Overview

For those already familiar with the Schedule Roster Clipboards, here are some suggestions for blocking out times for those Vets in isolation until they are back on-board again.

For those not familiar with the Schedule Roster Clipboards, please refer to our Online Manual for more information: https://softwareservices.covetrus.com/apac/OnlineManual/schedule-roster-clipboards/

Social Distance Your Appointments

We suggest increasing the duration of your appointment types in the clipboards by **15 minutes** to minimise cross-over of clients in the reception area.

To hide a clipboard entirely (in cases where a clipboard is Vet-specific) you could turn off the "Show Available" button in **Schedule Display Settings**.

Setup a Clipboard Schedule

Make sure the groups are visible in the left-hand side of the clipboard screen. Pressing the **expand** button on the clipboard group will make it appear:
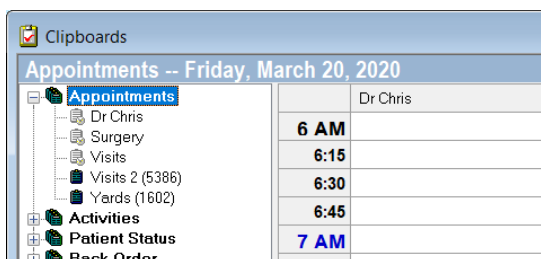
Now, right-click any group or clipboard in that region and a pop-up menu will be displayed with Schedule Configuration at the bottom:
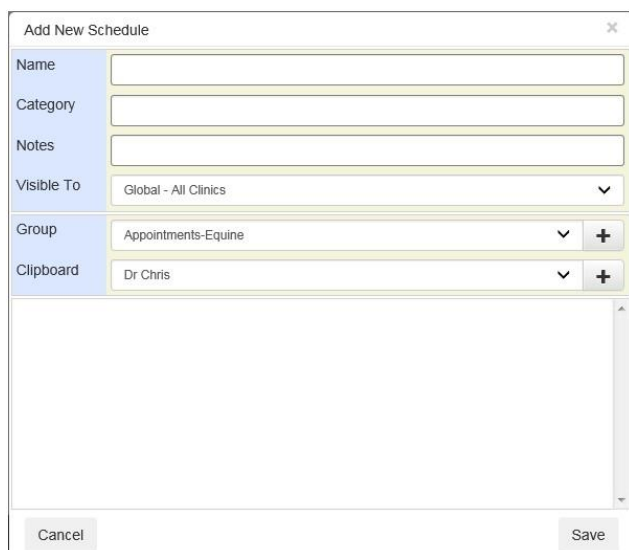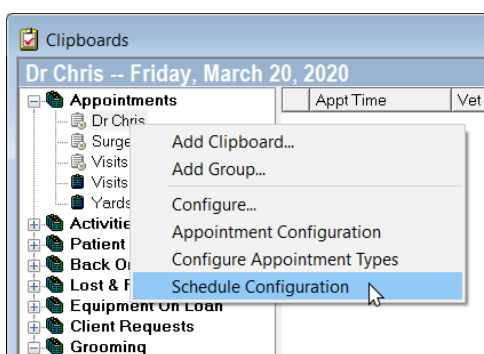

Block out a Clipboard

Let's consider how to block out Dr Chris's Clipboard on the assumption that he is not able to work or in isolation for the next few weeks.

Launch **Schedule** and click (**Add**).

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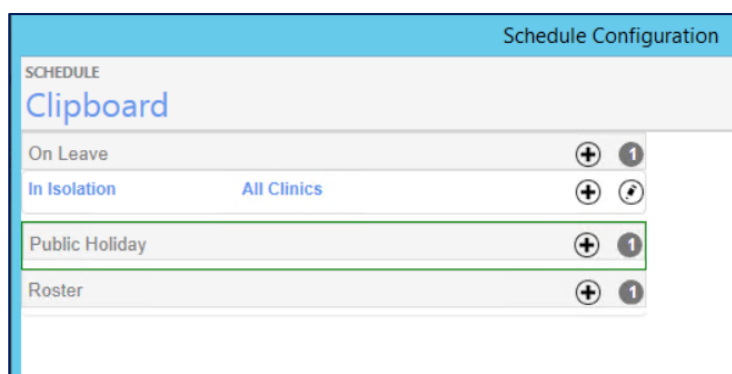You will be presented with the following dialogue:

Add a **Name** and **Category** such as "Isolation" and "On Leave" respectively. The notes is an optional text field. However, the **Visible To** drop-down specifies which clinics may be affected by this schedule. When the Visible To is set to "Global - All Clinics" the **schedule patterns** will determine which clinics are affected.

The ➕ button in general means add. Depending on the context it will either add all the clipboards for a Group or an individual clipboard.

To apply a schedule to a clipboard group, select the Group with the drop-down button and press the ➕ button at the end of the Group line and all the clipboards in that Group are added. To add them individually press ➕ at the end of the Clipboard line in conjunction with the drop-down list.

