



Practice Support Program

## OSCAR: CUSTOMISE YOUR SCHEDULE

### Appointments:

- Change Appointment Colors

- Add / Change Appointment Types

### Making Schedule Templates:

- Template Codes

- Schedule Templates

- Provider Schedules

# Change the Appointment Colors in Oscar

You can customise the types of appointments and the colors on your screen. If you need more appointment types created, your OSP can do that for you.

1. In Administration select schedule management
2. Then select appointment status setting
3. Pick the appointment type you want to edit. You can also edit the description here, so if there is an existing type of appt that you are not using, you can just change the name (& color if you wish) and start using it.
4. If you want additional appointment types your service provider can add them for you.

Administration Panel

- User Management >
- Billing >
- Labs/Inbox >
- Forms/eForms >
- Reports >
- eChart >
- 1** Schedule Management >
- Schedule Setting
- 2** Appointment Status Setting
- Appointment Type List
- Add a Group
- Search/Edit/Delete Groups
- Access Control
- Prevention Notification Settings
- System Management >
- Faxes >
- System Reports >
- Integration >

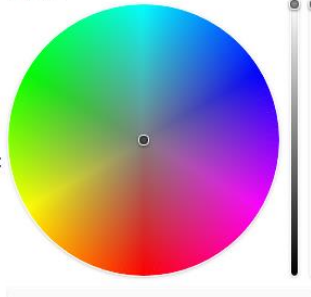
Appointment Status Manager						
Code	Description	BG Color	Status			
t	To Do	#FDFEC7	1			
T	New Patient	#DF209E	1	<a href="#">Edit</a>		
H	Here	#D0ee00	1	<a href="#">Edit</a> <a href="#">Disable</a>		
P	Docs To-Do	#37CFAC	1	<a href="#">Edit</a> <a href="#">Disable</a>		
L	Pap	#F35408	1	<a href="#">Edit</a>		
a	Exam 1	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
b	Exam 2	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
c	Exam 3	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
d	Exam 4	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
e	Exam 5	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
f	Exam 6	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
g	Exam 7	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
h	Exam 8	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
j	Exam 9	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
k	Exam 10	#897DF8	1	<a href="#">Edit</a> <a href="#">Disable</a>		
s	Injection	#CA2AE7	1	<a href="#">Edit</a> <a href="#">Disable</a>		
i	Procedure	#F5BF1F	1	<a href="#">Edit</a>		
N	No Show	#cccccc	1	<b>3</b> <span style="border: 1px solid red; padding: 2px;"><a href="#">Edit</a></span>		
S	NOTICE	#F8F506	1	<a href="#">Edit</a>		
X	CPX	#F52626	1	<a href="#">Edit</a> <a href="#">Disable</a>		
r	Baby check	#1BE1D9	1	<a href="#">Edit</a> <a href="#">Disable</a>		
E	Prenatal	ff99ff	1	<a href="#">Edit</a> <a href="#">Disable</a>		
m	Sport Med	#8D1252	1	<a href="#">Edit</a> <a href="#">Disable</a>		
n	Not Billed	#E59E9E	1	<a href="#">Edit</a> <a href="#">Disable</a>		
C	Cancelled	#999999	1	<a href="#">Edit</a>		
B	Billed	#3EA4E1	1	<a href="#">Edit</a>		

Move your cursor around the color wheel until you find one you like, or enter the color number if you know it, then select **(4)** Submit.

**Note:** The color you select might look quite different if you have the blue background on your main Oscar screen – you will likely have to experiment a bit to find ones that work. If you like any of the colors in the example above you can just enter the number in the “Old Bg Color” box & select submit – don’t forget the hashtag.

Administration Panel

- User Management >
- Billing >
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- Schedule Management >
- Schedule Setting
- Appointment Status Setting
- Appointment Type List
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- Access Control

