

## **Chapter 4: Appointment Scheduler**

### **Section 2: Staff Schedules**

#### **Lesson: Special User – Template Maintenance**

##### ***Objectives:***

Upon completion of this lesson the user will be able to:

- create and maintain Appointment Scheduler templates.

##### ***Overview:***

A well-designed appointment schedule is essential to all WIC clinics. In this lesson you will learn the first steps to creating a schedule — creating, modifying and copying templates.

Templates consist of time intervals, appointment types and other scheduling features. These templates will be used as patterns for “typical” days to create the clinic’s appointment pages. Once a template is created you will be able to apply it to staff, specific days and clinic locations to build an appointment calendar for one day, a month or for an entire year. Templates may be used over and over again or they can be modified to meet the changing needs of the clinic.

Now let’s look at setting up your templates to develop a “pattern” for your templates.

##### ***Instruction:***

##### ***Creating A New Template***

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Template Maintenance

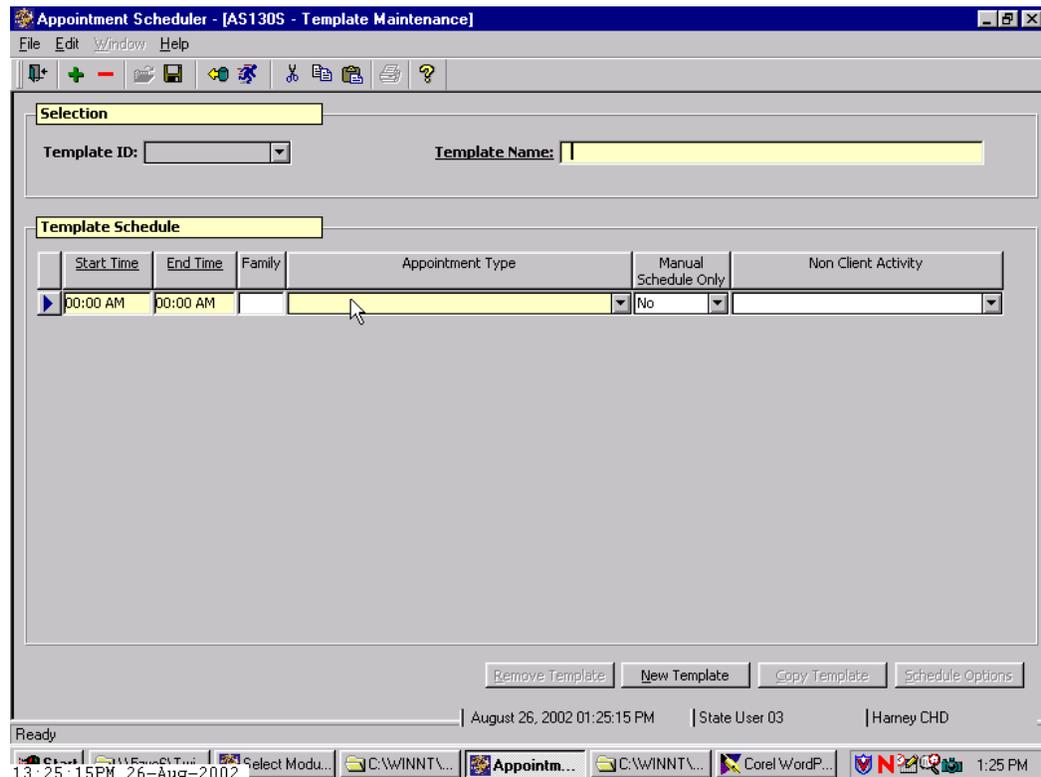


Figure 1: “Template Maintenance” Screen

1. **Click the “New Template” button.**

The “**Template ID**” field will be grayed out and the cursor is now in the “**Template Name**” field.

2. **Enter the name of the template in the “Template Name” field.**

The template name should reflect how the template will be used.

*Example: A template used for all staff in clinic 0305 might be called ‘Clinic 305 template.’ The system will assign an ID number to the template once you have saved your work.*

3. **Tab to the “Start Time” field and enter the time the first activity will begin.**

- To change the AM to PM, hold down the shift key and enter a “P.”
- This field connects to the “**Clinic Hours**” in the “**Agency/Clinic Information**” screen in “**Operations/Management**.” If you need to change the start or end times, you must first do this in the “**Clinic Hours**” tab.

4. **Tab to the “End Time” field.**

- TWIST will calculate the “**End Time**” using the predetermined duration of the appointment type selected.
- If information is entered in this field prior to selecting an appointment type, TWIST will override it with the predetermined end time for the appointment type selected.
- The “**End Time**” may be modified after user selects appointment type.
- If user changes the appointment type, a new end time will be calculated using the predetermined duration for the appointment type selected.
- If non-client activities are selected, an end time must be entered.

5. **Tab to the “Appointment Type” field and select the appointment type from the drop down list.**

Leave blank if this time slot is a “**Non Client Activity.**”

♪ NOTE: Either appointment type or non-client activity must be selected.

6. **Tab to the “Manual Schedule” field.**

6.1 The system defaults to “**No.**” If this appointment is available for the automatic scheduler, leave “No” as the value.

6.2 Setting this field to “**Yes**” reserves the appointment to save the slot for new or rescheduled appointments.

7. **Tab to the “Non Client Activity” and select the activity from the drop down list.**

If this time slot is a client activity, leave blank.

