

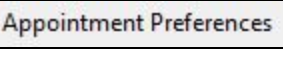
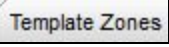



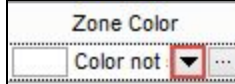
## Step 1

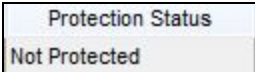
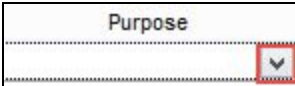

### 1. Navigate to Appointment Preferences

1. Select .
2. Select .
3. Select .
4. Select the tab for .


### 2. Create Appointment Preferences

1. Click  sign to add a new appointment zone.
2. A New line item will appear. Enter in the new appointment zone .
3. Select desired **color** by clicking on drop down arrow




4. Select if you wish to have a **Protection Status** on this appointment zone  

5. Select the **purpose** type for this appointment zone  

6. Click  to save changes.


### 3. Edit an Appointment Preference

1. Highlight the desired appointment zone that user wishes to modify.
2. Click  to edit an existing appointment zone.
3. Edit as necessary:
  - a. Appointment Zone Name
  - b. Zone Color
  - c. Protection Status
  - d. Purpose

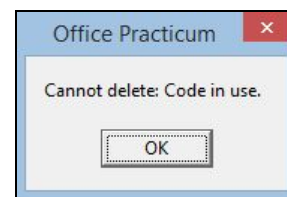
Appointment Zone	Zone Color	Protection Status	Purpose
CONSULTATION	 Lime	Same Day Only	Any Encounter

4. Click  to save changes.

### 4. Delete an Appointment Preference



1. Highlight the desired appointment zone that user wishes to remove from being used.
2. Click  to delete an appointment zone.

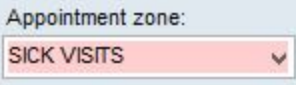
**NOTE:** User cannot delete an Appointment Zone that has already been used/applied in a template for a schedule. User will receive this pop up message if the zone is already used.



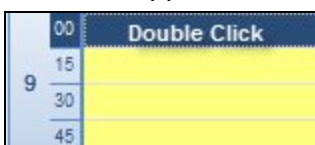
## Step 2 (must have the permissions **Schedule\_View** & **Schedule\_Manage\_All\_Slots**)

### 1. Create Slots on the Scheduler

1. Open .
2. Click .
3. Select the **Appointment Zone** that should be applied to selected Providers schedule.

Appointment zone:  


4. **Double Click** in the desired time where this should be applied.




5. Once slot is applied to schedule, user may opt to extend that slot throughout the schedule for the day as desired, by clicking on the **bottom red dot** of appointment slot and dragging to the desired time.





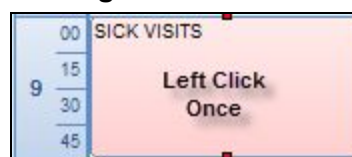
6. The **red dot on the top** of the appointment slot allows user to move the slot to another area on the schedule if originally placed incorrectly in the wrong hour time slot.



7. When all slots are applied as desired, click on  to save your modifications.

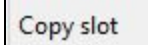
### 2. Copy Slots on the Scheduler

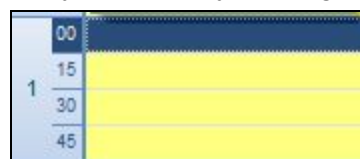
1. Open .
2. Click .
3. Select a Slot applied to schedule by **left clicking once** on slot.



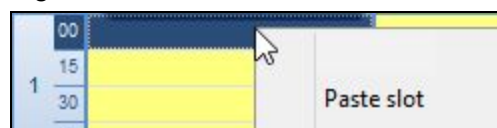
4. Now, **Right Click** over slot to get the fly out window with options for the selected slot.






5. Select .
6. Find another time on the schedule you wish to apply this slot, by clicking on the start time.



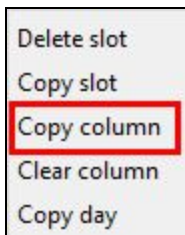
7. Right click and select **Paste Slot**.



8. When all slots are applied as desired, click on  to save your modifications.

1. Open .
2. Click .
3. Select anywhere on the provider's schedule by **left clicking once**.

4. Then right click once for the fly out window of

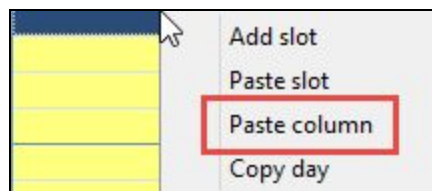


options. Select **Copy Column**.

5. Find the next Provider Column on your calendar and **Left Click** once to select their column.

	107 - (DD9) Demo Doctor	309 - (DRT) Doctor Test
AM 45		
9:00	SICK VISITS	
9:15		
9:30		
9:45		
10:00	WELL VISITS	
10:15		
10:30		
10:45		
11:00	PHONE TIME	
11:15		
11:30		
11:45		
12:00	LUNCH	
12:15		
12:30		
12:45		
1:00	SICK VISITS	
1:15		
1:30		
1:45		
2:00	WELL VISITS	
2:15		
2:30		
2:45		
3:00	PHONE TIME	
3:15		
3:30		
3:45		
4:00	DO NOT BOOK	
4:15		
4:30		
4:45		

6. Right Click and select **Paste Column**.



7. The end result will show user a copied Column from one provider's schedule to the next.

	107 - (DD9) Demo Doctor	309 - (DRT) Doctor Test
AM 45		
9:00	SICK VISITS	SICK VISITS
9:15		
9:30		
9:45		
10:00	WELL VISITS	WELL VISITS
10:15		
10:30		
10:45		
11:00	PHONE TIME	PHONE TIME
11:15		
11:30		
11:45		
12:00	LUNCH	LUNCH
12:15		
12:30		
12:45		
1:00	SICK VISITS	SICK VISITS
1:15		
1:30		
1:45		
2:00	WELL VISITS	WELL VISITS
2:15		
2:30		
2:45		
3:00	PHONE TIME	PHONE TIME
3:15		
3:30		
3:45		
4:00	DO NOT BOOK	DO NOT BOOK
4:15		
4:30		
4:45		

8. When all slots are applied as desired, click

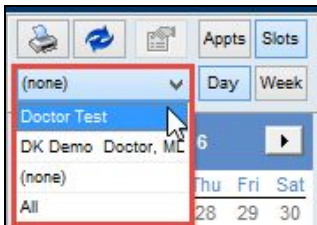


to save your modifications.

