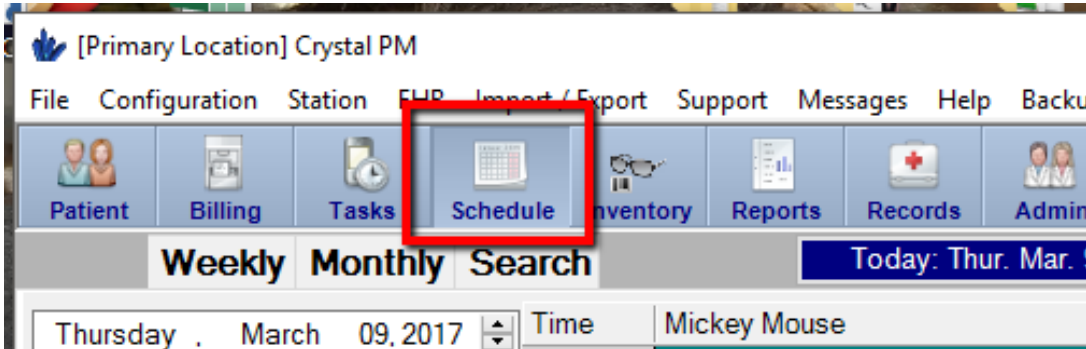


How to create a new schedule template

To begin, open Crystal and navigate to the Schedule tab



Select a time slot by double-left clicking on the grid (for this example I will use 1:00 PM)

The Make Appointment screen will appear. Select the dropdown box to the left of Patient and choose **Template** Next select Type.

(The types listed are the ones you have created under Admin >Schedule>Appointment Types).

For this example, I have chosen 'Phone Call'.

The screenshot shows the "Make Appointment" dialog box. The "Date:" field is set to "March 09, 2017" and the "Start Time:" field is set to "1:00 PM". The "Provider:" dropdown is set to "Dr. Mouse, Mickey" and the "Location:" dropdown is set to "1: Primary Location". Below these fields is a table with columns "Code", "Text", and "Minutes".

Code	Text	Minutes

Buttons for "Add Billing Code" and "Remove Billing Code" are present. The "Duration:" field is set to "15" and the "Type:" dropdown is set to "Phone Call". The "Patient:" dropdown is set to "Template". There are buttons for "Show Demo >", "Wait List", and "Show Linked >".

The "Notes:" field contains the text "Phone Call Template". The "Alerts:" field is empty. There is a "Recurrence" button.

The "Status" section has radio buttons for "None" (selected), "Signed-In", "Signed-Out", "Missed", and "Canceled". The "Flags" section has radio buttons for "None" (selected), "Ins Verified", and "Flag 2".

At the bottom are buttons for "Save Appointment", "Delete", "Show Log", and "Cancel".

Next click the 'Recurrence' button. The recurring appointment screen will appear:

Recurring Appointment: [X]

Patient: Phone Call Template

Duration: 15

Pattern

Daily

Weekly Repeat Appointment every 1 week(s)

Monthly

Yearly

Length

Start Recurrence: Thursday, March 9, 2017

Create a Total of 1

Repeat Until End Date: Thursday, March 9, 2017

Create Appointments

Recurrence

Status

None Signed-In Signed-Out Missed Canceled

The Phone Call Template has now been created. The 'Duration' box (showing 15 in this example) pulls from the make appointment screen.

12:00 PM		12:00 PM
12:45 PM	Lunch	12:45 PM
1:00 PM	Phone Call Template	1:00 PM
1:15 PM		1:15 PM
1:30 PM		1:30 PM

You can specify the pattern and repeat options.

Length allows you to specify the recurrence, the total number of appointments and how long you want to repeat the schedule template.

When finished, click the 'Create Appointments box to finish.