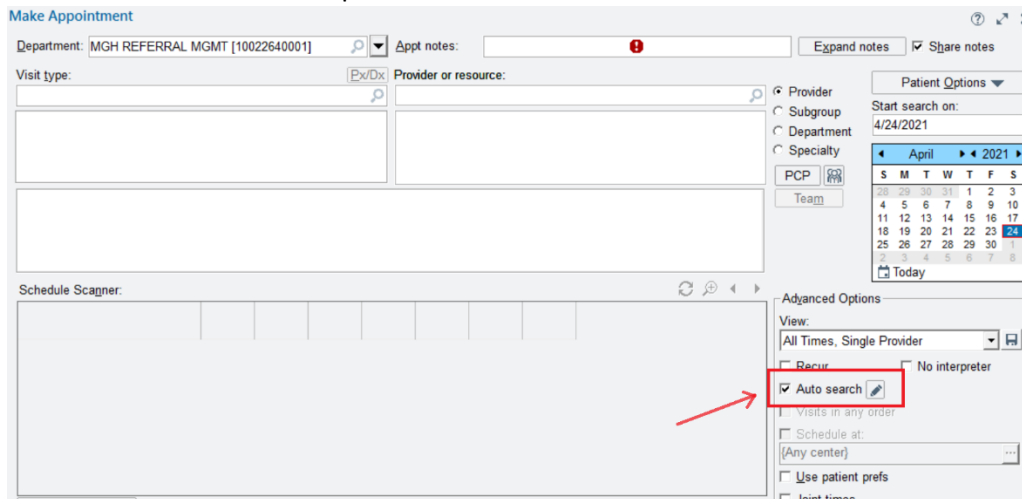# TEMPLATE READINESS REVIEW GUIDE

To review your department's templates, try scheduling each visit type for each provider using only auto-search. Below are some things to consider to better understand if your templates are over all set up appropriately and/or to identify any areas of concern:

Auto Search:

Whenever possible schedulers should be using auto search for scheduling appointments. Auto search can help with scheduling workflow efficiency and returning better options. Additionally, when patients are scheduling from a ticket, the only options they will generate are the ones that would populate via auto-search. Reviewing your auto search results will provide the patient's scheduling perceptive.

- Are you using auto search?
- When using auto-search do you get the expected results?
- Are you getting options that shouldn't be there? Or are you not getting enough options?
- Are you getting options for some providers' and not others?
- Why are you having to manually search?
- Do you receive and override warnings frequently when using auto search? (Patients will not see these options)

Where to find auto search option:

Templates:

Templates are schedules created for a specific provider in a specific department.

- Are you currently using templates?
- Does the template accurately display the provider's available time?
- What is preventing you from using templates?
- Is your template open (an open template is one without blocks, or without any criteria around the # of openings, am/pm sessions, available/unavailable time, etc.)? An open template would allow visit type to be schedule at any time.
- If you are not using a template, is there a template strategy that works and is still flexible?

Blocks:

Time reserved on a provider's schedule for a specific visit type or type of patient.

