

EpicEdge Tips & Tricks

Scheduling Templates and Snapboards

WHAT IS A SCHEDULING TEMPLATE? A Scheduling Template defines the hours and days of the week a clinician works.

A Scheduling Template is required for every clinician who will have visits placed on their schedule.

Schedule Template functions:

- Allow schedulers to see dates and time clinicians are available to scheduling
- Provide a place to add blocks of unavailable time to a patient schedule
- Limit the number of days in advance that a patient can be placed on a clinician’s schedule (This is the Release Date)

To manage a user’s Schedule Template, select the scheduling dashboard from the Dashboard dropdown menu:

Verify that new staff on your team have an appropriate scheduling template. (**Select Edit Template then Summary on the upper left**)

Copying a template to add a template to a new user is quick and efficient.

Select **Copy Template** from the Scheduler Dashboard or search icon:

HH/HSPC Scheduling Dashboard ▾

Links

Scheduling Links	Templates
Activities	Moved Appts
Snapboard	Display Template
View Schedule	Provider Calendar
Workqueue List	Department Calendar
<hr/>	
Reports	Display Visit Type Limits
Department Appointment Report	Template Audit Trail
Reschedule Report	Template Build Audit
<hr/>	
Resource Calendar	Edit Template
Provider Calendar	Rel Date Defaults
Departmental Calendar	Delete Template
	Edit Pattern
	Provider Pattern
	Copy Template
	Move Template
	Reassign Template
	Move Provider Appts

Or in the Hyperspace search:

Enter Copy template

The screenshot shows the 'Copy Template' interface. On the left, under 'From', the Department is set to 'TMCAH HH LAWRENCE' and the Provider/Resource field is empty. The 'Copy' section has 'All blocks' selected. On the right, under 'To', the Department is also 'TMCAH HH LAWRENCE' and the Provider/Resource field is empty. There are 'Start Date' and 'End Date' fields with calendar icons and a 'Use template's end date' checkbox.

Department on both sides should be: TMCAH SCHEDULING

On the left side (“From”)

This is a close-up of the 'From' section. The Department field is 'TMCAH HH LAWRENCE'. The Provider/Resource field is empty. The 'Copy' section has 'All blocks' selected.

- Search for someone with the same scheduling hours (Sasha RN)
- If needed, enter the start date: t for today
- If needed, enter the end date: Y+10 or Check “use template’s end date”

On the right side (“To”):

This is a close-up of the 'To' section. The Department field is 'TMCAH HH LAWRENCE'. The Provider/Resource field is empty. A red arrow points to the 'Remove Existing' section, which has 'Unavailable days', 'Unavailable time', and 'Time on hold' checkboxes.

- Remove existing items: check all fields
- Search for the provider (staff member for whom you are adding the schedule template)
- Department: TMCAH SCHEDULING (for everyone)
- Select Copy
- Set Release Date = Yes
- Release date: Y+10
- Allow Overbooks? = Yes
- Accept
- View any warnings and select Copy again if needed.

To add a block to a schedule via the Template from the HH/HSPC Scheduling Dashboard:

- Select Edit template

Epic | Epic User Survey | Appts | Snapboard | View Schedules | DAR - Dept Appts | My Reports

