4/9/2021	7/31/2021	3	
2	2								

In this example, the provider would like to limit Physicals to 3 visits for Monday morning sessions beginning 4/8/21.

5. To remove an existing limit, select the limit and click the Delete Session button in the top right corner.

Visit	Type Limits - Dail <u>y</u>			Overbook Day of Week From Date To Date Maximum Image: Monday 4/9/2021 7/31/2021 3 Image: Tuesday 4/9/2021 7/31/2021 2					
	Session	Visit Type	Visit Type Group	Overbook	Day of Week	From Date	To Date	Maximum	
1	MORNING	PHYSICAL			Monday	4/9/2021	7/31/2021	3	
2	AFTERNOON	VIRTUAL NEW			Tuesday	4/9/2021	7/31/2021	2	
3									

- 6. To save any edits to the visit type limits, select File in the bottom right corner.
- 7. Click No to close the editing visit type limits page.

Things to keep in mind:

• Session times should correlate with the provider's schedule/hours of operation. For example: if the morning session limits visits for 8AM-12PM but the provider is in clinic from 7AM-11AM, the morning session limit will not work appropriately.



	0	,									
II Di <u>s</u> play	✓ Edit Template	Delete Template	₽ De <u>f</u> aults	Exceptions	E Messages	[] С <u>о</u> ру	d Reassi <u>a</u> n	H Tem <u>p</u> late	karing Calendar		
Visit Typ	e Limits - Dail	lχ	<u>,</u>			lter	n Select		_	x	J
Se	ssion	V	Search	:						,o	
1		0	Name				Detail				ŀ
			AM				8:00 AM -	12:00 PM			
			DAILY	,			8:00 AM -	5:30 PM			
			DAILY	LONG			7:30 AM -	9:00 PM			
			PM				12:00 PM	- 5:30 PM			
											4

Select the magnifying glass in the session box to view the session times.

• You can also use visit type limits if you want to prevent any scheduling of a specific visit type during a specific session. For example, if a provider only wants virtual appointments to be scheduled in their afternoon session, you can add a visit type limit with a maximum of 0 virtual visits for the morning session to prevent virtual appointments from being scheduled in that session.