

# Creating a Schedule Using Slots

Last Modified on 10/18/2023 12:31 pm EDT

Version 21.3



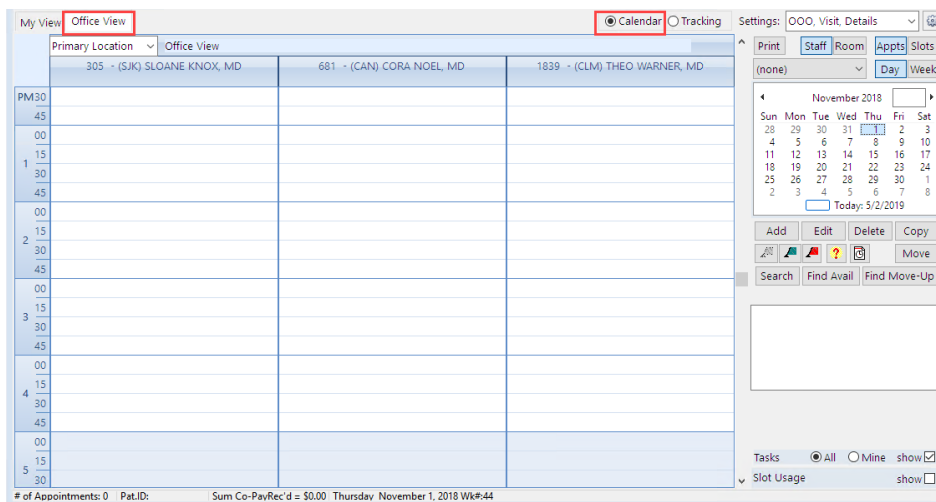
Our new Multi-Location Calendar updates are here! Please see the [OP 21.3 Calendar Articles](#) for an overview of the changes. Practices can configure OP to [switch to the new calendar](#) and explore its features.

## About

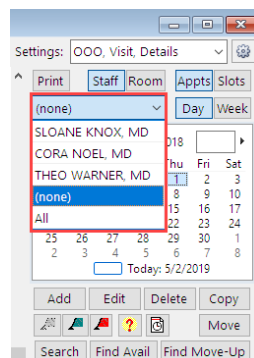
Schedule Templates and Slots provide a framework for appointment scheduling by designating the times for seeing patients and what types of appointments are preferred throughout the day. When providers have relatively regular schedules, Schedule Templates can be the most efficient way to define time usage for staff in charge of scheduling appointments. However, when providers have irregular schedules, using Slots is more efficient in defining the available time slots directly from the Calendar.

## Create a Schedule Using Slots

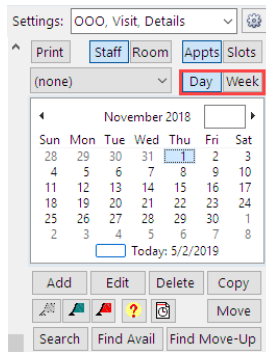
1. In the **Clinical, Practice Management, or Billing** tab, click the **Schedule** button.
2. Select the **Calendar** radio button in the top right of the window
3. Click the **Office View** tab or the tab where you will create a schedule using Slots.



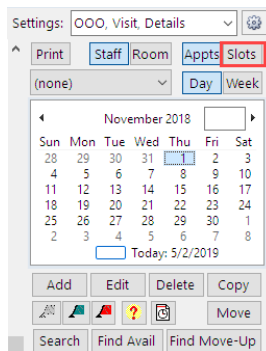
4. To work on the schedule for one provider, click the **drop-down** arrow located above the small calendar (and below the Print, Staff and Room buttons) to select a provider. Selecting a provider enables you to look at the Week view for the provider. If you prefer to only look at one day, it is *not* necessary to select a provider from the drop-down menu.



5. Click the **Day** or **Week** button.

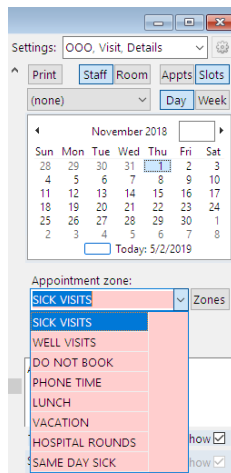


6. Click the **Slots** button.

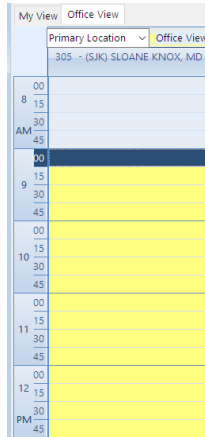


**Note:** The Slot view does *not* display appointments. The Appointment Zones are displayed. The background turns yellow as a reminder that you are in Slots mode. If you do not see the Appointment Zone that you are looking for, click the **Zones** button and create the Zone.

