


Apply Multiple Templates & Multiple Locations

Last Modified on 10/18/2023 12:30 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.

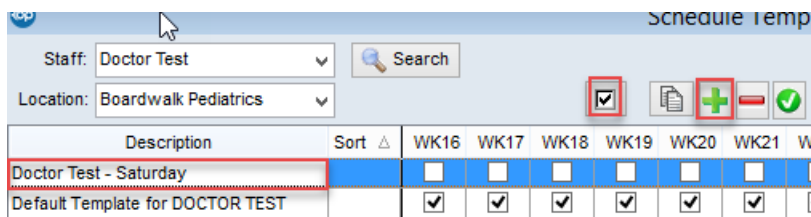
Utilities > Manage Practice > Schedule Templates


Overview

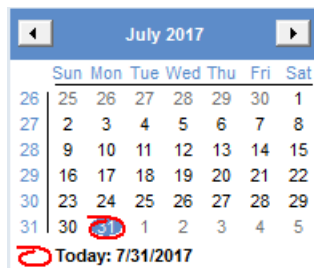
The instructions below will show you how to layer multiple schedule templates on a provider's schedule.

Applying Multiple Templates

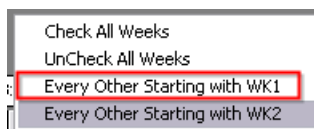
1. In the **Schedule Template Editor**, click on **Search** and select a provider, then **Insert Record**  to start a new template.
2. Give the new template a name, for example "Saturday". Build the template using the same steps as [Create a New Template](#).



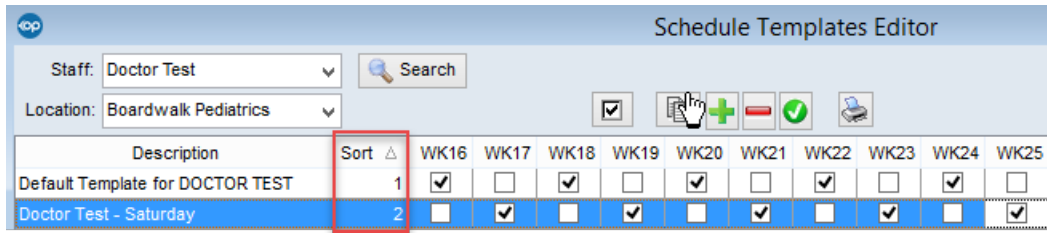
3. Apply this template by clicking the **Quick Picks** button . To determine whether to apply the templates to alternating weeks starting with Week 1 or Week 2, refer to the number along the left of the small calendar. For templates not applied every other week, simply check off the calendar weeks where the template should be applied to the schedule.



4. In the Select Weeks pop up, select **Every Other Starting with WK1**. The template will now be applied to every other odd Saturday. If **Every Other Starting with WK2** was selected it would be every other even Saturday.

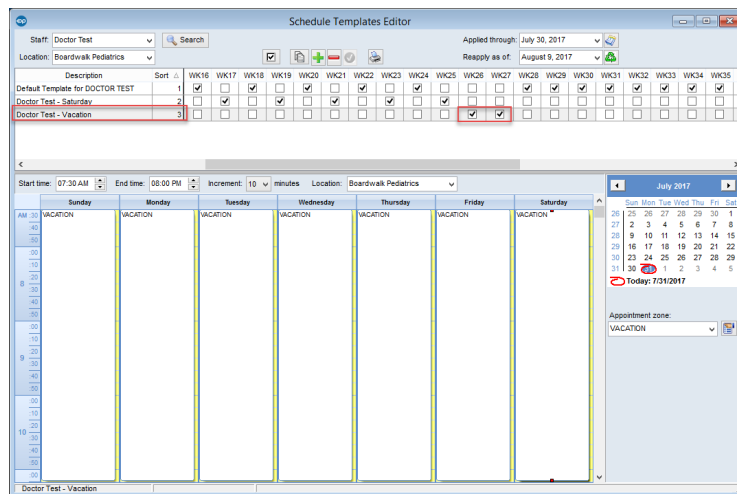


5. Apply the zones to the days of the week to be included in this template.
6. The **Sort** number determines the order of how the templates will layer on the schedule. A template with a Sort of 1 is considered the default template. Template 2 creates exceptions to the rules of Template 1. Template 3 creates exceptions to the rules of both Template 1 and 2. *For the example above we will enter the template Sort number as 2.*



Creating Vacation Templates

1. Create a template with **Vacation Zones** for the whole week.
2. Name it **Vacation** and set the **Sort** to number 3.
3. Check the template calendar for the week numbers, and check the box for each week you are taking a vacation.
4. Set the **Applied Through** date.



