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Schedule Templates

2014 Office Practicum User Conference

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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

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Moved from this….

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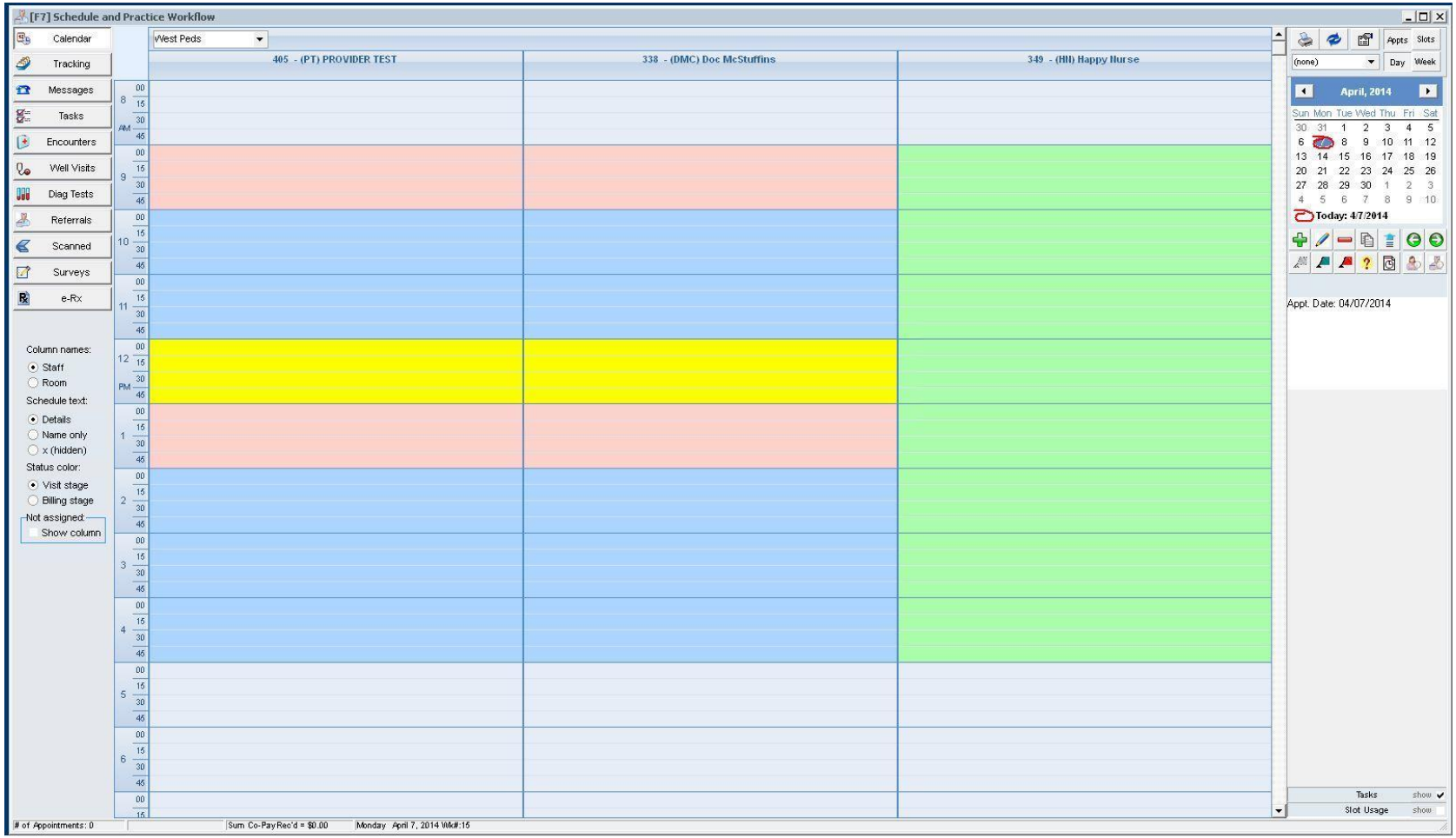
To this...



