

Set Up Confirm and Cancel Appointment Statuses for the Portal

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

About

Your Agency has the ability to set what type of appointment status is reflected in the Scheduler when a client cancels or confirms an appointment from the Client Portal.

Set Up Portal Cancel or Confirm Appointment Status

1. Navigate to Client Portal Settings by following the path above.
2. From the **Client Confirm Status** drop-down menu, select the status you want to be reflected in the Scheduler when a client confirms an appointment via the portal.
3. From the **Client Cancel Status** drop-down menu, select the status you want to be reflected in the Scheduler when a client cancels an appointment via the portal.
4. From the **Client Cancel Status (less than 24 hr notice)** drop-down menu, select the status you want to be reflected in the Scheduler when a client cancels an appointment via the portal less than 24 hours before the appointment.
5. Click the **Save** button.

CLIENT PORTAL SETTINGS

Client Confirm Status:	<input type="text" value="Confirmed : Portal"/>	<input type="button" value="x"/>	<input type="button" value="v"/>
Client Cancel Status:	<input type="text" value="Cancelled : No Charge"/>	<input type="button" value="x"/>	<input type="button" value="v"/>
Client Cancel Status (less than 24 hr notice):	<input type="text" value="Cancelled : Charge"/>	<input type="button" value="x"/>	<input type="button" value="v"/>