Note: If your practice is multi-location, you will create schedule templates for each location by changing the location dropdown. The "Applied through." date and button will be used for each location independently. Note: The Descriptions for the previously created location will show for reuse.


Version 14.10

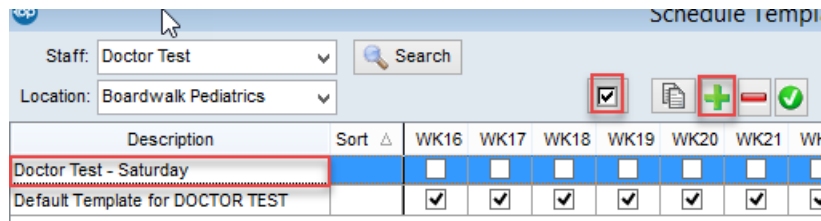
Utilities > Manage Practice > Schedule Templates

Overview

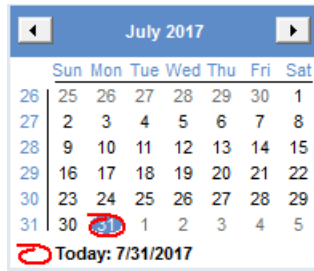
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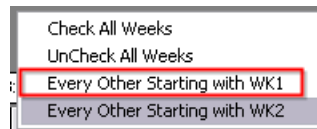
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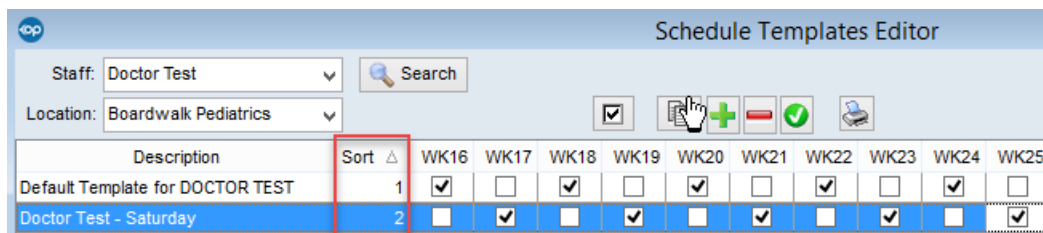
- Apply this template by clicking the **Quick Picks** button . To determine whether to apply the templates to alternating weeks starting with Week 1 or Week 2, refer to the number along the left of the small calendar. For templates not applied every other week, simply check off the calendar weeks where the template should be applied to the schedule.



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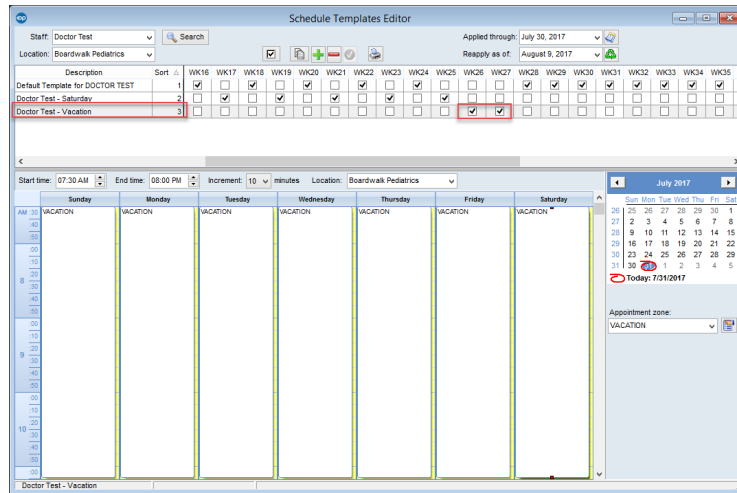



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