

Exa® PACS|RIS

Feature Summary

Schedule Templates

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What are schedule templates and schedule rules?

A *schedule template* controls 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.

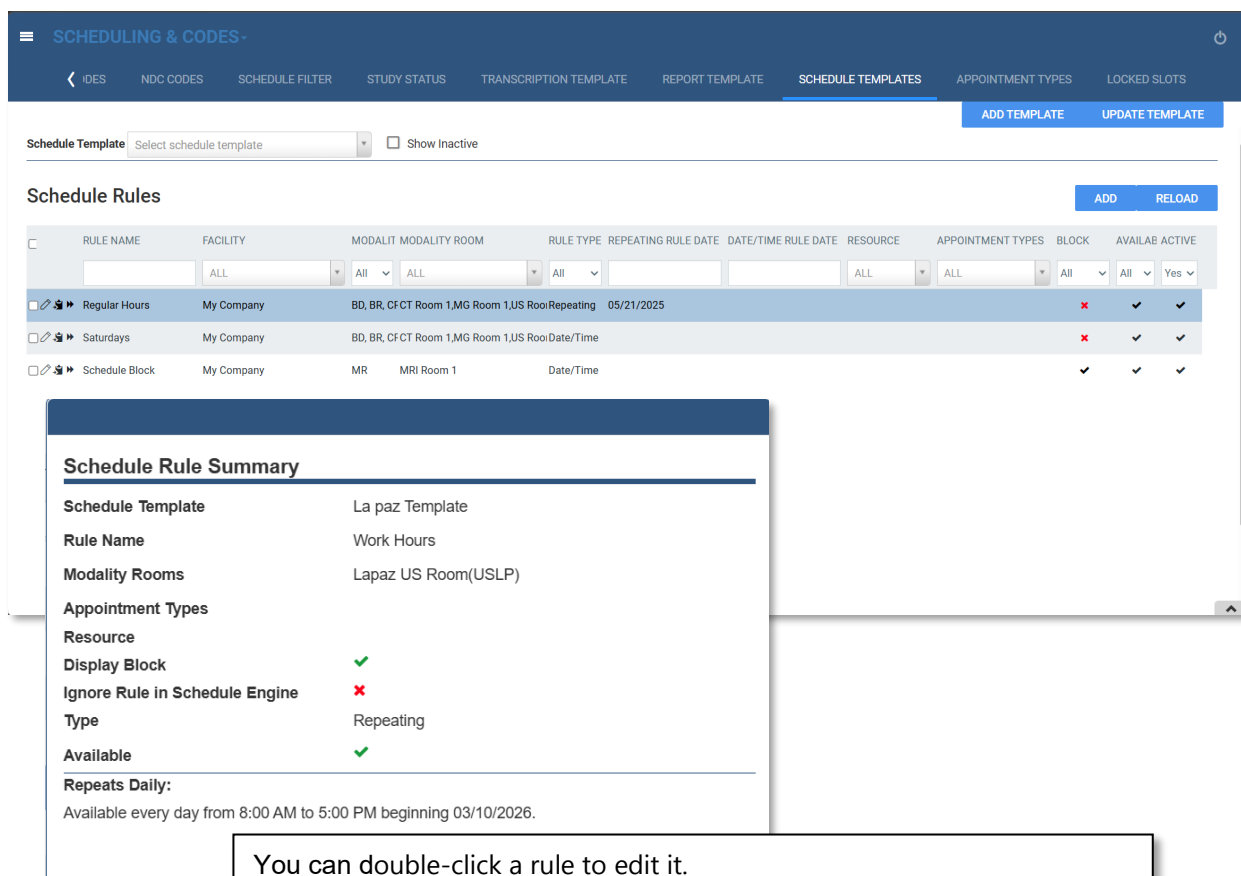
Schedule template: Like a folder in a computer, it contains schedule rules to help you organize them.

Schedule rule: The “office hours” of a modality room, defined by logic and settings.

Quick blocks are built into schedule templates for easier management. You can add and manage quick blocks directly from the schedule book. On the SCHEDULE TEMPLATES tab (see figure below), you can choose which template to display.

Build a schedule rule

On the burger  menu, select **SETUP > OFFICE > Scheduling & Codes > SCHEDULE TEMPLATES**.



