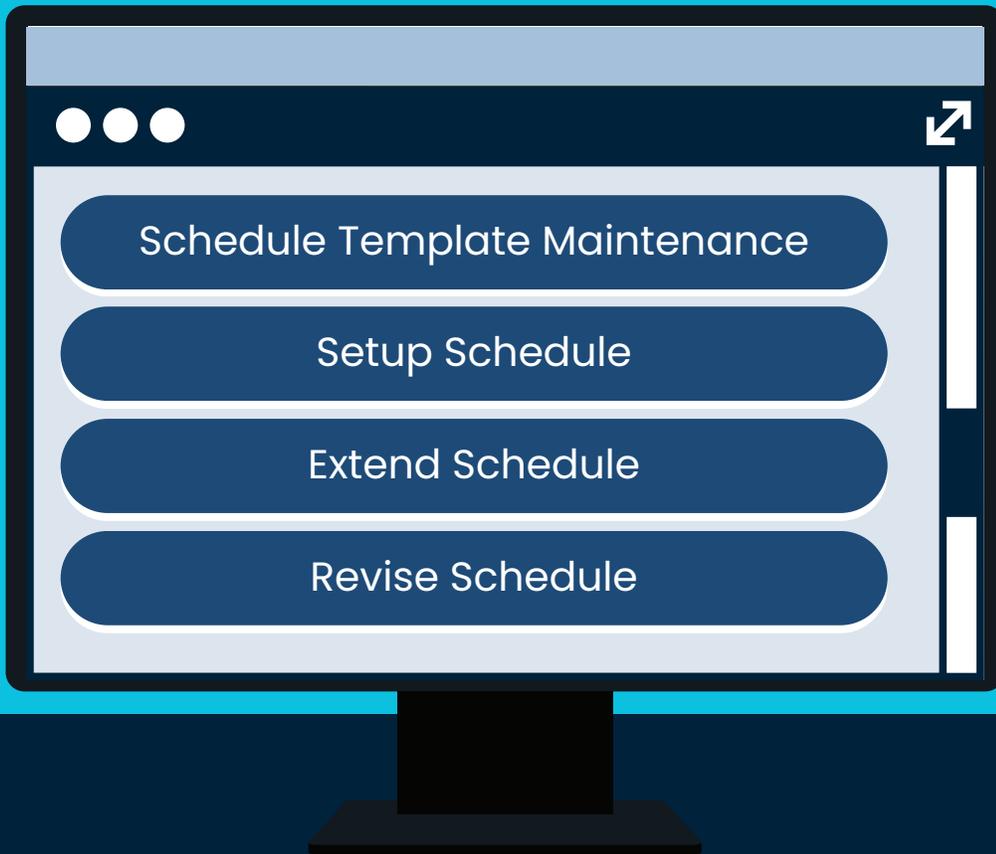


# Schedule Templates

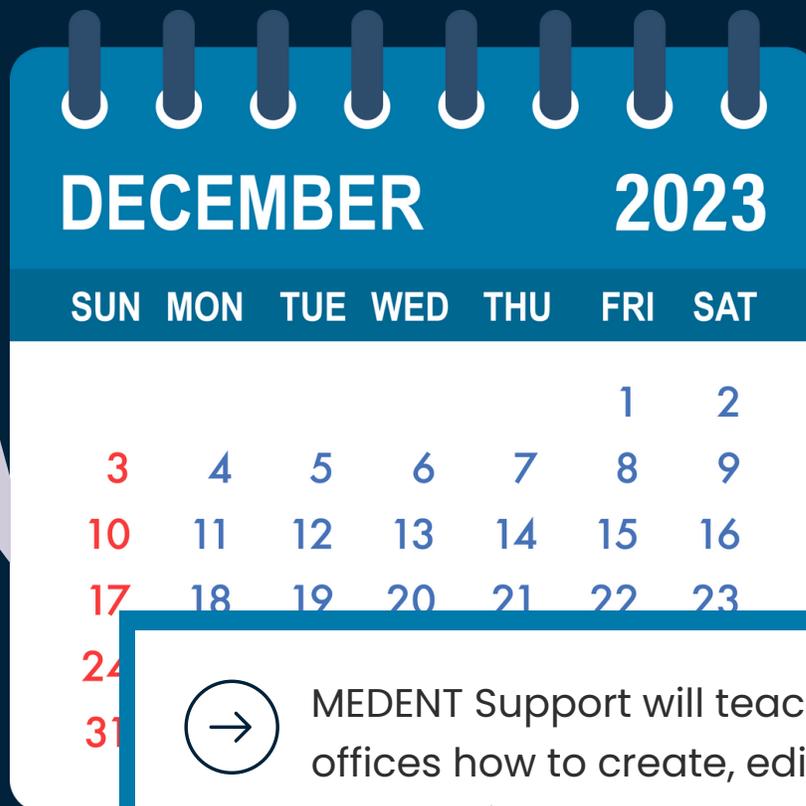
A guide on how to build schedules in MEDENT.



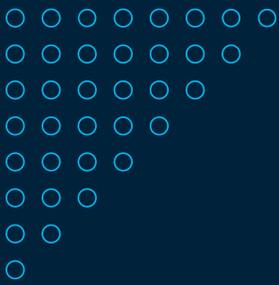
# Contents

→	Create Schedule Template	Page 3
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→	Setup Schedule	Page 11
→	Extend Schedule	Page 20
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→	Resources	Page 22

# MEDENT clients are responsible for maintaining **their own schedules.**



MEDENT Support will teach offices how to create, edit or extend scheduling templates. However, each office should be responsible for maintaining that schedule.



# Schedule Template Maintenance

A daily template should be set up for each set of scheduling circumstances. Days that have the same office hours can share a template.



## Create the Schedule Template

Practice Management > Appointments >  
Office Appointment Maintenance >  
Schedule Template Maintenance

