

This guide will help you schedule an event for a provider and apply a daily template. With the EPM it is now the expectation that all clinic staff will include their meetings, approved vacation/sick time and personal appointments in the Appointment Book.

I. Intro to Templates & Events

When booking events like meetings, vacation and sick time, there are three ways this can be done.

A. Weekly Templates

The regular weekly schedule that you generally hold each week. Your weekly template is already set for you, so you don't need to worry about it.

B. Daily Templates

Used as an exception to your regular weekly template. Daily templates block you out for an entire day or days. Examples are all-day meetings/conferences, vacation/sick time.

C. Events

Meetings, sick time or other appointments that are less than a full day. You would book these just as any other appointment.

II. Applying a Daily Template

Daily Templates should only be used when booking a provider out for an entire day or days. Anything less than a day should be booked as an event. Once you get the hang of it, daily templates can save a lot of time. Currently these are the daily templates to choose from:

- **Admin: BLOA**
- **Admin: Sick**
- **Admin: Training**
- **Admin: Vacation**
- **MDHFS** (provider is downtown all day)
- **Visit: SSI Appts. Preferred** (to set time aside mainly for SSI patients for a full day)
- **Visit: Sports Physical Appts.** (to set time aside mainly for sports physicals for a full day)

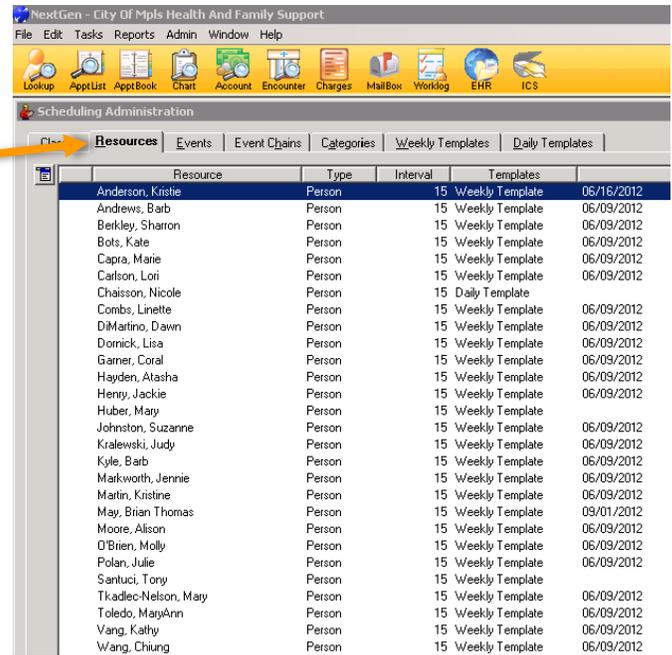
A. On the Menu bar, click on *Admin* and choose *Scheduling Admin*



Hint: You do not need to be in the Appointment Book to access Daily Templates.

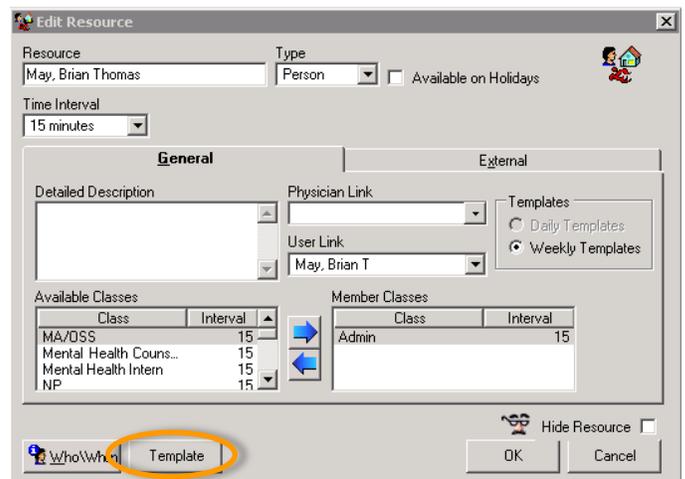
B. Click on the *Resources* tab and choose the resource you need to apply the template.

Note: Currently anyone can apply a Daily Template to anyone's schedule. Therefore, if someone calls in sick, you can block them out for the day so they don't get accidentally scheduled for patient appointments.