- Selecting a “**Non Client Activity**” will delete and grey out the “**Appointment Type**” and “**Manual Schedule**” field.
- Either an “**Appointment Type**” or “**Non Client Activity**” can be selected, not both.

♪ NOTE: An inserting non-client activity prevents those times from being scheduled for any other activity or appointments.

8. **Tab to create additional rows.**

- Follow steps three through eight to create additional appointments.

- Only one appointment type or activity can be selected for a time interval.
- If your time intervals overlap an error message stating “*Time cannot overlap*” will be displayed when you attempt to save your work.

## 9. Save.

TWIST will display the ID number in the “**Template ID**” field.

♪ NOTE: Clicking the “**New Template**” button will clear the screen and allow you to begin a new template.

## Modifying a Template

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Template Maintenance

1. **Select the template to be modified from the “Template ID” drop down list.**

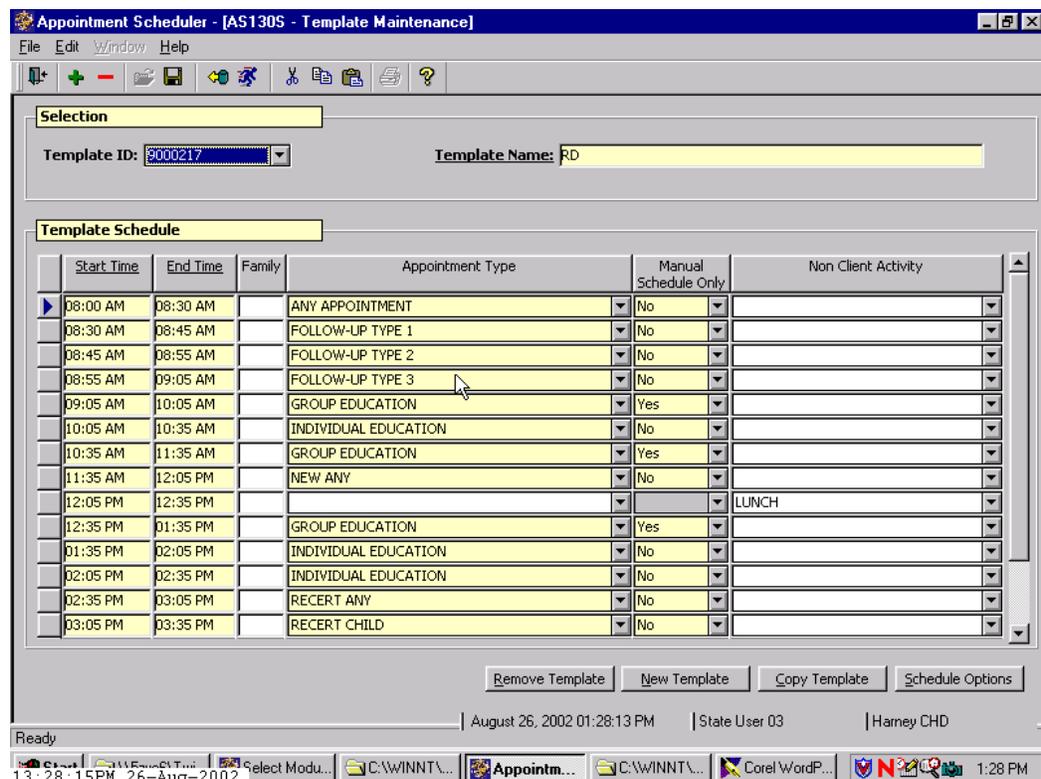


Figure 2: “Template Maintenance” Screen

The template information is displayed on the screen.

2. **Select the field you wish to modify and make your changes.**

Any field in this screen may be modified except for the “**Template ID**” number.

3. **Save.**

Your template has now been modified.

### ***Copying a Template***

This is a time saver for you. If you have more than one template that has the same basic pattern, you can copy the first one, rename it and simply make modifications to create a brand new template.

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Template Maintenance

1. **Select the template to copy from the “Template ID” drop down list.**

- The template information is displayed.
- The number to the right of the “**Template Name**” indicates if this template is an original or a copy.
- Any template followed by a zero is an original template.
- If the template is followed by a number greater than zero, it is a copy of the template it is listed beneath.
- You may only copy an original template.

2. **Click on the “Copy Template” button.**

The “**Copy Template**” pop-up is displayed.

3. **Enter the name for the new template.**

4. **Click “OK.”**

The pop-up is closed and the “**New Template ID**” is displayed on the screen.

5. **Modify the template fields you wish to change.**

6. **Save.**

Your copied template has been created.

## ***Removing a Template***

The starting point for this section is:

Appointment Scheduler ⇒ Scheduling ⇒ Template Maintenance

1. **Select the template to remove from the “Template ID” drop down list.**

The template information will be displayed on the screen.

2. **Click the “Remove Template” button to remove this template.**

A message stating “*Are you sure you wish to remove template?*” will be displayed.

3. **Click “Yes” or “No.”**

♪ NOTE: You cannot remove an original template without first removing all the copies of it.

## ***✂ Tips and Shortcuts:***

- The “Refresh” icon will clear the screen and allow the user to create a new template or select from the drop down list.
- If you use the Automatic Scheduler function, be sure to code some of your template appointments as “manual – yes”. This “saves” appointment slots to be used for reschedules and clean up after running the Auto Scheduler.

## ***📝 Notes:***

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