Select a clipboard, press ➕ and **Save** it using Save . In our example, we will press the button beside Dr Chris, and this will associate the Dr Chris clipboard to this schedule. After saving you will see the following dialog:
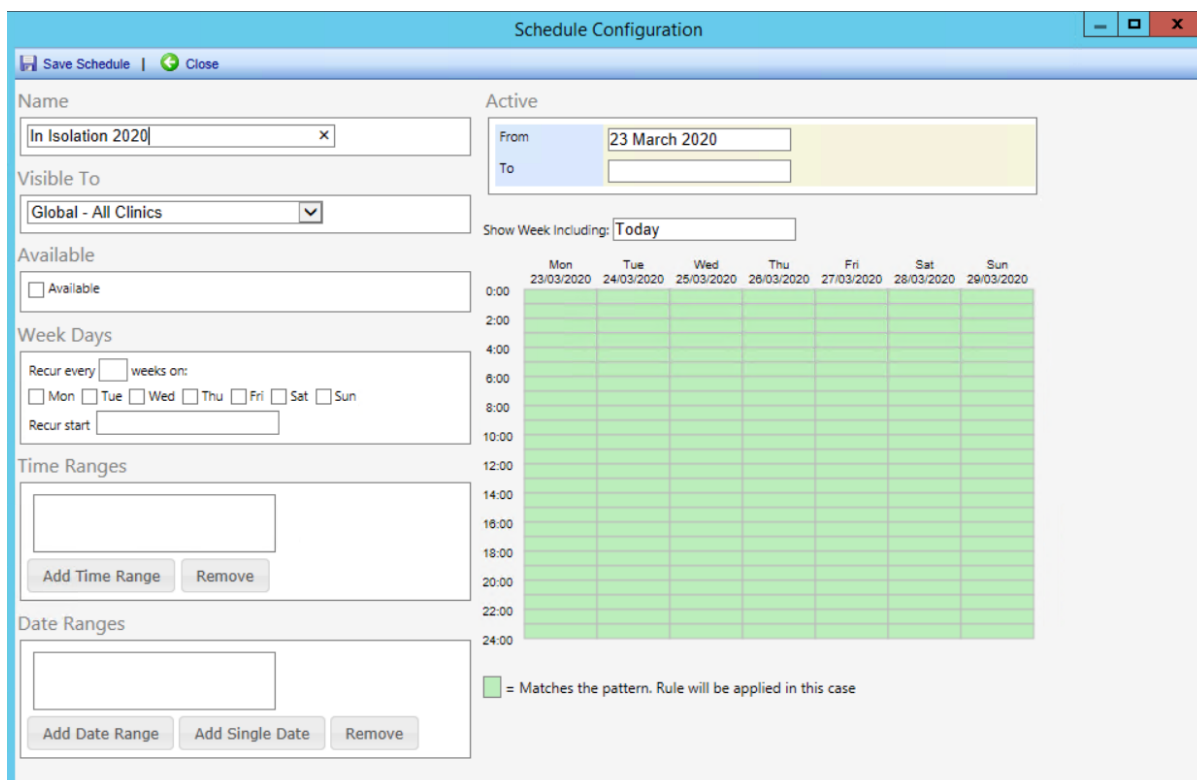

The Category entered on the previous screen acts as a grouping when you return to this screen. You don't have to enter a category, but it is a mechanism for keeping similar schedules and rosters in the same group and prevents this dialog from getting too cluttered.

The button ⊕ beside "On Leave" can be used to create another schedule in the same Category and would show the Add New Schedule dialog prefilled with the "In Isolation".

The ① icon indicates that there is one schedule in this group. As you add more the number would increase so that you know how many schedules are present without having to expand the Category.

Click on "On Leave" and you will see "In Isolation" beneath it. Click it again and the category will collapse.

Schedule Patterns

Click ⊕ beside "In Isolation". You will see the **Schedule Patterns** dialog as shown below:

This is where the schedule weeks, days, times and dates are defined. The green grid means that everything is available at present since no patterns have been defined.
The **Active From/To dates** are critically important as the schedule will be active between these dates and will impact clipboards attached to the schedule. The default Active From/To dates will make this schedule **immediately available**.
A schedule will become active between the **From Date** and the **To Date** inclusive. If a **To** Date is not specified, the schedule will never finish.

Give this schedule pattern a name such as "In Isolation 2020" and change the From/To dates.

When you configure a schedule pattern that will specify periods of unavailability such as leave or vacation you would leave the **Available** checkbox **Off** as shown above. However, when you configure an availability pattern such as "Opening Hours" you would turn the **Available** checkbox **On**.

Since we set the **Visible To** drop down to "Global - All Clinics" on the parent schedule, we have the option to configure whether this schedule pattern applies to all clinics. But since this is a 'holiday' schedule pattern it will apply to "All Clinics" in this example.

Since we are entering dates to exclude, use the date ranges section at the bottom to enter the dates.