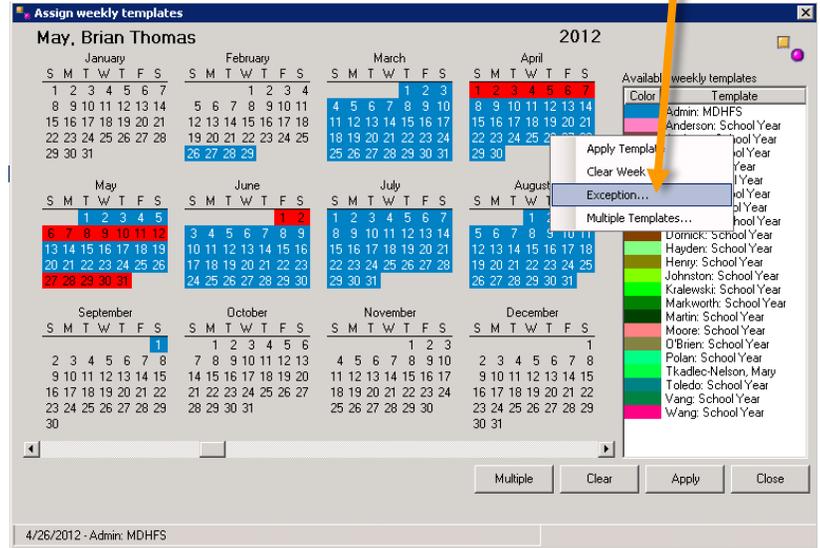


C. Click on the *Template* button

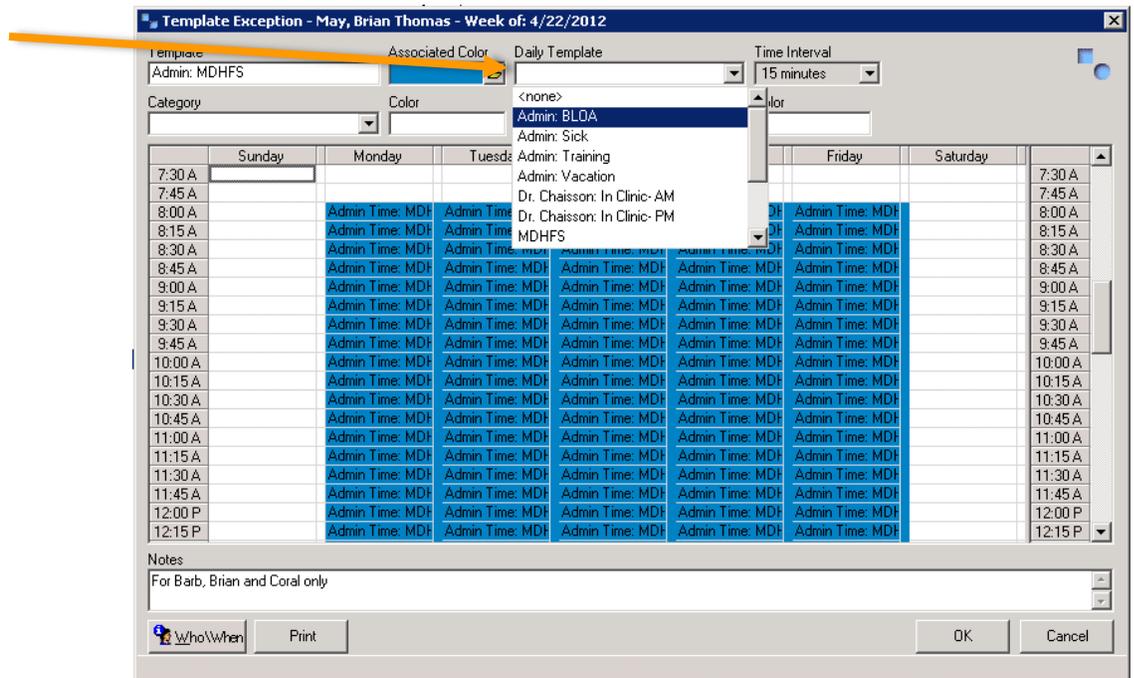
Please do not change any information on the *Edit Resource* screen.



