

Procedure: Template Change Management

Department: Patient Access Services
Policy Number: PAS002
Approval Date: 6/7/18

Description/ Overview

The standard operating procedure will outline the process on building, editing, modifying, and revising Provider Templates in Epic. Provider templates framework the scheduling abilities of the medical organization. Utilizing optimized template set-up and management is essential to the success of the Vanderbilt Medical Center.

Definitions

Standard Operating Procedure (SOP): Written procedure prescribed for repetitive use as a practice, in accordance with agreed upon specifications aimed at obtaining a desired outcome.

Template: A provider or resource's daily schedule.

Template Builder: Any centralized staff member or Cadence Analyst that has attended Epic Template Builder and has administrator approval for making permanent changes to a provider's or resource's daily schedule.

Template Office: The Patient Access Services department comprised of the centralized Template Builders.

SUP: Template building platform in Epic that is used as testing interface before build is moved to production. Used for complex template adjustments.

Slot: A segment of time, often in specific time increments, that in aggregate, composes a provider's template.

Block: A visual indicator that designates a time slot for a specific patient or visit type.

Held Time: Time or day in a provider's schedule that is reserved from scheduling.

Unavailable Time: Time on the template when a provider is not available for scheduling.

Visit Type: The kind of appointment you are scheduling for the patient.

Template End Date: The last day a provider would ever see a patient; indefinite is preferred.

Release Date: How far out you can initially schedule a patient appointment.

Release Date Offset: Set by Template Office, determines how much of the schedule is always available.

Session Limits: Visit type session limits control how many visit types can be scheduled for a certain time of day or ranges of dates, which are referred to as sessions.

Goal/ Purpose

The purpose of this standard operating procedure is to ensure a standardized process for designing, building, maintaining, and revising provider templates in Epic. The process will ensure the build and revisions of templates are in accordance with the standards of Vanderbilt Medical Center and promote operational and financial success. The standard operating procedure will also ensure a common understanding of roles and responsibilities around each of these Epic template processes.

Templates will be managed through a centralized governance process requiring sign off and approval of key stakeholders before new templates are developed or existing templates are modified. Governance will be maintained through the use of the Template Change Request Form.

Change Management Team Governance:

The Template Change Request Form will require the approval from the following individuals or their designee to permit certain template changes. The utilization of a sign-off form ensures correct documentation of the necessary authorization to these types of template changes. The template changes requiring approval are:

1. Changes that conflict with the VMG Clinician Template Management Guiding Principles.



Clinician Template
Management Principle

2. Changes that decrease template availability and impede schedule performance.
3. Changes that alter the days a provider practices.

The governing parties required for approval are listed below:

1. Vice President of Patient Access Services (Head of Change Management Team)
2. Clinical Department Chair
3. Department Business Officer
4. PCC Medical Director and Administrator
5. PCC or Children's Financial Manager
6. Hospital CEO (EVP of Adult Ambulatory Operations in future state)

Sign-off Form



Template Change
Management Authori

If a change requested does not meet one of the above criteria, the change management team will be solely responsible for authorizing the change request.

Roles/ Responsibilities

Requester: Submit Change request template via Pegasus to the Change Management Team.

Office Administrator: Approve change management requests sent from department.

Change Management Team: Analyze incoming change request to determine the operational, financial, and service impact. Manage all template initial builds and subsequent change requests for all adult areas within Vanderbilt University Medical Center.

Template Specialists: Build and edit templates, edit modifiers, set visit type limits, set provider level block flips.

Cadence team: Define sessions for departments, release blocks to departments, create blocks, edit block rules, create visit types, edit visit types, create non-billing providers, create pools, edit pools, create subgroups, edit subgroups, create one-clicks, edit one-clicks, private to public slot flips, release of slots, create decision trees, edit decision trees, set department level block flips.

Clinic Staff: Hold templates or mark schedules unavailable. Fulfill template responsibilities as outlined by the PTA policy.

Process/ Procedures

Designing Process:

1. If available, utilize organizational goal template patterns established for department.
2. Determine the template's slot length
 - a. When you build your visit types and templates, build them based on multiples of the shortest visit length.
 - b. Example:



- c. Make sure the visit type default length matches template interval length.
 - i. Example: If there is a 15 minute visit type default length, then the template has to be built with 15 minute intervals.
3. Verify the provider template is set up with the proper slot length.
4. Determine Template End and Release Dates (VUMC Release date standard: ME +13).
5. Assess Held, Unavailable and Private slots
 - a. Held and private time keeps the appointments already on the schedule.
 - b. Unavailable time cancels existing appointments.
 - i. Unavailable reasons include clinic closure due to time of day, weather, construction, staffing, equipment repair/maintenance, provider vacation/holiday, meeting/conference, research, rounds, provider is sick

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- c. Lunch will not be templated time.
6. Establishing Overbook slots
 - a. Overbook slots may improve visits to budget, but decreases template utilization due to a high unfilled rate.
7. If necessary, utilize session limits
 - a. Define visit type session limits for either a department or for individual providers in that department.
8. As last resort, utilize blocks to develop schedule
 - a. Use blocks for accessibility and resource restrictions only.
 - b. Avoid overusing blocks, as it reduces flexibility to meet fluctuations in demand.
 - c. Too much blocked time generally leads to negative utilization: long lead times and decreased revenue.
 - d. Blocks must be linked to a Visit Type to be effective.
 - e. Recommend building blocks to match on blocks and open slots to improve template utilization.

