



Epic Cadence Questionnaires

The Challenge

- **Expanding the centralized scheduling center**, bringing on large institutes that have multiple locations across Cleveland.
- Gaining the consensus of the administration/clinicians/scheduling center in order to be able to **streamline the scheduling process across all locations**.
- Figuring out how to make sure that outside schedulers, that don't know all of the intricacies of each department and provider, would be able to schedule the appropriate appointment for the patient.
- Finding a process that will help unfamiliar schedulers, while being cautious not to make changes that will become cumbersome and time consuming, both in scheduling and maintenance.

The Solution

- **Analyze the current scheduling process** for each location in the institute to identify similarities and differences.
- Attend weekly design sessions with representation from each of the areas to **discuss challenges and allow collaboration**.
- Carefully **document the process and create standards** to be followed in the redesign of each institute to provide consistency in a long term project.
- Clean up inaccurate provider, visit type, panel, subgroup, and block records and identify any new records that are needed.
- Create generic department records that will direct the scheduler to the appropriate department, visit type, provider, length that the patient needs.
- **Create up to 4 levels of questionnaires** that a scheduler goes through before an appointment is scheduled, utilizing very intricate rules and conditions. Some questions are connected to custom category lists with thousands of options to allow for easier entry and maintenance.
- **Involve the institutes** in the process, allowing them to be involved in the decisions, approve the design, and test the build in the Test environment.

The Results

- Pediatrics, Women's Health, Digestive Disease, Urology, and Head/Neck have been successfully transferred to the centralized scheduling center.
- The standards that have been put into place for the project have helped to **improve the communication between teams**.
- **Schedulers from all areas can now successfully schedule appointments correctly by following guidelines built into questionnaires**.