

Zone Purpose

Last Modified on 10/18/2023 12:32 pm EDT

Version 14.19



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 > Zone Purpose tab

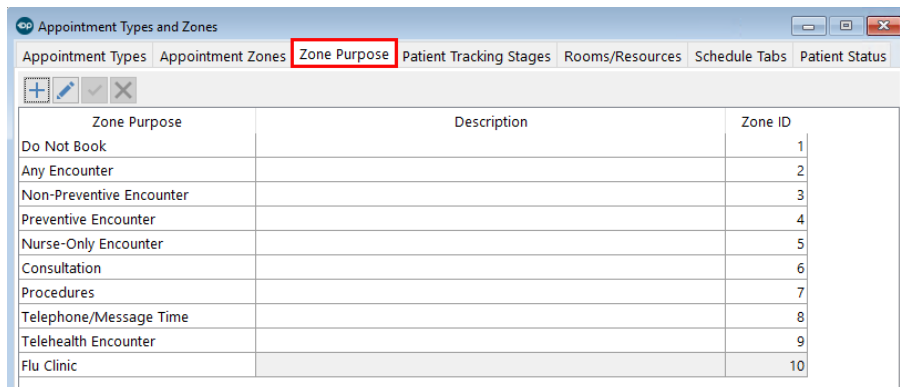
About

The Zone Purpose tab in the Appointment Types and Zones window gives you the ability to define the purpose of their Appointment Zones. Entries in this list are displayed in the Purpose drop-down menu on the Appointment Types and Appointment Zones tabs. Zone Purpose is advisory, not mandatory. These generic purposes, like Preventive Encounter, Non-Preventive Encounter, Any Encounter, Consultation, and so on, are treated like strong suggestions of how to book the time. However, OP will not prevent a staff member from booking a sick appointment in a Well slot, or vice versa. The ultimate enforcement mechanism is an office policy about circumstances which do (or do not) warrant using slots for other than their intended purposes. For example, Well time that did not fill prior to today would become fair game for any kind of appointment, in order to fill the slot.




When patients self-schedule from the Patient Portal, the Purpose will be enforced on their requests. If they ask for an appointment type that is associated with Well care, they will only be shown empty slots of sufficient length with a generic purpose of Preventive Encounter or Any Encounter. The same will be true of sick visits, nursing visits, consults, and so on.

Adding a Zone Purpose

1. Navigate to the **Zone Purpose** tab using the path above.



Zone Purpose	Description	Zone ID
Do Not Book		1
Any Encounter		2
Non-Preventive Encounter		3
Preventive Encounter		4
Nurse-Only Encounter		5
Consultation		6
Procedures		7
Telephone/Message Time		8
Telehealth Encounter		9
Flu Clinic		10

2. Click the **Add** button . A blank entry line is displayed in the table.
3. In the **Zone Purpose** column, enter the name of the **Purpose**.
4. In the **Description** column, enter a **Description** (optional).
5. Click the **Save** button . If edits need to be made to this table, click the **Edit** button  before clicking the **Save** button.
6. Click the **X** in the upper right hand corner to exit the window.

Viewing Slot Usage on the Calendar

Zone Purpose is used to calculate the number of minutes that have been slotted for each Appointment Type and how much of that slotted time has been scheduled. Zone Purposes cannot be removed or archived, but will only calculate if they are used on the calendar.

1. Navigate to the **Calendar: Clinical, Billing, or Practice Management** tab > **Schedule** button.
2. Click the **Schedule** tab located at the top of the calendar (if enabled) and confirm that the **Calendar** radio button is selected.
3. On the right of the window is the **Slot Usage** section, select the **Show** checkbox.

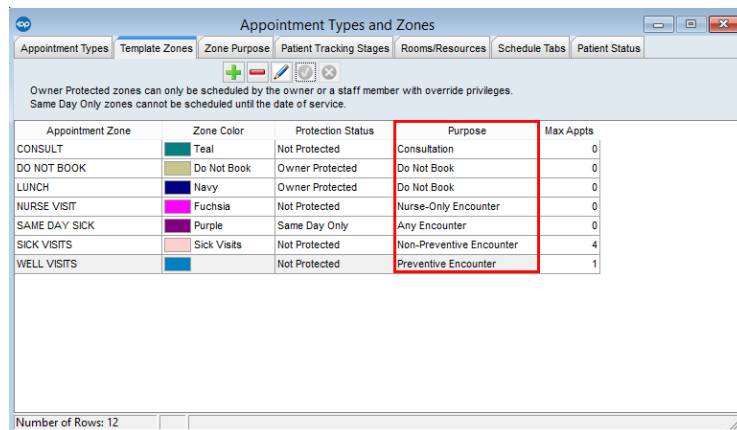
Slot Usage		show <input checked="" type="checkbox"/>	
Appointment Zone	Appt Min	Slot Min	
Non-Preventive	15	0	
Preventive Encounter	30	0	
Nurse-Only Encounter	15	0	
	60	0	

Version 14.10

Utilities > Manage Practice > Appointment Preferences

Overview

The Zone Purpose tab in the Appointment Types and Zones window gives users the ability to define the purpose of their Appointment Zones. Entries in this list will be displayed in the Purpose drop-down menu on the Appointment Types and Template Zones tabs (the Template Zones tab is shown below). Zone Purpose is used to calculate the number of minutes that have been slotted for each Appointment Type and how much of that slotted time has been scheduled. Zone Purposes cannot be removed or archived, but will only calculate if they are used on the calendar.

