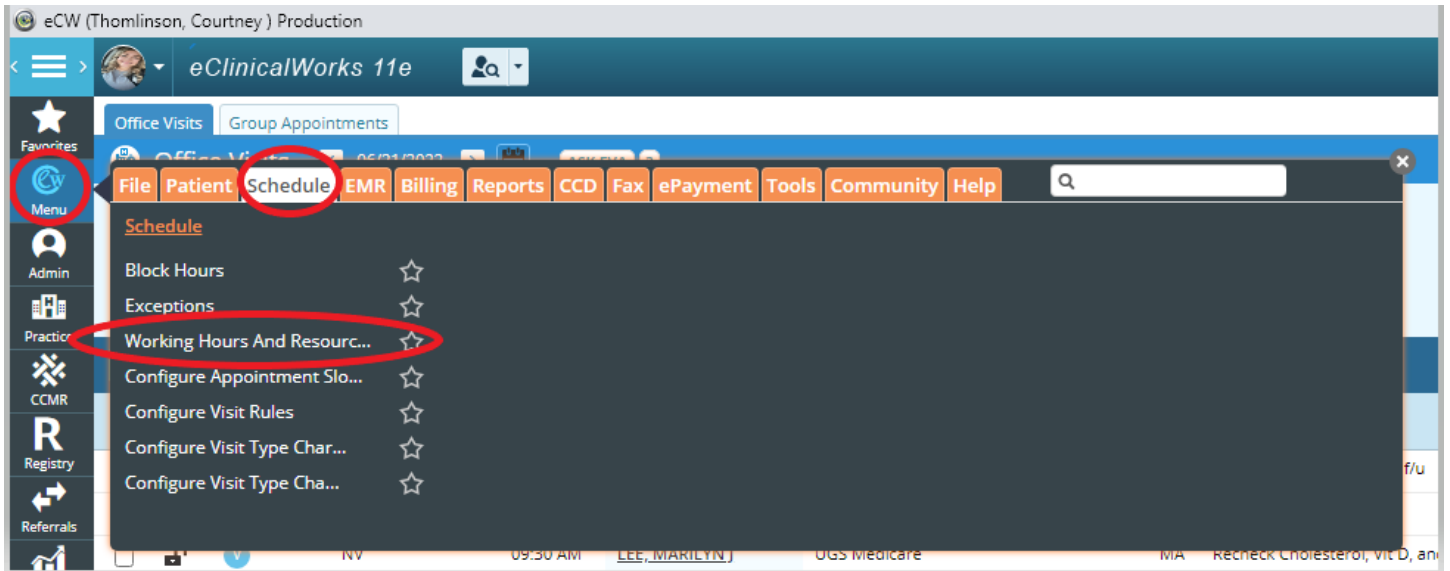
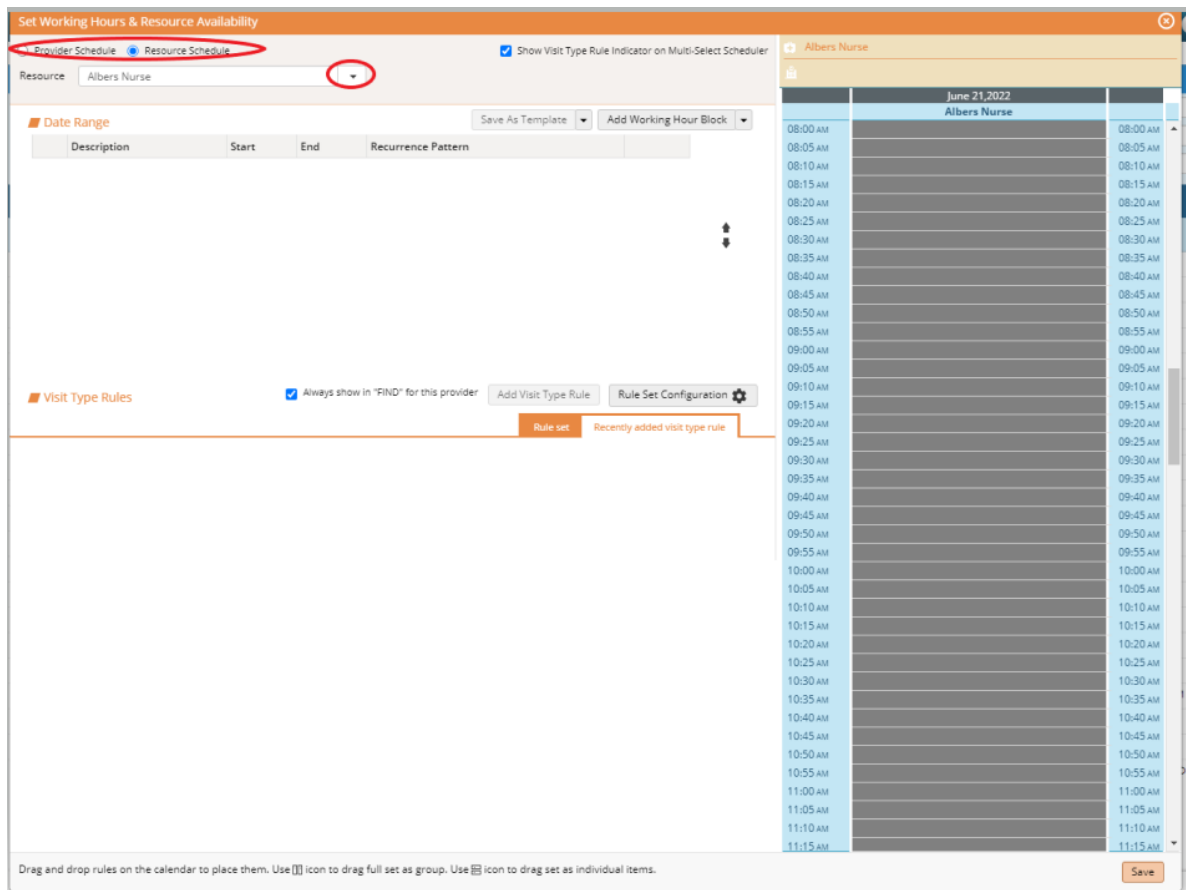