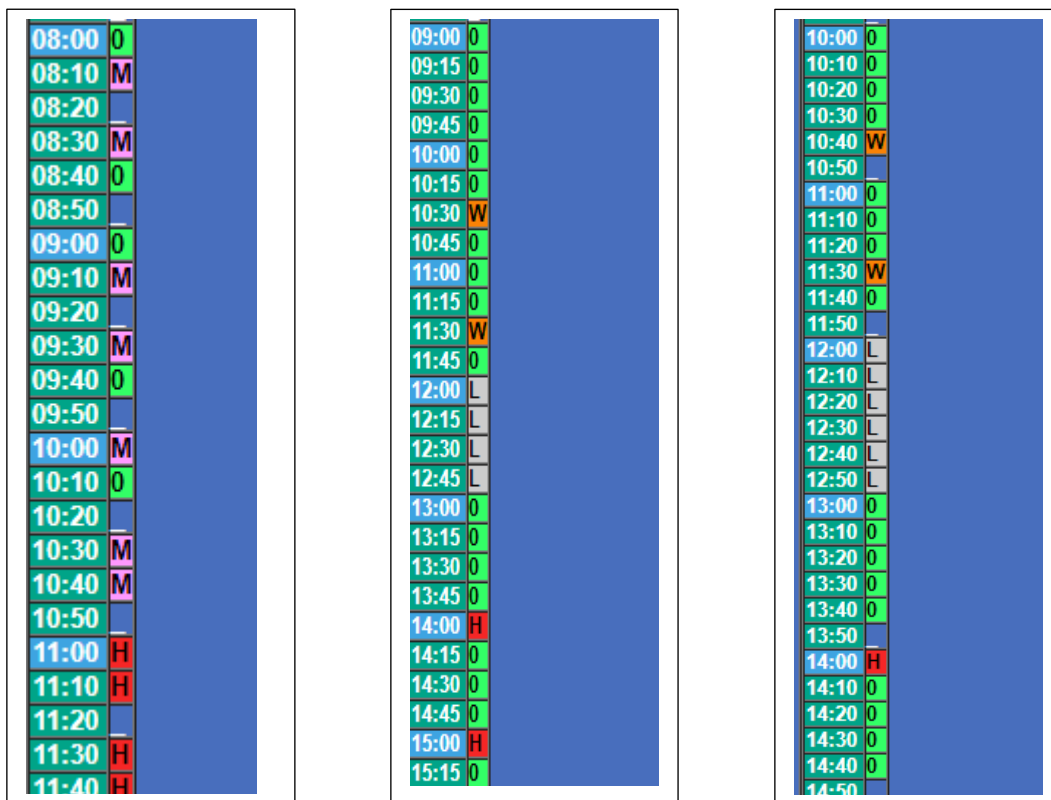
Appointment Status Manager	
Code:	<input type="text" value="N"/>
Description:	<input type="text" value="No Show"/>
Old Bg Color:	<input type="text" value="#cccccc"/>
New Bg Color:	
<b>4</b> <span style="border: 1px solid red; padding: 2px;">Submit</span>	

## Schedule Templates

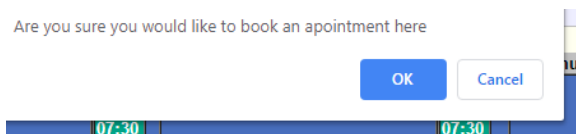
You can set up as many “types” of schedule templates as you need. The examples below are all from the same clinic – different practitioners. Your OSP will likely have set up the initial templates for you, but as locums come through the office and practitioners change, you will need to change or modify these.

The Template Codes are the different colors indicate different type of appt to be booked in the spot - in this case:  
O = open (any type of booking), W = walk-in, M = maternity, H = same day appt, L = lunch

The standard set-up for family practice is 10 or 15 minute increments, but there are other options available – check with your OSP for advice. Some of the doctors at this clinic use the blank spaces for either catch-up or to squeeze in extra patients that need to be seen on an otherwise booked day.



In this clinic the W & H spots have a pop-up warning as a double check to make sure the appt is being booked properly. You can also set it to not allow booking until the same week or same day (see below).



# Set up your Template Codes

In administration select:

1. Schedule Management
2. Schedule Setting
3. Template Code Setting

From the drop down menu:

4. Select the appointment type you want to change
5. Choose edit

6. You can rename an existing appt type that you are not using
7. You can make a new type. **Note** that capital and small letters create separate types of appointments
8. You can use the existing color or create a new color
9. Limit Type are the warnings & restrictions: Off is nothing, Warning is the pop-up (are you sure ...)  
If you select Same Day or Same Week you **cannot** book an appt in that spot until the specified time

# Set up your Schedule Templates (Daysheets) or Edit an Existing Template

**SCHEDULE TEMPLATE SETTING**

1. Select the provider's name to set up the provider's schedule.

2. Check the 'Holiday Setting' link to specify the holidays.

Select a provider:

Or do:

