exa-PACS · exa-RIS

Feature Summary

Schedule Templates

What are schedule templates?

Schedule templates control the available hours that studies can be scheduled. You can configure a schedule template that contains one or more schedule rules for scheduling appointments. A schedule rule is a range of available dates and times for appointment types and modality rooms (business hours). For advanced rules you may need a variety of schedule templates and rules.

Quick blocks are now built into schedule templates for easier management. Quick blocks can be added and managed directly from the schedule book.

Schedule templates are available on the main grid of the Schedule Templates tab.

Schedule rules are available within each schedule template.

How do schedule rules affect scheduling?

When working in the schedule book, Exa PACS/RIS prevents you from scheduling a study that breaks any rule you define (i.e. is outside of an available date or time), either by hiding modality rooms on specified days, or by warning you with a message. If you attempt to schedule a study or order that breaks the rules, the study or order moves to the Pre-orders area. When working in Find Slots, slots that are not available for a particular modality room or appointment type are not shown.

How do schedule rules work?

Find Slots uses schedule rules to determine the availability of timeslots in the following manner.

1. A slot is always available if there are no applicable schedule rules.
2. No scheduling occurs in timeslots with applicable *exclusion rules*.

    EXAMPLE: A room is normally open 8 am–5 pm, but on Sept 28th the room is closed 11 am–1 pm. The

    schedule rule for Sept 28th is the exclusion rule, and nothing can be scheduled during that time.
3. If there is **any** active *inclusion rule*, even if it applies to a different timeslot:

    All slots *except* those included in the inclusion rule are unavailable.

A priority is set for the inclusion rules: Specific date, yearly, monthly, weekly, daily. If a specific date inclusion rule and a daily inclusion rule exist, the specific date rule is applied instead of the daily rule. If two equal priority rules exist (such as two daily rules), they stack.

Two sets of rules can apply simultaneously. For example, a weekly inclusion rule and a daily exclusion rule can both apply.

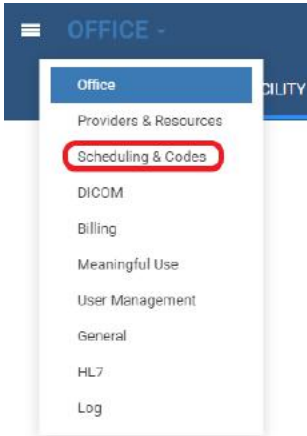## Example of configuring a schedule template

In this example we create a schedule template for a CT room that is open M–F 8 am–8 pm. Contrast studies are not available M–F 4–8 pm and Wednesday from 8–10 am.

1. Select the navigation ("burger") menu.
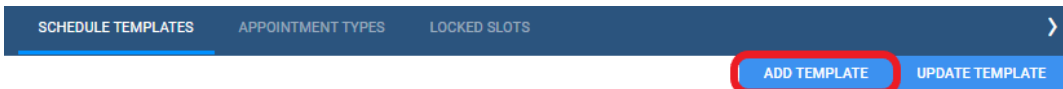2. Select **SETUP**.

    *Your menu options may vary.

3. Select **OFFICE** > **Scheduling & Codes**.

4. Select **SCHEDULE TEMPLATES**.

5. Select **ADD TEMPLATE**.
6. Type an intuitive name for the template, such as the facility or type of template.

To create a rule for the normal hours that the room is open, enter all required fields (marked with an asterisk *).

7. **Under Rule Name,** select **Predefined** or **Free Text**.
   - Predefined rule names can be setup in Setup > Company > Reason Codes > Schedule Rule Reasons. We recommend names that describe the modality and availability.
   - If you choose Free Text, type the rule name in the box.

8. Select modality rooms, appointment types, or both.

   Modality Room – Select at least one modality.
   IMPORTANT: If you do not select a modality, the room applies to every facility.

   Appointment Type – Specify appointment types if you want only certain procedures to be available (e.g. only contrast studies).

9. Select the type of rule:

   Repeating: Rule repeats every day.
   Date/time: Rule is only applied on a specific date and time.

10. **Resource** – Select for resource-based technologist scheduling.

11. **Autoblocking** - If you selected a resource, enable or disable autoblocking.
    Autoblocking automatically blocks a technologist in situations were they are assigned to multiple modality rooms.

12. **Not Available** check box: Select or clear to make appointment types or modality rooms not available or available on certain dates and times.

   Selected – The room is not available for scheduling appointments.

   Cleared – The room is available for scheduling appointments.

13. **Display as a block on schedule book** - Select to show the block on the schedule book.
14. If you selected **Display as a block on schedule book**, you can select **Ignore rule in scheduling engine** to add "rules" only for visual displays on the schedule book to alert users.

15. **Repeats**. Select options to repeat Daily, Weekly, Monthly, or Yearly.

16. Select **SAVE**.

Create a quick block

To more easily block off timeslots on the schedule book, you can create a quick block.

1. On the schedule book, select **Quick Block**.
2. Drag to select timeslots to block.
3. In the schedule template area, select options.

    Result: A quick block appears on the schedule book.

Edit or delete a quick block

To edit or delete a quick block from the schedule block, select **Quick Block** and then select the edit button on the block.
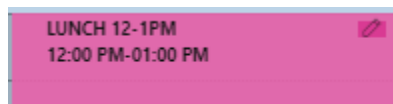
Example 1: One-time quick block for machine maintenance

Example 2: Technologist lunch block

☐ Inactive

Template Name * Jenn's Template ▾

Rule Name * ○ Predefined ● Free Text

Lunch 12-1pm

Modality Rooms **EDIT MODALITY ROOMS** ⊞ ✕

Appointment Types **EDIT APPOINTMENT TYPES**

BD-H (BD-H) CT-H (CT-H)
MG-H (MG-H) MR-H (MR-H)
US-H (US-H)
XRAY-H (XRAY-H)

Type * Repeating ▾
☑ Not Available

Start Date 10/03/2022 🗓

☑ Display as a block on schedule book
#e02d8e

☐ Ignore rule in scheduling engine (use only for displaying text/color label)

Repeats Daily ▾
Every 1 ▾ days
From 12:00 PM ⏰ To 1:00 PM ⏰

Summary

Not Available Every day from 12:00 PM to 1:00 PM beginning 10/03/2022