Templates in Patient Scheduler

User Instruction

RESource

A template is a predefined block of time reserved for a specific purpose/type of appointment. For example, there are templates for N/P (New Patient) appointments and F/U (Follow Up) appointments. These appointment templates can be added to schedules on an individual basis as needed, and they can also be combined to create calendar templates for an entire day/week/month. These calendar templates can then be inserted into (physician) schedules/calendars, eliminating having to re-create the same scheduling pattern repeatedly. For example, if Dr. Smith devotes 3 days a week to seeing New Patients and Follow Ups, you can create one templated day and apply that calendar template to the appropriate days in his calendar.

To apply an appointment template (individually) to a calendar:

1 – go to the main menu and select **Options – Template Mode**. If you are not in template mode the Patient Appointment window will appear instead of the Appointment Template form (as indicated in step #2)

2 – select the calendar, date and time you wish to add the template to – double click. The Appointment Template form will appear.


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3 – select the appointment type, appointment location and duration. The Adjust Start Time field allows you to adjust the start time by plus or minus15 minutes. For example, if you are inserting the template at 9am, but would like for it to appear as 9:15am, enter 15 for the Adjust Start Time – if you want it to appear at 9am leave it at 0.

4 – if applicable, select a resource from the Resource dropdown. Resources will be explained in the next section.

5 – enter any text you would like to display in the appointment slot (to be visible from the actual schedule) in the Message section (text in addition to the Appointment Type, Location and Resource which will automatically appear). For example, if this template is not for a patient appointment, but rather for a meeting, you could enter "Business Meeting" and it will appear on the calendar.
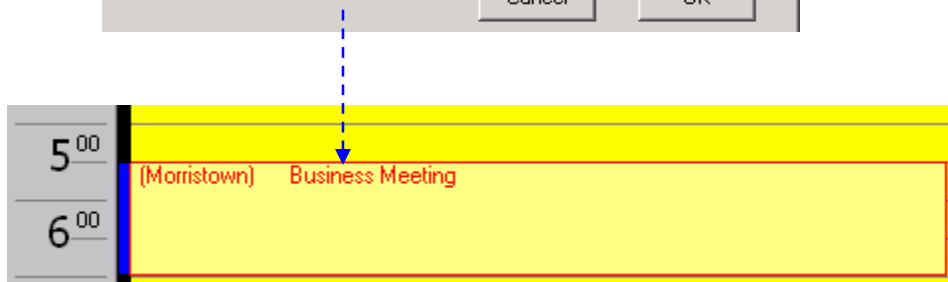
When inserting templates for Appointment Types other than 'Other', the templated Appointment Type will appear in the schedule, along with the scheduled time, location and any text that appears in the Message section of the template.

Read Only

If the template being inserted is not for a patient appointment, but rather for a meeting or a Reference you may opt to make it **Read Only**. Upon making it **Read Only,** only the person who created the template can edit/delete it.

To create a new Template calendar:

1 – select the Templates folder in the folder tree, right click and select **New Template**. The Appointment Template Properties prompt will appear – enter the name of the new template.
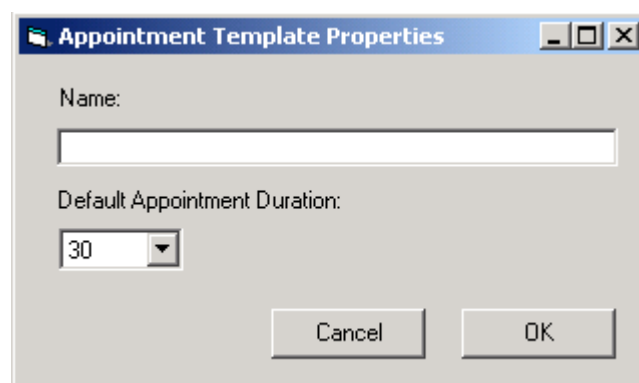
2 – select a Default Appointment Duration – this will determine how the time intervals in the calendar are displayed:

15 minute

30 minute   60 minute
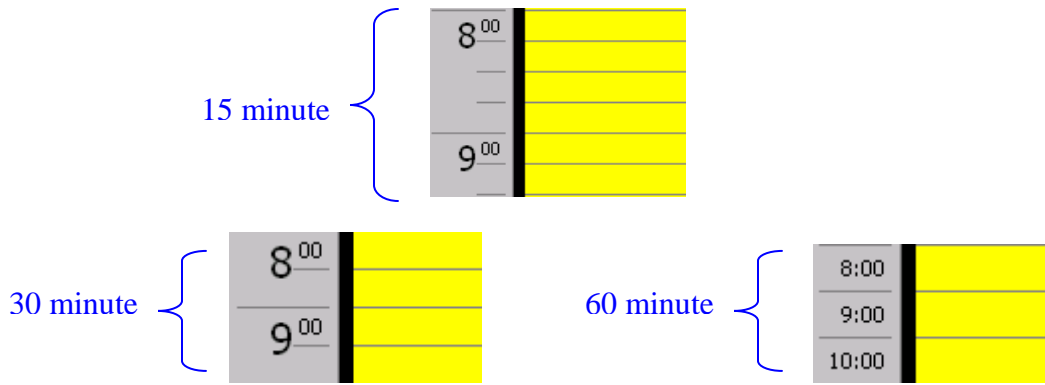
3 – the new template calendar will now be visible under the Template folder in the Folder Tree

