Quick Reference Guide
A Day in the Life of a Therapist

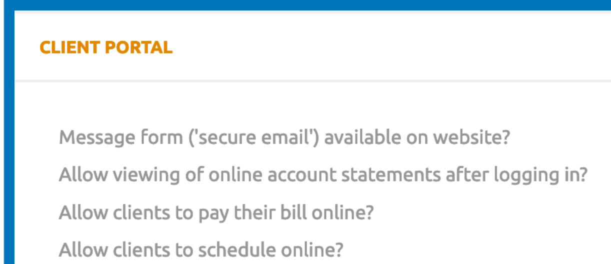
Client Self-Scheduling

Allowing clients to self-schedule online can reduce administrative time, supporting office workflow. Below are 3 outlined steps that allow clients to self-schedule.

Self-Scheduling: Client Portal

When working THIS...

Client Portal



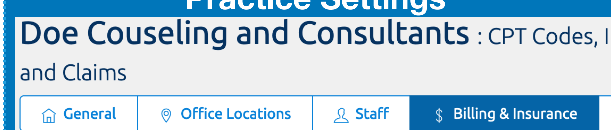
Follow these STEPS...

1. Click **My Profile** from the left-hand menu.
2. Select **Client Portal Settings** from the far right menu.
3. Click **Edit** next to 'Client Portal'.
4. Select **Yes** next to 'Allow clients to schedule online?'.
5. Hit **Save**.

Self-Scheduling: Practice Settings

When working THIS...

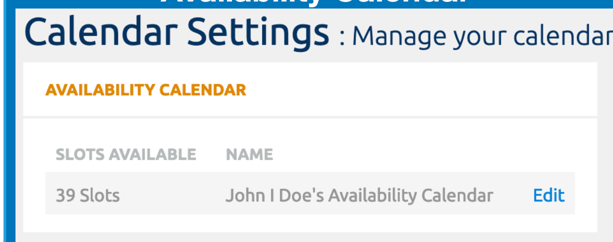
Practice Settings



Follow these STEPS...

1. Click **Practice Settings** from the left-hand menu.
2. Select **Billing & Insurance** from the top tabs.
3. Click **Set Up** next to 'CPT Codes'.
4. Check the box where it asks 'Client can schedule?'.
   ****NOTE:** Be aware of CPT Code naming - name the CPT codes so patient can understand (i.e. 'Therapy, 50 minutes').

Self-Scheduling: Calendar Settings

When working THIS…	Follow these STEPS…
Availability Calendar 	1. Click **My Schedule** from the left-hand menu. 2. Click **Calendar Settings** from the right-hand menu. ****NOTE IF:** You have already set up your Calendar, click the **Clear Availability** button. 3. Within the 'Availability Calendar' section, click **Edit**. 4. Click the **Add Availability Slots?** button. 5. Select '**Yes**' to allow clients to schedule online.