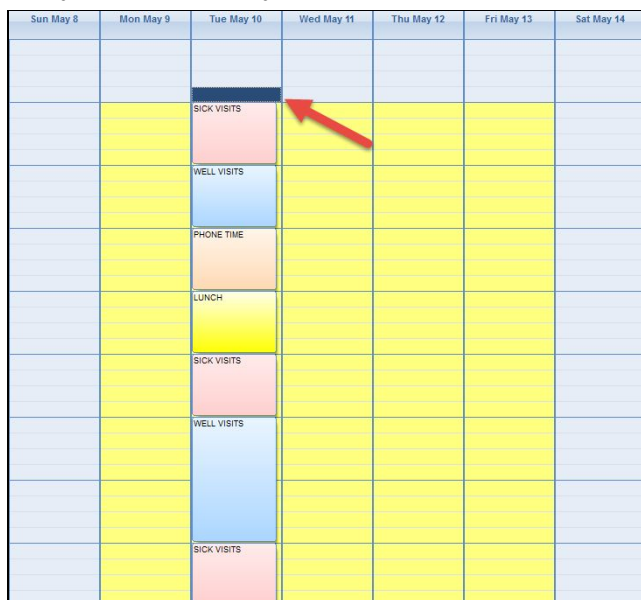
## Copy Days

From **Slots** mode:

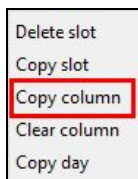
1. Click on the drop down above the calendar to choose a provider.



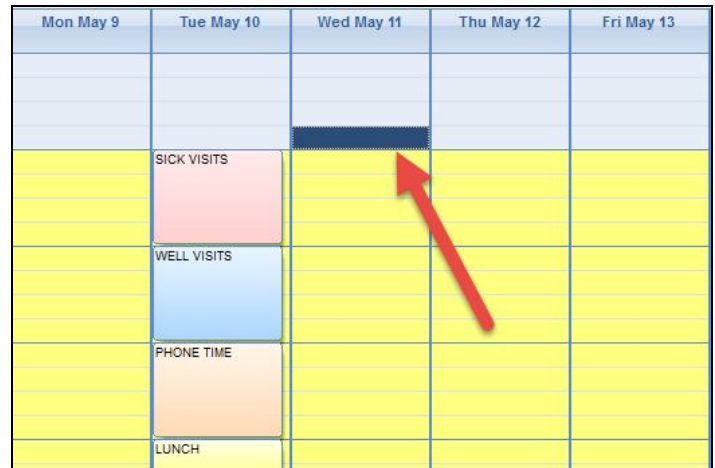
2. Click **Week** button.
3. Select anywhere on the provider's schedule that you wish to copy, and **left click once**.



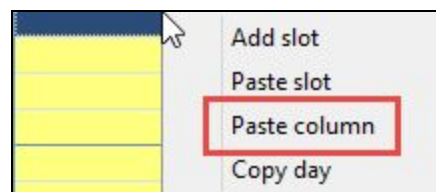
4. Then right click once for the fly out window of options select **Copy Column**.



5. Click into the next available column that you wish to apply to your copied column by left clicking once into that open column.



6. Then right click once for the fly out window of options select **Paste Column**.



7. **Repeat** steps 5-6 as necessary for all days that should have these slots applied.

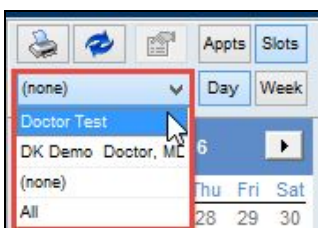
8. When all slots are applied as desired, click **Appts** to save your modifications.



## Copy Weeks

From **Slots** mode:

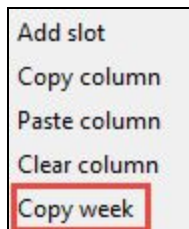
- Click on the drop down above the calendar to choose a provider.



- Click **Week** button.
- Select anywhere on the provider's schedule that you wish to copy, and **left click once**.

Mon May 9	Tue May 10	Wed May 11	Thu May 12	Fri May 13
SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS
WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
PHONE TIME	PHONE TIME	PHONE TIME	PHONE TIME	PHONE TIME
LUNCH	LUNCH	LUNCH	LUNCH	LUNCH
SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS
WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS	WELL VISITS
SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS	SICK VISITS

- Then right click once for the fly out window of options and select **Copy Week**.



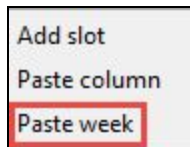
- Click into the next available week that you wish to apply your copied week.

Mon May 23	Tue May 24	Wed May 25	Thu May 26	Fri May 27	Sat May 28

- Then left click anywhere once into that open schedule.

Mon May 23	Tue May 24	Wed May 25	Thu May 26	Fri May 27

- Then right click once for the fly out window of options select **Paste Week**.



- Repeat** steps 5-6 as necessary for all weeks that should have these slots applied.

- When all slots are applied as desired, click **Appts** to save your modifications.

