How do I...

Create my schedule for next month (or year)?

The screen shots included in these instructions may differ from your version of PracticeMaker or the Scheduler. The instructions will be pretty much the same no matter the version or program you are using.

Step 1. Go to the Days Module

From the *PracticeMaker* Main Menu, select Calendar. Click the blue **Days** button near the top of the screen to go to the Days Module.

From *The Scheduler* Main Menu, select **Days**.

Step 2. Set up your Provider(s)

Already Have Template(s)

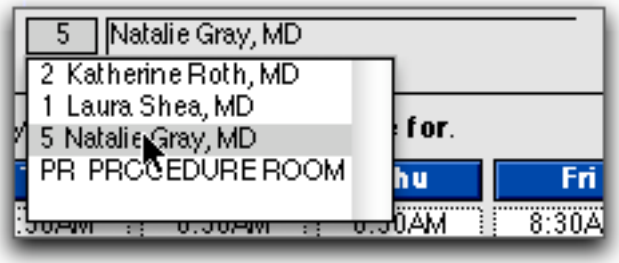
If you already have made templates for your provider(s), you can review the templates and make any changes as necessary. You will need to do this for each provider. You can review every provider at once by clicking on each day at the bottom of the screen where it says "All Providers". To review an individual provider, you will need to click **Setup** (or **Default**), select the provider and then click **Day Slots**. Then you can go through each day of the week by clicking on the button in the row with that provider's name. For minor adjustments, see no. 6 below.

Need to Create Template(s)

If there are any providers for whom you need to make templates, you will need to create the template. When you create a new template, the previous one, if any, is deleted. *This does not affect appointments already in the Appointments module*. This is only the template for slots that will be added!

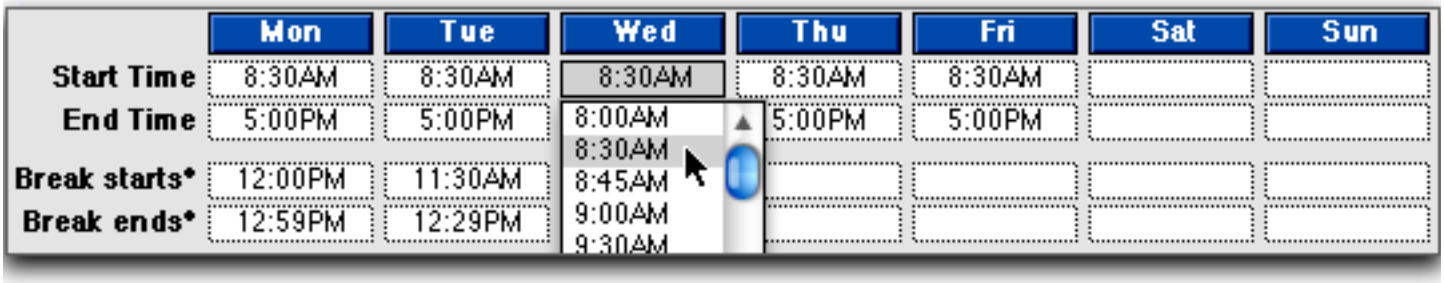
1. Click on **Setup** (or **Default**).

2. Select provider for template building. These providers are stored in the Personnel section of the PhoneBook module and have the box **Examiner** (or **Group**) checked in their individual record. If there is someone for whom you need to make a schedule and the name is not on the list, you will need to make sure there is a record in Personnel and that the proper box is checked.



3. Enter the **Start** and **End** times for each day of the week for which you will be creating a template. If the time you need isn't shown on the list, click again in the time slot and you can enter any time. Afternoon times can be entered as either 1:00PM or 13:00. If you entered

1:00 it would take it as being 1:00AM!



If you want to include a "Lunch Break", enter its start and end times. This flags any slot between these times as "not available". In the example, the first appointment after lunch is at 1:00PM so the break ends at 12:59PM.

4. Select the default spacing between appointments, in minutes, for each day. If you have

different appointment lengths in the mornings and afternoons, make the spacing for the *shorter* appointment. We'll go over adjusting the longer appointments later.

5. Now to actually create the templates. Before actually creating your template(s), be sure that all other parameters associated with that day are properly entered.

To create one daily template at a time just click on the **Day Name Button**, not the check box next to it. Only do this if you are just creating a template for a single day.

To create templates for multiple days (two or more), click in the check box next to each day name. Then click the Fast Build button.

You will get messages telling you that the [Day Name] template for that provider is being created and any old slots are being deleted. After the templates are created, review each and correct any errors.

6. Add or delete slots, adjust times, set visit types now. If you need to put in additional slots, for example every Monday the first three appointments are double-booked, you would add those now. In earlier versions of the software, click on the provider's name and then click **Duplicate Slot**. In later versions, there is a **Dup** button at each slot. To delete a time, click on the trash can to the left. To change a time, click on the time and adjust it accordingly. Visit types can be set now *if they are the same for every day***.** If the first four appointments every Monday are New Patients, select NP for the first four slots. When you build your schedule, *every* Monday will have NP set as the default visit type in the first four slots. This is optional and doesn't need to be done if you will be assigning the visit type when you schedule the appointment.

Step 3. Create the Schedule

Once you are sure your templates are set up properly, make sure the column to the right, **Build**, is green (or checked) for every slot you will be using. If you click the box with the X at the top of the column, it will mark all the slots (in the current found set) to Build. Clicking on an individual box will make it green (or check it).

Once all your slots are selected, click the blue **Calendar** button at the top of the screen. This will take you to the Calendar module, which is where the appointment schedule is built.

There will be a box with a drop down showing a year, be it the current year or another. Make sure it is the proper year for which you will be building appointments. If the year you want is not on the list, click **Edit**, click next to a year, hit return (not your enter key), type the year (or years), and click OK. Then you will be able to select it from the list.

When the proper year is selected, click on **Build Schedule**. You will be taken to where the schedule is built, dates are added to the days and times that were set up in the Days module.

1. Select the start month for which you will be building appointments.

2. Select the end month. If you are building for several months and it has been a while since you last built appointments, make the end month the same as the start month. Once you are sure your appointments are built properly, you can come back and build the rest of the months.

Note: If you are building appointments that wrap around the end of the year (ie: September through June), you will need to select September to December, change the year, then do January through June.

3. Check the days of the week for which you will be building your schedule.

4. Select the provider, if you will be building for everyone, leave it blank.

5. When you are sure of your selections, click **Build**. Go get a cup of coffee, it will take a while to build, longer for networked computers, several months, many providers.

Step 4. Review the Schedule

Go into Appointments and select a date and provider for whom you just created appointments. How does it look? Are they right?

If everything is OK, then you can build more slots (if you only did one month/provider) or you are finished.

If they're not right, go up under **Scripts** to **Toolbox**. This will allow you to delete the appointments you just created. It will present you with a find date dialog. Enter the date you created the appointments under Date Created (often "today") and click Find. You will be given a list of appointments. Quickly go through the list and click **Omit** (on the right) whenever you come to an appointment that has a patient. When you're finished, click **Continue** (on the left) and it will delete all the slots you just created.