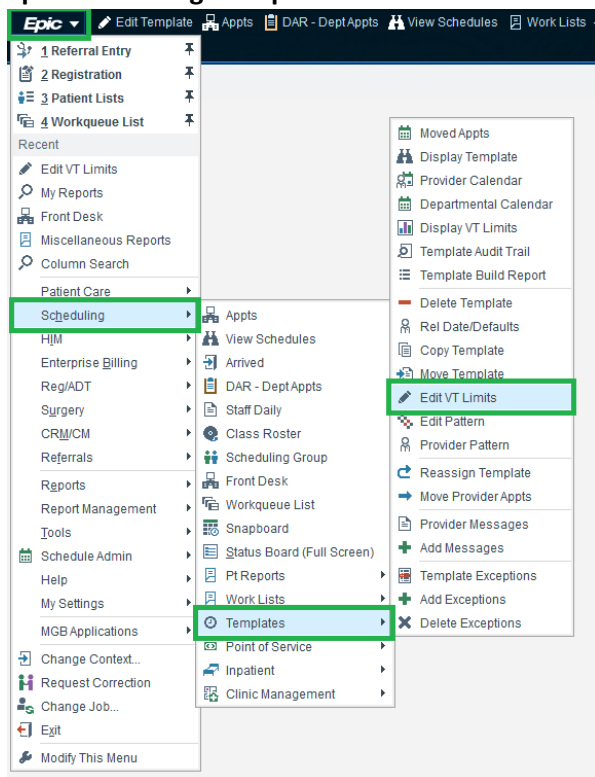


UPDATING VISIT TYPE LIMITS TIP SHEET

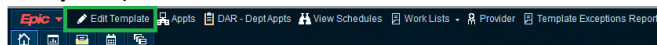
In EPIC, Visit Type Limits allow users to assign a maximum number of visits allowed within a given period (session).

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.



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

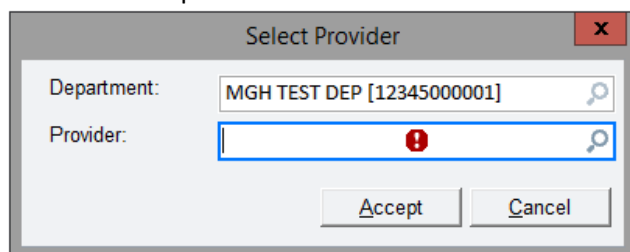


Then select **Edit VT Limits** from the Edit Template toolbar.

Define Template for POTTER, HARRY MD [19876001]



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



- 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.

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	
1	MORNING	PHYSICAL	<input type="checkbox"/>	Monday	4/9/2021	7/31/2021	3	
2			<input type="checkbox"/>					

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

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

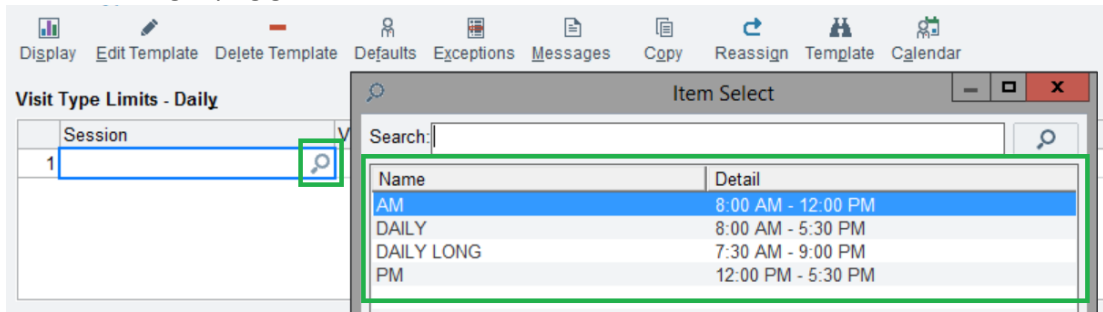
Visit Type Limits - Daily								
Session	Visit Type	Visit Type Group	Overbook	Day of Week	From Date	To Date	Maximum	
1	MORNING	PHYSICAL	<input type="checkbox"/>	Monday	4/9/2021	7/31/2021	3	
2	AFTERNOON	VIRTUAL NEW	<input type="checkbox"/>	Tuesday	4/9/2021	7/31/2021	2	
3			<input type="checkbox"/>					

- To save any edits to the visit type limits, select File in the bottom right corner.
- 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.

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.