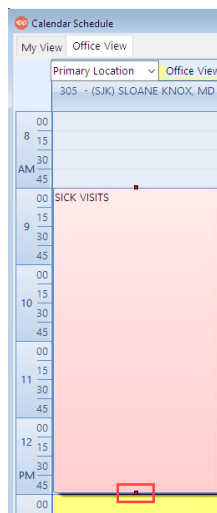
7. Select an **Appointment Zone** from the drop-down menu.



8. Click the **Start Time** slot.



9. Drag the bottom **Move bar** to the end time.



10. Repeat these steps for all of the days and times to complete the template.

My View Office View		Primary Location Office View						
		305 - (SJK) SLOANE KNOX, MD						
		Sun April 28	Mon April 29	Tue April 30	Wed May 1	Thu May 2	Fri May 3	Sat May 4
8:00 AM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
8:15 AM			SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS
8:30 AM			ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT
8:45 AM			SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS
9:00 AM			PHONE TIME	PHONE TIME	PHONE TIME	PHONE TIME	PHONE TIME	WELL VISITS
9:15 AM			LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	WELL VISITS
9:30 AM			ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	DO NOT BOOK
9:45 AM			ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	DO NOT BOOK
10:00 AM			ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	DO NOT BOOK
10:15 AM			ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	DO NOT BOOK
10:30 AM			ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	DO NOT BOOK
10:45 AM			ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	ANY VISIT	DO NOT BOOK
11:00 AM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
11:15 AM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
11:30 AM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
11:45 AM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
12:00 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
12:15 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
12:30 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
12:45 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
1:00 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
1:15 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
1:30 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
1:45 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
2:00 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
2:15 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
2:30 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
2:45 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
3:00 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
3:15 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
3:30 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
3:45 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
4:00 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
4:15 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
4:30 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
4:45 PM			WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS



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

- Right-click an appointment zone to see the list of choices to change the zone.
- Right-click to delete a slot or use the keyboard shortcut Ctrl+Del.
- Right-click to copy a slot or use the key board shortcut Ctrl+C.
- Right-click at the top of the column and use Copy Column then Paste Column on the day you would 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**.
- **Copy/Paste Week:** Can be used for providers with similar schedules or applied to another week where a provider's schedule is identical.
- **Copy/Paste Day:** In Day mode, copies all providers for the selected day.
- **Clear Column:** To clear a template for a day, if you make a mistake or the provider is unavailable.

## Slot Usage

The total amount of time in minutes allocated on the schedule for each Appointment Zone.

Appointment Zone	Slot Min
SICK VISITS	540
WELL VISITS	1065
DO NOT BOOK	960
PHONE TIME	225
LUNCH	300
RECEPTION	0
HOSPITAL ROOMS	0
SAME DAY SICK	0
CONSULTS	0
NURSE VISIT	0
WALK INS	0
IN OFFICE PROCEDURES	0
ANY VISIT	870
Total Allocated	3960