**1**  Pick your provider.

**2**  Click New.

**3** 

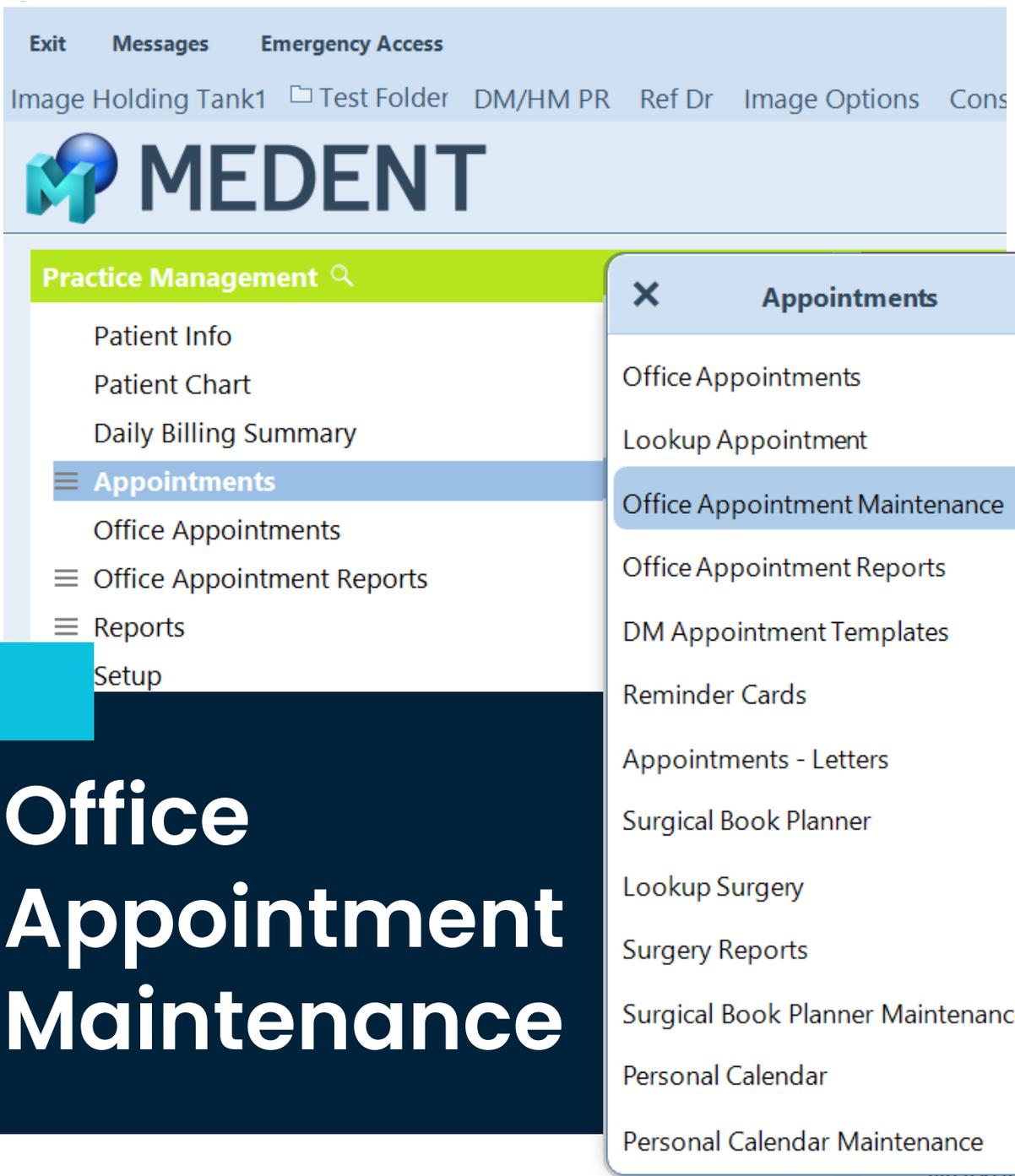
Answer the copy prompt.

 **Yes.**

Select the provider and template to copy.

 **No.**

Enter a code and description.



# Office Appointment Maintenance

From the main menu, under Practice Management, click Appointments and Office Appointment Maintenance.