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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

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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

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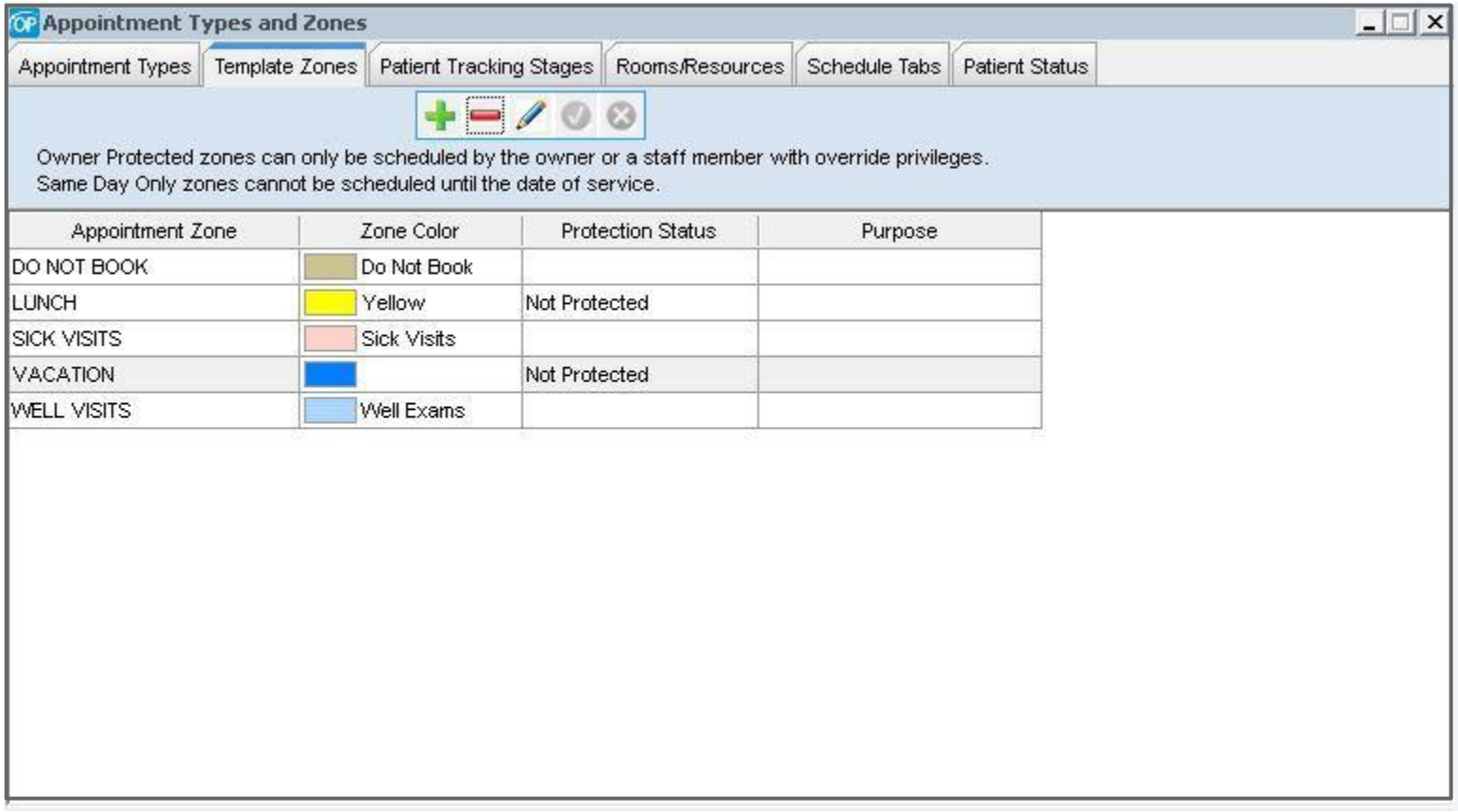
Permissions

- 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



Now you're ready to get started!