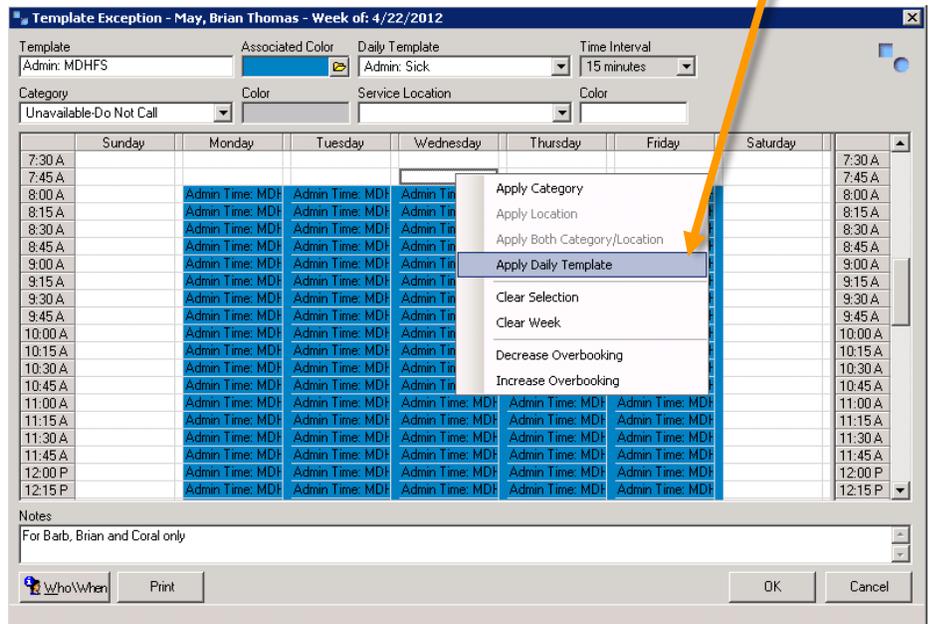
D. Right-click on the date you need to apply a Daily Template and choose *Exception*.



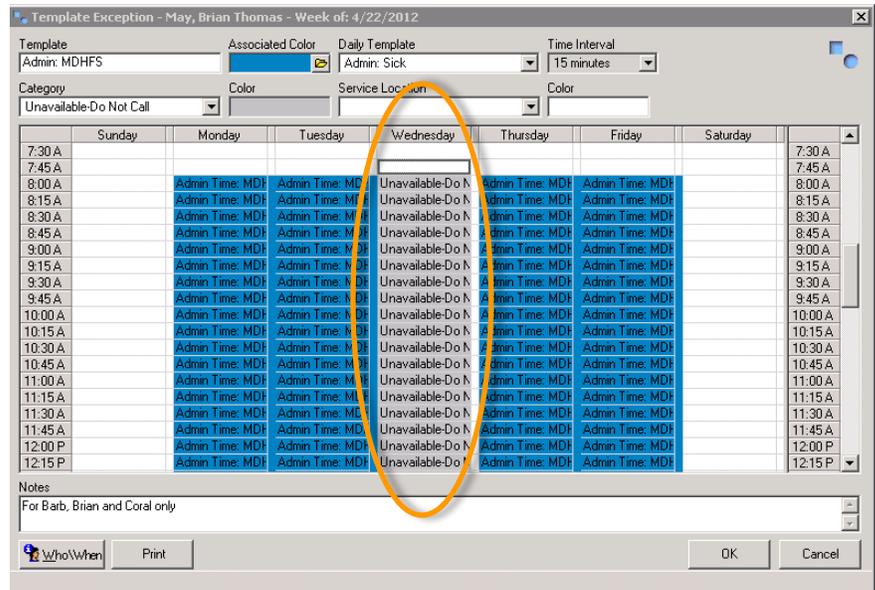
E. Under *Daily Template* choose the template you wish to apply
For this example *Admin: Sick* will be chosen.