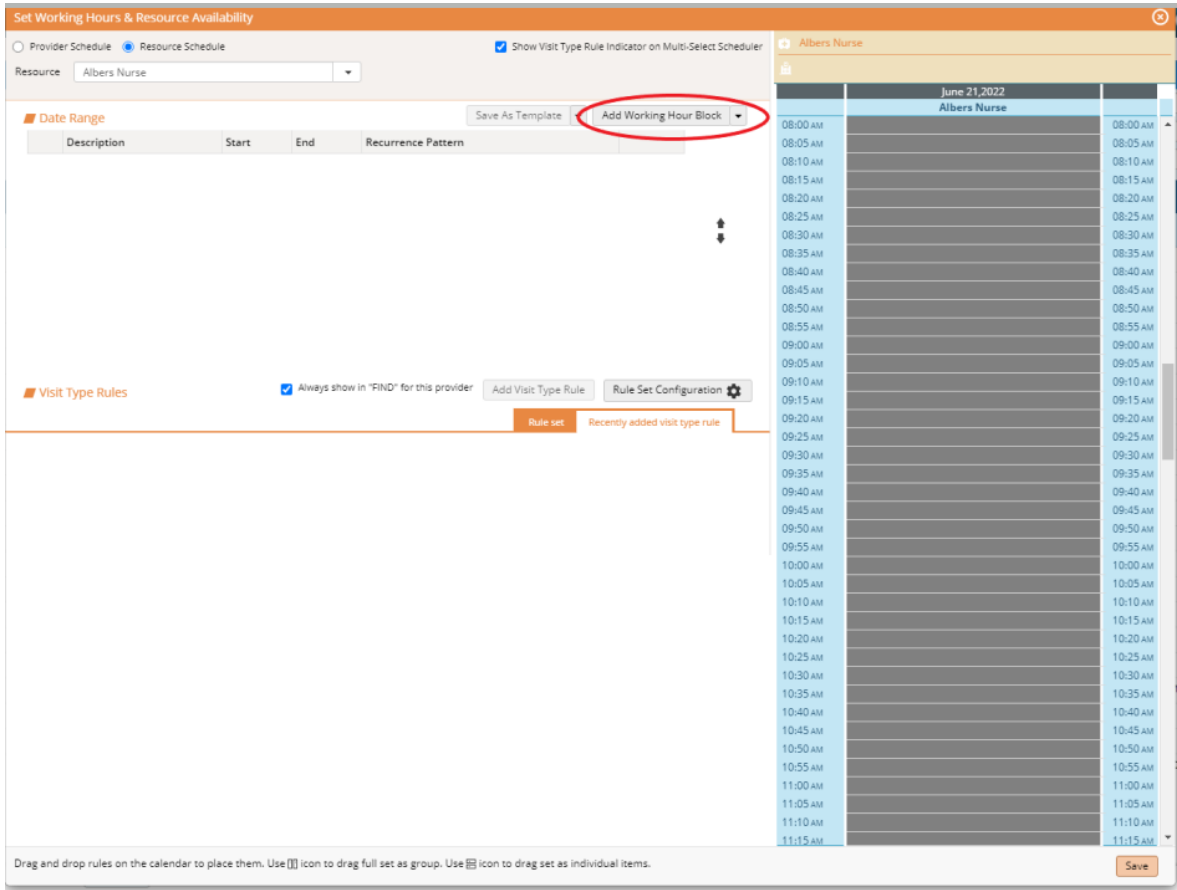
1. Menu > Schedule > Working Hours and Resource Availability