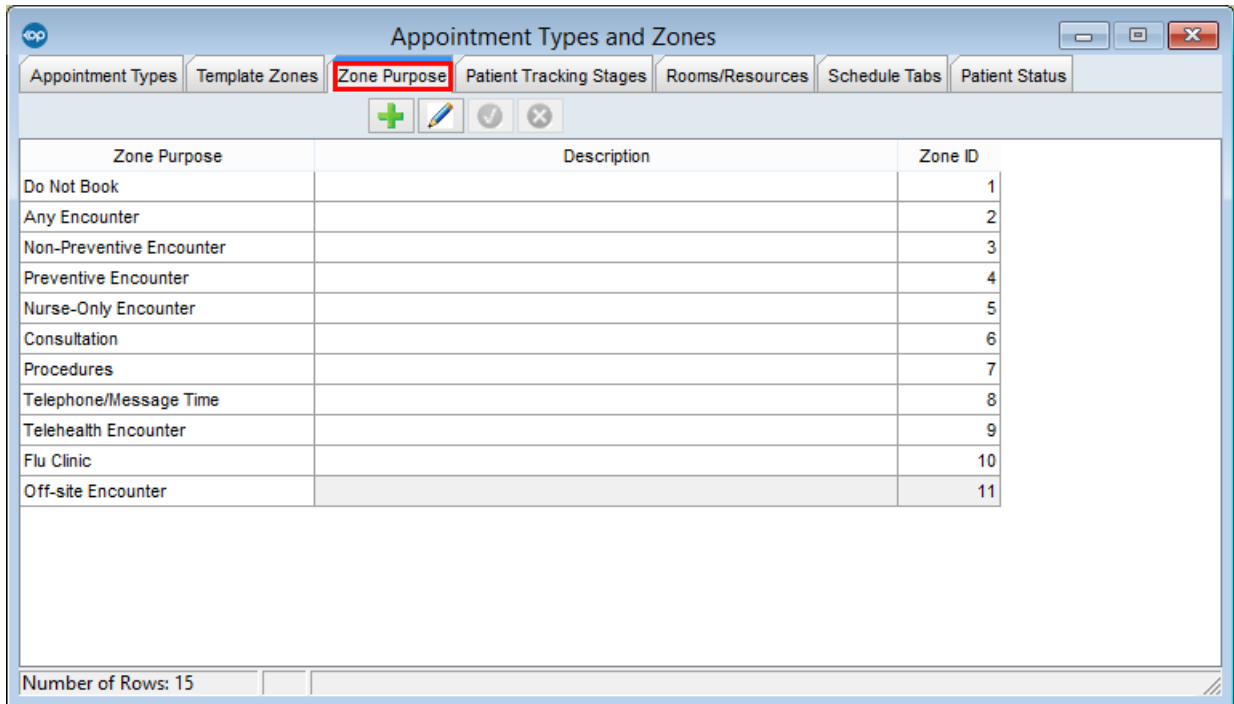





Appointment Zone	Zone Color	Protection Status	Purpose	Max Appts
CONSULT	Teal	Not Protected	Consultation	0
DO NOT BOOK	Do Not Book	Owner Protected	Do Not Book	0
LUNCH	Navy	Owner Protected	Do Not Book	0
NURSE VISIT	Fuchsia	Not Protected	Nurse-Only Encounter	0
SAME DAY SICK	Purple	Same Day Only	Any Encounter	0
SICK VISITS	Sick Visits	Not Protected	Non-Preventive Encounter	4
WELL VISITS		Not Protected	Preventive Encounter	1

Number of Rows: 12

Adding a Zone Purpose

1. From the **Menu Toolbar**, click **Utilities**.
2. Select **Manage Practice**.
3. Select **Appointment Preferences**.
4. Click the **Zone Purpose** tab.



5. Click the **Insert Record** button  . A blank entry line is displayed in the table.
6. Enter the **Name** of the **Purpose** and a **Description** (optional).
7. Click the **Post Edit** button  .
8. Once all changes are made, click the **Exit** button  .

Viewing Slot Usage on the Calendar

1. From the **Smart Toolbar**, click the **Sched** button to navigate to the **Calendar**
2. Click the **Schedule** tab located at the bottom of the calendar (if enabled).
3. On the right of the window is the **Slot Usage** section, select the checkbox to **Show**.

Slot Usage			show <input checked="" type="checkbox"/>
Appointment Zone	Appt Min	Slot Min	
Any Encounter	0	225	
Non-Preventive	15	175	
Preventive Encounter	0	160	
3% filled	15	580	