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## Chapter 4: Appointment Scheduler

### Section 2: Staff Schedules

#### Lesson: Special User – Template Scheduling Options

#### **Objectives:**

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

- set up a Daily Clinic Schedule.

#### **Overview:**

Now that you have learned how to create and modify templates, the second step to building a clinic schedule is to assign the template to staff members and specific days, weeks or months. The only difference in these three options is in how the time period to be scheduled is entered.

To schedule days you will enter only from and to dates. To schedule weeks you will enter a “from” date, the number of weeks to schedule and the days of the week to schedule. To schedule months you will enter the start month, the number of months to schedule and the days of the week to schedule.

In this lesson you will learn how to assign the template to any clinic, to one day or an entire year and to one or multiple staff members. In short, you will learn how to use templates to create a Daily Clinic Schedule.

#### **Instruction:**

#### **Creating a Schedule**

The starting point for this lesson is:

Appointment Scheduler ⇒ Scheduling ⇒ Template Maintenance

1. **Select the “Template ID” to be assigned to a staff member(s).**  
This can be an actual staff member or a pseudo (generic) staff member.



3. In the “Schedule For” section of the screen, select the clinic from the drop down list.
  - The “Template Name” is displayed.
  - The “Staff Assignment” button is enabled.
4. Click on the “Staff Assignment” button.

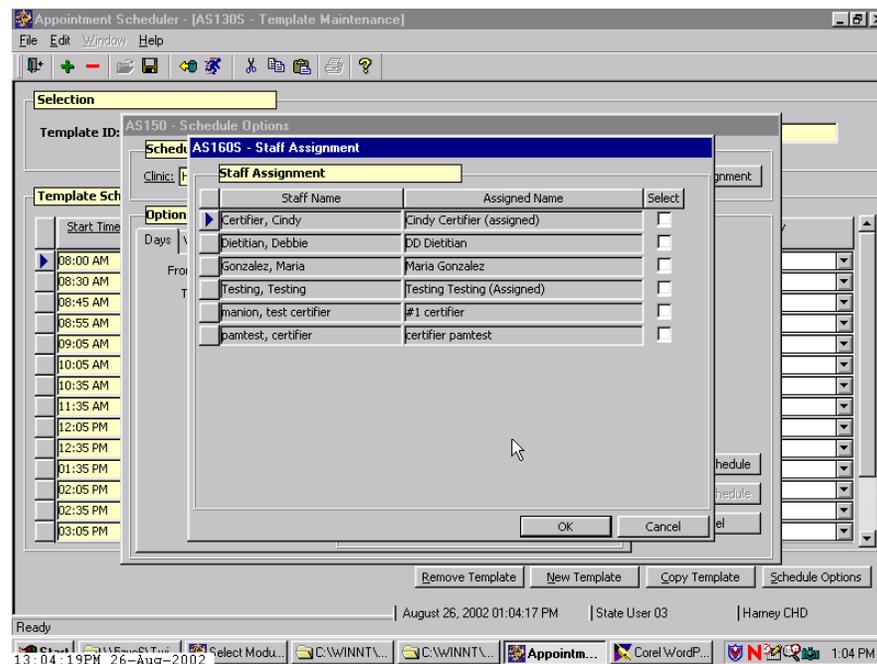


Figure 3: “Staff Assignment” Pop-Up

All the staff members assigned to this clinic are displayed in the “Staff Assignment” pop-up window.

5. Check the “Select” box next to the name of the staff member(s) you want to assign the template.
 

One or more staff members may be selected.
6. Click “OK” to close the pop-up.
7. In the “Options” section of the screen, select only one of the three time period selections:
  - 7.1 “Days” – Choose this option to schedule for specific days.

