



Schedule Templates

2014 Office Practicum User Conference

Presented by:

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Objectives

- The Basics: Creating a Schedule Template
- How to use Apply and Reapply
- Discuss the benefits of Slots
- Using Shortcuts effectively
- Action items
- Questions



Moved from this....



To this...

[F7] Schedule and Practice Workflow

Calendar | West Peds

	405 - (PT) PROVIDER TEST	338 - (DMC) Doc McStuffins	349 - (HI) Happy Nurse
8:00			
8:15			
8:30			
8:45			
9:00			
9:15			
9:30			
9:45			
10:00			
10:15			
10:30			
10:45			
11:00			
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5:30			
5:45			
6:00			
6:15			
6:30			
6:45			
7:00			

Column names:
 Staff
 Room

Schedule text:
 Details
 Name only
 x (hidden)

Status color:
 Visit stage
 Billing stage

Not assigned:
 Show column

Calendar: April, 2014
 Sun Mon Tue Wed Thu Fri Sat
 30 31 1 2 3 4 5
 6 7 8 9 10 11 12
 13 14 15 16 17 18 19
 20 21 22 23 24 25 26
 27 28 29 30 1 2 3
 4 5 6 7 8 9 10

Today: 4/7/2014

Appt. Date: 04/07/2014

of Appointments: 0 | Sum Co-Pay Rec'd = \$0.00 | Monday April 7, 2014 WK#16

Tasks show
 Stc Usage show

Why Create Schedule Templates?

- What is the overall goal?
 - Create, update, and share
 - Easily manage your practice's workforce
 - Limit the amount of time spent modifying the schedule
 - Allow for easier scheduling by Front Desk



When Creating Schedule Templates



Keep in mind...

- Assign Permissions
- Setup Template Zones
- Schedule Template or Slots?
- Use Slots for variations
- Start with at least 1 template per provider

Assigning Permissions



Permissions

- Utilities-Manage Practice-Staff/Provider Directory
 - Schedule_Manage_All_Slots
 - Schedule_Manage_Own_Slots
 - Schedule_Manage_Templates

Template Zones

- **Utilities-Manage Practice- Appointment Preferences**
 - Add zones reserved for specific appointments or blocking the schedule
 - Sick, Well, Consults, Same day sick, or Hospital Rounds

Template Zones

Appointment Types and Zones

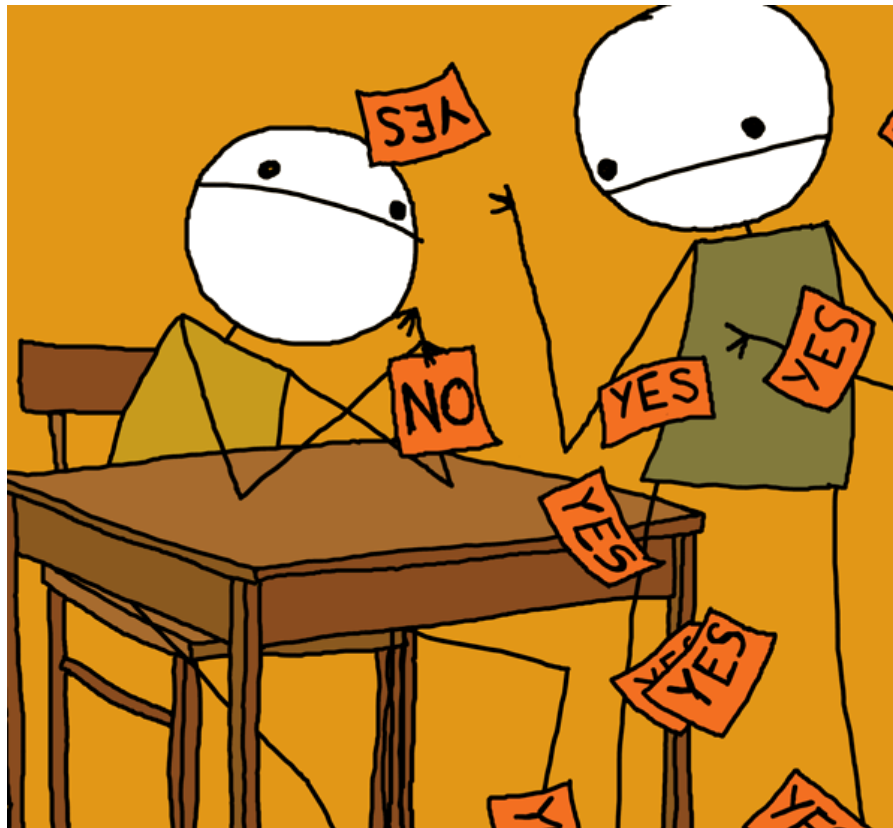
Appointment Types | **Template Zones** | Patient Tracking Stages | Rooms/Resources | Schedule Tabs | Patient Status

Owner Protected zones can only be scheduled by the owner or a staff member with override privileges.
 Same Day Only zones cannot be scheduled until the date of service.

