# I N D I V I C A

Schedule Settings

A physician in OSCAR will appear on the appointment screen based on their schedule settings.
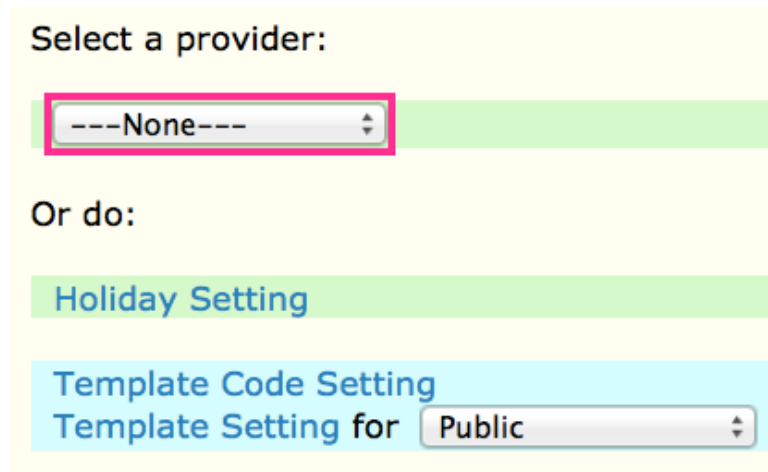
Schedule templates can also be applied to certain days to a physician's schedule. This is particularly useful when a physician has a set schedule on specific days of the week. A schedule template is constructed from template codes; this template is then applied to specific days of a physician's schedule.

I. Selecting Days for Schedules

1. Go to Admin. Click on Schedule Settings. A new window appears.
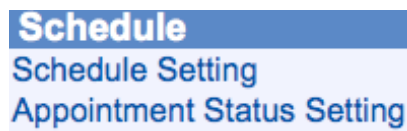
2. Under Select a Provider, use the drop-down menu to choose a physician.

3. Use the checkboxes to mark which days will appear for this physician on the appointment screen. Uncheck days that should not appear.
    Note: If a doctor has alternating weekly schedules, check "Alternating Week Schedule" to display a second week's listing. Check off the days to appear on the second week for this physician.

I N D I V I C A

Nelson, Kent V. 2012-01-01 ~ 2013-12-31 ⇕ Delete

Date from: 2012 - 1 - 1 (yyyy-mm-dd) **to:** 2013 - 12 - 31

is available EVERY (Day of Week): ☐ Alternating Week Setting

☐ Sun		<<
☑ Mon		<<
☑ Tue		<<
☑ Wed		<<
☑ Thu		<<
☑ Fri		<<
☐ Sat		<<

4. Click Next in the bottom right. A preview appears.
    Note: White squares are days which appear as days that will appear on the appointment screen. Dark blue squares will have not display appointments.

Nelson, Kent V. effective (2012-01-01 - 2013-12-31)
◄ last month **2012-8** next month►

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

5.   Click Finish.

II. Schedule Start and End Dates

A physician's schedule in OSCAR has a start and an end date. Dates beyond the end date will not display for that physician until a new schedule start and end date is set.

1.   Go to Admin. Click on Schedule Settings. A new window appears.

2.   Under Select a Provider, use the drop-down menu to choose a physician.

3.   Use the fields at the top to choose a "from" date and a "to" date.
      Note: Schedules can be no more than 2 years in length or they will not display correctly. It is recommended to choose a from and to date in the format: (from) 2000-1-1 ... (to) 2001-12-31.

4.   Click Next. A preview appears.

5.   Click Finish.

Note: If you create a schedule by mistake, you can select it from the drop-down menu at the top when you Select a Provider and then click Delete.

III. Template Code

1.   Go to Admin. Click on Schedule Settings. A new window appears.

2.   Click on Template Code Setting. A new window appears.

I N D I V I C A

Select a provider:

    ---None---   ⬍

Or do:

Holiday Setting

Template Code Setting
Template Setting for Public   ⬍

3. Fill in the fields. When you are done, click Save.
    Note: To edit an existing template code, use the drop-down menu at the top
    to choose an existing code. Click Edit then make the appropriate changes.

