



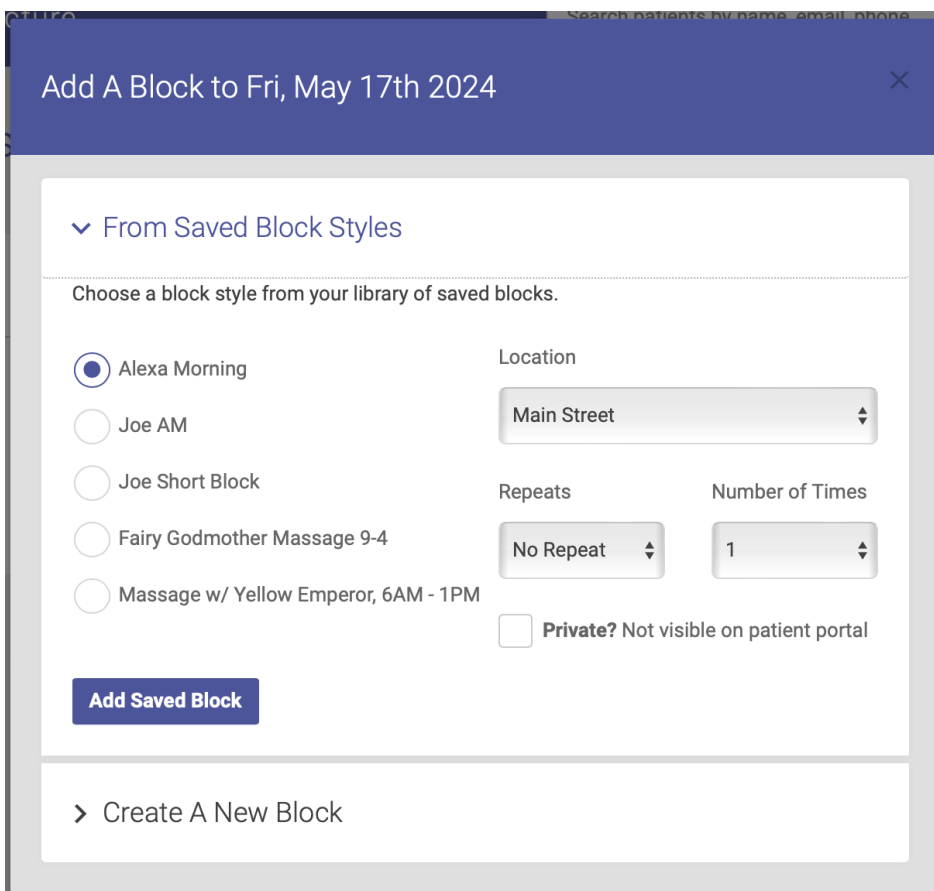


Saving Block Styles and Using Them

Any block can be used as a template of sorts, saving that block as a block style. Block styles include the practitioner, the service options, the start to finish times and any coffee breaks included. This is intended to make it easier to make blocks and to have fewer errors.

To create a block style

- Locate a block you want to save. It should have the start and finish times, Service choices, practitioner and coffee breaks you want.
- Click the stacked plus icon in that block's edit icons.    
- In the popup form give it a unique and descriptive name and click save.
- Now, when you create a new block the option of using your saved block styles is available.



Search patients by name, email, phone

Add A Block to Fri, May 17th 2024

▼ From Saved Block Styles

Choose a block style from your library of saved blocks.