2. Select what type of schedule you are wanting to work with and then choose the name of the schedule



3. Add Working Hour Block

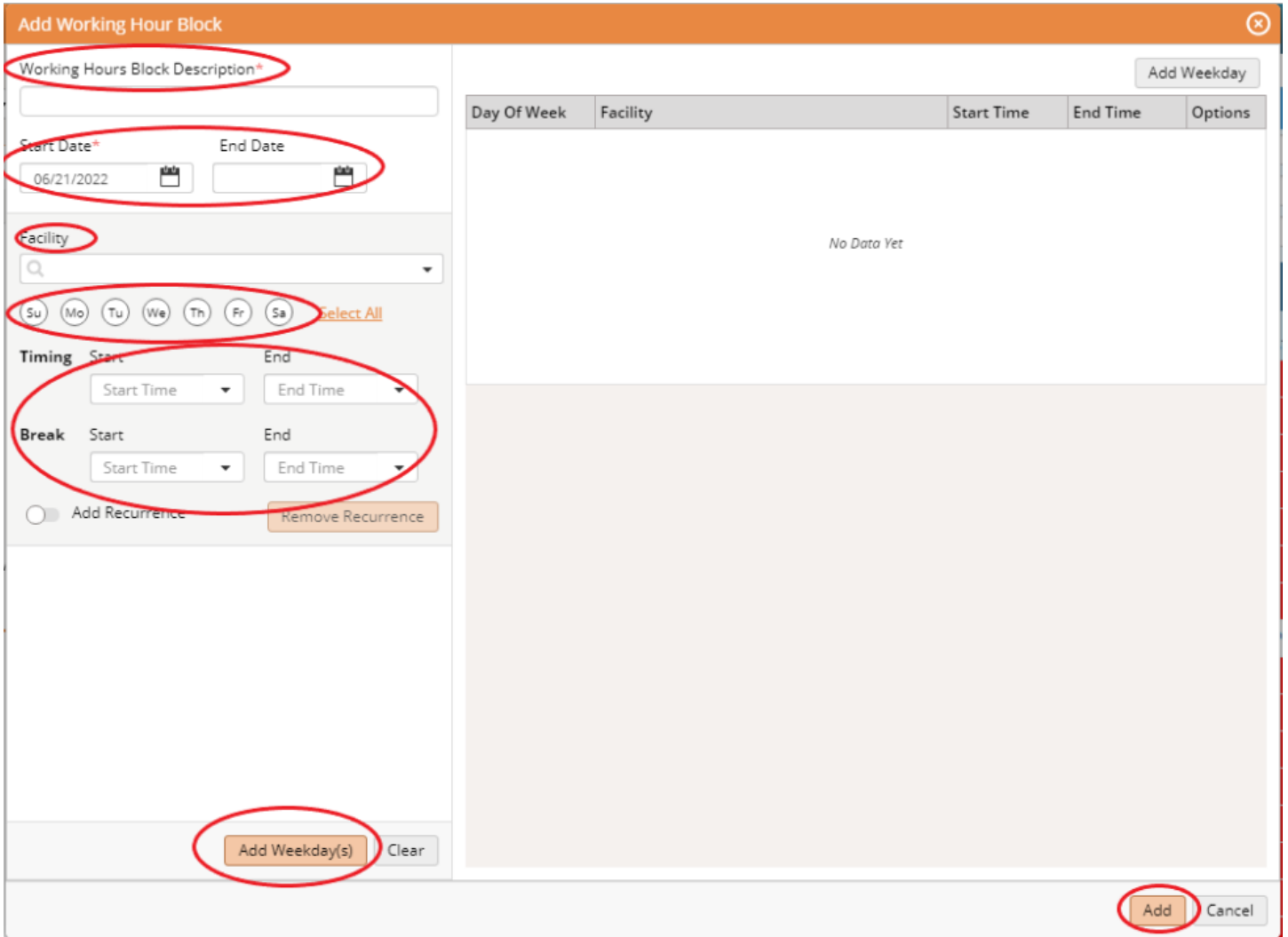


The screenshot shows the 'Set Working Hours & Resource Availability' interface for the resource 'Albers Nurse' on June 21, 2022. The interface is divided into several sections:

