

Scheduling Templates Configuration Guide

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[Key configuration options](#) | [Example](#) | [Before going live](#)

The **Scheduling Templates** module under **Self-Scheduling** lets clinics set different working hours for specific appointment profiles, offices, and providers. The main goal is to control exactly when each appointment can be booked; for example, new patient visits only in the mornings or procedures only on certain days.

Key configuration options

Template activation

- **Enable Scheduling Templates:** Turns on custom working days and hours for specific booking flows.
- **Select Offices on Templates:** Adds a calendar column so templates can also be limited to specific offices.
- **Show Appointment Profiles on Templates:** Adds a calendar column so templates can also be limited to specific providers.
- **Show Providers on Templates:** Adds a provider column so templates can also be limited to specific providers.

Template definition

- **Template Name:** An internal label to identify the template.
- **Calendars:** The calendars or offices the template applies to.
- **Appointment Profiles:** The appointment profiles the template applies to.
- **Providers:** The providers the template applies to.
- **Active:** Turn on the template so its rules take effect.
- **Set Availability:** The days and times this template accepts appointments.



FrontOffice+ also supports **DrChrono Templates**, using the **Appointment Templates** configured in DrChrono.

Example

- **Scenario:** A practice only wants **New Patient** visits booked on Monday and Wednesday mornings.
- **Setup:** Turn on **Scheduling Templates**, add a template named "New Patients AM," select the **New Patient** appointment profile, and set availability to Monday and Wednesday, 8:00 AM–12:00 PM.
- **Outcome:** FrontOffice+ only offers **New Patient** slots in that window, while other appointment profiles keep their regular availability.

Before going live

Confirm:

- **Profile coverage:** Every appointment profile that needs restricted hours is included in a template.
- **Availability accuracy:** Template days and hours fall within the practice's **Scheduling Days and Scheduling Hours** (set in **Confirmations**) and the providers' real schedules.
- **Overlap rules:** Templates that share calendars, appointment profiles, or providers don't conflict unless overlap is intended.

If you require further assistance, contact our Customer Support team via in-app chat, email us at support@drchrono.com, or call us at (844) 569-8628.
