Set Up Appointment Templates and Time Blocks for Self-Scheduling in the Portal

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> **Path: Main Menu > Admin Tools Menu > System Setup (Supplemental) > Scheduler Configuration**

About

In order for clients to be able to self-schedule in the Client Portal, there are setup items that must be completed in the Appointment Templates (Types) and Time Blocks in NSS. After working through the sections below to complete this setup, consider how far out you want clients to be able to self-schedule. This setting is controlled by a Setup Variable that is defaulted to 30 days and can be set to a maximum of 120 days. If you'd like to change how far in advance a client can self-schedule, please contact NSS Support and reference the Setup Variable: **PortalSchedFreeTimeMaxDays**.

Table of Contents

Configure an Appointment Template to Show on the Portal

Appointment Templates, which represent a type of appointment and its associated location and duration, are created within the Scheduler RDP and can be configured within NextStep Clinical to show on the Client Portal for clients to self-schedule their appointments.

1. Navigate to Scheduler Configuration by following the path above.
2. In the Scheduler Templates section, select the **Show in Portal** checkbox for the template(s) you want to be available as an option for a client to schedule on the portal.

Scheduler Templates

Apt Tem Name	Default Status	Activity	Location	Duration	Show in Portal
15-Minute Med Check	None	15-Minute Med Check	Default	15 minutes	☑
Generic Appointment	None	Default	Default	30 minutes	☐
Psychotherapy Session	None	Individual Therapy	Main Office	1 hour	☑

3. Click the **Save Changes** button.
4. Click the **Save** button located at the bottom of the Scheduler Configuration section.

Configure a Time Block to Show on the Portal

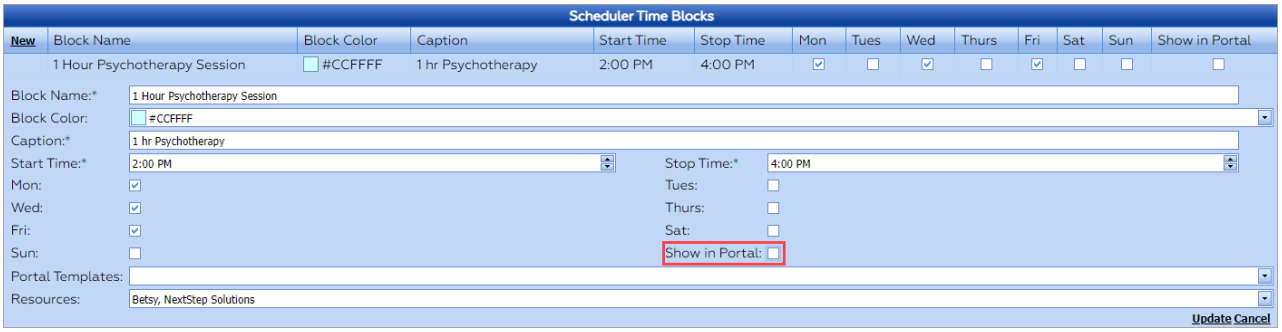
Time Blocks are when (date/time) a client can schedule a specific appointment and with who.

1. If not already there, navigate to Scheduler Configuration: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Scheduler Configuration**.
2. In the Scheduler Time Blocks section, click **Edit** next to the time block you'd like to modify.

Scheduler Time Blocks

New	Block Name	Block Color	Caption	Start Time	Stop Time	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Show in Portal
Edit	1 Hour Psychotherapy Session	#CCFFFF	1 hr Psychotherapy	2:00 PM	4:00 PM	☑	☐	☑	☐	☑	☐	☐	☐

3. Select the **Show in Portal** checkbox.



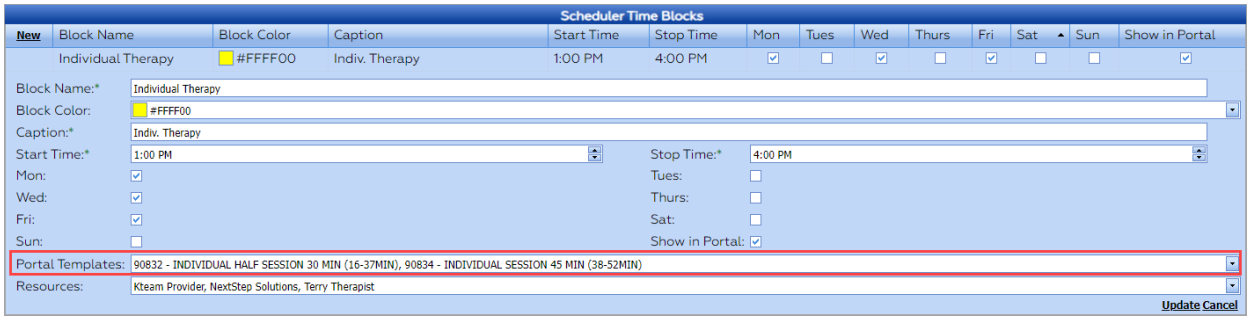
4. Click **Update**.
5. Click the **Save** button at the bottom of the Scheduler Configuration section.

Associate Appointment Templates With Time Blocks

After you've marked which Appointment Templates you want to have available for your clients to self-schedule and marked the Time Blocks that your clients can self-schedule appointments during, you'll need to associate which appointments can be scheduled during which time blocks.

1. If not already there, navigate to Scheduler Configuration: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Scheduler Configuration**.
2. In the Scheduler Time Blocks section, click **Edit** for a time block you want to edit.
3. Complete one of the following options in the **Portal Templates** drop-down menu:
   - Leave it blank to allow **all** Appointment Templates (Types) that you've marked to be shown in the portal to be able to be self-scheduled by a client.
   - Select one or multiple Appointment Templates (Types) by selecting the checkbox(es). Only those specific Appointment Types will be made available to a client for self-scheduling.
4. Click **Update**.
5. Click the **Save** button at the bottom of the Scheduler Configuration section.

Example: We have a time block called Individual Therapy for 1:00-4:00 PM M, W, F. During this time, we want our clients to be able to schedule either an Individual Half Session 30 Min or Individual Session 45 Min appointments. From the **Portal Templates** drop-down menu within the Individual Therapy time block, we've selected these two Appointment Templates in the screenshot below.



Note: The **Resources** drop-down menu reflects the resources available for a client to self-schedule an appointment with for the Time Block and associated Appointment Templates. It is important to note if the client is assigned to specific Clinicians on the Face Sheet, they will only be able to schedule with those particular resources. In our example above, Kteam Provider is assigned to our client's Face Sheet so this resource is the only option available for the client to schedule with of the three resources listed.