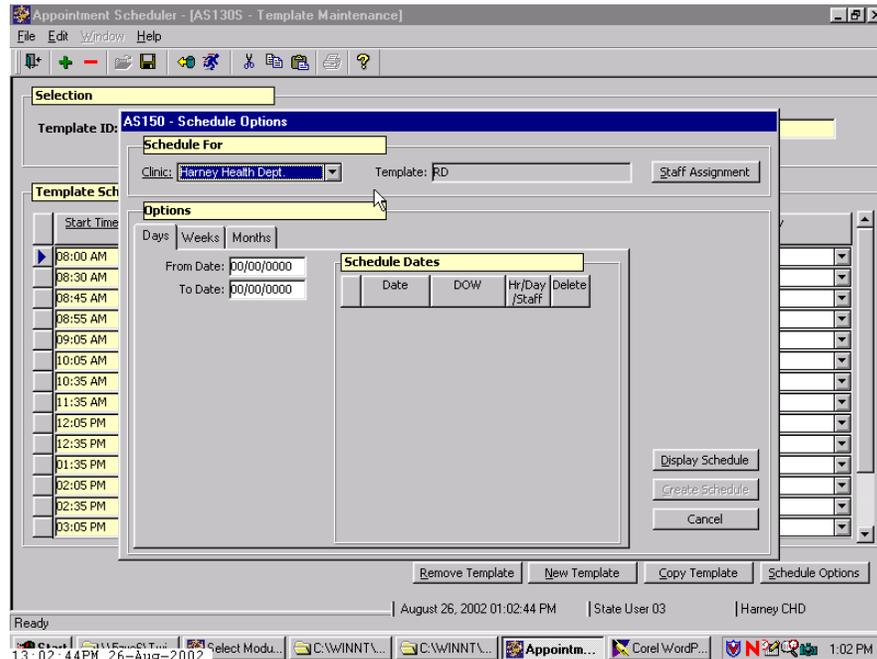


Figure 4: “Days” Selection

- Enter “**From Date**” and “**To Date**” dates.
- The end date may be the same as the start date when scheduling only one day.

7.2 “**Weeks**” – Choose this option to schedule for specific weeks.

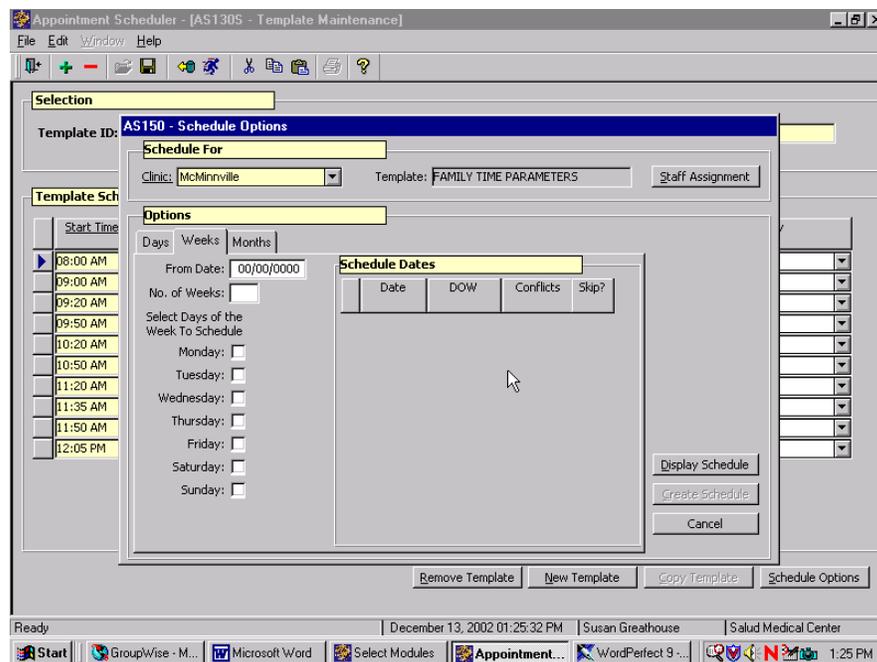


Figure 5: “Weeks” Selection

- Enter “**From Date,**” “**No. of Weeks**” and “**Days of the Week to Schedule.**”

7.3 “**Months**” – Choose this option to schedule for specific months.

