Appointment Templates: Associating Offices, Exam Rooms, Dates, and Times with Appointment Profiles
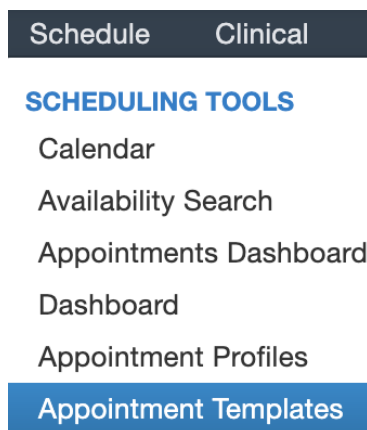
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Appointment templates are blocks of time during which a provider usually sees appointments with the same profile. These may have a longer duration than the corresponding profile, in which case they may allow multiple appointments to be booked during that period.

With appointment templates, you may assign offices, exam rooms, days of the week, a start time, and/or a set appointment duration with an appointment profile. If you have an appointment template associated with an appointment profile, additional fields will auto-populate on the schedule. When you click an appointment template on the calendar while creating an appointment, the corresponding fields will automatically fill with the office, exam room, start time, and set appointment duration.

It should be noted that the creator of the Appointment Profile is the "owner" of whatever Appointment Template they create.

To set up your appointment templates, you will need at least one appointment profile created. Once your appointment profile(s) have been created, you may begin setting up your appointment templates by navigating to the **Appointment Templates** page.

1. To access this page, go to **Schedule** and select **Appointment Templates**.

On your appointment templates page, you will see a list of your existing appointment templates.

2. To create a new template, select the **+Add New Template** button.

3. Fill out any of the desired fields you wish to associate with your appointment template. Leave any fields you do not wish to use blank. At the bottom of the page, select an appointment profile and select **Create**.

Note: You may not create an appointment template without selecting an appointment profile. Additionally, the information you enter in your appointment template will be cross-referenced with your existing appointment templates. If there is a conflict, you will be unable to proceed.