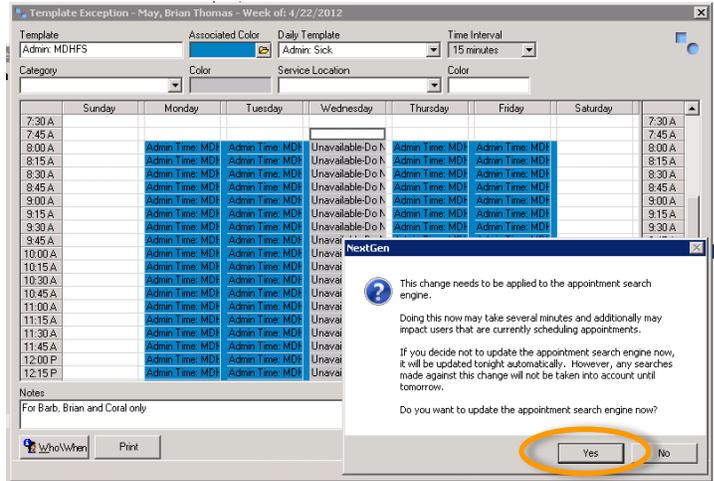
- F. Left-click on 8:00 on the day you want to apply the template then right-click and choose *Apply Daily Template*



- G. The template, category and location have now been applied.
Repeat Step F if you need to apply the template to another date in this week.



H. Click *OK* and select *Yes* on the pop-up warning.

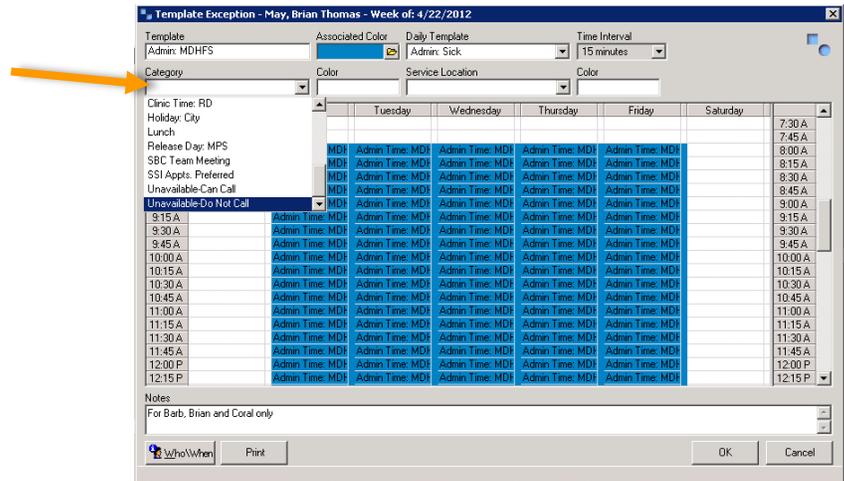


I. Continue to click either *OK* or *Close* until you leave Scheduling Admin.

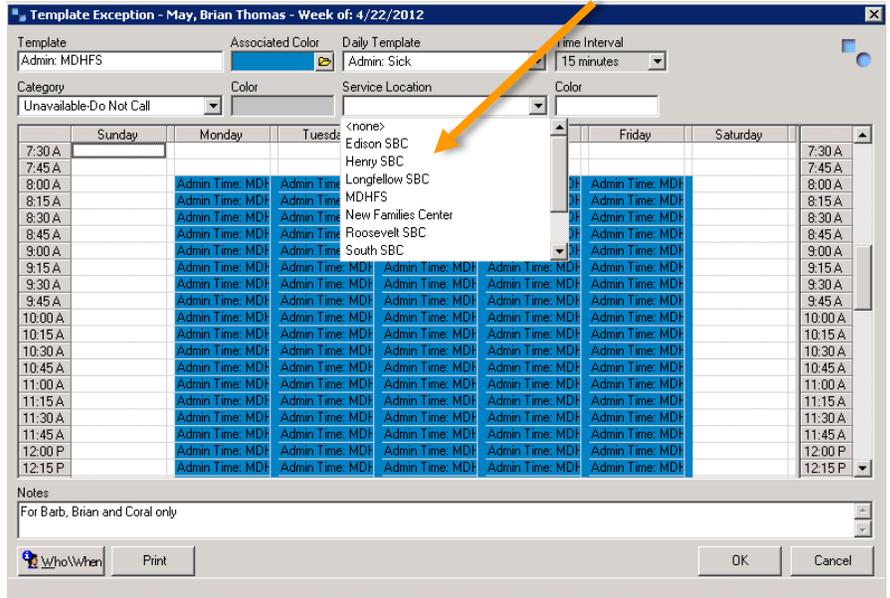
III. Editing your Weekly Template

If you are visiting a different clinic than normal is a common reason why you would need to change your template. If you are uncomfortable with this, feel free to contact Brian to do it for you.