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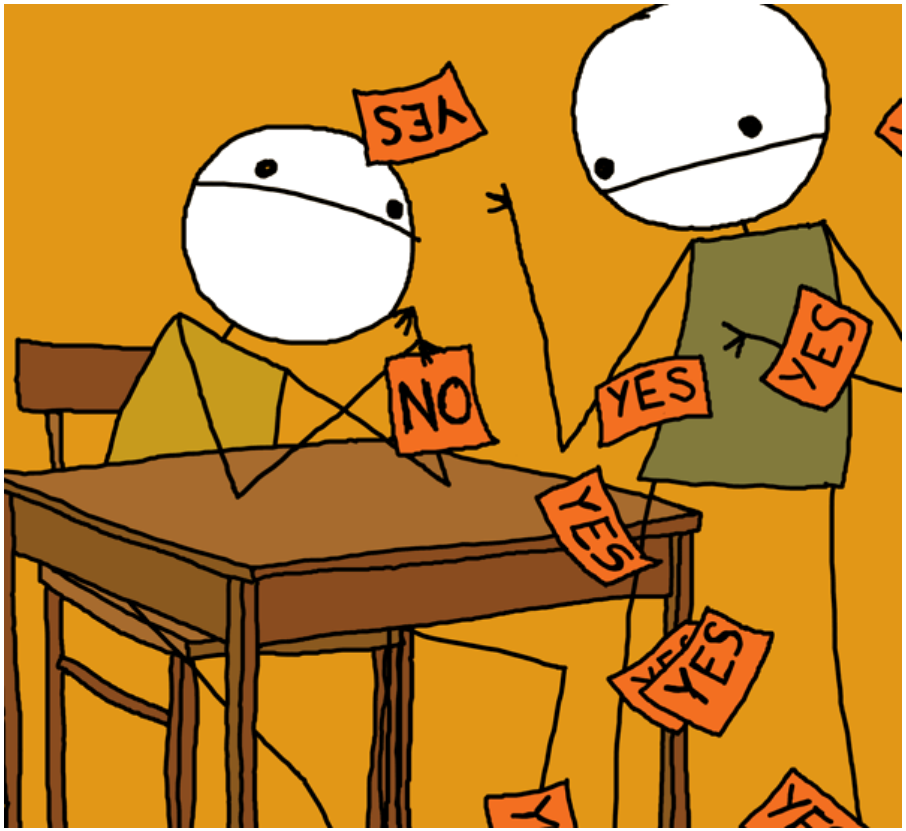
Schedule Template or Slots?



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Schedule Template

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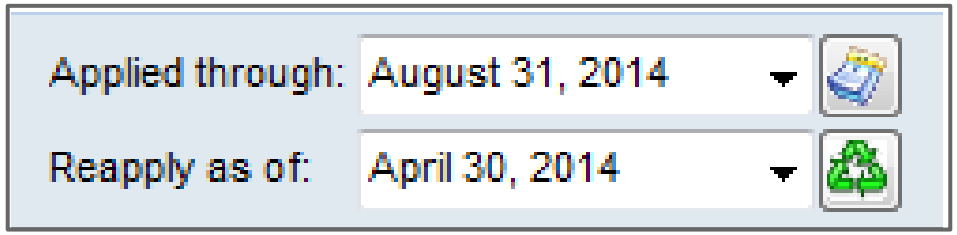
Apply and Reapply

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



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

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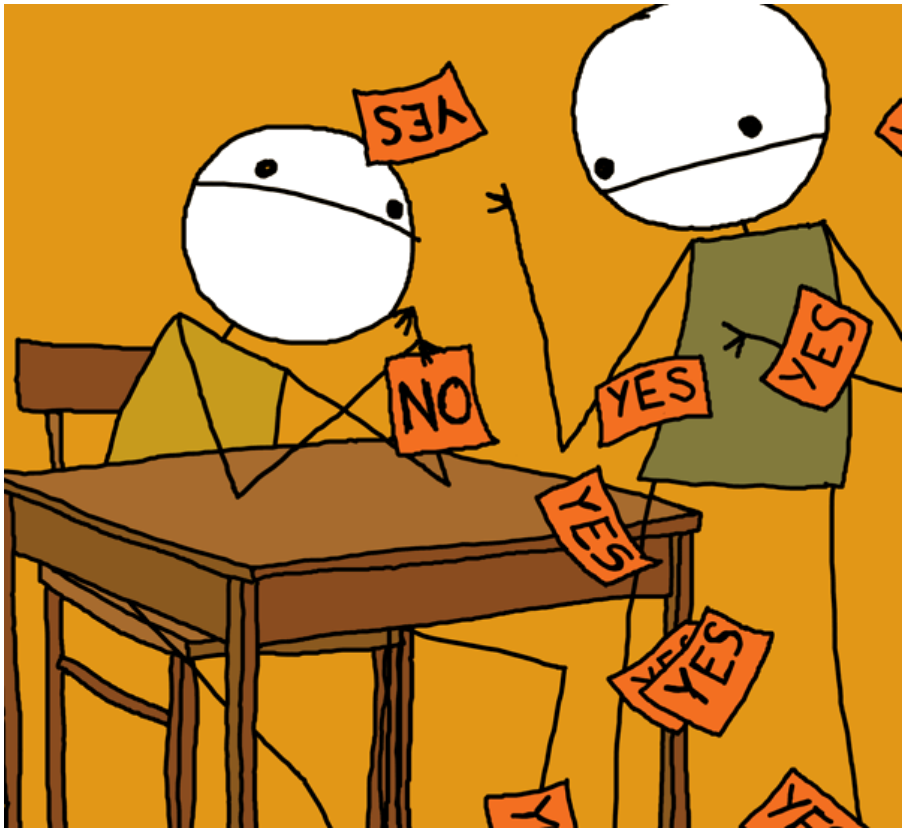
Schedule Template or Slots?