Version 14.10

## Overview

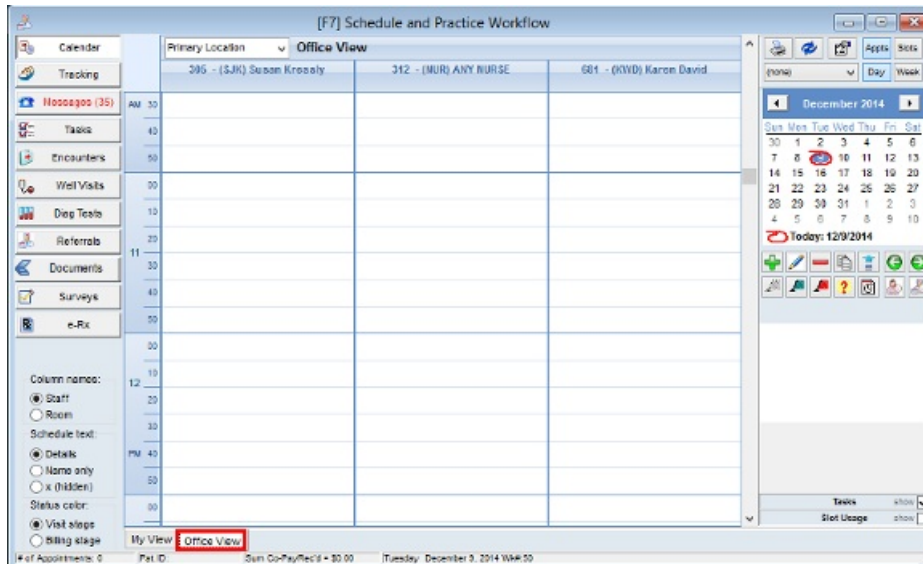
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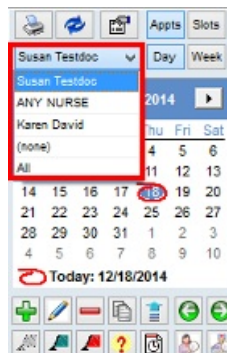
1. Click the **Schedule** button  on the Smart Toolbar.



2. Click the **Office View** tab.



- To work on the schedule for one provider, click the **Drop-Down Menu** located above the small calendar to select a provider. Selecting a provider enables you to look at the **Week** view for the provider. If you prefer to only look at one day, it is *not* necessary to select a provider from the drop-down menu.




- Click the **Day** or **Week** button.

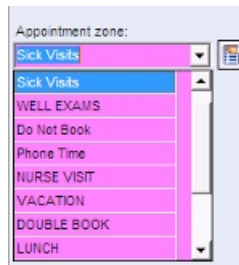


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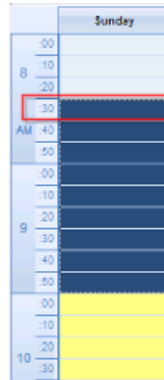


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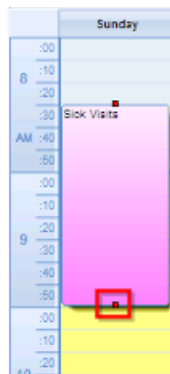
6. Select an **Appointment Zone** from the drop-down menu.



7. Click the **Start Time** slot.



8. Double-click on the **Start Time** slot, then drag the bottom **Move bar** to the end time.

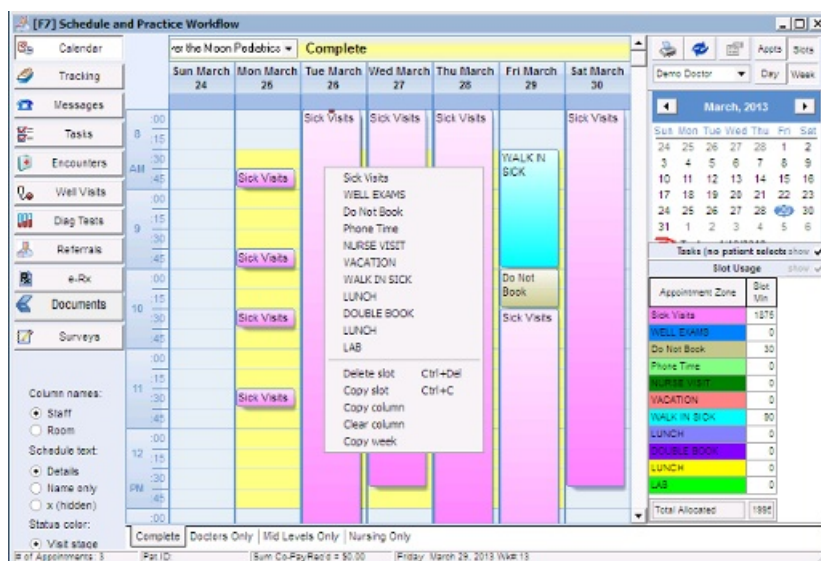


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Slot Usage

The total amount of time in minutes allocated on the schedule for each Appointment Zone.

Slot Usage		show
Appointment Zone	Slot Min	
Sick Visits	735	
WELL EXAMS	495	
Do Not Book	30	
Phone Time	0	
URGENT VISIT	210	
VACATION	0	
WALK IN SICK	90	
LUNCH	0	
DOUBLE BOOK	0	
LUNCH	120	
LAB	330	
Total Allocated	1980	