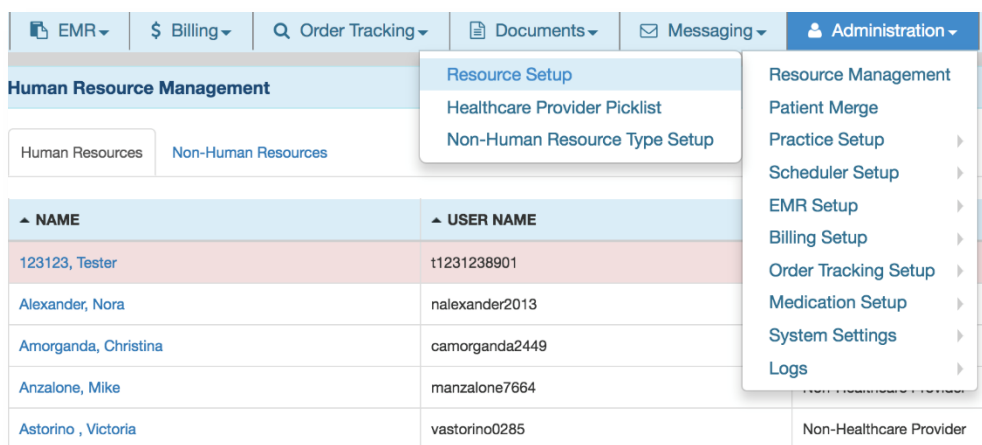# PROVIDER SCHEDULE TEMPLATE

🖥 GO TO

Administration → Resource Management → Resource Setup → Click on Provider Name

From here, you will click on the provider's schedule tab and complete the following steps as necessary.
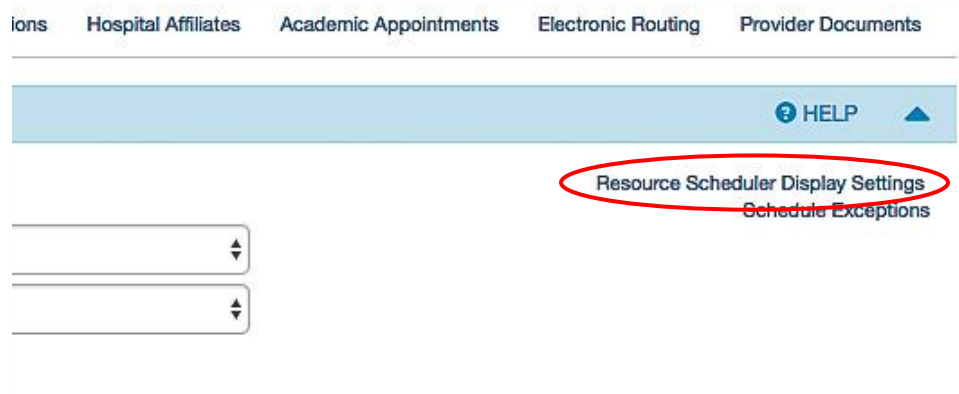

☰ STEPS

Part I:

Click on 'Resource Scheduler Display Settings' and enter the following information:

1. Select the EARLIEST time this provider will ever see a patient
2. Select the LATEST time this provider would ever end his/her appointments (this will need to be the END of the apt as it needs to provide 'wiggle' room to be able to book the last apt)
3. Select the smallest time interval for the provider's appointments
4. Click 'Submit' and then 'Back to Schedules'

Part II:

From the Schedules tab:

1. Select your location
2. Select your option for Appointment Type (Appointment Type can be left to 'Any', which means any type of appointment can be seen, or you can create template based on a specific appointment type)
3. Click 'Make New Schedule' Effective Date will default to one year – this can be extended if desired
4. Recurrence should be selected as weekly, every other week, every 3 or every 4 weeks, depending on the provider's availability
5. Click 'Continue'
6. From here, you will individually select (or click and drag) the time parameters that the provider is available to see patients on any specific days/times. Any box in red signifies that the provider is AVAILABLE to see patients, while any box shaded grey means they are UNAVAILABLE.
7. Please note – for any break time, leave box open so patients can't be booked
8. Click 'Save'

💡 NOTES

Creating PERMANENT Changes to the templates:

To create a permanent change to the template, you will want to go to the provider's schedule tab and click on 'View Current Schedule". From here, click on the effective date, alter the template by removing or adding time, and click 'Save'. This will change the template going forward, on a permanent basis.