Template Code: 1 |15 Minute Appointment ⬍   Edit

Appt Template Code	
Code:	(a)
Description:	(b)
Duration:	(c) mins.
Color:	(d) e.g. #1b2c3d, ivory.
Booking Limit:	1 (e)
Limit Type: (f)	○ Off ○ Warning ○ Same Day ⊙ Same Week

Delete   Save   Exit

(a) **Code**. A unique, one character code. This will appear on the schedule.
(b) **Description**. A short description of the code. Will appear on the
     schedule if a user hovers over the code.
(c) **Duration**. When an appointment is booked in a slot with this code, the
     duration will automatically be set to this value.

(d)   **Color**. The color that will appear on the schedule for this template. It must be entered as a hexadecimal colour code preceded by a pound (#) sign. Click on "color chart links" at the bottom to view a webpage with a list of commonly used colours.

(e)   **Booking Limit**. The number of appointments that should be booked in time slots with this code. A user can over-ride this number when booking appointments.

(f)   **Limit Type**. Choose Warning if you would like a pop-up to appear when a user tries to book an appointment in a slot with this code. Otherwise, choose Off. Same Day and Same Week are not supported at this time.

IV. Creating New Templates

1.   Go to Admin. Click on Schedule Settings.

2.   Click on Template Setting.
Note: The drop-down menu allows you to create and edit templates that only specific physicians will be able to use. Choosing Public before clicking Template Setting will allow you to create and edit templates accessible by all physicians.

Select a provider:

    ---None---

Or do:

Holiday Setting

Template Code Setting
Template Setting for Public

3.   Fill in the appropriate fields. When you are done, click Save.
Note: To edit an existing template, use the drop-down menu at the top to choose an existing template. Click Edit then make the appropriate changes.

I N D I V I C A

(a) **Period**. Choose which period interval (in minutes) this physicians schedule will be viewed under.

(b) **Template Name**. User selected name for the template. Does not appear on the schedule.
Note: It is helpful to name the template with the physician's name followed by the day it should be applied to. e.g. Strange-M,T,W,R

(c) **Summary**. User selected summary for this template. Does not appear on the schedule.

(d) **Template Code**. Click on this to be shown a list of all current template codes in the system.

(e) **Template**. Dictates where a code should appear on the template. Type the template code into the appropriate fields.
Note: Pictured above, each field represents a 15 minute period from the hour indicated.

V. Applying Templates to a Physician

1. Go to Admin. Click on Schedule Settings.

2. Under Select a Provider, use the drop-down menu to choose a physician for whom you wish to apply a template.

INDIVICA

Select a provider:

---None--- ⬍

Or do:

Holiday Setting

Template Code Setting
Template Setting for Public ⬍

3. On the right, click the template you will apply. A preview appears of that
    template along the right.

4. Click on the "< <" button next to a day to apply that template to that day.
    Note: If a doctor has alternating weekly schedules, check "Alternating Week
    Schedule" to display a second week's listing.

Strange, Stephen   2012-01-01 ~ 2013-12-31 ⬍   Delete

Date from: 2012 – 1 – 1 (yyyy-mm-dd)   to: 2013 – 12 – 31

is available EVERY (Day of Week): ☐ Alternating Week Setting

			Strange–F |
			Strange–M,T,W,R |
☐ Sun		<<	
☑ Mon	Strange–M,T,W,R	<<	
☑ Tue	Strange–M,T,W,R	<<	
☑ Wed	Strange–M,T,W,R	<<	
☑ Thu	Strange–M,T,W,R	<<	
☑ Fri	Strange–F	<<	
☐ Sat		<<	

Next   Cancel

I N D I V I C A

5.   Repeat steps 3 and 4 to apply a template(s) to another day(s).

6.   When you are done, click next. A preview appears.

7.   Your template will appear on your appointment screen on the appropriate days.