Calendar Setup

Understanding how to setup your calendar will get you ahead of the game when it comes time to allowing client self-scheduling and more. The steps below show you this setup.

Scheduling Availability

When working THIS…	Follow these STEPS…
FIRST STEPS: Add Availability Slots **Client Portal Settings** **Calendar Settings** **Session Settings**	1. Click **My Profile** from the left-hand menu. 2. Select **Calendar Settings** from the right-hand menu, then click **Edit.** 3. In the 'Availability Calendar' section, click **Edit**. 4. Click the **blue** button to 'Add Availability Slots?'. ****NOTE**: Skipping/missing this step requires users to re-do the <u>entire availability schedule.</u>

Client Scheduling

When working THIS…	Follow these STEPS…
SECOND STEPS: Self-Scheduling Availability start and end START / END TIME 8:00am 5:00pm Days of Week SUNDAY Yes ● No MONDAY ● Yes No TUESDAY ● Yes No	1. Complete **Scheduling Availability** first steps from the initial, above guideline. 2. Select '**Yes**' or '**No**' for **Client Scheduling**. 3. <u>Define your availability start/end times.</u> 4. Select '**Yes**' for the days client scheduling is desired. 5. Select '**No**' for each day client scheduling is not desired. 6. <u>THEN</u>: Choose your session link and click **Save** (blue button, bottom right). ****NOTE:** You will have an option to come back/set the availability for each day you selected '**No**'.

When working THIS…	Follow these STEPS…
'No' Availability [Done] [**Add Availability Slots?**]	1. To add Availability for days marked '**No**', view **My Profile > Calendar Settings > Edit > Availability Calendar > Edit**. 2. Click 'Add Availability Slots?', then refer to the **Client Scheduling** second step guidelines above. ****NOTE:** If you need to change your availability schedule, you will click 'Clear Availability' and **START FROM SCRATCH**.