

How to Add a New Appointment Profile

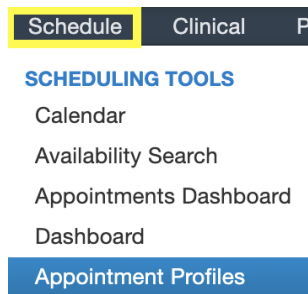
07/24/2024 4:40 pm EDT

Appointment profiles save you time by pre-populating fields when creating a new appointment.

Appointment profiles are used to:

- Automatically set a Reason For Visit
- Set a duration for an appointment
- Set a color for the appointment
- Fill out billing codes associated with the appointment
- Fill out the payment type for the appointment
- Attach consent forms or any other forms to the appointment.

To create a new appointment profile, go to **Schedule** on your navigation bar and select **Appointment Profiles**.



In your appointment profile editor, select **+Add New Profile** in the upper-right-hand corner.

Custom Appointment Profiles

[+ Add New Profile](#)

Name	Color	Duration	Reason For Visit	Billing Profile	Payment Profile	Consent Forms	Updated	Created		
☰ Check up		20 minutes	Check up	Physical Check Up	Insurance	0	Oct 27, 2016	Aug 2, 2016	History	E
☰ CT Scan		120 minutes	CT Scan		Insurance	0	Oct 27, 2016	Aug 2, 2016	History	E
☰ Background Questions		15 minutes	Patient Information	Healthy Check Up	Insurance	0	Oct 27, 2016	Aug 3, 2016	History	E

A form will appear that prompts you to fill out the details of your appointment profile. Here you can:

Create Custom Appointment Profile

×

Name	<input type="text" value="Annual Physical"/>
Color	<input type="color" value="#76923c"/>
Reason For Visit	<input type="text" value="Physical Examp"/>
Duration	<input type="text" value="30"/> minutes (5-1200)
Billing Profile	<input type="text" value="Physical Exam"/>
Payment Profile	<input type="text" value="Insurance"/>
Eligibility Profile	<input type="text"/>
Enable for Online Scheduling	<input checked="" type="checkbox"/> Allow your patients to select this profile when they schedule an appointment with you online
Consent Forms	<input checked="" type="checkbox"/> Check to select consent forms
	<input type="text" value="× HIPAA Data Use Agreement"/>
	<input type="text" value="× No Show Policy"/>

- Name your appointment profile
- Associate a color with your appointment profile
- State a reason to visit that will populate in a new appointment's 'Reason For Visit' field
- Specify a duration for the appointment
- Associate a [billing profile](#) with the appointment profile to auto-populate billing codes
- Add a payment profile
- Enable online schedule
- Attach consent forms to your appointment profile. You must [upload consent forms](#) to your account before they can be attached to appointment profiles.

Make changes as you see fit and select **Create**.