

Appointment Types and Zones

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Version 14.19



This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

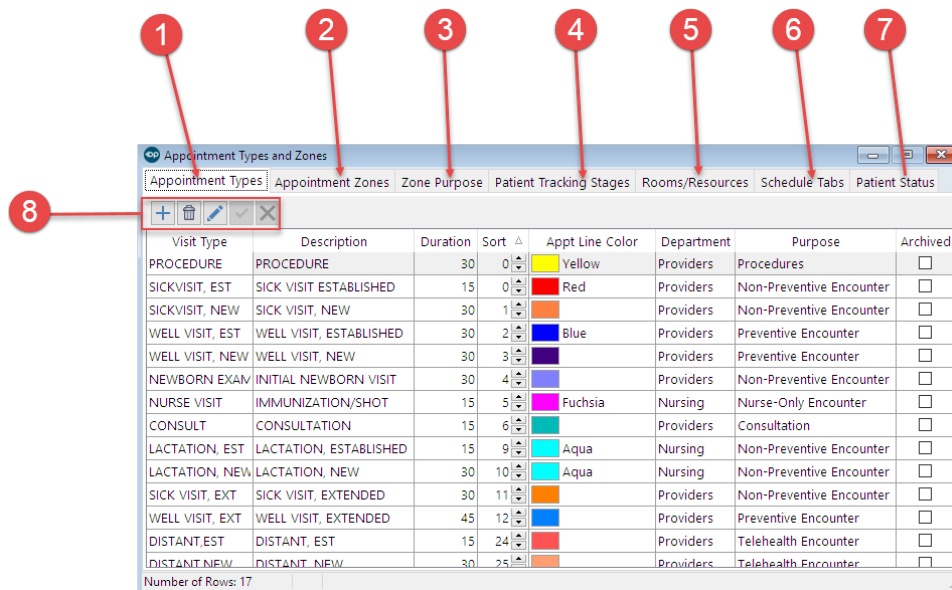
About Appointment Types and Zones

Path: Practice Management tab > Appointments button



User Permission: Permission must be granted to those individuals responsible for schedule maintenance. Go to **Admin tab > Security Administration** to assign the following permissions: Schedule_Manage_All_Slots, Schedule_Manage_Own Slots, Schedule_Manage_Templates.

The Appointment Types and Zones window creates templates that can be applied for scheduling and visit purposes. Each tab can be configured to correspond with the scheduling needs for each practice.



Appointment Types and Zones Map

Number	Section	Description
1	Appointment Types tab	The Appointment Types tab creates Visit Type template records. Some fields include type, description, duration, sort, appointment color, department, purpose, and archived.
2	Appointment Zones tab	Appointment Zones are the building blocks to creating Schedule Templates. Appointment Zones block off times on the provider's schedule designated for specific appointments. Some fields include appointment zone, zone color,

		protection status, and purpose.
3	Zone Purpose	The Zone Purpose tab defines the purpose of each Visit Type zone.
4	Patient Tracking Stages tab	The Patient Tracking Stages tab shows members in the office the stage of a patient visit. Some fields include description, stage, sort, color, and archived.
5	Rooms/Resources tab	The Rooms/Resources tab provides a way for the staff to know where the patient is located. This tab can configure the rooms and resources at the practice. Some fields include Room/Resource name, Initials, Active, Location, Colloquial Name and Color.
6	Schedule Tabs tab	The Schedule Tabs tab creates additional tabs at the bottom of the Schedule and Practice Workflow window. Some fields include Tab Name, Description, User-Specific, Location, Archived, and Sort.
7	Patient Status tab	The Patient Status tab indicates whether or not a patient is still active with the practice. Only some fields of the Patient Status can be edited through Appointment Preferences. In this window, the only fields that allow editing are Archived, Sort, and Allow New Appts. Using the dropdown, indicate whether or not to "Allow New Appts." All other fields must be edited through the Code Table window.
8	Function buttons	The Function buttons add a record, remove a record, edit a record, post the new edit, or cancel the new edit.

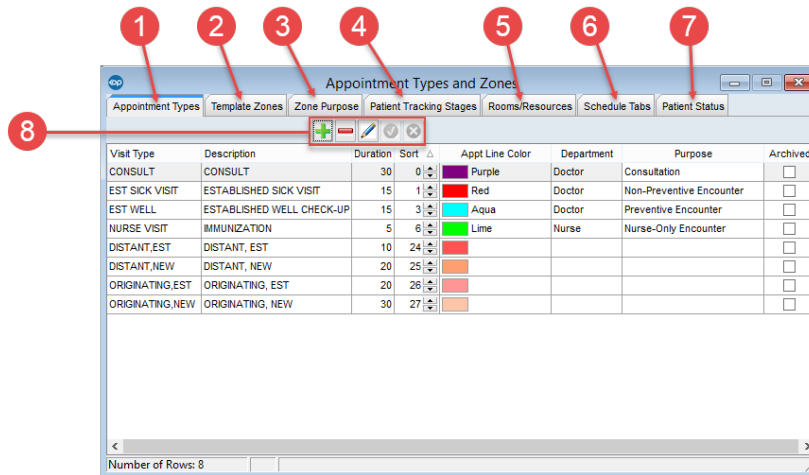
Version 14.10

About Appointment Types and Zones

Path: Utilities Menu > Manage Practice > Appointment Preferences (Keyboard Shortcut keys: [Alt][U][P][A])

i Permission must be granted to those individuals responsible for schedule maintenance. Go to **Utilities > Manage Practice > Staff/Provider Directory** to assign the following permissions: Schedule_Manage_All_Slots, Schedule_Manage_Own Slots, Schedule_Manage_Templates.

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Appointment Types and Zones Map

Number	Section	Description
1	Appointment Types tab	The Appointment Types tab creates Visit Type template records. Some fields include type, description, duration, sort, appointment color, department, purpose, and archived.
2	Template Zones Tab	Template Zones are the building blocks to creating Schedule Templates. Template Zones block off times on the provider's schedule designated for specific appointments. Some fields include appointment zone, zone color, protection status, and purpose.
3	Zone Purpose	The Zone Purpose tab defines the purpose of each Visit Type zone.
4	Patient Tracking Stages tab	The Patient Tracking Stages tab shows members in the office the stage of a patient visit. Some fields include description, stage, sort, color, and archived.
5	Rooms/Resources tab	The Rooms/Resources tab provides a way for the staff to know where the patient is located. This tab can configure the rooms and resources at the practice. Some fields include Room/Resource name, Initials, Active, Location, Colloquial Name and Color.
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