- Header:** 'Set Working Hours & Resource Availability' with a close button.
- Resource Selection:** 'Resource' dropdown set to 'Albers Nurse'. A checkbox 'Show Visit Type Rule Indicator on Multi-Select Scheduler' is checked.
- Date Range:** A section with a 'Save As Template' button and a circled 'Add Working Hour Block' button. Below it is a table with columns: 'Description', 'Start', 'End', and 'Recurrence Pattern'.
- Visit Type Rules:** A section with a checkbox 'Always show in "FIND" for this provider' checked. It includes 'Add Visit Type Rule' and 'Rule Set Configuration' buttons. Below these are 'Rule set' and 'Recently added visit type rule' buttons.
- Calendar:** A vertical calendar view for June 21, 2022, showing time slots from 08:00 AM to 11:15 AM in 5-minute increments. The current time slot is highlighted in blue.
- Footer:** A note: 'Drag and drop rules on the calendar to place them. Use [Group Icon] icon to drag full set as group. Use [Item Icon] icon to drag set as individual items.' and a 'Save' button.

Set Working Hours & Resource Availability

- Name your Working Hour Block, pick your start and end date (if applicable), the facility, days of the week, timing, and break. Then click Add Weekday(s) and then Add.



The screenshot shows the 'Add Working Hour Block' form. The form is divided into two main sections. The left section contains input fields for 'Working Hours Block Description*', 'Start Date*' (with a calendar icon), 'End Date' (with a calendar icon), a 'Facility' dropdown menu, a row of day selection buttons (Su, Mo, Tu, We, Th, Fr, Sa) with a 'Select All' link, 'Timing' fields for 'Start' and 'End' times, 'Break' fields for 'Start' and 'End' times, and a 'Remove Recurrence' button. The right section is a table with columns for 'Day Of Week', 'Facility', 'Start Time', 'End Time', and 'Options'. The table is currently empty, displaying 'No Data Yet'. At the bottom of the form, there is an 'Add Weekday(s)' button and a 'Clear' button. At the very bottom right, there are 'Add' and 'Cancel' buttons.

Set Working Hours & Resource Availability

5. Choose the day of the session you are wanting to work with (i.e. Monday 8:00 AM to 12:00PM)

Set Working Hours & Resource Availability

Provider Schedule Resource Schedule Show Visit Type Rule Indicator on Multi-Select Scheduler

Resource: Albers Nurse

Date Range

Description	Start	End	Recurrence Pattern
Test	06/21/2022		

Day of Week	Start Time	End Time	Facility
<input checked="" type="radio"/> Monday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Monday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia

Visit Type Rules

Always show in "FIND" for this provider

Add Visit Type Rule Rule Set Configuration

Rule set Recently added visit type rule

6. Click Add Visit Type Rule

Set Working Hours & Resource Availability

Provider Schedule Resource Schedule Show Visit Type Rule Indicator on Multi-Select Scheduler

Resource: Albers Nurse

Date Range

Description	Start	End	Recurrence Pattern
Test	06/21/2022		

Day of Week	Start Time	End Time	Facility
<input checked="" type="radio"/> Monday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Monday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia

Visit Type Rules

Always show in "FIND" for this provider

Add Visit Type Rule Rule Set Configuration

Rule set Recently added visit type rule

Visit Type	Start Time	End Time	Duration	Max Visit
S/D (Same Day Appointment)	09:00 AM	01:00 PM	4 Hrs	16
S/D (Same Day Appointment)	04:00 PM	04:15 PM	15 mins	1
S/D (Same Day Appointment)	03:45 PM	04:00 PM	15 mins	1
S/D (Same Day Appointment)	03:30 PM	03:45 PM	15 mins	1

7. Add your Visit Type, Start time and end time (for that time slot) and Max visits allowed (usually 1). Click OK.

Always show in "FIND" for this provider

Add Visit Type Rule Rule Set Configuration

Recently added visit type rule

Add Visit Type Rule

Visit Type: NV

Start Time: 08:15 AM End Time: 08:30 AM

Max Visits Allowed: 1

Cancel OK

Set Working Hours & Resource Availability

- Now to add more slots choose the two rectangles stacked on each other, click and hold and then drag that visit type into your next time slot. Once you release your click it creates a new slot. Repeat until all slots are configured for that session.

