

# Creating a Schedule Using Slots For Multi-Location

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Version 21.3

The content listed here is transitional documentation and is subject to change.

## 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.

**Clean-up Tip:** In order for the multi-location functionality to work in the New Calendar, a provider can only have **asingle bookable Appointment Zone filled across all locations at any given time.**

- Bookable zones have a **purpose** of anything except "Do Not Book".
- For multi-location practices that have used non-bookable zones such as "Out of Office" to indicate where a provider is not working at a specific location on a specific day: if these **overlap** with a bookable zone then they will be suppressed and the bookable zone will display.

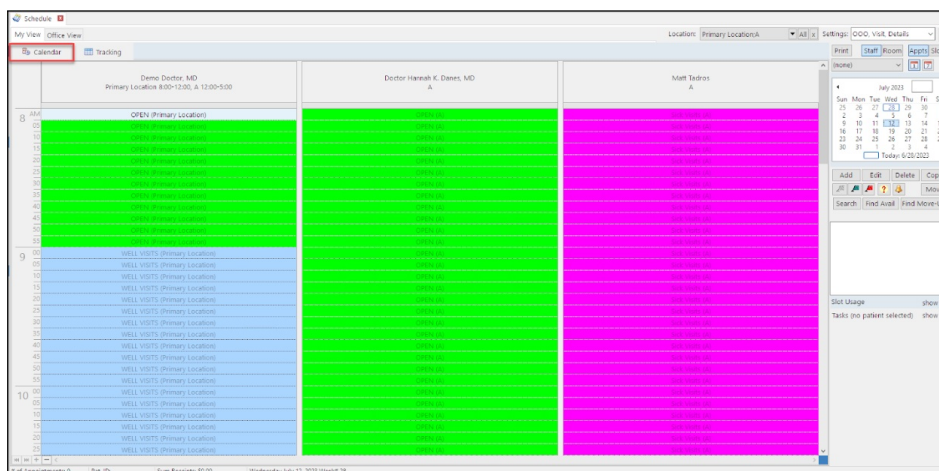


If you have overlapping bookable zones you will need to **clean-up the schedule templates or slots** in order to effectively use the new calendar.

For example, you will need to ensure the **purpose** of "In other location" zones are set to "Do Not Book". For more information, see the **Appointment Zones** article on how to update the Zone purpose.

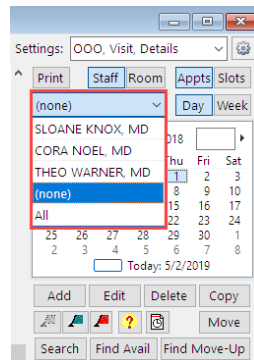
## Create a Schedule Using Slots

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

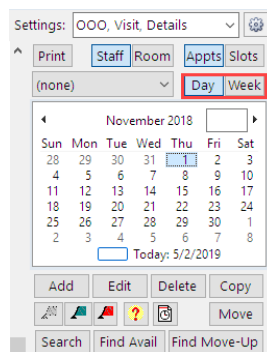


4. To work on the schedule for one provider, click the **drop-down** arrow located above the small calendar (and below the Print, Staff and Room buttons) to select a provider. Selecting a provider enables you to look at the Week view for the

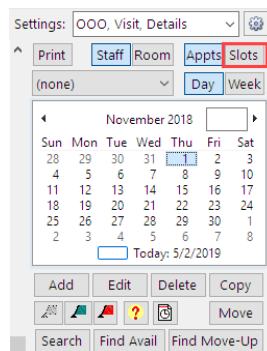
provider. If you prefer to only look at one day, it is *not* necessary to select a provider from the drop-down menu.




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

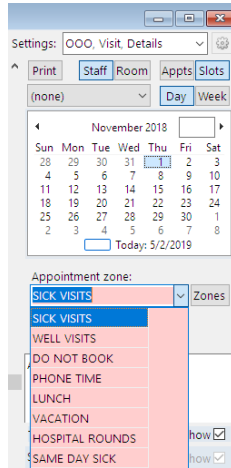


6. Click the **Slots** button.

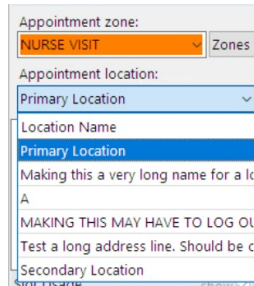


 **Note:** The Slot view does *not* display appointments. The Appointment Zones are displayed. The background turns yellow as a reminder that you are in Slots mode. If you do not see the Appointment Zone that you are looking for, click the **Zones** button and create the Zone.

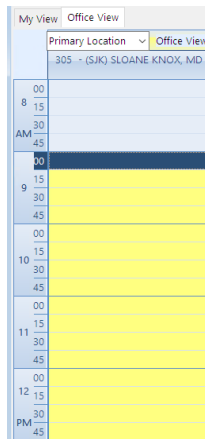
7. Select an **Appointment Zone** from the drop-down menu.



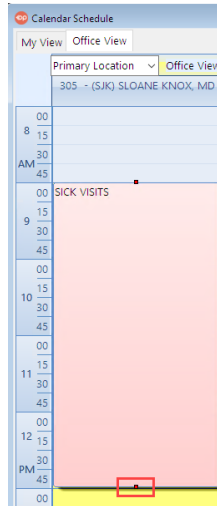
- If using Multi-location mode, or scheduling for a provider who splits their time across different locations, select the **Location** from the Location drop-down menu.



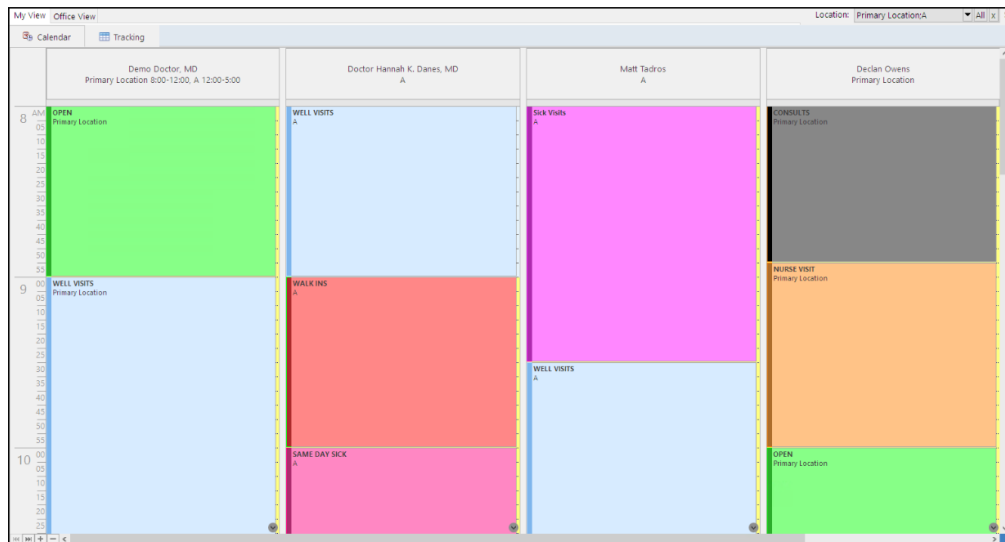
- Click the **Start Time** slot.



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



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



**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.

Slot Usage show

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