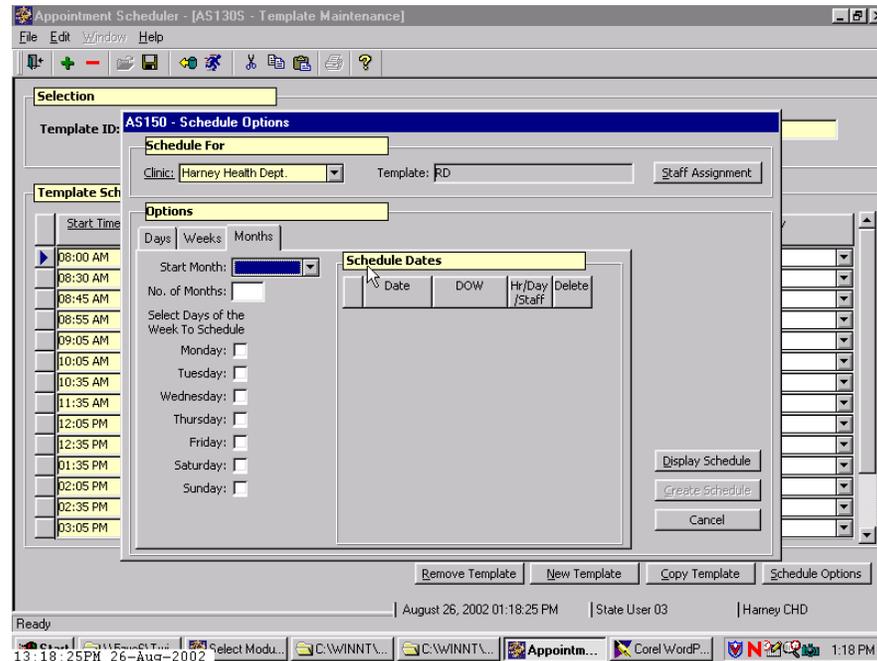


Figure 6: “Months” Selection

- Enter “start month,” the “number of months” and the “days of the week to schedule for.”

8. Click the “**Display Schedule**” button.

All days selected will display under the “**Schedule Dates.**”

8.1 The “**Date**” field will display the day of the month.

8.2 The “**DOW**” field will display the day of the week.

8.3 The “**Conflicts**” field will display codes when conflicts between clinic and template information exist.

- An “**A**” indicates that **appointment** slots already exist and the template overlaps these slots.
- A “**D**” indicates the clinic is closed on this **day**.
- An “**H**” indicates the **hours** in the template do not match the hours of operation for the clinic.

- An “O” indicates that the staff person is already scheduled in **other** clinic that same day.
- An “S” indicates **staff person** has appointments booked at this clinic or another clinic on this date. It does not indicate which staff when multiple staff were assigned.
- Multiple conflicts can exist.