	Visit Type	Start Time	End Time	Duration	Max Visit
	NV (Nurse Visit)	08:15 AM	08:30 AM	15 mins	1
	S/D (Same Day Appointment)	09:00 AM	01:00 PM	4 Hrs	16
	S/D (Same Day Appointment)	04:00 PM	04:15 PM	15 mins	1
	S/D (Same Day Appointment)	03:45 PM	04:00 PM	15 mins	1

Set Working Hours & Resource Availability

Provider Schedule
 Resource Schedule
 Show Visit Type Rule Indicator on Multi-Select Scheduler

Resource: Albers Nurse

Date Range

Description	Start	End	Recurrence Pattern
Test	06/21/2022		

Day of Week	Start Time	End Time	Facility
<input checked="" type="radio"/> Monday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Monday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia

Visit Type Rules

Always show in "FIND" for this provider

	Visit Type	Start Time	End Time	Duration	Max Visit
	NV (Nurse Visit)	08:15 AM	08:30 AM	15 mins	1
	S/D (Same Day Appointment)	09:00 AM	01:00 PM	4 Hrs	16
	S/D (Same Day Appointment)	04:00 PM	04:15 PM	15 mins	1
	S/D (Same Day Appointment)	03:45 PM	04:00 PM	15 mins	1

Albers Nurse

Katy Trail Com Health Sedalia

June 27, 2022

Time	Availability	Time
08:00 AM	Available	08:00 AM
08:05 AM	Available	08:05 AM
08:10 AM	Available	08:10 AM
08:15 AM	1 / 1 NV (Nurse Visit)[01:Katy Trail Com Health Sedalia]	08:15 AM
08:20 AM	Available	08:20 AM
08:25 AM	Available	08:25 AM
08:30 AM	1 / 1 NV (Nurse Visit) 08:15 AM 08:30 AM 15 mins 1 AM	08:30 AM
08:35 AM	Available	08:35 AM
08:40 AM	Available	08:40 AM
08:45 AM	Available	08:45 AM
08:50 AM	Available	08:50 AM
08:55 AM	Available	08:55 AM
09:00 AM	Available	09:00 AM
09:05 AM	Available	09:05 AM
09:10 AM	Available	09:10 AM
09:15 AM	Available	09:15 AM
09:20 AM	Available	09:20 AM
09:25 AM	Available	09:25 AM
09:30 AM	Available	09:30 AM
09:35 AM	Available	09:35 AM
09:40 AM	Available	09:40 AM
09:45 AM	Available	09:45 AM
09:50 AM	Available	09:50 AM
09:55 AM	Available	09:55 AM
10:00 AM	Available	10:00 AM
10:05 AM	Available	10:05 AM
10:10 AM	Available	10:10 AM
10:15 AM	Available	10:15 AM
10:20 AM	Available	10:20 AM
10:25 AM	Available	10:25 AM
10:30 AM	Available	10:30 AM
10:35 AM	Available	10:35 AM

Albers Nurse

June 27, 2022

Time	Availability	Time
08:00 AM	Available	08:00 AM
08:05 AM	Available	08:05 AM
08:10 AM	Available	08:10 AM
08:15 AM	1 / 1 NV (Nurse Visit)[01:Katy Trail Com Health Sedalia]	08:15 AM
08:20 AM	Available	08:20 AM
08:25 AM	Available	08:25 AM
08:30 AM	1 / 1 NV (Nurse Visit)	08:30 AM
08:35 AM	Available	08:35 AM
08:40 AM	Available	08:40 AM
08:45 AM	Available	08:45 AM
08:50 AM	Available	08:50 AM

9. Then Save

Set Working Hours & Resource Availability

Provider Schedule Resource Schedule Show Visit Type Rule Indicator on Multi-Select Scheduler

Resource: Albers Nurse

Date Range Save As Template Add Working Hour Block

Description	Start	End	Recurrence Pattern
Test	06/21/2022		

Day of Week	Start Time	End Time	Facility
<input checked="" type="radio"/> Monday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Monday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Tuesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	08:00 AM	12:00 PM	Katy Trail Com Health Sedalia
<input type="radio"/> Wednesday	01:00 PM	05:00 PM	Katy Trail Com Health Sedalia

