How to build **schedules in medent.**

Schedule Templates
A guide to scheduling in medent.

Table of Contents

medent clients are responsible for maintaining **their own schedules.**

DECEMBER 2023

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24						
31						

→ 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

Doctor Selection ≡

1	Doctor-Test, Ryan, FIDSA
2	Test, Jonas, X, NP
3	Test, Sarah, M.D.
4	njmtest2
5	njmtest3
6	John Harris PT
7	njmtest5
8	Njmtest6
9	njmtest7
10	Echo2
11	njmtest9
13	Kale, Jane, PA
14	Test, Jeff
15	Kale,Jamie S, MD
16	Regis, Edward, M.D.
17	Kalvin, Lars, PA
18	Test, Portal, LMSC
19	Testing, eVisit, M.D.
20	Kale, Tommy, M.D.
21	Doctor, Dummy
22	McGale, James, MD
23	Avanzato, John, M.D.
25	Nurse Practitioner
26	Nurse Practitioner (CA)
27	Physician's Assistant
28	Resident
29	Dentist
30	Other Non-Doctor Provider

Search...

Cancel

Click Schedule Template Maintenance and select the provider.

Schedule Template Code

Code (*Deactivated)

24 hr
8-5
Ext
LM
New
new
Sat
Vid

Description

24 hr schedule
Normal Work Day
Extended Hours

Click New.

Copy Prompt

medent will ask

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

→

New

Do You Want to Copy Over Another Doctor's Template   Yes   No

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	LAB
Desc	Lab Location

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   1
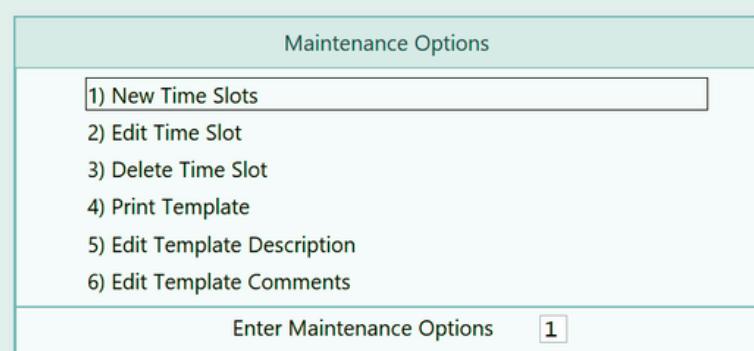
medent will ask **Would You Like to Copy Over Another Days Template Schedule?**

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

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

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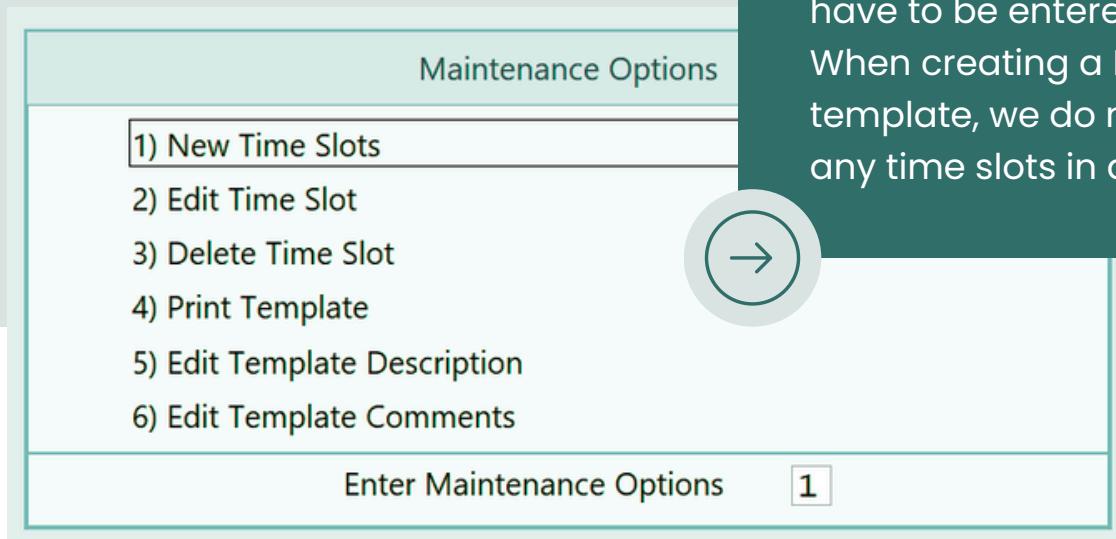
1) New Time Slots

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%.