# Doctor Selection

Schedule Template Maintenance

Setup Schedule

Extend Schedule

Revise Schedule

Type of Appointment Maintenance

Location Color Maintenance

Format Appointment Reminder Cards

Setup Patient Arrival Printers

Appointment Group Template Maintenance

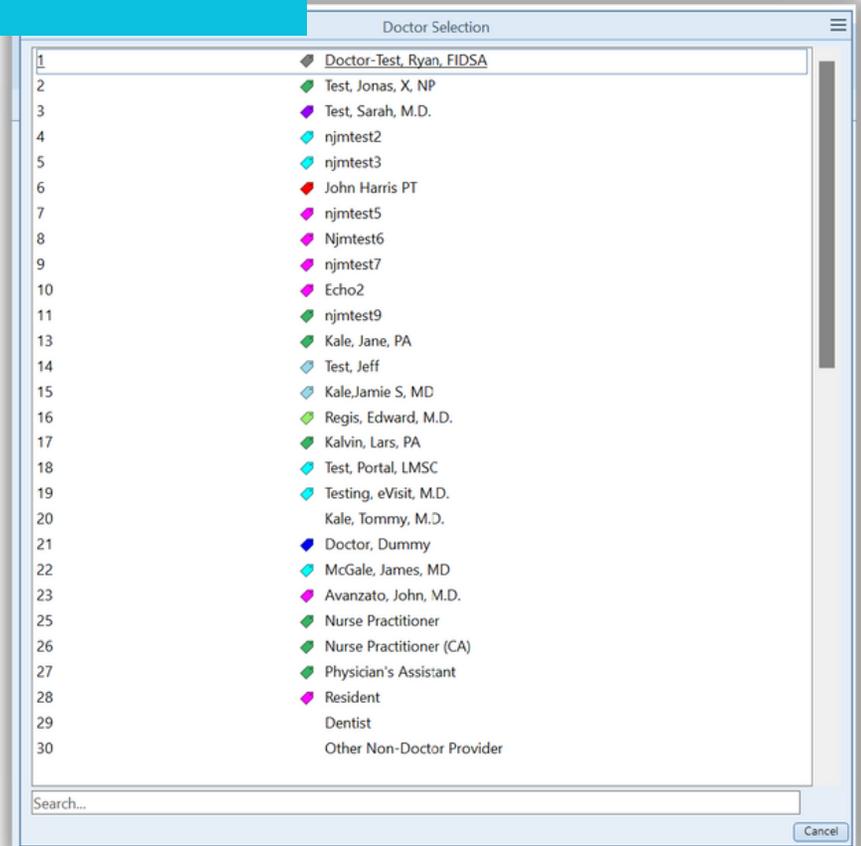
My Appointment Screen Setup

Other Appointment Screen Setup

Holidays/Days Off/Vacation Utility

Patient Late Cancel / Late Reschedule

Reason for Cancel / Reschedule



Click Schedule Template Maintenance and select the provider.

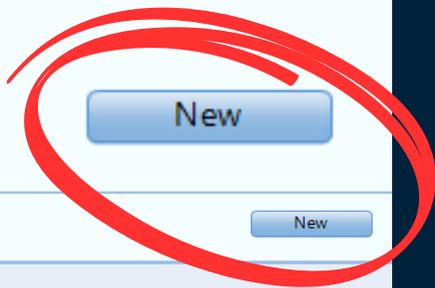


Hide/Show Deactivated

Schedule Template Maintenance for Dr # 1 Ryan Doctor-Test, FIDSA

Schedule Template Code Options

Code (*Deactivated)	Description
24 hr	24 hr schedule
8-5	Normal W
Ext	Extended
LM	LM sched
New	new temp
new	new temp
Sat	Saturday
Vid	Video Vis



**CLICK NEW.**

**Copy Prompt**

MEDENT will ask

**Do You Want To Copy Over Another Doctor's Template?**

→

Do You Want to Copy Over Another Doctor's Template

**Yes**

Click yes to copy another Provider's template codes.

**No**

Click No to create unique template codes for each Provider.

### New Schedule Template

Code

Desc

Enter Schedule Template Code

# Unique Template Codes

## Code

Enter the Schedule Template Code. This can be alpha, numeric or both.

## Desc

Enter the Schedule Template Description.

Example:

### New Schedule Template

Code

Desc

Enter Schedule Template Description

# Create the Schedule Template Code Time Slots

When creating a template code, the user has the option to copy over from another Doctor's templates.

Would You Like to Copy Over Another Days Template Schedule

Maintenance Options

- 1) New Time Slots
- 2) Edit Time Slot
- 3) Delete Time Slot
- 4) Print Template
- 5) Edit Template Description
- 6) Edit Template Comments

Enter Maintenance Options

MEDENT will ask  
**Would You Like to Copy Over Another Days Template Schedule?**

**Yes.** Copy another Provider's template into this Provider's template.

**No.** Create the time slots, types and location for that template code using the Maintenance Options.



# Maintenance Options

NOTE: Time slots do not have to be entered. When creating a BLANK template, we do not put any time slots in at all.

## Maintenance Options

- 1) New Time Slots
- 2) Edit Time Slot
- 3) Delete Time Slot
- 4) Print Template
- 5) Edit Template Description
- 6) Edit Template Comments



Enter Maintenance Options

1

## 1) New Time Slots

Add a range of time slots.