Save the Schedule, then click on the "On Leave" group again and you will see a new line of text in light brown which represents the schedule pattern we just defined as shown below. You can edit it again by pressing the ⊕ button at the end of the line.
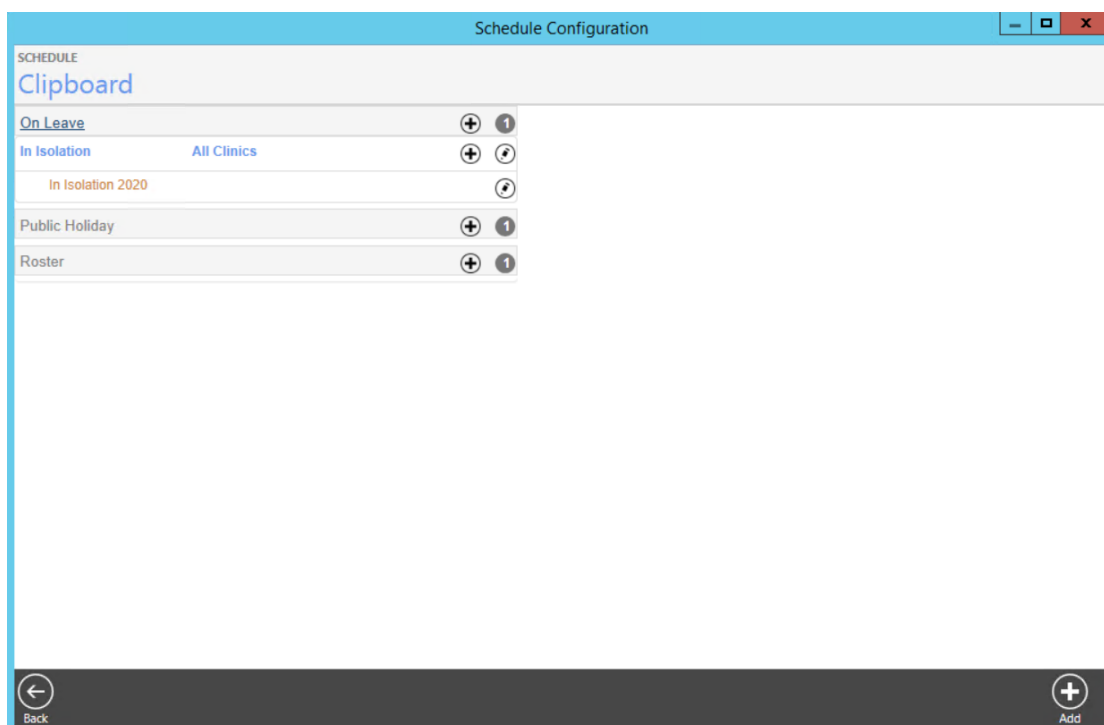
Returning to the clipboards screen you will notice that all the appointment slots for Dr Chris are unavailable as shown below:
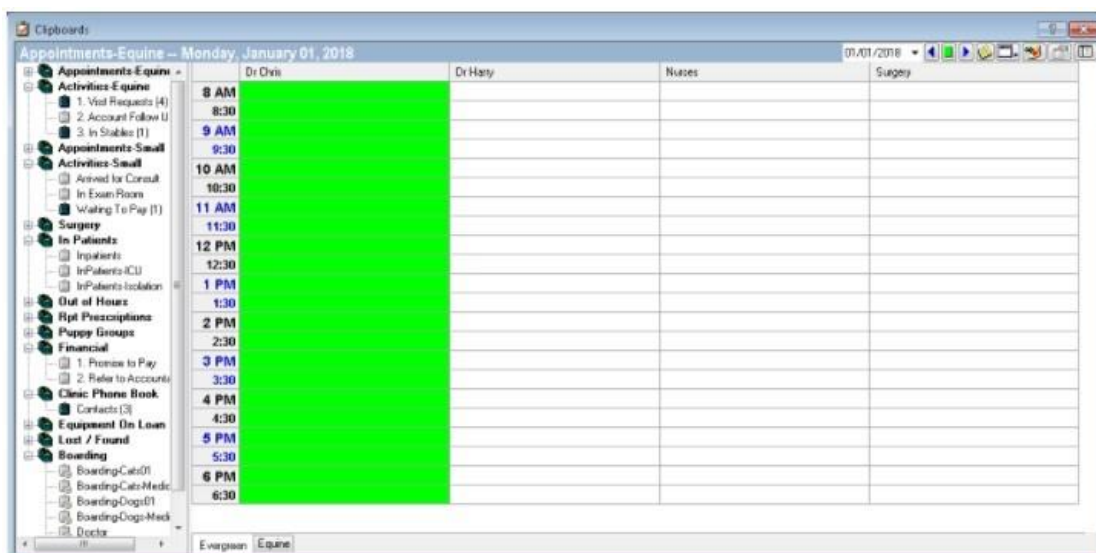
This happens because the **On Leave** schedule we defined was applied to the Dr Chris clipboard. To attach the schedule to all clipboards we would go back to Schedule configuration and press ✚ beside all of the **Schedule Groups**.