Lab Location

Doc# 1 Ryan Doctor-Test, FIDSA T

Comments:

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

9:10 am	10	3		Yes
9:20 am	10	3		
9:30 am	10	3	U	
9:40 am	5	3	A	
9:50 am	5	3	A	
10:00 am	15	3	)	
10:10 am	10	3		
10:20 am	10	3		
10:30 am	10	3	U	
10:40 am	5	3	A	

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.

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.

$\rightarrow$

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.

Office Appointment Maintenance

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

Doctor Selection

Schedule Template Maintenance

Setup Schedule

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Revise Schedule

Type of Appointment Maintenance

Location Color Maintenance

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Search...

Cancel
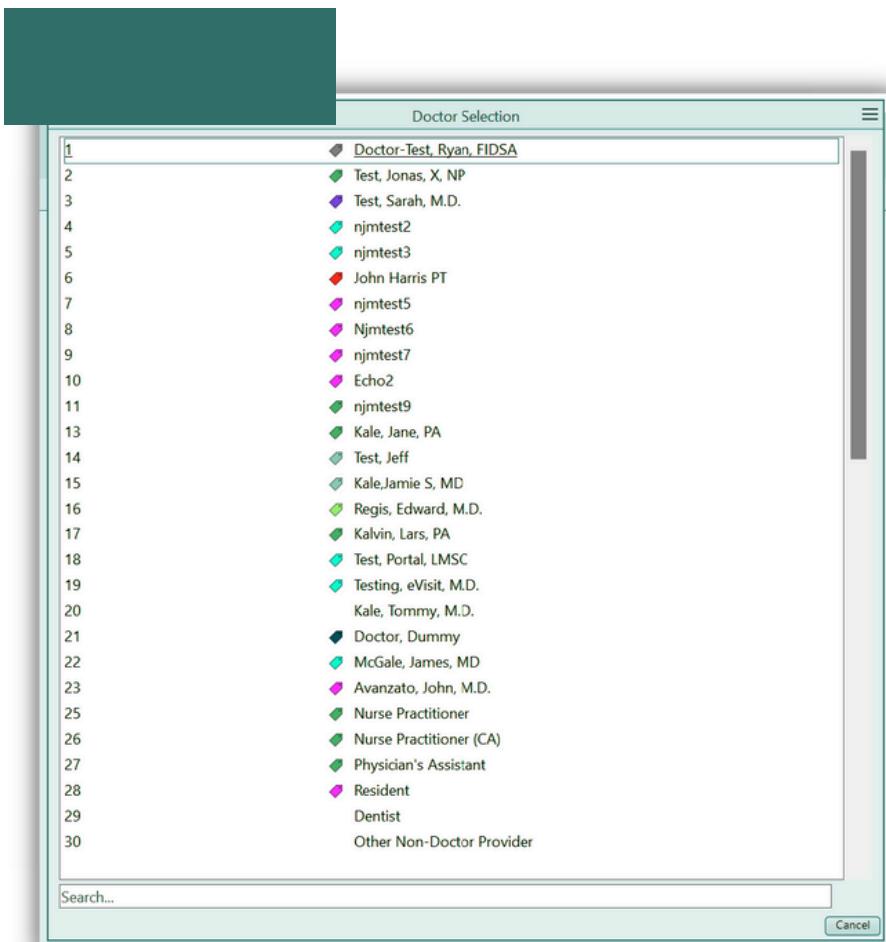
Click Setup Schedule and select the provider.

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

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.