[Holiday Setting](#)

[Template Code Setting](#)

3b [Template Setting for Public](#) 3a

1. In administration, select Schedule Management
2. Then Schedule Setting
3. Select Template Setting with the default of **(b)** public or select the provider from the dropdown menu first **(a)** & then choose Template Setting to make a personal template
 

**Tip:** If you make your templates public, they can be used for any provider. Personal Templates are available only to that provider. It is often helpful to make most templates public.
4. If you are making a new template **(a)** chose the time increment first, then **(b)** name the template – take care when naming – a new template with the same name will overwrite the original
5. If you want to edit an existing template, choose it from the dropdown menu & select Edit

1. Provider dropdown menu showing options like P: 11-6, P: 11:30-5:00, P: 12-5, P: 12:30-5, P: 2-6, P: 2:30-5, P: 8-4, P: 8-12:00, P: 9:00-2:30, P: 9:20-4:30, P: 1-5, P: 1-6, P: 1-8, P: 10-2, P: 11-3, P: 12-4, P: 12-6, P: 12-6 No Break, P: 12-8.

2. Time slot dropdown menu showing options like P: PM (1:30-4:30), P: AM (9-12:30), P: Day (9-4:30).

3. Template name dropdown menu showing options like P:MC JMC, P:MC JMC, P:Regular Schedule j0900-1700 (10), P:Urgent clinic j0700-1900.

One way to easily be able to pick your different templates is to name them to reflect the time or shift of the template. For public templates, that you will use for multiple providers, naming the time makes it much easier to pick the one you want.

The Summary info reads after the vertical dash. **Note** if you are making two templates for the same time frame (ie 12-6) but with a difference – that note must be included in the Name, not the Summary or the first one will be overwritten.

Provider: Public

5

4a

Add A Template	
Template Name:	4b <input type="text" value="P:MC JMC"/> (≤20 chars)
Summary:	<input type="text" value=""/> <a href="#">Template Code</a>

## Make your Schedule Templates

Next fill in your template with the template codes to reflect the types of appointments for each slot

In this example 0 = open (any type of booking), W = walk-in, H = same day appt, L = lunch. The dashes indicate a blank spot on the appointment screen. This doctor books in 10 minute increments but leaves a “catch-up” spot in the last position of each hour. Some doctors put the catch-up in the middle spot each hour, some doctors book all 6 spots.

Add A Template																												
Template Name:		P:8:30-4:30 (<20 chars)																										
Summary:														<a href="#">Template Code</a>														
00:00	_	_	_	_	_	_	01:00	_	_	_	_	_	_	_	02:00	_	_	_	_	_	_	03:00	_	_	_	_	_	_
04:00	_	_	_	_	_	_	05:00	_	_	_	_	_	_	_	06:00	_	_	_	_	_	_	07:00	_	_	_	_	_	_
08:00	_	_	_	_	0	_	09:00	0	0	0	0	W	_	10:00	0	0	0	W	0	_	11:00	0	0	0	W	0	_	
12:00	L	L	L	L	L	_	13:00	0	0	0	0	0	_	14:00	0	0	0	0	0	_	15:00	0	0	0	0	0	_	
16:00	0	0	H	H	_	_	17:00	_	_	_	_	_	_	18:00	_	_	_	_	_	_	19:00	_	_	_	_	_	_	
20:00	_	_	_	_	_	_	21:00	_	_	_	_	_	_	22:00	_	_	_	_	_	_	23:00	_	_	_	_	_	_	

2  1

1. When you have finished your template make sure you save it!
2. If you want to delete a template, bring it up as if you were going to edit it, then select delete

Here is an example of a template laid out in 15 minute increments:

Add A Template																													
Template Name:		9:30-4 (<20 chars)																											
Summary:														<a href="#">Template Code</a>															
00:00	_	_	_	_	01:00	_	_	_	_	02:00	_	_	_	_	03:00	_	_	_	_	04:00	_	_	_	_	05:00	_	_	_	_
04:00	_	_	_	_	05:00	_	_	_	_	06:00	_	_	_	_	07:00	_	_	_	_	08:00	_	_	_	_	09:00	_	_	T	T
10:00	T	T	C	C	11:00	T	T	T	T	12:00	L	L	L	L	13:00	U	U	T	T	14:00	T	T	T	T	15:00	U	U	U	U
16:00	_	_	_	_	17:00	_	_	_	_	18:00	_	_	_	_	19:00	_	_	_	_	20:00	_	_	_	_	21:00	_	_	_	_
22:00	_	_	_	_	23:00	_	_	_	_	24:00	_	_	_	_	25:00	_	_	_	_	26:00	_	_	_	_	27:00	_	_	_	_

## Make your Provider Schedules (Daysheets)

Go back to the main schedule setting screen & select the provider you want to make a schedule for from the dropdown menu.