Appointment Zone	Zone Color	Protection Status	Purpose
DO NOT BOOK	Do Not Book		
LUNCH	Yellow	Not Protected	
SICK VISITS	Sick Visits		
VACATION		Not Protected	
WELL VISITS	Well Exams		

Now you're ready to get started!

Schedule Template or Slots?





Schedule Template



Apply and Reapply

- Only used for Schedule Templates, this feature is not linked to Slots

Applied through:	August 31, 2014	▼	
Reapply as of:	April 30, 2014	▼	

Applied Through

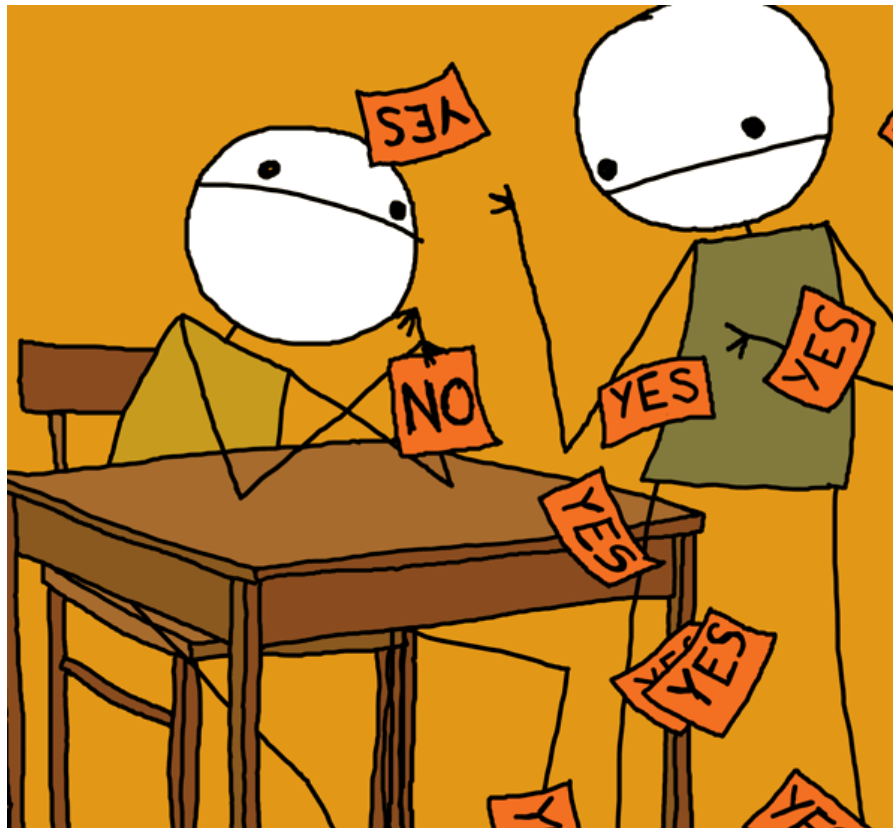
- Will apply all templates for all providers by location
- Confirm all providers templates have been created
- Determine applied through date: How far out is the schedule open?
- Sort #
- Select weeks of the year to apply the template
- Considered the “end” date

Reapply as of

- Only affects provider's schedule you are working on
- Used for making long term modifications to the schedule template
- Considered as the “start” date



Schedule Template or Slots?



Slots

Slots

- On the Fly appointment slots
- Best used for providers who do not have a default weekly template
- Allows for more flexibility



Shortcuts



OP Schedule Templates Editor

Staff: Doctor Melody Applied through: December 31, 2013

Location: Kressly Pediatrics Reapply as of: April 15, 2014

Description	Sort	WK1	WK2	WK3	WK4	WK5	WK6	WK7	WK8	WK9	WK10	WK11	WK12	WK13	WK14	WK15	WK16
Default Template for DM	233	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Start time: 08:00 AM End time: 08:00 PM Increment: 10 minutes Location: Kressly Pediatrics

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8:00							
8:10							
8:20							
8:30	Do Not Book	Exams	Sick Visits	Exams	Sick Visits	Exams	Do Not Book
8:40							
8:50							
9:00		Exams	Exams	Exams	Exams	Exams	
9:10							
9:20							
9:30							
9:40							
9:50							
10:00		Sick Visits	Sick Visits		Sick Visits		
10:10							
10:20							
10:30							