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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   12/01/23   to   12/31/23

OK

Enter Ending Date for Templates by Day

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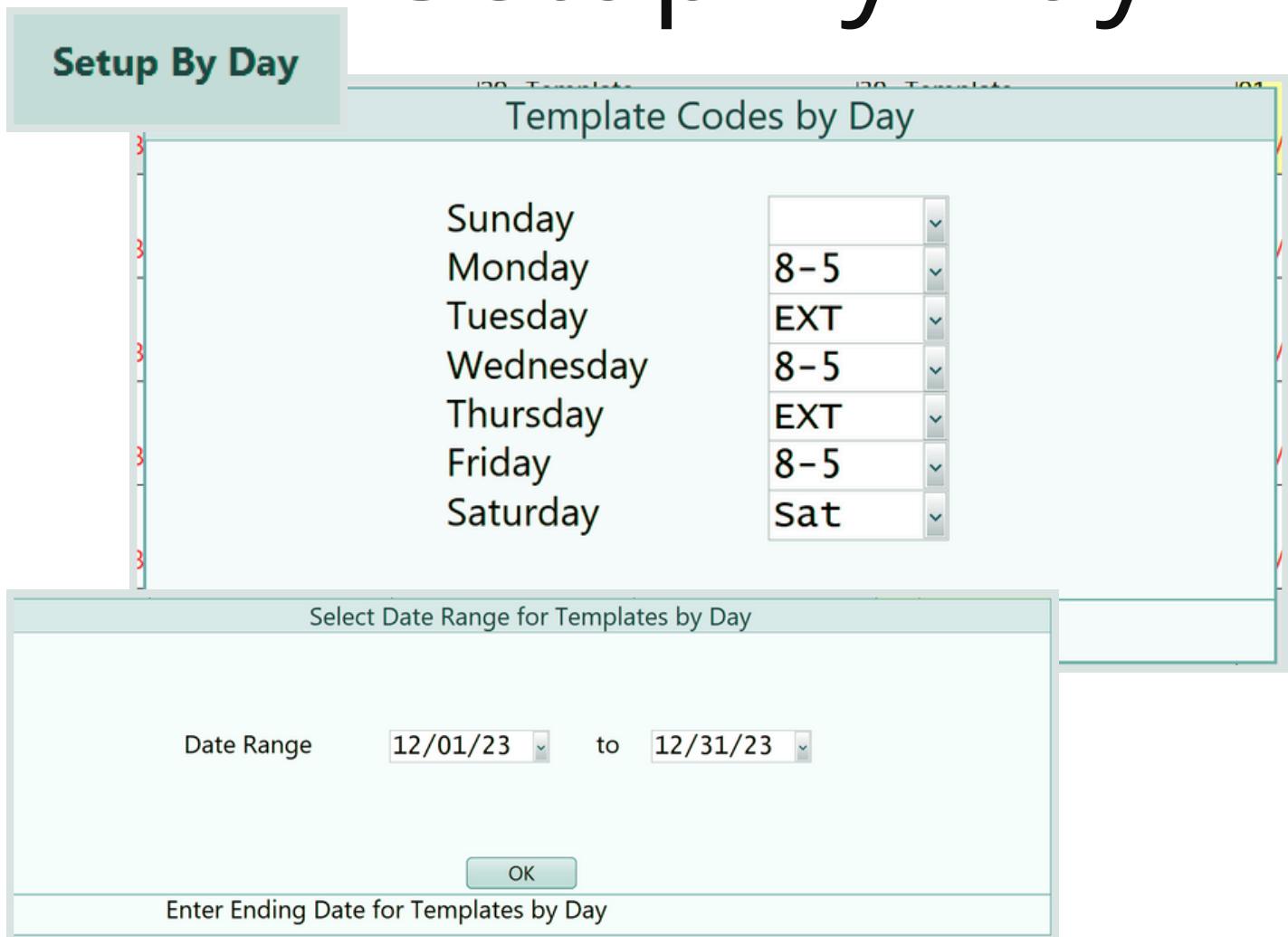
Click **Setup By Day** at the top of the screen to select Template Codes for each day of the week. Then, select a Date Range for these codes to be used.

Copy Schedule

Copy Schedule

Copy Type

1) Copy a single month
2) Copy by date range

Enter Copy Type   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 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 | 11/29/23 | Ending Date | 11/29/23 |
| Paste Date | 11/29/23 | Repeat Paste | 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.

Schedule Template Maintenance

Setup Schedule

Extend Schedule

Revise Schedule

Type of Appointment Maintenance

Location Color Maintenance

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Reason for Cancel / Reschedule

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

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