4 – click on the new template calendar and select a date in the date picker calendar. It does not matter what date you select when creating the templated day – the day can be applied to any date(s) in a live calendar/schedule.

5 – add individual appointment templates (as described above) to time slots to create a template for the entire day.

Repeat this process for however many days you want this template calendar to apply to. Remember, you can create a template for a week, or even a month, if desired - just template each day in the time period. But note that if you create templated days for Monday through Friday, when you apply this template calendar to an actual schedule, Monday through Friday will fill in with the template – you do not have the option to apply only parts of the template calendar. If you do not have a consistent weekly template then you should create individual template calendars for each day to be templated.

Example of a templated day:

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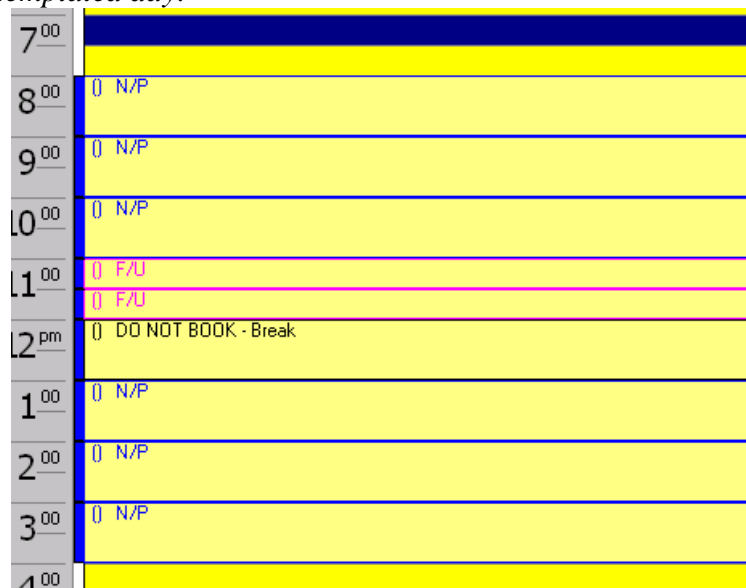
To apply a template calendar to a live schedule/calendar:

      1 – select the appropriate folder in the folder tree and select the desired calendar

      2 - from the date picker calendar, choose the date you want to apply the template calendar to. If you are applying a template calendar that has multiple templated days, select the first date you want to apply the templates to.

      3 – right click over the calendar name in the folder tree and select Apply Template, or go to File in the main menu and select Calendars – Apply Template. The Apply Template to Calendar window will appear.
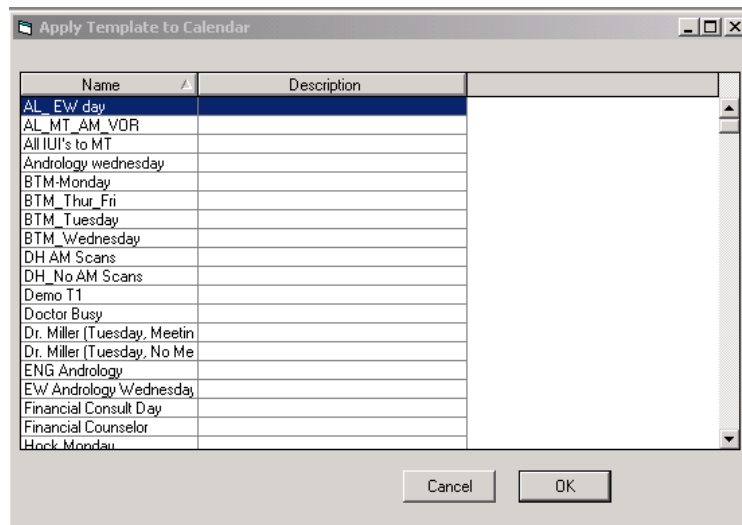
      4 – select the desired template calendar and click **OK** - the selected calendar/schedule will fill in with the templates

Clear Day

The Clear Day button is used to remove all templated slots from a given day. If, however, a patient has been scheduled in the slot it will not be removed – only templated slots that have not been scheduled in will be deleted.

Work Load

The Work Load button displays a small window listing the total hours templated for each appointment/template type (for the selected calendar and day).