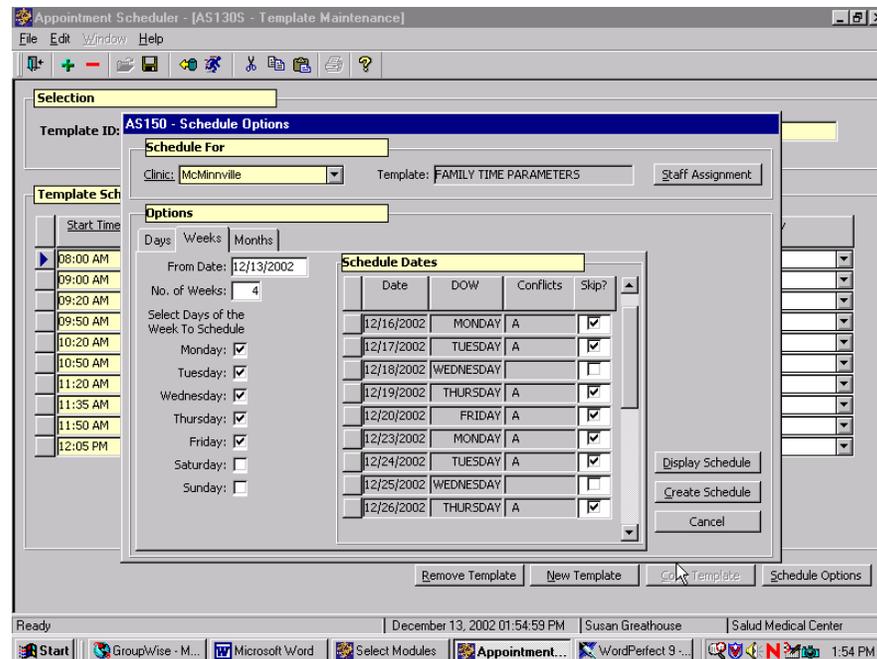


Figure 7: “Scheduling Conflicts” Screen

8.4 The “**Skip**” box will be automatically checked if the “**Conflict**” field is populated.

- TWIST will not create a schedule for days with the “**Skip**” box checked.
- The user can uncheck the “**Skip**” box and override the system to create the schedule for that day, unless there is an “**A**” code in the “**Conflict**” field. In this case, you must first reschedule any booked appointments for that day(s) before you can use the “**Skip**” function.
- The user may check the “**Skip**” box to manually exclude any particular day when creating the schedule.

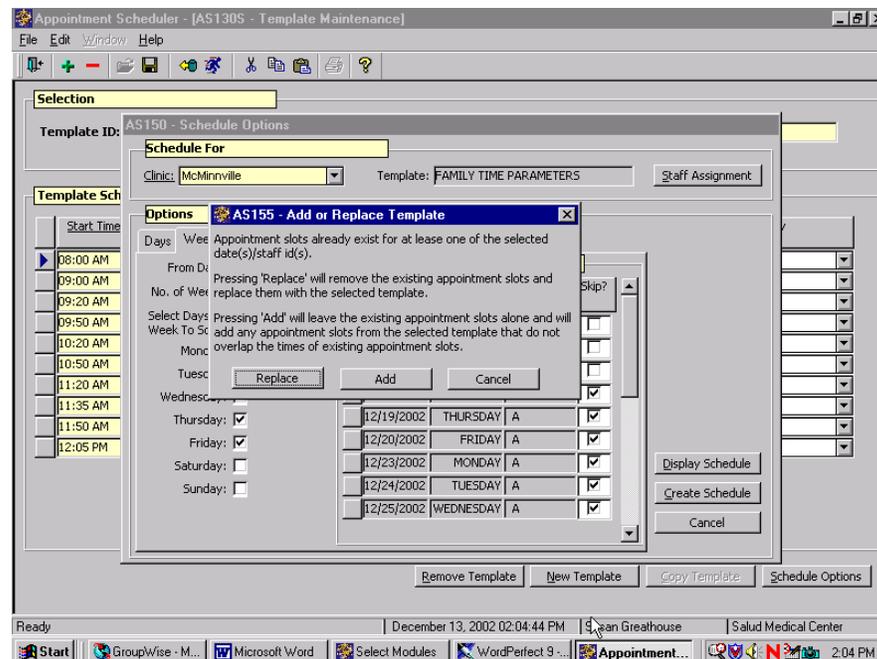
😊 See Job Aid “Schedule Conflict Codes” for more information.

9. Click the **“Create Schedule”** button.

9.1 The schedule will be created for the selected staff members.

- The pop-up is closed and the user is returned to the **“Template Maintenance”** screen when the schedule is successfully created.
- If the schedule was not created, an error message will be displayed indicating the problem.
- If the error indicates a staffing problem occurred you will need to review each staff member individually to identify the problem and make corrections.

9.2 If you have unchecked the **“Skip”** box (for a template scheduling conflict) and then click the **“Create Schedule”** button, you will be given three options:



**Figure 8: “Add or Replace Template” Pop-Up**

- **“Replace”** will remove the existing appointment slots and replace them with the selected template. If the conflict code is **“O”** (staff has existing schedule in a different clinic), clicking **“Replace”** will delete the schedule in the first clinic and schedule the template in the new clinic.
- **“Add”** will leave the existing appointment slots alone and will add any appointment slots from the selected template that do not overlap the times of existing appointment slots.

Selecting the “Add” option when the schedule conflict is “O” will result in schedules being created for the same staff person in two different clinics.

- “**Cancel**” will close the pop-up and return you to the “**Schedule Options**” screen without scheduling the template.

10. **Exit the “Template Maintenance” screen.**

 **Tips and Shortcuts:**

- If an “**S**” is displayed in the “**Conflict**” field when multiple staff were selected, create the schedule for one staff person at a time to easily identify your error.
- You can make changes to a template and recreate the schedule without deleting any data providing no appointments have been scheduled for the days you want to recreate.

 **Notes:**

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