## 2) Edit Time Slot

Change existing time slots (Type, Length, Location, Note, Available).

## 3) Delete Time Slot

Delete existing time slots.

## 4) Print Template

Print individual template or all templates for provider.

## 5) Edit Template Description

Edit template code or description.

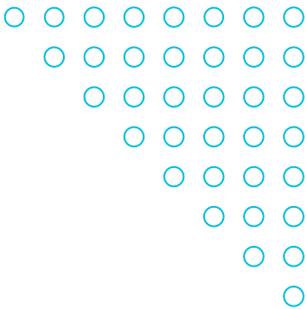
## 6) Edit Template Comments

Edit template comments.

## 7) Change Appointment Threshold

Set a percentage of appointment slots to hold. Example: If you'd like 20% of the day to be set aside for same-day appointments, the threshold should be set to 80%.

EXAMPLE



# Lab Location

### Comments:

Time	Min	Loc	Type	Avl	Note
8:00 am	5	3	A-BT	Yes	
8:10 am	5	3	A-BT	Yes	
8:20 am	10	3		Yes	

Edit Template Schedule

First Slot	8:00 am	Last Slot	8:00 am
Location	3	Imaging Center	
Sched Type	A-BT	Length	5
Available	Yes	Note	

9:20 am	10	3
9:30 am	10	3
9:40 am	5	3
9:50 am	5	3
10:00 am	15	3
10:10 am	10	3
10:20 am	10	3
10:30 am	10	3
10:40 am	5	3

Appointment types can be built into the template for easy searching. (e.g. A-BT, Allergy Blood Test)

Appointment time slots can be set up in any time increments with multiple slots/times.



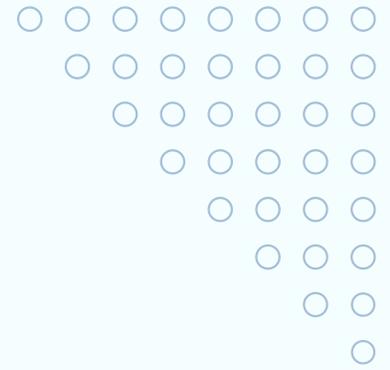
## Schedule Template Code Options

### Code (\*Deactivated)

24 hr  
8-5  
Ext  
Flu  
Lab  
Loc3  
Sat  
Vid

### Description

24 hr schedule  
Normal Work Day  
Extended Hours  
Flu Clinic  
Lab Location  
Location 3  
Saturday 8-12pm  
Video Visits



New

Edit/View

De/Reactivate



Create every possible code to accommodate all Provider(s)/ Resource schedules for the office(s) at all locations.



# Next Steps



## Setup Schedule

Set up how each day should look for your providers.



## Extend Schedule

Extend the schedule.



## Revise Schedule

Correct any existing templates.

NOTE: You must **Setup Schedule** to assign the templates before extending any provider's schedule. MEDENT recommends reviewing the templates before extending schedules.



# Setup Schedule

01

## Setup Schedule

Click Appointments > Office Appointment Maintenance and select Setup Schedule.

02

## Doctor Selection

Select your provider.

03

## Daily Schedule

Set up how each day should look for this provider.

04

## Extend Schedule

Extend the schedule for a specific time frame.



Exit Messages Emergency Access

Image Holding Tank1 Test Folder DM/HM PR Ref Dr Image Options Cons



Practice Management 🔍

- Patient Info
- Patient Chart
- Daily Billing Summary
- Appointments**
- Office Appointments
- Office Appointment Reports
- Reports
- Setup

**Appointments**

- Office Appointments
- Lookup Appointment
- Office Appointment Maintenance**
- Office Appointment Reports >
- DM Appointment Templates
- Reminder Cards
- Appointments - Letters >
- Surgical Book Planner
- Lookup Surgery
- Surgery Reports >
- Surgical Book Planner Maintenance >
- Personal Calendar
- Personal Calendar Maintenance >

