Template Zones

Last Modified on 10/18/2023 12:28 pm EDT

Version 20.4

> 📢 Our new Multi-Location Calendar updates are here! Please see the **OP 21.3 Calendar Articles** for an overview of the changes. Practices can configure OP to **switch to the new calendar** and explore its features.
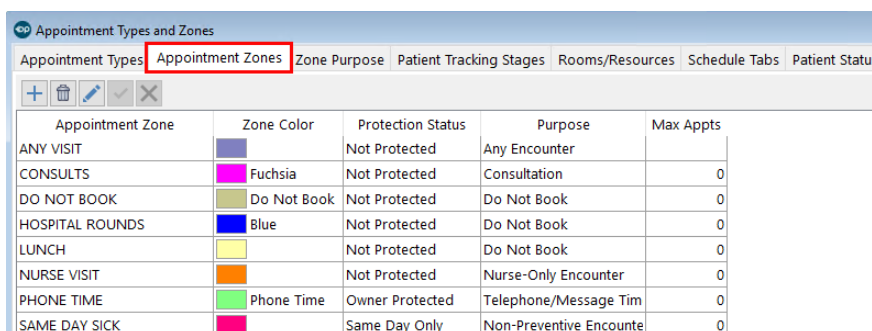
Path: Practice Management tab > Appointments

About

Template Zones are the building blocks to creating Schedule Templates and using Slots. They are used to designate times on the provider's schedule for specific appointments. This setup piece also allows the Zones to be protected against scheduling by certain users, overbooking, and live scheduling from the Patient Portal.

Creating Appointment Zones

1. Navigate to the **Appointment Types and Zones** window using the path above.
2. Click the **Appointment Zones** tab.

3. Click the **Add** button ➕ .
4. Add template zones using the table definitions below:

Field	Description
Appointment Zone	The type of zone that will be blocked in the provider's schedule.
Zone Color	The color this Template Zone is displayed on the schedule.
Protection Status	Who can book an appointment in that Template Zone: • **Not Protected**: Any staff member can make an appointment in this zone at any point now or in the future. • **Owner Protected**: Only administrators and the person whose schedule the zone is on may make appointments in this zone (typically used for Lunch, Vacation, etc.). • **Same Day Only**: Reserved; appointments can only be made in this zone when patients are going to be seen the same day. Only the calendar owner or system Admins can pre-book in this zone. • **Staff Protected**: These slots will not be visible to parents/patients who are trying to Live Schedule on the Patient Portal. This allows you to control how much (if any) of your calendar is open or closed to Live Scheduling.

Field	Description
Purpose	Identifies the purpose for each Appointment Zone. Slot usage is calculated based on the number of minutes allotted to each purpose. The Zone Purpose tab contains the purposes available in this drop-down menu.
Max Appts	The maximum allowed number of appointments in a specific time slot. If there is no limit, select 0. Only the calendar owner or system Admins can override this setting during scheduling.

5. Click the **Save** button ✓ .

Editing Appointment Zones

1. Select the **Appointment Zones** tab.
2. Click to highlight the item to modify.
3. Click the **Edit** button 🖊 .
4. Edit any fields (Appointment Zone, Zone Color, Protection Status, Purpose, Max Appts).
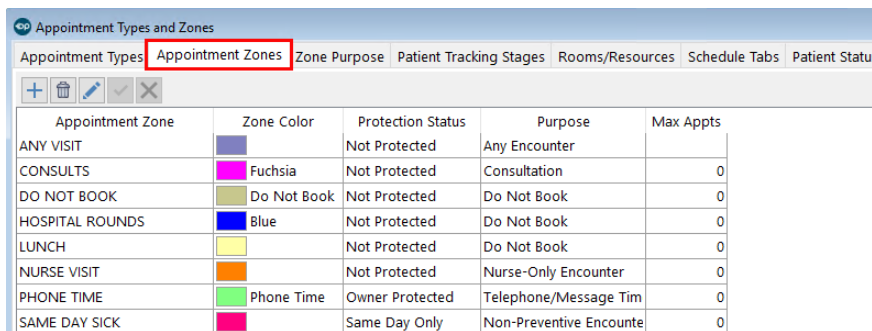5. Click on the **Save** button.

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Overview

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