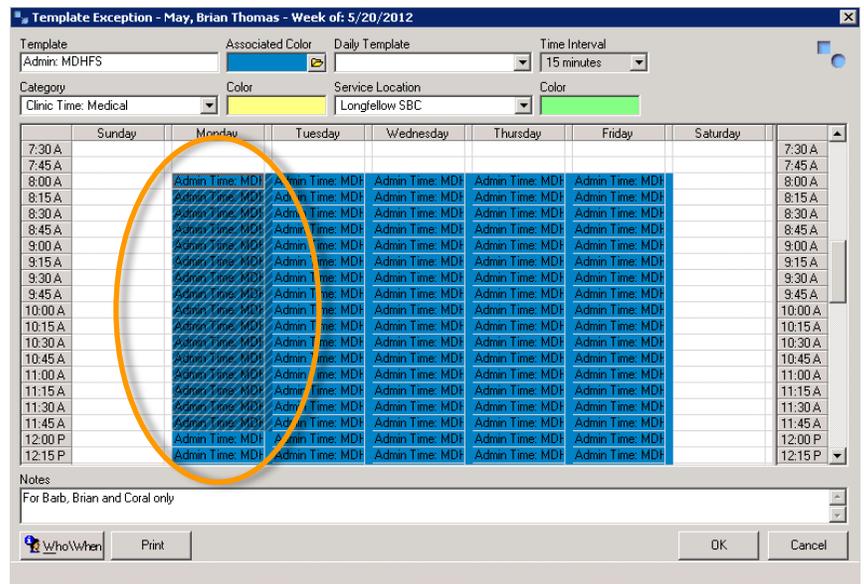
- Follow Steps A – D above in *Applying Daily Template*
- Make sure the Daily Template field is left blank
- Under *Category* choose the appropriate Category to display in the schedule. This will most likely be *Clinic Time: Medical*, *Clinic Time: Behavioral Health*, etc.



