

# Schedule Templates Editor

Last Modified on 09/22/2021 2:57 pm EDT

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 Schedule Templates Editor

**Path: Practice Management tab > Schedule Templates button**

Schedule Templates provide a framework for appointment scheduling by designating the times for seeing patients and indicating the types of appointments that are preferred throughout the day. It also helps to designate times that are blocked when patients are not seen.



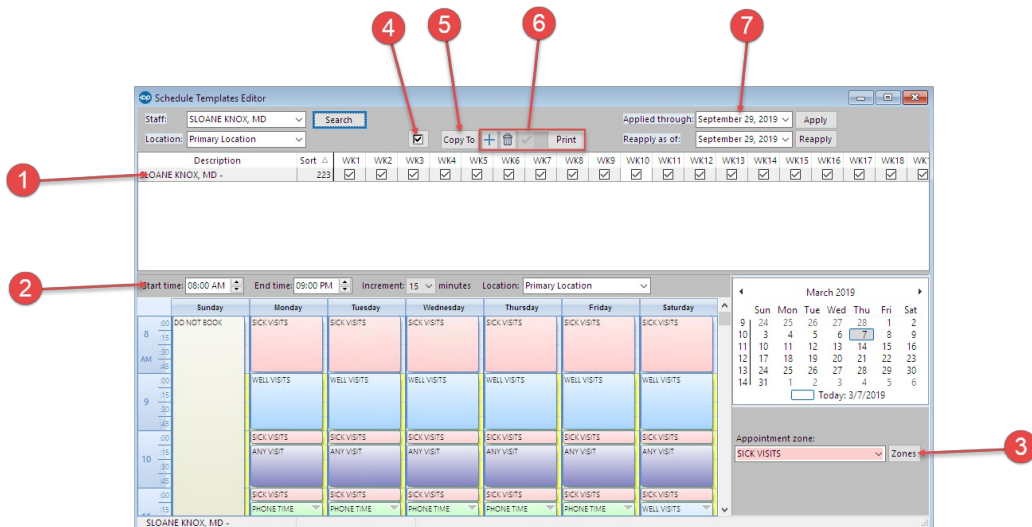
**User Permission:** Permission must be granted to those individuals responsible for schedule maintenance. Go to **Utilities > Manage Practice > Staff/Provider Directory > Security Access** to assign the following permissions: **Schedule\_Manage\_All\_Slots, Schedule\_Manage\_Own Slots, Schedule\_Manage\_Templates.**

The Schedule Templates editor window creates the schedule templates. In the Schedule Templates Editor you can:

- Create a new template
- Apply Multiple Templates & Multiple Locations
- Copy Schedule Templates Between Providers
- Create a Schedule Using Slots



**Note:** If your provider's schedule changes weekly (and does not have a default weekly schedule), you will benefit from using the slot feature from the Calendar. See [Creating a Schedule Using Slots](#).



The screenshot shows the 'Schedule Templates Editor' window. At the top, there are dropdown menus for 'Staff: SLOANE KNOX, MD' and 'Location: Primary Location'. A search bar is next to the staff dropdown. Below these are buttons for 'Copy To', a plus icon, and 'Print'. On the right, there are date pickers for 'Applied through: September 25, 2019' and 'Reapply as of: September 29, 2019'. The main area contains a table with columns for 'Description', 'Sort', and weeks 'WK1' through 'WK18'. The first row shows 'SLOANE KNOX, MD -' with a sort value of 223 and checkmarks in all week columns. Below the table are settings for 'Start time: 08:00 AM', 'End time: 09:00 PM', and 'Increment: 15 minutes'. A calendar view for 'March 2019' is on the right, showing a grid of dates with appointment slots. A dropdown menu for 'Appointment zone: SICK VISITS' is at the bottom right. Red callout numbers 1 through 7 point to these specific elements.

