

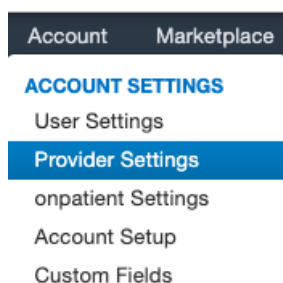
How do I add a date range to my appointment templates?

07/08/2024 7:51 pm EDT

[Appointment Templates](#) are associated with [Appointment Profiles](#) to establish an office, exam room, weekday, and duration parameters for the templates you set up on your schedule. Date ranges can be added to your appointment templates to account for availability changes. These changes may include:

- Availability changes that vary by weekday
- Availability changes based on seasonality

To add date ranges to your appointment templates, you will need to enable the **Date Range** on the **Appointment Template** setting within your account settings. To begin, mouse over **Account** and select **Provider Settings**.



Select the General tab and check the **Date Range on Appointment Template** box in your account settings. When this is complete, click **Update Entire Profile** at the bottom of the page.

Account Settings



Calendar Settings

| | | |
|-------------------------------------|---|---|
| Use new dashboard homescreen | <input checked="" type="checkbox"/> | Uncheck to go straight to the calendar after logging in |
| Show user satisfaction survey | <input checked="" type="checkbox"/> | Uncheck to opt out of user satisfaction surveys. |
| Default Office | <input type="text" value="Main PG Office"/> | Default Office on Calendar |
| Duration of Exam | <input type="text" value="30"/> | Default duration of an exam in minutes |
| Duration of Follow-up | <input type="text" value="15"/> | Default duration of a follow-up exam in minutes |
| Examroom Calendar Increments | <input type="text" value="10"/> | Adjust minute increments on calendar |
| Date range on Appointment Template | <input checked="" type="checkbox"/> | If true date range can be set for Appointment Template (starting from - ending by). |
| Appointment Templates in more views | <input checked="" type="checkbox"/> | Show appointment templates in Daily View, Doctor View and Weekly View |
| Allow Exam Room Overlaps | <input type="checkbox"/> | Allow appointments to overlap within an exam room |
| Global Overlap Checking | <input type="checkbox"/> | Disallow overlapping appointments in any office or exam room |
| Appointment Default Color | <input type="text" value="Yellow"/> | |
| Phonetic Name | <input type="text"/> | Used by automated phone system to pronounce doctor's name |

When you enable the 'Date Range on Appointment Templates' setting, your appointment templates will now have fields to set a start and end date. These dates will be cross-referenced with your other appointment templates and will disable the 'Create' button if a conflict is found.

Create Custom Appointment Template



Office

Exam Room

Week Days

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Available from

Available to

Time press arrow keys to change time

Duration minutes (5-300) (End Time: 1:00 PM)

Appointment Profile

Create

Cancel