

Schedule Templates

Last Modified on 10/23/2023 12:34 pm EDT

Version 21.3




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.

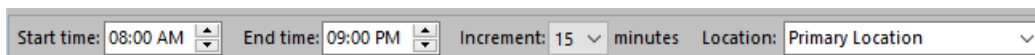
About

Path: Practice Management tab > Schedule Templates

Schedule Templates are used to create and apply a consistently structured provider schedule to a week, month, or year. If your providers do not typically have the same type of weekly schedule but rather their schedule changes from week to week, it may be better to construct a schedule using **Slots**.

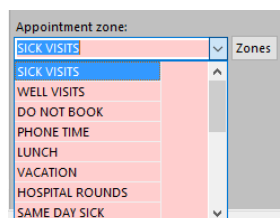
Create a New Template

1. Navigate to the Schedule Template Editor by following the path above.
2. In the **Staff** field, click the drop-down to select the staff member for which you will create a Schedule Template. For multi-location practices, make sure the correct location is selected in the **Location** box.
3. Click the **Search** button.
4. If the staff member already has Schedule Templates created, click the **Add** button  to create a new template. If this is the first template you're creating for a provider, you will receive a message stating a new template will be started. Click **OK** to start a new template.
5. In the **Description** field, enter a description for the new Schedule Template.
6. In the **Sort** field, select the sort number. This determines the order of the templates.
7. Review the **Start time**, **End time**, and **Increments**. These settings carry over from the **Schedule Properties** but can be edited here, if necessary.
8. Select the **Location** for the template.

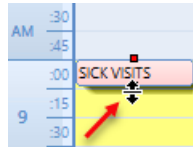


Start time: 08:00 AM End time: 09:00 PM Increment: 15 minutes Location: Primary Location

9. On the right-hand side of the window under the calendar, use the **Appointment Zone** drop-down to select an Appointment Zone that you will apply to a time slot. If you do not see an Appointment Zone that fits your need, click the **Zones** button to access the **Appointment Types and Zones** window. Also, see [Template Zones](#).



10. Double-click in the start time slot.
11. Hover over the slot's bottom red square until you see **black arrows**. Expand the slot to the end time by dragging the slot to cover the desired time slots.



12. Repeat the above steps for all of the days and times to complete the template.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
AM :45							
:00	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS
:15							
9 :30							
:45							
10 :00	ANY VISIT	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	ANY VISIT
:15							
:30							
11 :45		ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	DO NOT BOOK	SICK VISITS
12 :00	DO NOT BOOK				HOSPITAL ROUNDS		
:15							
:30							
PM :45							
1 :00				DO NOT BOOK			DO NOT BOOK
:15							

Note: After clicking on a zone to select it, you can:

- Right-click on an appointment zone to see the list of choices to change the zone.
- Right-click to delete a slot.
- Right-click to copy a slot.
- Right-click at the top of the column and use **Copy Column** then **Paste Column** on the day you'd like to copy to if a provider has the same schedule for different days of the week.
- Clear a template for a day by right-clicking in that day and selecting **Clear Column**.

13. Select the checkboxes for the weeks this template should be applied to or use the **Quick Picks** button to:

- Select All Weeks
- Deselect All Weeks
- Every Other Starting with WK1
- Every Other Starting with WK2

14. In the **Applied through** field, set the date the template should be applied through.

Note: You can apply through a date that is 360 days from the current date in the **Applied through** field. Typically, the **Applied through** date coincides with how far in the future your schedule is open for scheduling. If you continue using Schedule Templates, you will need to return to the **Schedule Templates Editor** and extend the **Applied through** date.

15. Click **Apply**.

16. Click **Yes** to apply the template to the desired time frame. The **Applied through** date will now be completed for that location.

17. Return to the **Schedule** to view the template.

Edit and Reapply a Schedule Template

Edits can be made to Schedule Templates at any time. Once the edit is made, the template needs to be reapplied so that the change takes effect on the Schedule right away.

1. Navigate to the Schedule Template Editor by following the path above.

2. In the **Staff** field, click the drop-down to select the staff member for which you will create a Schedule Template. For multi-location practices, make sure the correct location is selected in the **Location** box.
3. Click the **Search** button.
4. Select the **Schedule Template** that needs to be edited.
5. Edit the slots in the template by:
 - Selecting the slot, right-clicking, and selecting a different Appointment Zone
 - Selecting the slot and using the red squares to move (top red square), or extend or shorten (bottom red square) the time slot
6. In the **Reapply as of** field, enter the date the template should take effect. Think of this as the start date or in other words, when you want these changes to show on the calendar. The **Applied through** is now the "end date".
7. Click **Reapply**.
8. Carefully read the pop-up warning, and click **Yes** to proceed or **No** to cancel the re-applying of the template.
9. Repeat this process for all providers and all locations if needed.

Schedule Template Tips and Tricks

"Applied Through" and "Reapply As Of"

Applied Through

- Think of this as your **end date**.
- When selecting **Apply**, this will apply all templates that have been created for **all staff members in the drop-down at the specific location** that is selected.
- The Applied Through date can only increase in **11 month intervals** (eg if the Current Applied Through Date states 01/01/2024, this date can only be increased by 11 months, or 12/01/2024).
- Applied Through Date **cannot be changed to a date that is before** the date that is shown in this field.

Reapply As Of:

- Think of this as your **starting date**.
- When selecting **Reapply As Of**, this will only apply the template of **the staff member that you have currently selected in the drop-down**.

Sample Scenarios

Moving the Applied Through Date Forward and Selecting Apply

1. From within the Schedule Template Editor, verify that **all Staff Members with a Schedule Template Created do have an updated template**.
 - If a Staff Member needs the template updated, please do so prior to selecting the Apply option.
 - If a Staff Member needs the template disabled, please unselect all of the checkboxes for the weeks and then use the green checkmark to save that change.
2. Edit the **Applied Through Date** (remember that this can only be increased in increments of 11 months).
3. Select **Apply**.
4. Verify that the popup has the correct information, and then select **Yes**.

Creating and Applying a Template for only 1 Staff for a Specific Time Period

1. From within the Schedule Template Editor, select the **staff member** that you would like to update and verify that the correct location is selected.
2. Create a new template by using the **+** for that staff member.
3. Verify that the correct **Weeks** are checked for that template. (Verify that any other template for that staff does not have the same weeks selected).

4. Verify that the **other schedule templates are correct** for this provider.
 5. Select **Reapply**.
 6. Verify that the popup has the correct information, and select **Yes**.
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