

# Scheduling Express

## Procedure Templates

Office staff can create procedure templates by provider in order to pre-populate booking forms with procedure and admission details. This will save time for staff who frequently book the same type of cases in Scheduling Express.

### Using this feature in Scheduling Express

There are two ways to set up a template, a) under **User Settings** or b) from the **scheduling calendar / booking form**. Templates are built per physician, so all office staff associated with a physician's office has access to use, view or edit templates.

#### Create a template from User Settings

1. Click **User Settings** and access the **Clinic Setup** page > **Procedure Template** tab. Existing templates can be edited or deleted as needed from this page.
2. To build a new template, click **Create New**.

The screenshot shows the 'Clinic Setup' page with the 'Procedure Template' tab selected. A table lists existing templates, and a '+ Create New' button is highlighted. The table has the following data:

Template Name	Physician Name	Created By	Created DateTime	Modified By	Last Modified DateTime	
Black - Screening Colonoscopy	BLACK,JOHN	Albright,Tonya	1/6/2022 11:01:41 AM	Albright,Tonya	1/6/2022 11:01:41 AM	<a href="#">Edit</a> <a href="#">Delete</a>

3. Complete the **required fields** and any **optional fields** in order to pre-populate information on the electronic booking form.

- **Note** – for the template name, use a standard naming convention of **Dr. Last Name – Procedure Description** (example: Black–Appendectomy).

4. Click **Save**.

The screenshot shows the 'Physician Procedure(s) Template' form. The form includes the following fields:

- Procedure Details
- Black - Appendectomy
- Appendectomy
- Outpatient/Day Surgery
- BLACK,JOHN
- 44960 - APPENDECTOMY
- Assisting
- Site/Side
- No anesthesia selected...
- \*Your surgeon's description of the procedure, special equipment needed, comments, etc.
- Admission Details
- Do you expect the patient to be here two or more midnights?
- AM Admission?
- Patient has Medicare?
- They are attached to this booking request
- [Discard](#) [Save](#)

## Create a template from the booking form

1. Open a booking form by creating a booking draft; complete all fields of the booking form.
2. Click the gray disk icon to **Save as New Template**.
3. Enter the template name and click **Save Template**. Physician, procedure, and admission details will save to a template, patient details *will not save*.

The screenshot shows a booking form with the following details:

- Case Date: 02/17/2022
- Duration: 30m
- Start Time: 12:00 PM
- End Time: 12:30 PM
- Room: JSE002.JSE002
- EMR Account#: Pending
- Patient Name: Smith, Joe
- Gender: Male
- Date of Birth: 01/01/1950
- Mobile: (615) 555-1111
- Procedure: Hip replacement
- Procedure Details: 29860 - HIP ARTHROSCOPY DX, 27125 - PARTIAL HIP REPLACEMENT

A red box highlights a gray disk icon in the 'Draft Request Draft' section.

The 'Save As New Template' dialog box contains the following text:

Please name your Procedure Template below.  
To make edits to an existing Procedure Template please visit the Clinic Setup page in Settings.

The input field contains the text: Black - Partial Hip

Buttons: Cancel (red), Save Template (green)

## Applying a template from the booking form

1. Open a booking form. Click **Select Template** and choose a template from a drop-down menu.

The screenshot shows the 'Patient Details' section of the booking form. The 'Select Template' dropdown menu is open, showing the following options:

- Select Template--
- Black - Screening Colonoscopy
- Black - Colonoscopy, Brooming
- Black - EGD & Colonoscopy
- Black - Nissen, GERD

A red box highlights the dropdown menu and the 'Black - Screening Colonoscopy' option.

2. Click the **green checkbox** to apply. This automatically enters the information from the saved template. Fields can be edited as needed. If a template is added in error, a new template can be applied or all fields can be edited or overwritten.

The screenshot shows the 'Patient Details' section of the booking form. The 'Select Template' dropdown menu is now set to 'Black - Screening Colonoscopy'. A green checkbox is checked, and a gray disk icon is visible next to it.

Note: Once the case is submitted, the apply template buttons are disabled.

## Create a new template from an existing template

You can create a similar template from one that is already created. This can save time because it allows you to retain the information you need, and edit or add procedure or admission details that may be different.

**Example: You created a template for an EGD & Colonoscopy with Dr. Black. You are now submitting a scheduling request for the same procedure with a different physician, and you want to create a template for Dr. Dailey using the same procedure details.**

1. From the booking form, **select the template** you want to copy and click the green check box (**apply**).
2. **Change** the information that is different.
3. Click **Save**.

Patient Details

Smith Joe Suffix Female 01/01/1950

Language Mobile (555) 555-5555 Other none@email.com

No special accommodations.

Black - EGD & Colonoscopy

Procedure Details

Abd Pain Outpatient/Day Surgery \*Primary Insurance

Charles Dailey, M.D. 43252 - EGD OPTICAL ENDOMICROSCOPY Assisting Site/Side Hospital Procedure

Charles Dailey, M.D. 44389 - COLONOSCOPY WITH BIOPSY Assisting Site/Side Hospital Procedure

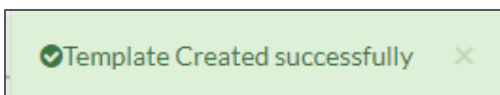
4. Enter a **name** and click **Save Template**. A pop-up box will appear at the bottom of the screen confirming that the template was saved.

**Save As New Template**

Please name your Procedure Template below.  
To make edits to an existing Procedure Template please visit the Clinic Setup page in Settings.

Dailey - EDG & Colonoscopy

Cancel Save Template



**Refer to the Online Help resource for additional information about the Scheduling Express system**