Select a provider:

---None---

This main template is the routine schedule – you can make daily changes as needed without having to change this template (instructions below).

1. Select a start and end date for the schedule – note: do not add leading zero's to the single digit numbers. The max length for a schedule is 3 years – depending on how often your provider's schedule changes you can set a much shorter timeframe so you don't have to reschedule patients as often if the schedule changes a lot.  
**DO NOT overlap dates** – when you put in the next date range, the 1<sup>st</sup> day of the new schedule is immediately after the last day of the old schedule, not the same day.

2

2019-01-01 ~ 2019-12-31

↔

2018-03-01 ~ 2018-12-31

↔
Delete

3. Check off the days of the week that the provider is available (if you miss this little step your schedule will not show up on the appointment screen even though the template is made!)
4. If your provider works an alternating schedule on the same two-week cycle, there is an option to add the second week as part of the standard template.
5. Select the template from the column on the right **(a)** & click the arrows **(b)** to move the template to that day. If you have made any personal templates for that provider, you will see them in the column along with all the public ones.

2019-01-01 ~ 2019-06-30 Delete

1
Date from: 2019 - 1 - 1 (yyyy-mm-dd) to: 2019 - 6 - 30

is available EVERY (Day of Week):  Alternating Week Setting **4**

<input type="checkbox"/> Sun		<<	
<input type="checkbox"/> Mon		<<	
<input checked="" type="checkbox"/> Tue	MF 8 - 2:20	<<	<b>5b</b>
<input checked="" type="checkbox"/> Wed	MF 1 - 4:00	<<	
<input checked="" type="checkbox"/> Thu	MF 8 - 2:20	<<	
<input checked="" type="checkbox"/> Fri	MF 8 - 12	<<	
<input type="checkbox"/> Sat		<<	

P: |  
P: 11-6 |  
P: 11:30-5:00 |  
P: 12-5 |  
P: 12:30-5 |  
P: 2-6 |  
P: 2:30-5 |  
P: 8-4 |  
P: 8:-12:00 |  
P: 9:00-2:30 |  
P: 9:20-4:30 |

**5a**

Next **6**

6. When you have filled in all the appropriate weekdays, select Next. This calendar is where you can put in a different template for a single day (see below). If you do not have any changes to make at this time select next at the bottom of this calendar & you will get a message that you have finished one schedule successfully. Do it again takes you back to make another schedule, or close the window if you are finished.

You have finished one Schedule Setting successfully.

Do it again

## Change a Schedule for a Day

You can insert a different template into a single day when a schedule is changing for a day or a short(ish) period of time. For longer term changes, you might want to consider making a new schedule for the duration.

1. Click on the text on the day you want to change.

effective (2019-01-01 - 2019-06-30)  
◀ last month 2019-5 next month ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 MF 1 - 4:00	2 MF 8 - 2:20	3 MF 8 - 12	4
5	6 MF 8 - 4	7 MF 8 - 2:20	8 MF 11:30-4:30	9 MF 8 - 2:20	10 MF 8 - 4	11
12	13	14 MF 8 - 2:20	15 MF 1 - 4:00	16 MF 8 - 2:20	17 MF 8 - 12	18
19	20	21 MF 8 - 2:20	22 MF 1 - 4:00	23 MF 8 - 2:20	24 MF 8 - 12	25
26	27	28 MF 8 - 2:20	29 MF 1 - 4:00	30 MF 8 - 2:20	31 MF 8 - 12	

Next 4

2. A window will open with a dropdown menu of your available templates – choose the one you want for that day

Date: 2019-05-07

Available:  Yes  No

2 Template: P:MC |MC

By: Me

3 Save Cancel Delete

3. Select save. The day will turn yellow to indicate a change to the regular template. If you have another day(s) to change, select the next day and repeat the steps.
4. Once you have finished making all your changes for that provider, select Next at the bottom of the calendar & you will get a message that you have successfully finished the schedule 😊

You have finished one Schedule Setting successfully.

Do it again