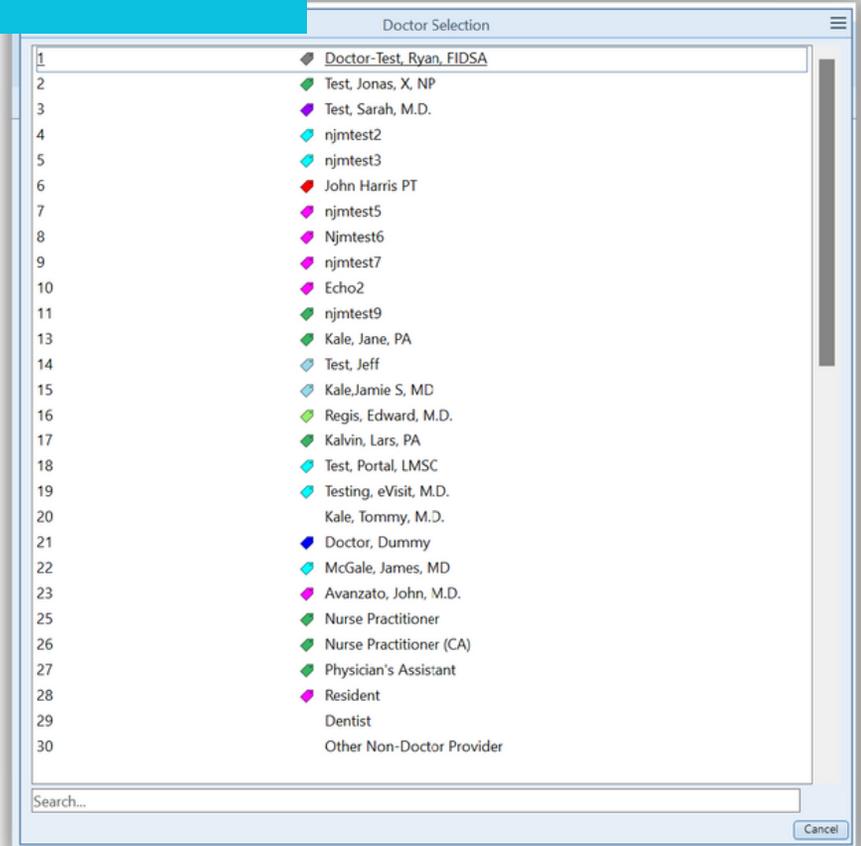
# Office Appointment Maintenance

From the main menu, under Practice Management, click Appointments and Office Appointment Maintenance.



# Doctor Selection

- Schedule Template Maintenance
- Setup Schedule**
- Extend Schedule
- Revise Schedule
- Type of Appointment Maintenance
- Location Color Maintenance
- Format Appointment Reminder Cards
- Setup Patient Arrival Printers
- Appointment Group Template Maintenance
- My Appointment Screen Setup
- Other Appointment Screen Setup
- Holidays/Days Off/Vacation Utility
- Patient Late Cancel / Late Reschedule
- Reason for Cancel / Reschedule



Click Setup Schedule and select the provider.



Main Menu > Office Maintenance Menu > Appointments Ryan No PHI v237 RC

Update Template Setup By Day Doctor Next Blank Copy Schedule Log

Ryan Doctor-Test, FIDSA Doctor's Schedule December 2023

Today Move 12/25/23 Weeks 1 2 3 4 5 6 Months 1 2

Sun	Mon	Tues	Wed	Thu	Fri	Sat
26 Template	27 Template 8-5	28 Template 8-5	29 Template 8-5	30 Template 8-5	31 Template 8-5	01 Template 8-5
03 Template	04 Template 8-5	05 Template EXT	06 Template 8-5	07 Template 8-5	08 Template 8-5	09 Template 8-5
10 Template	11 Template 8-5	12 Template EXT	13 Template 8-5	14 Template 8-5	15 Template 8-5	16 Template 8-5
17 Template	18 Template 8-5	19 Template EXT	20 Template 8-5	21 Template 8-5	22 Template 8-5	23 Template 8-5
24 Template	25 Template	26 Template EXT	27 Template 8-5	28 Template 8-5	29 Template 8-5	30 Template 8-5
31 Template	01 Template	02 Template	03 Template	04 Template	05 Template	06 Template

