

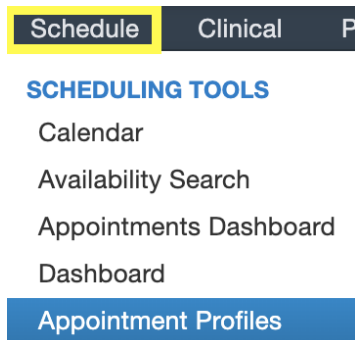
How to Build an Appointment Profile

07/24/2024 4:40 pm EDT

Appointment profiles save you time by automatically adding duration, the reason for the visit, color coding your appointment, and even adding your billing profiles automatically.

Here is how to set them up:

- Go to **Schedule > Appointment Profiles**.



- Select **Add New Profile** to create an Appointment Profile. Create an Appointment Profile for the types of visits you see patients in your office.

The screenshot shows a table titled 'Custom Appointment Profiles'. The table has columns for Name, Color, Duration, Reason For Visit, Billing Profile, Payment Profile, Eligibility Profile, Consent Forms, Updated, and Created. There are also buttons for 'Sort (A-Z)', 'Show Archived Profiles', and '+ Add New Profile'. A red arrow points to the '+ Add New Profile' button.

Name	Color	Duration	Reason For Visit	Billing Profile	Payment Profile	Eligibility Profile	Consent Forms	Updated	Created	
Followup Visit	Blue	30 minutes	Followup Appointment	Existing Patient Visit			0	Jun 30, 2020	Jun 25, 2020	History Edit
TeleHealth Visit -	Red	15 minutes	Zoom Call with patient				2	Jun 30, 2020	May 18, 2020	History Edit
Breast Augmentation New Patient	Brown	30 minutes	Breast Augmentation				2	Jun 30, 2020	Jan 17, 2020	History Edit
Initial Psychiatric Visit	Cyan	60 minutes	First visit with office				0	Sep 4, 2020	Sep 4, 2020	History Edit
Deep Tissue Massage	Orange	45 minutes	sore muscles		Insurance Out of Network		0	Jun 30, 2020	May 11, 2018	History Edit

- Once a pop-up appears, fill in your desired information and hit **Create**.

The screenshot shows a pop-up form titled 'Create Custom Appointment Profile'. The form has the following fields and options:

- Name: (Required)
- Color:
- Reason For Visit:
- Duration: minutes (5-1200)
- Billing Profile:
- Payment Profile:
- Eligibility 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

Buttons: **Create** and **Cancel**

This Appointment Profile is now ready for use.