The screenshot shows the 'SCHEDULING & CODES' interface with the 'SCHEDULE TEMPLATES' tab selected. Below the navigation bar, there's a 'Schedule Template' dropdown and a 'Show Inactive' checkbox. The main area displays a table of 'Schedule Rules' with columns: RULE NAME, FACILITY, MODALIT MODALITY ROOM, RULE TYPE, REPEATING RULE DATE, DATE/TIME RULE DATE, RESOURCE, APPOINTMENT TYPES, BLOCK, AVAILAB, and ACTIVE. Three rules are listed: 'Regular Hours', 'Saturdays', and 'Schedule Block'. A modal titled 'Schedule Rule Summary' is open, showing details for the 'Regular Hours' rule.

RULE NAME	FACILITY	MODALIT MODALITY ROOM	RULE TYPE	REPEATING RULE DATE	DATE/TIME RULE DATE	RESOURCE	APPOINTMENT TYPES	BLOCK	AVAILAB	ACTIVE
Regular Hours	My Company	BD, BR, CFCT Room 1, MG Room 1, US Rooi	Repeating	05/21/2025		ALL	ALL	All	All	Yes
Saturdays	My Company	BD, BR, CFCT Room 1, MG Room 1, US Rooi	Date/Time							
Schedule Block	My Company	MR MRI Room 1	Date/Time							

Schedule Rule Summary

Schedule Template: La paz Template

Rule Name: Work Hours

Modality Rooms: Lapaz US Room(USLP)

Appointment Types

Resource

Display Block: ✓

Ignore Rule in Schedule Engine: ✗

Type: Repeating

Available: ✓

Repeats Daily:
Available every day from 8:00 AM to 5:00 PM beginning 03/10/2026.

You can double-click a rule to edit it.

To show a summary of the schedule rules, select the  button.

☐ Inactive

Schedule Template * Normal Hours

Rule Name * Regular Hours

Modality Rooms * ALL SELECTED (6) -

Resource Select resource

☐ Not Available

☐ Display as a block on schedule book

Type * Repeating

Repeats Daily

Every 1 days

Start Date 05/21/2025

End Date MM/DD/YYYY

Start Time 8:00 AM

End Time 6:00 PM

Summary
Every day from 8:00 AM to 6:00 PM beginning 05/21/2025.

SAVE SAVE & CLOSE CLEAR BACK

Appointment Types EDIT APPOINTMENT TYPES

Required settings

- Schedule Template: The template to contain the schedule rule.
- Rule Name: A name that *clearly* describes the purpose of the schedule rule (such as “Regular hours” in the SCHEDULE TEMPLATES screenshot above).
- Modality Rooms: Which rooms the schedule rule applies to.
- Type: Whether the rule is repeating or a single “Date/Time” rule.
 - o For repeating rules, you must specify a frequency (see below for open time priority rules).

Optional settings

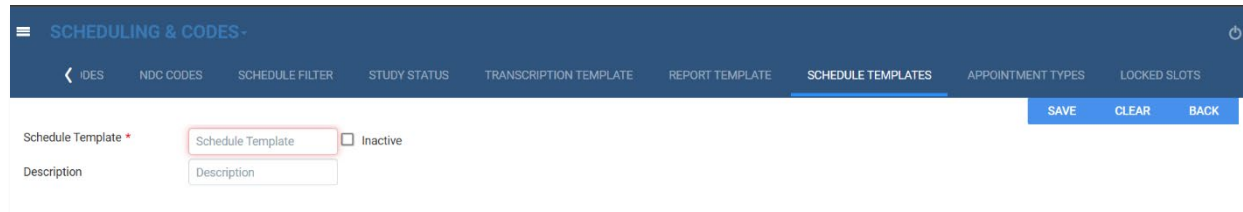
- Appointment Types: Specifies available appointment times for the modality rooms.
- Resource: When assigning a technologist resource this gives the option to activate autoblocking for the given modality rooms. This means that if a study is scheduled for 9am in one room a block is automatically applied for 9am in another room for the same duration.
- Display as a block on schedule book: Shows the rule name on schedule blocks for the times defined.
 - o When on, you can add a color from a color picker
 - o You can select “Ignore Rule in scheduling engine” (use only for displaying text/color label). This makes the rule a simple label on the schedule book, commonly used for things like “Lunch.”
- End Date: This is sometimes helpful but not required.

Inclusionary vs Exclusionary

The **Not Available** checkbox makes a rule inclusionary (unchecked) or exclusionary (checked). *Exclusionary* means Exa strictly defines a time as not available even if an inclusionary rule exists for the same time frame. *Inclusionary* rules have a priority which must be strongly observed (see “How do schedule rules work?” below).