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Slots

Slots

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

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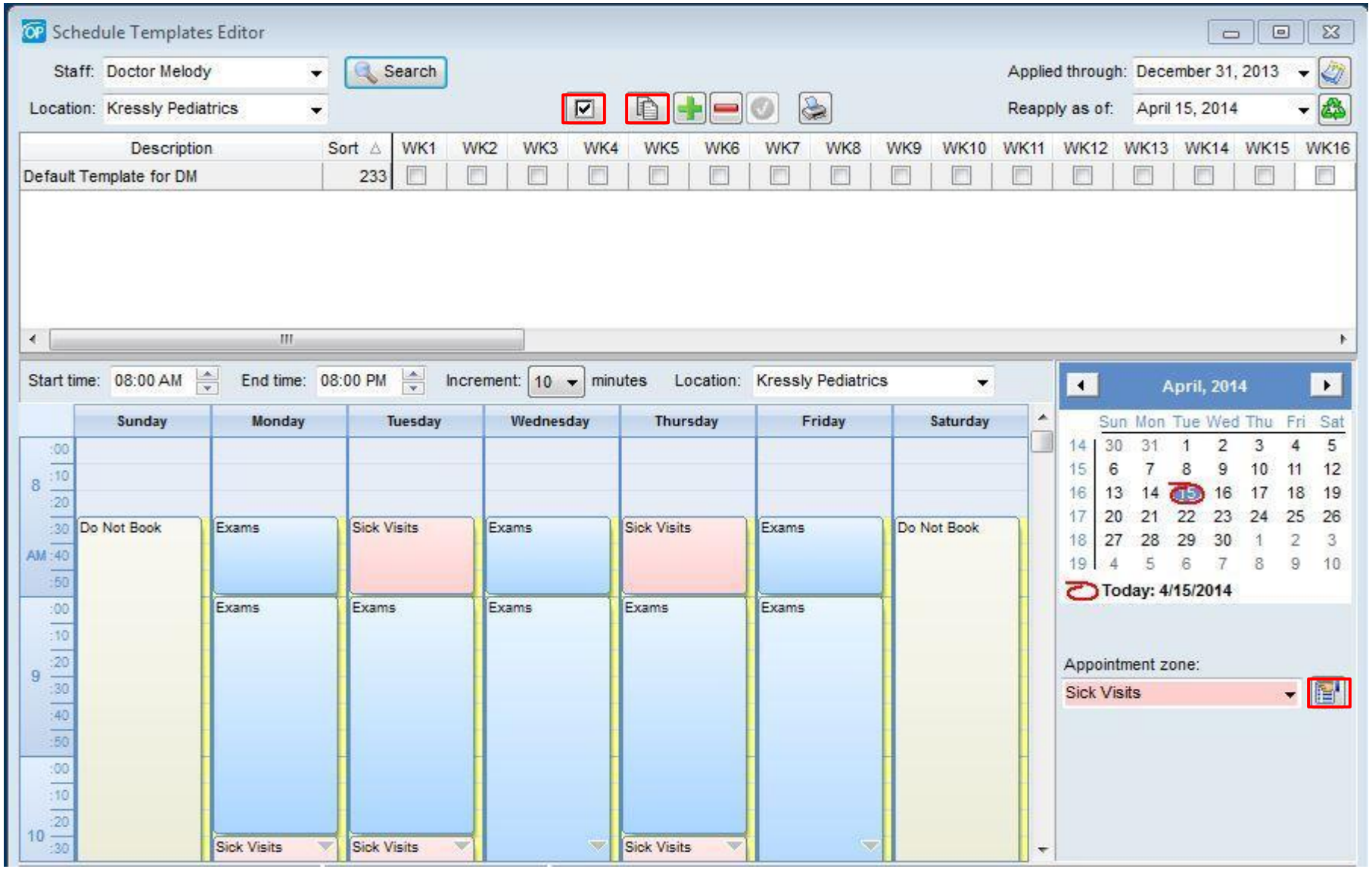
Shortcuts



