Schedule Slots QRG

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Slots, created using Appointment Zones, are used to establish a scheduling framework for your practice. They designate blocks of time to specific types of visits and are color-coded to provide visual indication. Slots, however, unless protected, do not prevent the scheduling staff from scheduling an appointment in a Slot that is intended for a different type of visit. Your practice should have clear guidelines in place for when it is appropriate to not schedule according to Slot designation.

Appointment Zones

Prior to creating and applying Schedule Slots, review and update the Appointment Zone types that your practice will use during the day.

Note: The user must have the following permissions to perform these functions: **Schedule_View** and **Schedule_Manage_All_Slots**.

Review Appointment Zones

1. Navigate to the Appointment Types and Zones window: **Practice Management tab > Appointments.**
2. Select the **Appointment Zones** tab.

Create an Appointment Zone

1. Click the **Add** button to add an Appointment Zone. A new entry line is added to the grid.
2. Complete the fields below:
   a. **Appointment Zone**: Click in the field and type a name for the zone.
   b. **Zone Color**: Click the drop-down arrow and select from the list or click the **Ellipsis** and choose a color. This is the color that is displayed on the Schedule.
   c. **Protection Status**: Click the drop-down arrow and select from the list:
      - **Not Protected**: Any staff member can make an appointment in this zone at any point now or in the future.

- **Owner Protected**: Only administrators and the person whose schedule the zone is on can make appointments in this zone (typically used for zones such as Lunch and Vacation).
- **Same Day Only**: Appointments can only be made in this zone on the current day. Only the Calendar owner or administrator can pre-book in this zone.
- **Staff Protected**: These slots will not be available to parents/patients who are trying to Live Schedule on the Patient Portal (if enabled for your practice).
- **Purpose**: Click the drop-down arrow and select from the list.
  Note: The Zone Purpose gives users the ability to define the purpose of their Appointment Zones. It 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.

e. **Max Appt**: Click in the field and type a number.
Note: This setting indicates the maximum number of appointments that may be scheduled in a zone, essentially controlling overbooking. A **zero** indicates there is no max number of appointments that may be scheduled in a zone.

3. Click the **Save** button .

Edit an Appointment Zone

1. Highlight the desired Appointment Zone to edit.
2. Click the **Edit** button .
3. Edit the Appointment Zone as necessary.
4. Click the **Save** button .

Delete an Appointment Zone

Note: Any Appointment Zone that has already been used or applied in a Schedule Template cannot be deleted. If you attempt to delete such an Appointment Zone, OP displays a popup stating, “Cannot Delete, Code In Use.”

1. Highlight the desired Appointment Zone to delete.
2. Click the **Delete** button .

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Add Slots

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button.**
2. Select the **Office View** tab to view all schedules.

3. Click the **Slots** button located above the Calendar on the right panel of the window.

   Note: To work on the schedule for one provider, click the drop-down arrow located above the small calendar to select a provider and the **Week** button. If you prefer to only look at one day, it is *not* necessary to select a provider from the drop-down menu.
4. Select a zone to apply to the Schedule from the **Appointment Zone** drop-down.
5. Double-click the time slot on the Calendar where that Appointment Zone should be applied. Two red boxes are added to the new Schedule Slot:
   - The red square at the top of the Appointment Zone can be used to move the entire Appointment Zone to a different time.
   - The red square at the bottom of the Appointment Zone can be used to extend the zone.

     Note: If you chose an incorrect Appointment Zone in error, right-click the slot and choose another Appointment Zone.
6. Repeat steps 4 and 5 until all slots have been added to the Schedule or follow the sections below to complete your slots.
7. Click the **Appts** button to return to the appointment view of the Schedule.

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Copy Slots

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button**.
2. Select the **Office View** tab to view all schedules.
3. Click the **Slots** button located above the Calendar.
4. Select a slot to copy, right-click, and select **Copy Slot**.
5. Click in the slot you would like to copy the slot to.
6. Right-click and select **Paste Slot**.
7. Click the **Appts** button to return to the appointment view of the Schedule.

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Copy Column to Another Provider

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing > Schedule button**.
2. Select the **Office View** tab to view all schedules.
3. Click the **Slots** button located above the Calendar.
4. Click anywhere on the Schedule of the Provider you would like to copy.

5. Right-click and select **Copy column**.
6. Click anywhere on the Schedule of the Provider you would like to paste the slots.
7. Right-click and select **Paste column**.
    - If the selected Provider's schedule already contains Appointment Zones, OP displays a warning to do the following:
        - **Replace**: Replaces the Appointment Zones in the selected column.
        - **Merge**: Combines the Appointment Zones in the selected column.
        - **Cancel**: Cancels the Copy Column action.
8. Click the **Appts** button to return to the appointment view of the Schedule.

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Copy Column Using Week View

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button**.
2. Select the **Office View** tab to view all schedules.
3. Click the **Slots** button located above the Calendar on the right panel of the window.
4. Click the drop-down to select a Provider.
5. Click the **Week** button to the right of the provider drop-down.
6. Right-click anywhere on the Provider's schedule and select **Copy column**.
7. Click in the column you would like to paste the slots to.
8. Right-click and select **Paste Column**.
9. Click the **Appts** button to return to the Appointment View of the Schedule.

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Copy a Week

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button**.
2. Select the **Office View** tab to view all schedules.
3. Click the **Slots** button located above the Calendar on the right panel of the window.
4. Click the drop-down and select a Provider.
5. Click the **Week** button to the right of the provider drop-down.
6. Right-click anywhere on the Provider's schedule and select **Copy week**.
7. Navigate to a different week or use the Calendar to select a different month..
8. Right-click and select **Paste week**.

9. Click the **Appts** button to return to the Appointment View of the Schedule.

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Copy a Day

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button.**
2. Select the **Office View** tab to view all schedules.
3. Click the **Slots** button located above the Calendar on the right panel of the window.
4. Verify the **Day** button is selected.
5. Right-click anywhere on the schedule and select **Copy Day**.
6. Navigate to a different week or use the Calendar to select a different month and select a day.
7. Right-click anywhere on the schedule and select **Paste Day**.
8. Click the **Appts** button to return to the Appointment View of the Schedule.

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Remove Slots or Columns

Delete a Slot:

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button.**
2. Select the **Office View** tab to view all schedules.
3. Click the **Slots** button located above the Calendar on the right panel of the window.
4. Navigate to the slot you would like to remove and select it.
5. Right-click and select **Delete slot**.
6. Click **OK** to delete the slot or **Cancel** to keep the slot.

Clear a Column:

1. Navigate to the Schedule: **Clinical, Practice Management, or Billing tab > Schedule button.**
2. Select the **Office View** tab to view all schedules.
3. Click the **Slots** button located above the Calendar on the right panel of the window.
4. Click anywhere on the Schedule of the Provider of the column you would like to remove.
5. Right-click select **Clear Column**.
6. Click **OK** to remove the slots in the column or **Cancel** to keep the slots.

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