April, 2014

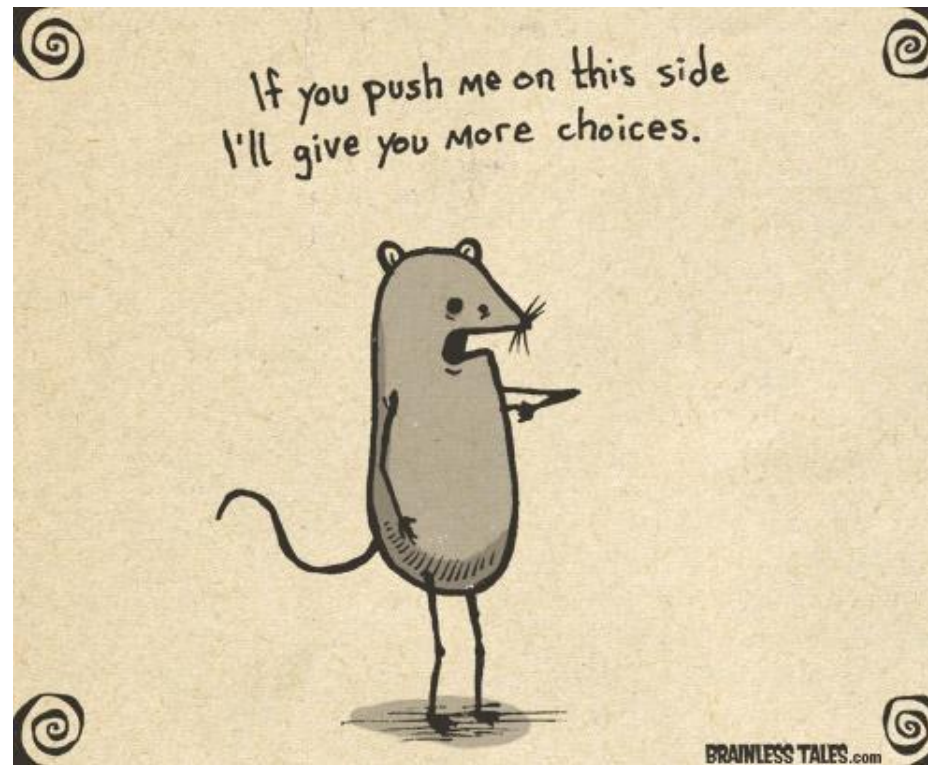
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
14	30	31	1	2	3	4	5
15	6	7	8	9	10	11	12
16	13	14	15	16	17	18	19
17	20	21	22	23	24	25	26
18	27	28	29	30	1	2	3
19	4	5	6	7	8	9	10

Today: 4/15/2014

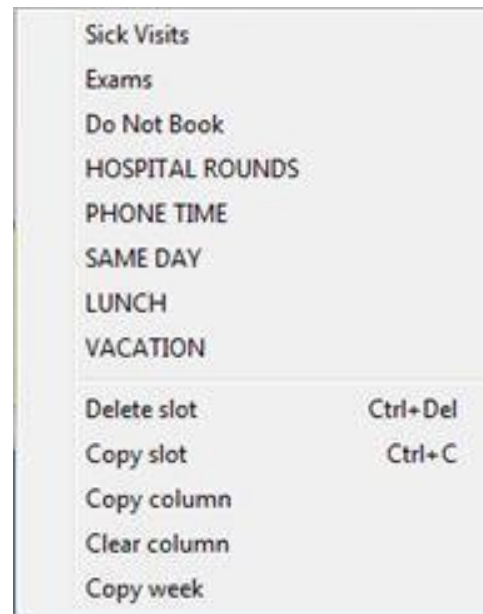
Appointment zone:
Sick Visits



Save Time by Right Clicking!



Save Time by Right Clicking!



These shortcuts are available through Schedule Templates or Slots

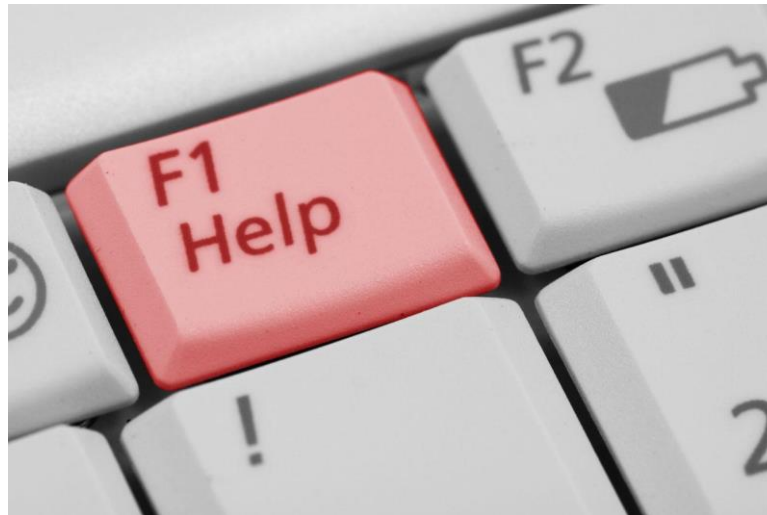


Action Items

- Who will be responsible for managing the schedule templates?
- Would it be better to use Schedule Templates or Slots?
- Remember shortcuts!



Need Additional Help?



[Click here to access the Office Practicum Help Page](#)

On the way out...

SCAN ME