# Select Template

To change a template on a specific date:



25 Template

**01** Click the date.

**02**  
Select the template.

Select Template(s) to Update

Code	Description
24 hr	24 hr schedule
EXT	Extended Hours
FLU	Flu Clinic
HOL	HOLIDAY
LAB	Lab Location
Loc3	Location 3
8-5	Normal Work Day
Sat	Saturday 8-12pm
Vid	Video Visits

24 hr 24 hr schedule

Would you like to change all Mondays to HOL by a Date Range?

Yes

No

**03**  
Answer the date range prompt.

# Setup By Day

**Setup By Day**

Template Codes by Day

Sunday	
Monday	8-5
Tuesday	EXT
Wednesday	8-5
Thursday	EXT
Friday	8-5
Saturday	Sat

Select Date Range for Templates by Day

Date Range  to

OK

Enter Ending Date for Templates by Day



Click **Setup By Day** at the top of the screen to select Template Codes for each day of the week. Then, select a Date Range for these codes to be used.

Copy a single month

# Copy Schedule

Copy Schedule

Copy Type	
1) Copy a single month	
2) Copy by date range	
Enter Copy Type	<input type="text" value="1"/>

Copy a prior month's calendar, matching up last month's days to this month's.



## Copy Templates for Month

Start on the month to copy to: (Click on Next Blank Month button)

This feature allows you to copy chosen provider's template schedule from a prior month to the same provider's next open (blank) month. Days, hours and location should be the same for each month. You are not able to cross copy from one provider to another.

Copy templates from October 2023 over to November 2023, for Doctor 1.

Month to Copy

Copy to Doctors

Start Copying

Copy by date range

# Copy Schedule

NOTE: **Next Blank** takes you to the next blank calendar.



Copy Schedule

This feature will copy one part of the schedule's templates to the date specified by Paste Date. You may paste these days multiple times using the "Repeat Paste" field.

Blank days will not overwrite templated days and if "Warn if overwriting" is checked, you will be notified if a template already exists for each day.

Copy schedule for Ryan Doctor-Test, FIDSA

Start Date  
Paste Date

11/29/23  
11/29/23

Ending Date  
Repeat Paste

11/29/23  
1 time(s)