HH/HSPC Scheduling Dashboard ▾

Links

Scheduling Links

- Activities
- Snapboard
- View Schedule
- Workqueue List

Reports

- Department Appointment Report
- Reschedule Report

Resource Calendar


- Provider Calendar
- Departmental Calendar

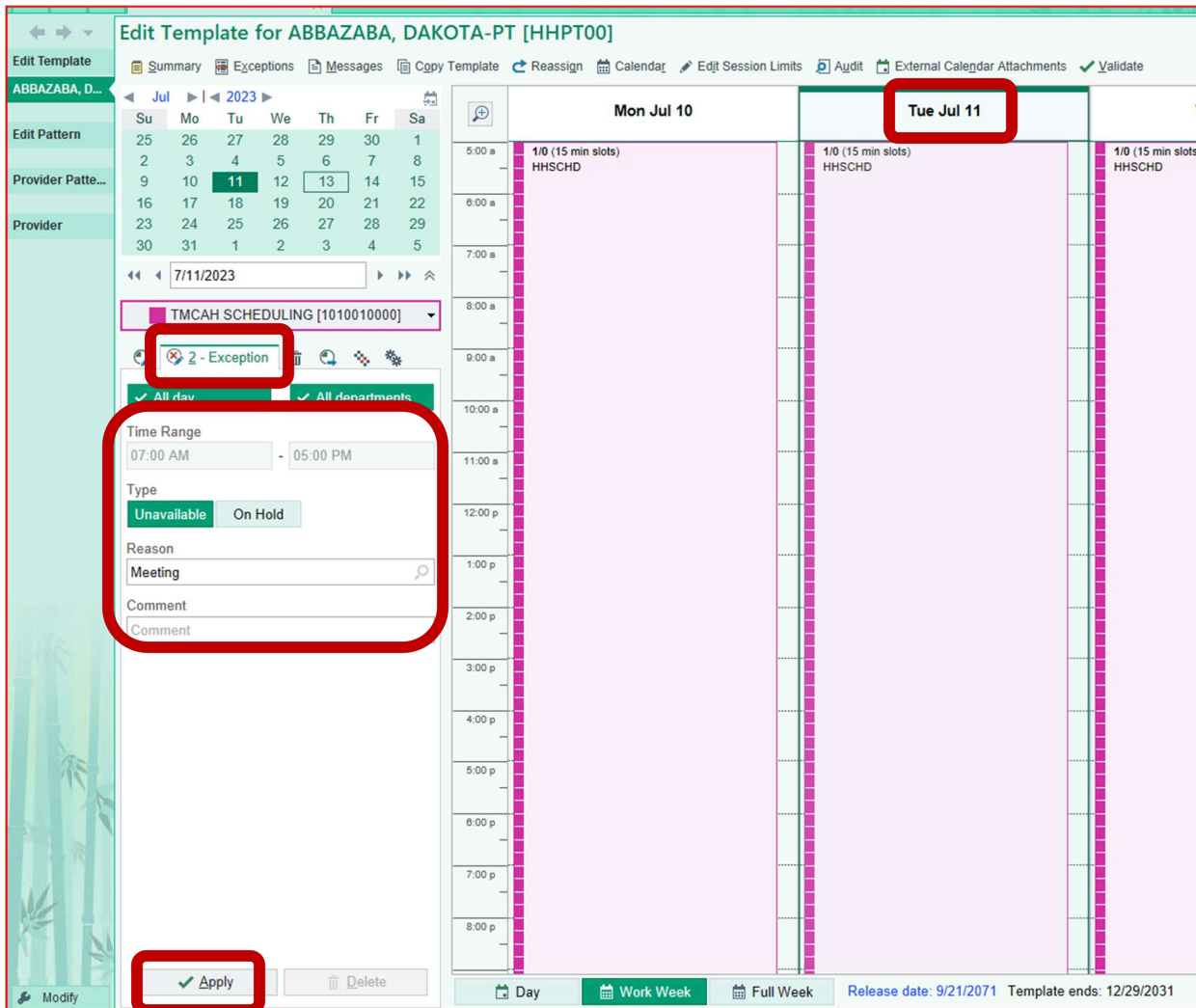
Templates

- Moved Appts
- Display Template
- Provider Calendar
- Department Calendar
- Display Visit Type Limits
- Template Audit Trail
- Template Build Audit

- Edit Template**
- Rel Date Defaults
- Delete Template
- Edit Pattern
- Provider Pattern

- Copy Template
- Move Template
- Reassign Template
- Move Provider Appts

- Search for a clinician
- Select the day you want to block
- In the menu, select the **X**/Pencil Exception 
- Select the date on the calendar, the time range and the reason
- Add a comment if desired
- Click Apply on the lower left
- Then select File and close



Edit Template for ABBAZABA, DAKOTA-PT [HHPT00]

Summary Exceptions Messages Copy Template Reassign Calendar Edit Session Limits Audit External Calendar Attachments Validate

ABBAZABA, D...

Jul 2023

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	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	1	2	3	4	5

7/11/2023

TMCAH SCHEDULING [1010010000]

2 - Exception

All day All departments

Time Range: 07:00 AM - 05:00 PM

Type: Unavailable On Hold

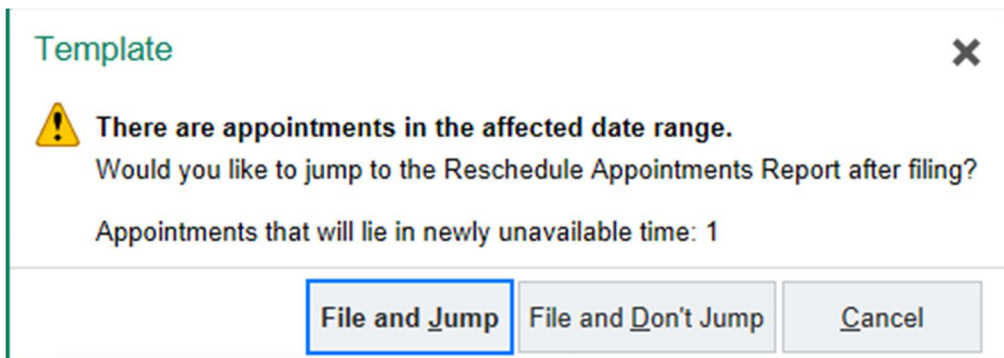
Reason: Meeting

Comment: Comment

Apply Delete

Day Work Week Full Week Release date: 9/21/2071 Template ends: 12/29/2031

If there are appointments scheduled during the unavailable time a warning will appear. Select File and Jump to reschedule the appointments.