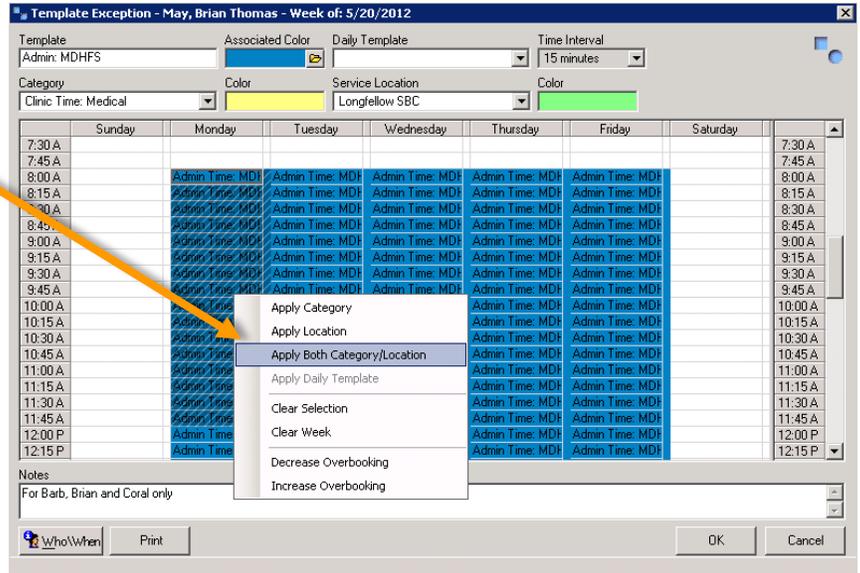
D. Choose a Service Location



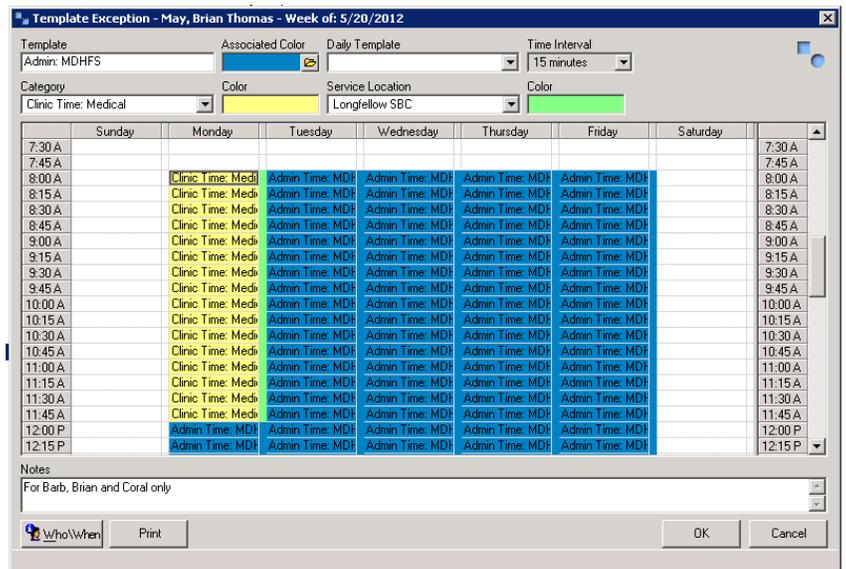
E. Click and drag over both the time slots and location column you want to change



F. Right-click and select Apply Both Category and Location



G. The category and location should now be changed.



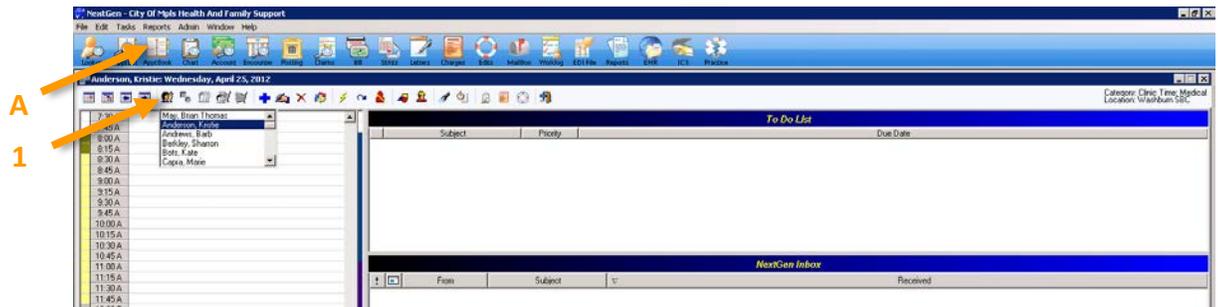
IV. Booking an Event (meeting, appointment, etc.)

A. In the EPM click on *Appt Book*

The Appointment Book will automatically open to the Daily Schedule with your tasks and NextGen email.

Note: Make sure you updated your user preferences so that you are seeing your schedule, not someone else's. See *NextGen Setup Guide*.

1. If you are not seeing your own schedule, click on the *Chance Resource* icon  and double-click on your name. The next time you log in, you should see your schedule.