Warn if overwriting

OK

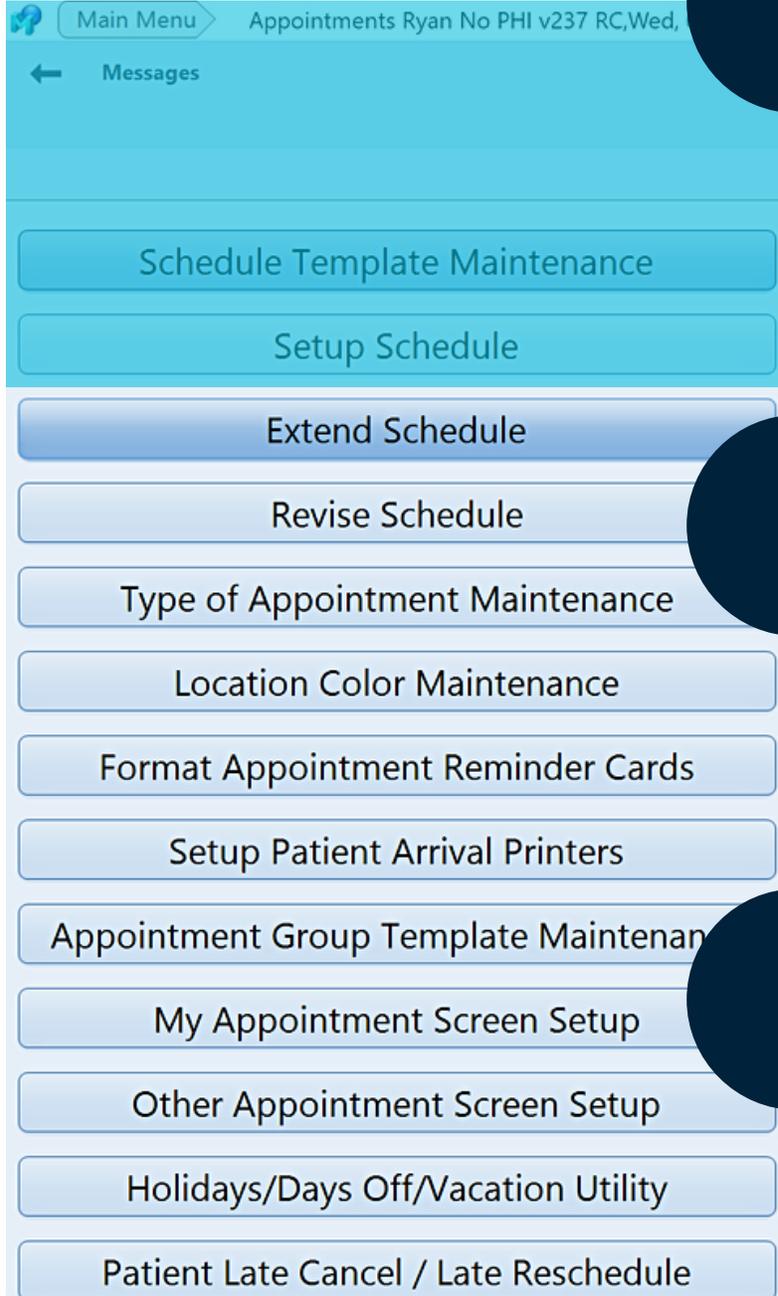
Cancel

Enter starting copy from date

Copy one part of a schedule's templates Start Date through Ending Date to the date specified by Past Date.

# Extend the Schedule

As the schedule is extending, MEDENT displays the days and dates as they are being added. MEDENT will return to the Office Maintenance Menu upon completion.



## Extend Schedule

Once Setup Schedule has been complete for the provider, click Extend Schedule in the Office Appointment Maintenance Menu.

## Warning

A warning states the user may not be able to switch windows. Click yes to continue.

## Select Doctor(s).

Select the doctor(s).

# Revise the Schedule

## SETUP SCHEDULE

- Select the provider.

## REVISE ONE DAY

- Click on the day.
- Click on the template.
- Answer the prompt.
- If yes, enter date range.

## REVISE FOR MORE THAN ONE DAY OF THE WEEK

- Click on Setup by Day.
- Click each day's dropdown to select a template.
- Click the check mark.
- Enter the date range.
- Answer the prompt.
- If no, select the next provider to set up.
- If yes, answer the **Revise Schedule Options**.

If any changes or corrections are necessary, the user will need to Setup and Revise the Schedule. NOTE: Users will see two warnings advising you to consult with MEDENT prior to revising the schedule.



**Revise Schedule for Every Doctor?**

**Revise Schedule for the Whole Day?**

**Set Availability of Time Slots from Template**

**Update Schedule With Notes From Template**

**Update Schedule Comment Line From Template**



# More Information



Don't forget to refer to our MEDENT Manual, Video Tutorials and Webinar Recordings for more info!

-  [Office Appointment Maintenance Manual](#)
-  [Office Appointment Maintenance Tutorials](#)
-  [Better Booking: How to Build Schedules in MEDENT Webinar](#)