Visit Type Rules Always show in "FIND" for this provider Add Visit Type Rule Rule Set Configuration

Visit Type	Start Time	End Time	Duration	Max Visit
NV (Nurse Visit)	08:15 AM	08:30 AM	15 mins	1
S/D (Same Day Appointment)	09:00 AM	01:00 PM	4 Hrs	16
S/D (Same Day Appointment)	04:00 PM	04:15 PM	15 mins	1
S/D (Same Day Appointment)	03:45 PM	04:00 PM	15 mins	1

Calendar View: June 27, 2022 - Albers Nurse. Shows a red block for '1 / 1 NV (Nurse Visit)[01:Katy Trail Com Health Sedalia]' from 8:15 AM to 8:30 AM.

Drag and drop rules on the calendar to place them. Use [icon] icon to drag full set as group. Use [icon] icon to drag set as individual items.

Save

10. Repeat steps 1-9 until your week is complete on each different session.

****Tips**

Right-clicking on the visit type you have already placed you can either edit it or remove it.

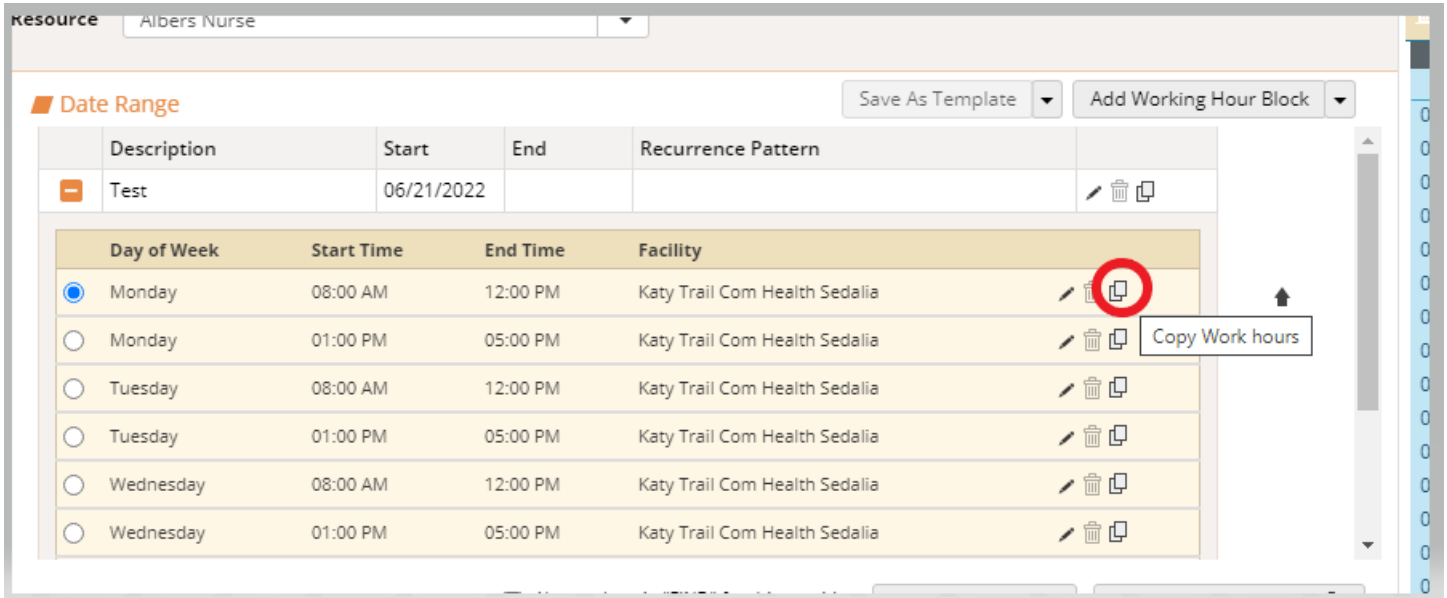
Calendar View: 08:10 AM to 09:15 AM. Shows a red block for '1 / 1 NV (Nurse Visit)[01:Katy Trail Com Health Sedalia]' from 8:15 AM to 8:30 AM.

Context Menu:

- Edit visit type rule
- Remove visit type rule

Set Working Hours & Resource Availability

After you have already created your template for one session you can copy it onto other sessions instead of building them individually.



Clicking the Pencil on any of your sessions allows you to make modifications to that individual session, including changing the facility.