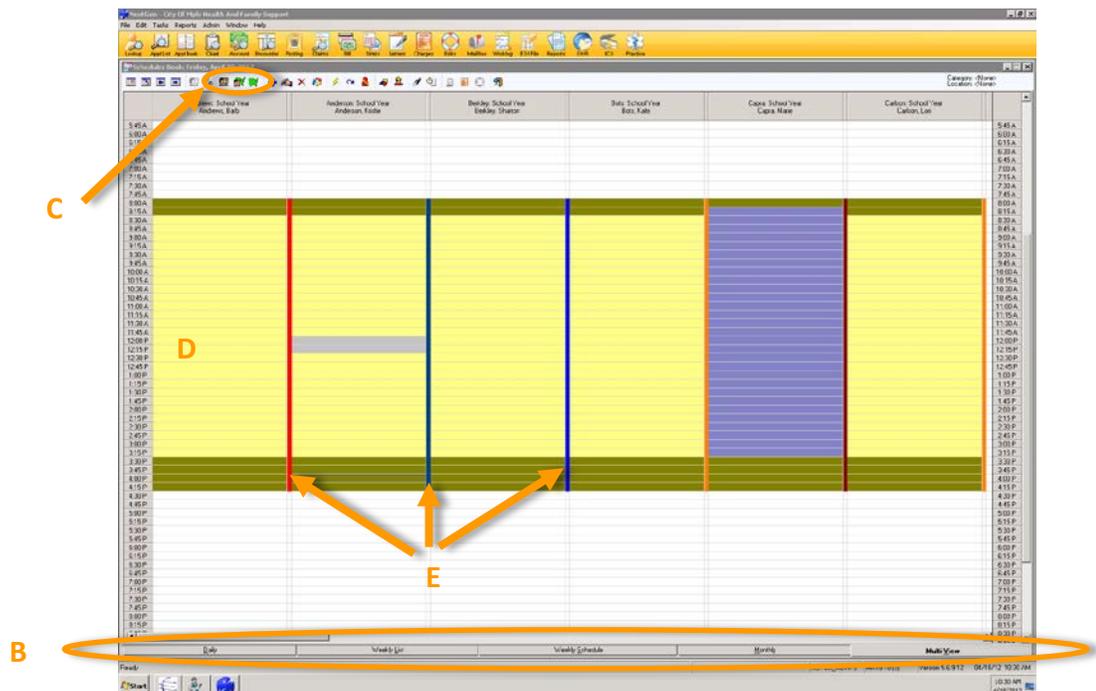


B. Change the View

You can change the view depending on what you're doing in the book.

1. **Weekly List:** View a list of your events (appointments) for the week.
2. **Weekly Schedule:** View your schedule/calendar for the week.
3. **Monthly:** View your monthly calendar.
4. **Multi-View:** View multiple providers' schedules for a specific date.

This is the view captured above. Please select *Multi-View* on your Appointment Book to continue with this guide.



C. Change the Providers in Multi-View

Use one of the 3 view buttons to view multiple providers' schedules on a specific date. This can be helpful when trying to book a meeting or appointment with multiple providers.

1. To look at the schedules of providers in a specific class (NP, RN, Mental Health, etc.). 
2. To look at the schedule of providers in a specific class at a specific location (i.e. Mental Health at South SBC). 
3. To look at the schedule of all providers at a specific location. 

D. Categories

Colored blocks indicate the types of events (appointments) that can be booked. In this example yellow is Clinic Time for Medical Staff. The most important color to know is gray. This means the provider is generally unavailable during this time.

Hint: Don't worry too much about categories now. They will come naturally once you are familiar with the system.

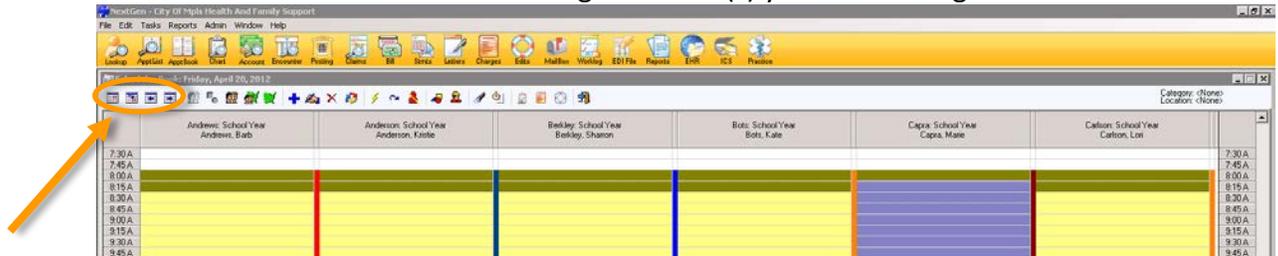
E. Locations

The location where the provider is at during a specific time is indicated by the skinny bar to the right of her schedule. Location colors are as follows:

