

How do I edit my appointment profiles?

07/24/2024 4:00 pm EDT

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

If you have previously created appointment profiles and would like to edit them, first mouse over **Schedule** on your navigation bar and select **Appointment Profiles**.

Schedule Clinical P

SCHEDULING TOOLS

- Calendar
- Availability Search
- Appointments Dashboard
- Dashboard
- Appointment Profiles**

In your appointment profile editor, select **Edit** to the right of the appointment profile you would like to edit.

Appointment Fields

Appointment Profiles

Appointment Templates

Billing Profiles

Billing Statuses

Patient Demographics

Patient Payment Types

Procedures

Procedure Categories

Vital Signs

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	Edit Archive
☰ CT Scan		120 minutes	CT Scan		Insurance	0	Oct 27, 2016	Aug 2, 2016	Edit Archive
☰ Background Questions		15 minutes	Patient Information	Healthy Check Up	Insurance	0	Oct 27, 2016	Aug 3, 2016	Edit Archive

A form will appear that allows you to edit the details you previously entered in your appointment profile. Make changes as you see fit and select **Save**.

Edit Custom Appointment Profile



Name

Color

Reason For Visit

Duration minutes (5-1200)

Billing Profile

Payment Profile

Enable for Online Scheduling Allow your patients to select this profile when they schedule an appointment with you online

Consent Forms Check to select consent forms

Save

Save as

Cancel