## Schedule Templates Editor Map

Number	Section	Description
1	Apply Template for Staff	The Apply Template for Staff panel applies the template for selected staff members on specific weeks. Staff members can have more than one template.
2	Schedule Template Creator	The Schedule Template Creator creates the default template for a Practice or Provider. The start and end times carry over from the Schedule Properties window. You set the start time, end time, and schedule intervals. Here you can block appointment zones for the Practice and Provider.
3	Appointment Zone	The Appointment Zone drop-down menu selects the appointment zone type for the highlighted slots in the calendar.
4	Quick Pick button	The <b>Quick Pick</b> button quickly selects ranges where the template is active. Selections include check/uncheck all weeks, every other week starting with week 1, and every other week starting with week 2.
5	Copy To button	The <b>Copy To</b> button copies the selected template to another staff member.
6	Function buttons	The function buttons insert a template record, remove a template record, save a template record, and print a template.
7	Apply Through	The Apply Through date determines the length of time that the template is applied. Typically the Applied Through date coincides with how far in the future your schedule is open. If you continue using schedule templates, you will need to return to the Schedule Template Editor and extend the Applied through date.

Version 14.10

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**Path: Utilities Menu > Manage Practice > Schedule Templates (Keyboard Shortcut keys: [Alt][U][P][T])**

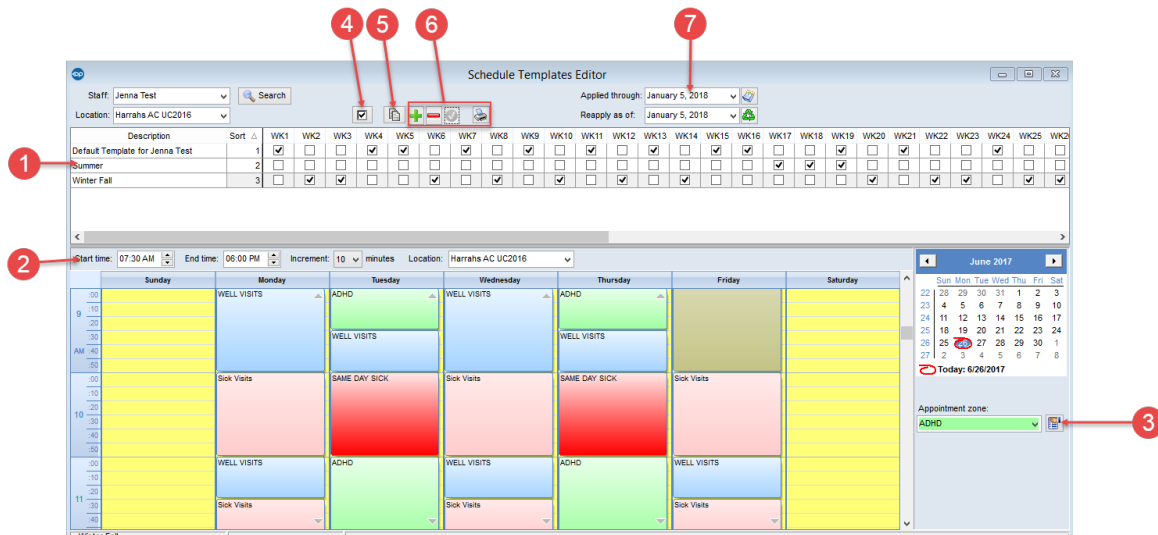
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3	Appointment Zone	The Appointment Zone dropdown selects the appointment zone type for the highlighted slots in the calendar. If you do not see an Appointment Zone that fits your needs, click on the Manage Template Zones button to take a shortcut to Utilities > Manage Practice > Appointment Preferences > Template Zones.
4	Quick Pick button	The <b>Quick Pick</b> button quickly selects ranges where the template is active. Selections include check/uncheck all weeks, every other week starting with week 1, and every other week starting with week 2.
5	Copy	The <b>Copy</b> button copies the selected template to another staff member.
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