- | | |
|---------------------|-----------|
| Edison | South |
| Henry | Southwest |
| Longfellow | Washburn |
| New Families Center | MDHFS |
| Roosevelt | |

F. Change the Date

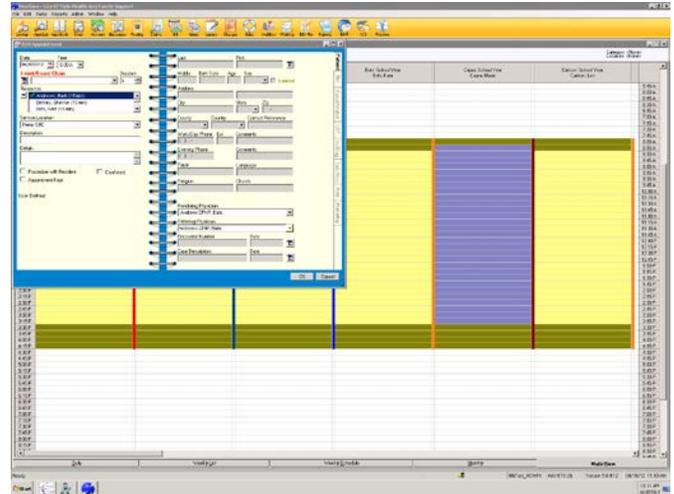
Use one of the 4 calendar buttons to change the date(s) you are viewing.



1. Find a date in the future (a calendar opens up). 
2. Come back to today or this week (depending on the view). 
3. Go back one day or week (depending on the view). 
4. Move ahead one day or week (depending on the view). 

G. Opening the Schedule Book

1. Double-click in the time slot you want to book the appointment in the provider's schedule. The Schedule Book will open.

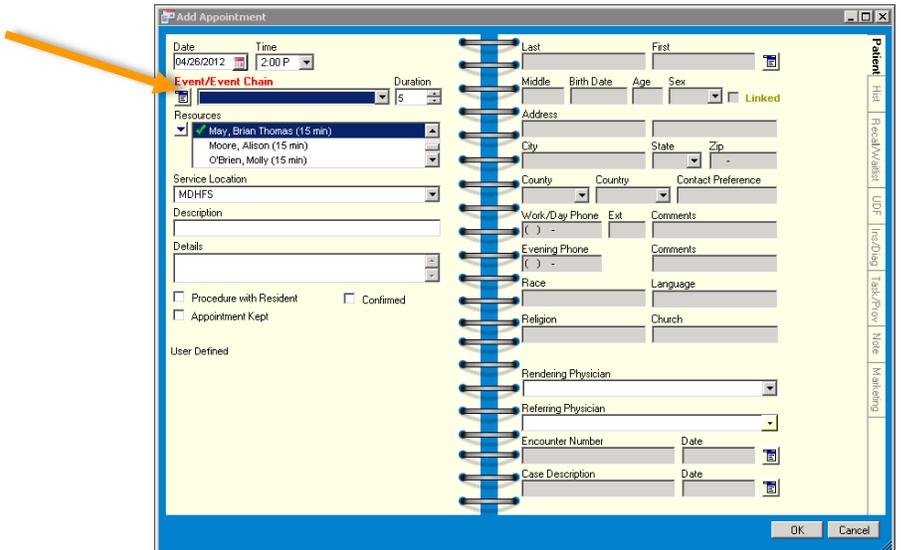


H. Select an Event

Note: Since this is not a patient appointment, you will not be linking this event with a patient.

1. Click on the drop-down menu under *Event/Event Chain* and select the event you need to schedule. You will be looking for events that start with *Admin:* or *Meeting:*
To schedule a visit, see How-To Guide 2: Scheduling: Patient Appointments.

Hint: You will only see events that are schedulable under the category selected for this provider in this time slot. If you want to see all available events, click on the *Norton* button and select *See all Events*.



2. Verify the *Resource* (provider) is correct. If you are including multiple providers for this event (meeting, training, etc), you can select additional resources.
3. Enter the name of the meeting or appointment.
4. Add any other details that may be useful to the provider(s) and click *OK*.

Congrats! You are done with this How-to Guide.