- Do you utilize blocks on your templates?
- Do the visit types find the appropriate blocks on a providers' template?
- Do you have blocks for follow-up visits?
- Do you have blocks for virtual (Virtual Integrated, Standalone Virtual and Telemedicine) vs in-clinic visits?
- Do you set unavailable time? This should be used for any time that should be unavailable for scheduling appointment such as vacations, chart review, meetings, etc.
- Are there private slots on templates?
- Do you feel like there is enough capacity set up in those blocks for patients to take advantage of ticket scheduling?
- If you do not have blocks for follow-up visits, does it matter what time of day follow ups are scheduled? Is there any concern that too many follow-ups will be scheduled on any given day?
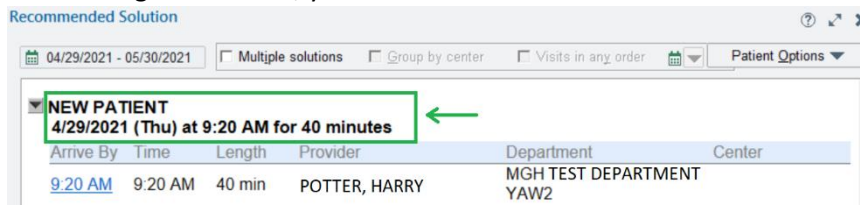
Sample template with blocks:
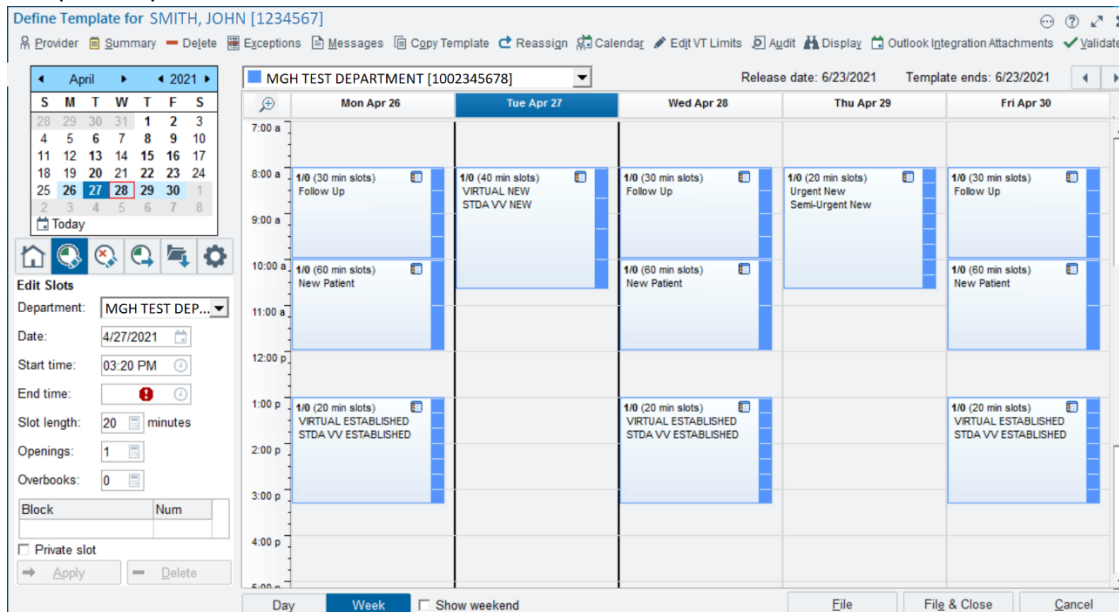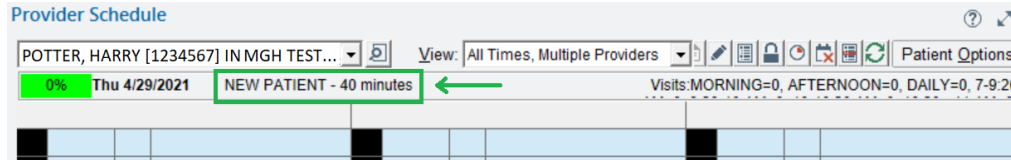

Visit Type Durations

Each visit type duration should display in your search results when scheduling an appointment.

When using auto search, you can find the visit duration here:

When doing a manual search, you can find the visit duration here:

- What are the durations for each visit type?
- Is the template set up to accurately capture the providers' appointment duration? (i.e. an appointment duration that is 30 minutes will not fit into a schedule that is built with 20 minute slots and therefore would not generate results using auto search)

Sessions and Visit Type Limits

Visit type limits control how many visit types can be scheduled for a certain time of day or range of dates; this section of time is called a session. These limits can be for the day, week or month.

Session times should correlate with the hours of operation for the practice.

- Do you utilize visit type limits for follow ups?
- Do your visit type limits appear to be working?
- Are the session times correct?
- Are limits set to a daily max or session max? Are they for a particular visit type, a group of visit types, or all visit types?
- If not currently using visit type limits, are there days/times where providers would like to limit the number of a visit type they are scheduled for?
- Is overbooking currently a concern?

Sample visit type limits:

Visit Type Limits - Daily

	Session	Visit Type	Visit Type Group	Overbook	Day of Week	From Date	To Date	Maximum
1	MORNING	NEW PATIENT		☐	Monday	3/1/2021		3
2	AFTERNOON	CONSULT NEW		☐	Wednesday	4/2/2021		2
3	DAILY	URGENT		☐	All	4/15/2021		4
4				☐				