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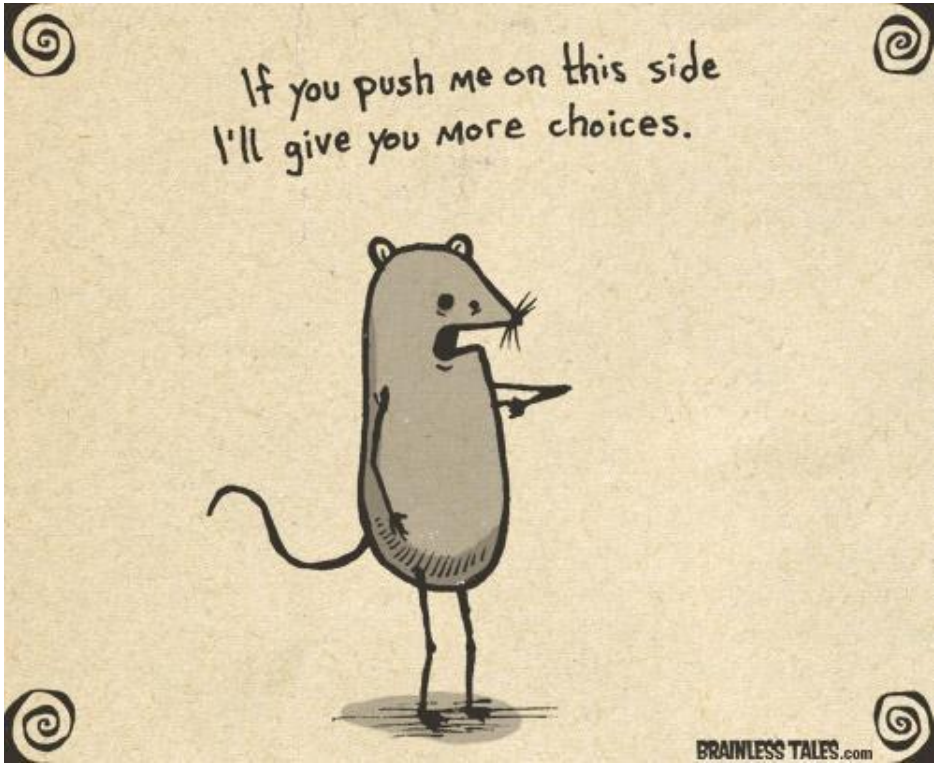
Save Time by Right Clicking!



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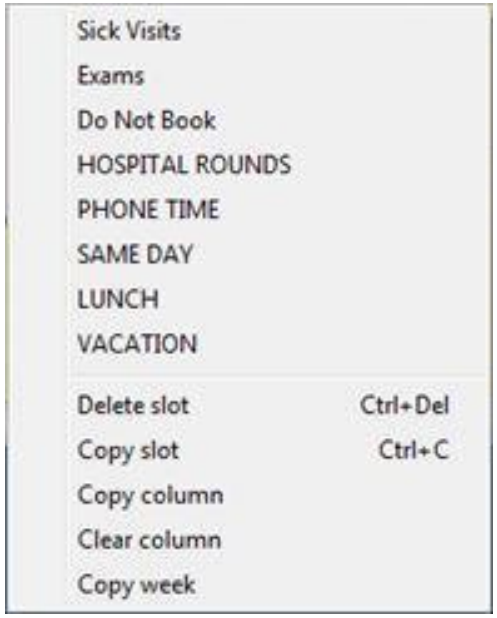
Save Time by Right Clicking!



These shortcuts are available through Schedule Templates or Slots

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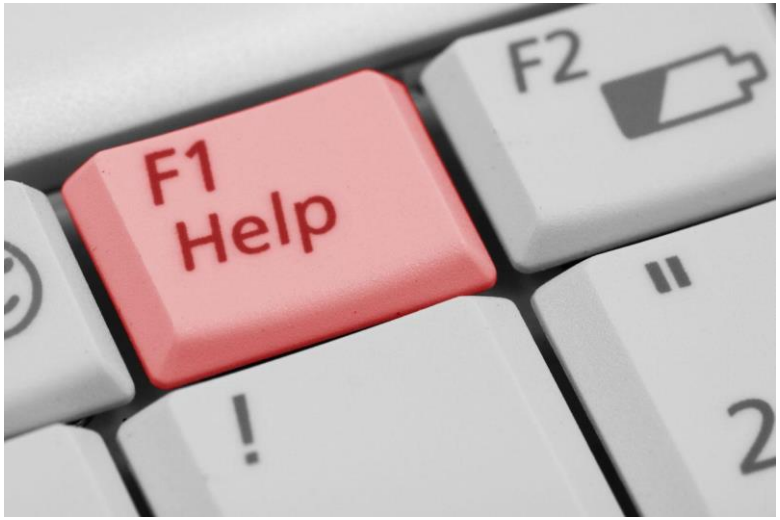
Action Items

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

Need Additional Help?



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On the way out...

SCAN ME

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