

# Copy Schedule Templates Between Providers

Last Modified on 10/18/2023 12:31 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.

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

## Overview

Do you have providers whose schedule templates are similar or exactly the same? Instead of doing double work, follow the steps below to copy a template from one provider to another.

## Copy Templates Between Providers

1. Navigate to the **Schedule Template Editor** using the path above.
2. Use the **Staff** drop-down field to select the provider whose template you will copy.
3. Click **Search**.
4. Select the template you want to copy from the grid.
5. Click **Copy To**. An information window appears stating the highlighted template will be copied to the staff member you select.
6. Click **OK**. The **Staff Name Lookup** window opens.
7. Select the staff member to whom you would like to copy the schedule template.
8. Click **OK**. An information window appears stating that a new template for the selected staff member will be generated.
9. Click **OK**. That staff member's templates are now displayed in the grid including the new template with description "Cloned from: ...".
10. Rename the template by clicking the **Description** field and typing a new name.
11. Edit the template if changes are necessary.
12. Apply to the appropriate weeks of the year.


Version 14.10

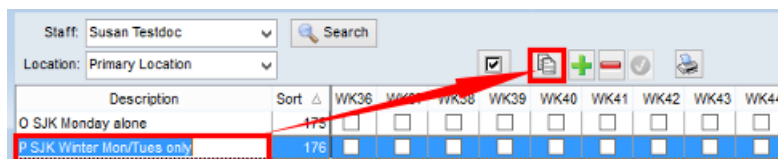
**Utilities > Manage Practice > Schedule Templates**

## Overview

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## Copy Templates Between Providers

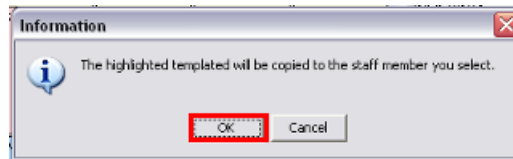
1. Click the drop down arrow in the **Staff** field and select the provider.
2. Select the template you want to copy, and click **Copy** .



Description	Sort	WK36	WK37	WK38	WK39	WK40	WK41	WK42	WK43	WK44
O SJK Monday alone	175	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P SJK Writer Mon/Tues only	176	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Schedule Templates Editor: Copy button

- Click the **OK** button to confirm.



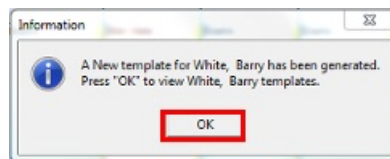
### Schedule Templates Editor: Confirm Dialog box

- Double-click to select a name from the **Staff Name Lookup** window.



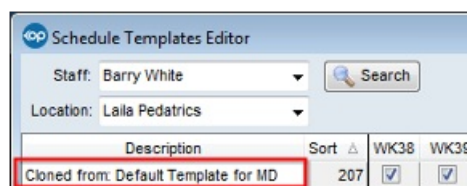
### Schedule Templates Editor: Staff Name Lookup

- Click the **OK** button.



### Schedule Templates Editor: Confirm Dialog box

- The **Description** will default to "Cloned from...". You can rename the copied template by clicking the **Description** field and typing a new name.
- Edit the template if changes are necessary.
- Apply to the appropriate weeks of the year.



### Schedule Templates Editor: Copied Template