Template

⚠ **There are appointments in the affected date range.**
Would you like to jump to the Reschedule Appointments Report after filing?

Appointments that will lie in newly unavailable time: 1

File and Jump File and Don't Jump Cancel

Add Weekend Availability for Scheduling

If a clinician rotates through weekend coverage, their template will need to be updated to include the weekends that they work. To add weekend availability for scheduling in a template:

- Go to Edit Template on the dashboard
- Search for the desired clinician and accept
- Click the clock icon with pencil to edit slot



- Click "Full Week" at the bottom of the page to display Saturday and Sunday
- Click on the date that needs to be available for scheduling
- Enter the time range
- Enter 1 opening and 10 overbooks
- Select "Apply"
- Add another day if desired using the same process
- Select File and Close (bottom right)

Jul 2023

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	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	1	2	3	4	5

7/30/2023

TMCAH SCHEDULING [1010010000]

1 - Slot

Time Range: 08:00 AM - 05:00 PM

Slot Length (mins): 15

Openings: 1 Overbooks: 10

Block: Num

Private slot

Apply Delete

Epic User Survey | Home Health Intake | Enaboard | Workqueue List | Templates | Chart | Reports | My Reports | Hospital Accounts

Schedule Admin

Edit Template for GRADY, DEBORAH [509988]

Provider: GRADY, DEBO

Department: TMCAH SCHEDULING [1010010000]

7/22/2023

Full Week

Release date: 6/20/2023 | Template ends: Indefinite

File | File & Close | Cancel

If a template is missing a release date which is preventing scheduling:

- Go to Edit template
- Select the release date link in blue at the bottom of the page
- Enter a release date (Y+10)
- Select file and close

The screenshot shows a scheduling software interface. The main area is a calendar grid with columns for days of the week (Sun Jun 18 to Sat Jun 24) and rows for time slots (7:00 a to 11:00 p). The grid shows a pattern of slots for '6/10 (15 min slots) HHSCHD' on Thursdays, Fridays, and Saturdays. On the left, there is a control panel with various settings: '1 - Slot', 'Time Range', 'Slot Length (mins)' set to 15, 'Openings' set to 1, 'Overbooks' set to 0, 'Block' and 'Num' fields, and a 'Private slot' checkbox. At the bottom, a status bar displays 'Release date: 6/22/2033' and 'File & Close' buttons, both highlighted with red boxes.

Managing Snapboards

Add a Schedule Exception from the Snapboard

To add a schedule exception from the Snapboard, navigate to the Snapboard from the Dashboard:

- Right click into a timeslot on the date of the exception
- Select the circle clock icon

The screenshot shows a scheduling snapboard with three columns for different staff members: Jessica No..., Karen Pofit, PT, and Sharon McCann, PT. A context menu is open over a 12:45 PM - 1:00 PM (15 min) slot for Sharon McCann. The menu includes icons for calendar, refresh, add, delete, and a clock icon (highlighted with a red circle). The snapboard also shows a 'Vacation (Off for the week)' block for Jessica No... and various other staff members listed in the columns.

Enter the unavailable time and reason. Add a comment if desired.

The screenshot shows the 'New Unavailable Time' dialog box for Sharon McCann. The time range is set to 1:00 PM - 1:15 PM (15 min). The dialog includes fields for 'Reason' and 'Comment'. The 'Reason' field contains a red exclamation mark icon, and the 'Comment' field is empty. A green checkmark and a refresh icon are visible at the bottom right of the dialog.

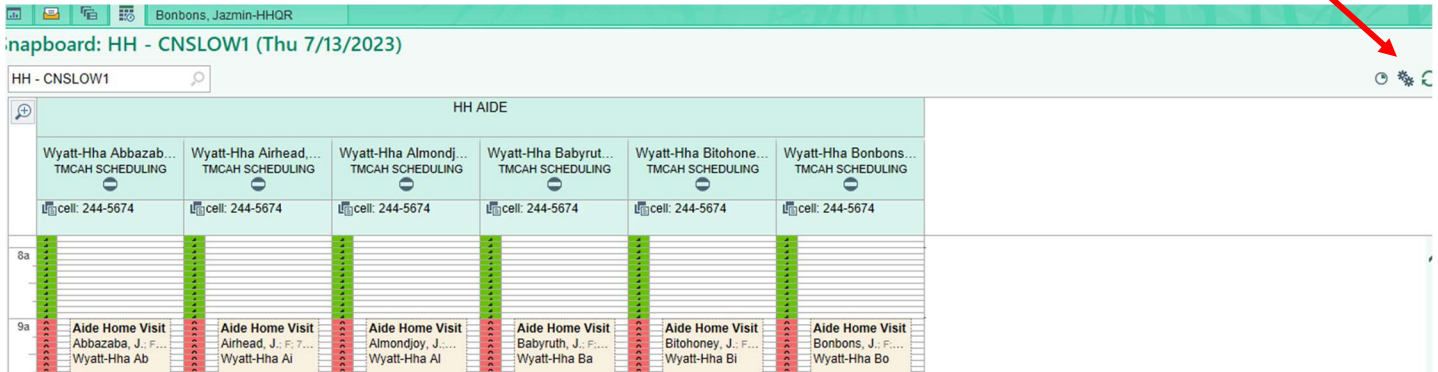
Select the green checkmark when done.