☒ Alexa Morning

☐ Joe AM

☐ Joe Short Block

☐ Fairy Godmother Massage 9-4

☐ Massage w/ Yellow Emperor, 6AM - 1PM

Location: Main Street

Repeats: No Repeat

Number of Times: 1

☐ Private? Not visible on patient portal


Add Saved Block

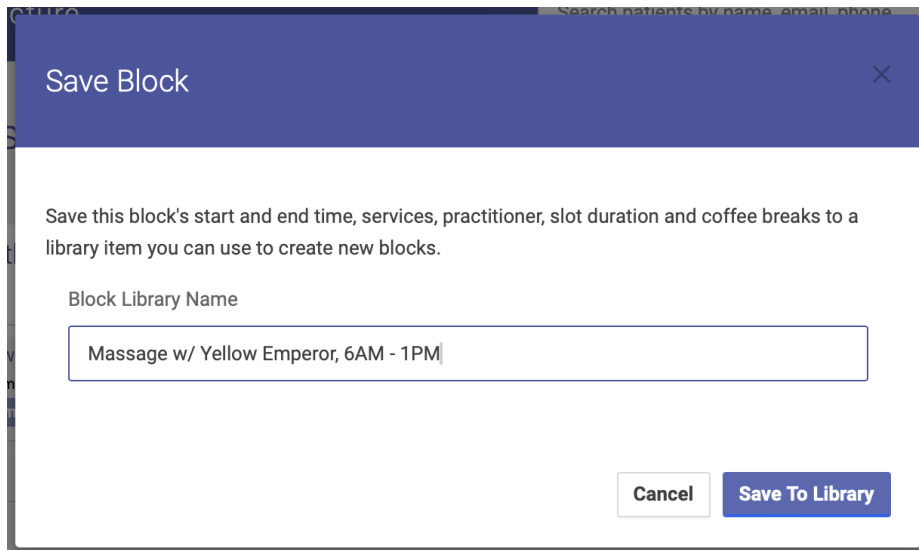
> Create A New Block

You can save any existing block to be used again on any other day or location. This includes the

practitioner, Service options, start and end times and all coffee breaks.


To Save a Block for Later Use

- Find a block in your schedule
- Click the [+] sign in the block header on the right. 
- Give your block a unique and descriptive name (max 80 characters)
- Click Save



The screenshot shows a 'Save Block' dialog box with a blue header bar containing the title 'Save Block' and a close button (X). Below the header, there is a text area with the instruction: 'Save this block's start and end time, services, practitioner, slot duration and coffee breaks to a library item you can use to create new blocks.' Underneath this is a label 'Block Library Name' followed by a text input field containing the text 'Massage w/ Yellow Emperor, 6AM - 1PM'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save To Library'.

To Use a Saved Block

- Go to the day and location where you want to create the block.
- Click the [+] at the top right of the day header 
- Select "From Saved Block Styles" to open the selection form (Create New Block is opened by default).
- Choose the block style you want to insert
- Click "Add Saved Block"

Add A Block to Sat, May 18th 2024

> From Saved Block Styles

▼ Create A New Block

Block Services (*telehealth)

Community Acupuncture [10 min] +

☐ Private? Not visible on patient portal

Start Time (24 hour format)

09:00

End Time

15:00

Practitioner

Joe Smith

Location

Main Street

Repeats

No Repeat

Number of Times

1

Add Block

To View Your Saved Blocks

Under the Appointments tab on the left-hand side of the page, click Saved Blocks. This will bring up a list of your saved blocks. From here, you can change the title of a saved block or delete a saved block.

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Sunshine Acupuncture

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Appointments

Appointments

Reports

Saved Blocks

All Blocks

Patients

EHR

Intake

Saved Blocks

Edit and delete saved blocks

Saved Blocks

Alexa Morning

Joe AM

Fairy Dust

Alexa 11-4

To Delete a Saved Block

From your Saved Blocks page, click on the name of the block you want to delete. The details of the saved block will appear to the right. Click Delete to delete the saved block.

Details

Title

Alexa Morning

Delete

Save

Service

Community Acupuncture [10 mins]

Service

New Patient Acupuncture [20 mins]

Practitioner

Alexa Hulsey

Start

10:00 am

End

4:00 pm

Coffee Break

10:20 am for 10 mins

Coffee Break

11:30 am for 20 mins

Coffee Break

1:50 pm for 10 mins

To Edit a Saved Block

You can edit the title of a Saved Block but not any of the details. From your Saved Blocks page, click on the name of the block you want to edit. The details of the saved block will appear to the right. Enter your new title in the Title field and click Save.

Revision #8

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