Building Process:

Existing Provider or New Provider in Existing Department:

9. After completing design, submit Template Change Request Form via Pegasus.
 - a. Link: <https://pegasus.mc.vanderbilt.edu/request/discover>
 - b. Request: *Epic Template Change Request*
10. Request Form is reviewed by Change Management Team. If request is for a new build, but design is not adequately described in request form, a meeting may be requested to ensure build accuracy.
11. If request is for Pediatrics, Change Request Form will route to Pediatric team for their review. Pediatric team will then forward the approved Change Request Form to the Change Management Team.
12. Change Management Team approves the request, and notifies submitter of approval.
 - a. See Change Management Team Governance.
 - b. If change is not approved, the requester receives written notification as to why the change has been denied.
13. Change Management Team directs the Pegasus ticket for the template modifications to the Template Specialists or Cadence Team based on the Template Building Roles and Responsibilities.
14. The estimated turnaround time on requests is based upon the nature and complexity of the request, but new builds are typically 6-8 business days.
15. Once build is complete in SUP, the Change Management Team reviews and authorizes build to production.
16. Once in production, the request is marked complete in Pegasus, and the requester is notified via automated email that changes are complete.

New Provider in New Department:

17. Office administrator completes Intake Form and submits to Organization Facilities.



Intake Form
051518.xlsx

18. Once department is built, and provider's template is designed, the Template Change Request

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Form is submitted via Pegasus.

- a. Link: <https://pegasus.mc.vanderbilt.edu/request/discover>
 - b. Request: *Epic Template Change Request*
19. If request is for Pediatrics, Change Request will route to Pediatric team for their review. Pediatric team will then forward the approved Change Request to Change Management Team.
 20. Request Form is reviewed by Change Management Team. If design is not adequately described in Request Form, a meeting may be requested to ensure build accuracy.
 21. Change Management Team approves the request, and notifies submitter of approval.
 - a. See Change Management Team Governance.
 - b. If change is not approved, the requester receives written notification as to why the change has been denied.
 22. Change Management Team directs the Pegasus ticket for the template modifications to the Template Specialists or Cadence Team based on the Template Building Roles and Responsibilities.
 23. The estimated turnaround time on requests is based upon the nature and complexity of the request, but new builds are typically 6-8 business days.
 24. Once build is completed in SUP, the Change Management Team reviews and authorizes build to production.
 25. Once in production, the request is marked complete in Pegasus, and the requester is notified via automated email that changes are complete.

Revising Process:

26. New template need or revision identified.
27. Need or revision reviewed and vetted with management and provider.
 - a. Assessing impact to productivity, quality and organizational standards
 - b. Ensure compliance with VMG Clinician Template Management Guiding Principles.
28. Template Change Request Form is submitted via Pegasus.
 - a. Link: <https://pegasus.mc.vanderbilt.edu/request/discover>
 - b. Request: *Epic Template Change Request*
29. Request Form reviewed by Change Management Team. If request is for Pediatrics, Change Request will route to Pediatric team for their review. Pediatric team will then forward the approved Change Request to Change Management Team.
30. Change Management Team approves the request and notifies submitter of approval.
 - a. See Change Management Team Governance
 - b. If change not approved, the requester receives written notification as to why the change has been denied.
31. Change Management Team directs the Pegasus ticket for the modifications based on the Template Building Roles and Responsibilities.
32. The estimated turnaround time on requests is based upon the nature and complexity of the request:
 - a. Template modifiers: 2-3 business days
 - b. Visit Type: 5-7 business days
 - c. Security: 5-7 business days
 - d. Blocks/Session Limits: 3-5 business days
 - e. MyChart Direct and Open Scheduling: 5-7 business days
 - f. Other- varies depending on complexity
33. If built in Production, once the modification is completed, the request is marked complete in Pegasus, and the requester is notified via automated email that changes are complete.

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- 34. If built in SUP, the builder will notify the Change Management Team once completed and they will approve it before moving it to production.
 - a. Standards for building in SUP versus Production outlined by Template Specialists and Cadence Team.
- 35. After modifications are in production, Centralized or Clinic staff will run the reschedule report to identify appointments that need to be rescheduled due to changes in a provider's template.
- 36. Reschedules are completed either by Clinic Staff or Care Connections; based upon Clinic / Care Connections agreement.

Departing Providers:

When a provider is departing the organization, it is essential to inactivate the provider's template in Epic.

- 37. Making a provider inactive, requires a Pegasus ticket [<Link>](#) to be submitted, with their departure date to the template office.
- 38. If provider has appointments past their departure date, indicate which existing department or resource will accommodate these appointments.
 - a. If appointments are to be rescheduled, it will be the responsibility of the clinic to do so.
- 39. Failure to inactivate a provider in a timely manner can cause the following issues:
 - a. Patient inconvenience
 - b. Decreased departmental schedule utilization

Document Control

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