Add a schedule template

1. On the burger  menu, select **SETUP > OFFICE > Scheduling & Codes > SCHEDULE TEMPLATES.** , and then select **ADD TEMPLATE.**
2. Optional: Type a name and a description, and then select **SAVE.**



The screenshot shows the 'SCHEDULE TEMPLATES' section of the Exa PACS|RIS interface. The top navigation bar includes links for IDES, NDC CODES, SCHEDULE FILTER, STUDY STATUS, TRANSCRIPTION TEMPLATE, REPORT TEMPLATE, SCHEDULE TEMPLATES (active), APPOINTMENT TYPES, and LOCKED SLOTS. Below the navigation bar, there are input fields for 'Schedule Template *' and 'Description'. The 'Schedule Template *' field has a red border and a red asterisk, indicating it is required. To the right of this field is an 'Inactive' checkbox. At the bottom right of the form, there are three buttons: 'SAVE', 'CLEAR', and 'BACK'.

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.

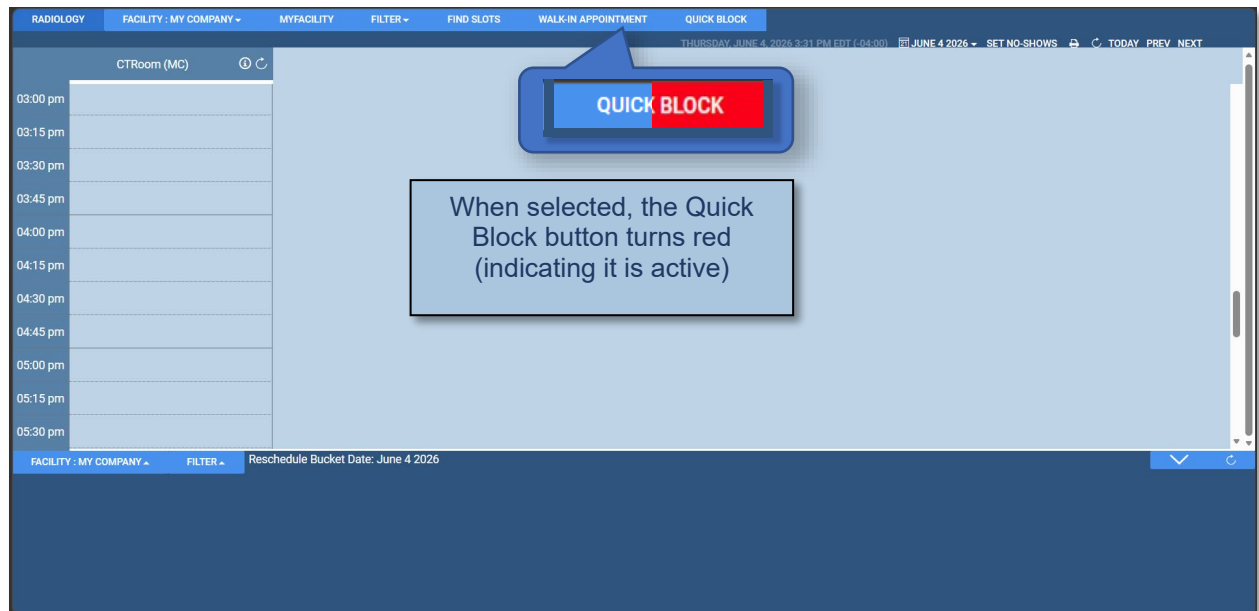
1. A slot is always available if there are no applicable schedule rules.
2. No scheduling occurs in timeslots with applicable *exclusion rules*.
EXAMPLE: A room is normally open 8 am–5 pm, but on Sept 28th the room is closed 11 am–1 pm. The schedule rule for Sept 28th is the exclusion rule, and nothing 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.

Create a quick block

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

1. On the burger  menu, select **SCHEDULE**. On the schedule book, select **Quick Block**.



2. In a column corresponding to the appropriate facility, drag to select timeslots to block.
3. In the **Create Quick Block** dialog, select **Predefined** (a predefined name) or **Free Text** to type a name.
4. Select or clear the **Not Available** checkbox to specify whether this is available or not available.
5. Click in the box labeled #ffffff in the figure, and then select a color for the quick block.
6. Optional. Select MORE OPTIONS, and then enter advanced settings such as repeating blocks, appointment types, and multiple modality rooms. The block must be set to a template.
7. Select **SAVE & CLOSE**.

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:

1. Select **Quick Block** and then select the edit button (with a pencil icon) on the block.
2. Select either **Delete This Block** or **Edit This Block**.
3. To edit a block, make changes to settings described earlier in this document.
4. Select **SAVE & CLOSE**.