Updating SNAPBOARD Content/Clinicians

Add a new Clinician to the Snapboard

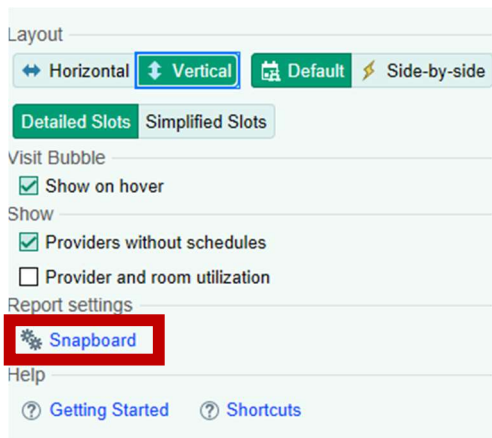
When new staff onboard, or there is a transfer from one team to another, you may add the new clinician to the Snapboard via the Snapboard settings:

- Select the gear icon on the upper right



The screenshot shows the Snapboard interface for 'HH - CNSLOW1' on 'Thu 7/13/2023'. The interface displays a grid of clinician schedules. The top row shows six columns for different clinicians: Wyatt-Hha Abbazab..., Wyatt-Hha Airhead..., Wyatt-Hha Almondj..., Wyatt-Hha Babyrut..., Wyatt-Hha Bitohone..., and Wyatt-Hha Bonbons... Each column includes a 'TMDAH SCHEDULING' label and a phone number 'cell: 244-5674'. Below the grid, there are two rows labeled '8a' and '8a'. The '8a' row shows 'Aide Home Visit' for each clinician, with names like 'Abbazaba, J. F...', 'Airhead, J. F.', 'Almondjoy, J.', 'Babyruth, J.', 'Bitohoney, J.', and 'Bonbons, J.' listed below. A red arrow points to the gear icon in the top right corner of the interface.

- Select Snapboard



The screenshot shows the Snapboard settings menu. The menu is titled 'Layout' and includes options for 'Horizontal', 'Vertical', 'Default', and 'Side-by-side'. Below this, there are options for 'Detailed Slots' and 'Simplified Slots'. The 'Visit Bubble' section includes a checked box for 'Show on hover'. The 'Show' section includes checked boxes for 'Providers without schedules' and 'Provider and room utilization'. The 'Report settings' section includes a red box around the 'Snapboard' option. The 'Help' section includes links for 'Getting Started' and 'Shortcuts'.

Select the Green + to get started.

- Under Department- Enter TMCAH Scheduling
- Enter the name of the clinician under Provider/ Resource
- Enter the Discipline under Group
- Use the Up/Down Icons to move the clinician’s location on the Snapboard
- Select Run to update the Snapboard

Criteria General

Schedule Resource Sidebar Visits Display

Date and Time

Date: Start Time: 0000 End Time: 0000

Layout

Room	Department	Provider/Resource	Show	Group
	TMCAH SCHEDULING	ABBAZABA, WYATT-HHA	Always	HH AIDE <input type="button" value="⌵"/>
	TMCAH SCHEDULING	AIRHEAD, WYATT-HHA	Always	HH AIDE <input type="button" value="⌵"/>
	TMCAH SCHEDULING	ALMONDJOY, WYATT-H...	Always	HH AIDE <input type="button" value="⌵"/>
	TMCAH SCHEDULING	BABYRUTH, WYATT-HHA	Always	HH AIDE <input type="button" value="⌵"/>
	TMCAH SCHEDULING	BITOHONEY, WYATT-HHA	Always	HH AIDE <input type="button" value="⌵"/>
	TMCAH SCHEDULING	BONBONS, WYATT-HHA	Always	HH AIDE <input type="button" value="⌵"/>
	TMCAH SCHEDULING		Always	<input type="button" value="⌵"/>

Refresh interval (minutes):

NOTE: Need to group disciplines together ... add staff in discipline groups. If you need to move a staff member, use the up and down arrows. If you need to delete a member, use the red – sign.