Office Practicum

# Appointment Types

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Version 14.19

Our new Multi-Location Calendar updates are here! Please see the **OP 21.3 Calendar Articles** for an overview of the changes. Practices can configure OP to **switch to the new calendar** and explore its features.

**Path: Practice Management tab > Appointments button**

## Overview

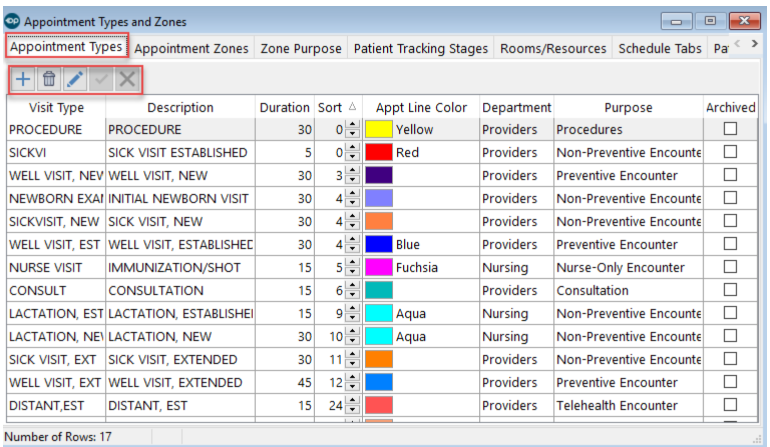
In this article you will learn how to create Visit Types used to schedule appointments.

## Add Appointment Types

1. Access the Appointment Types and Zones window by following the path above.
2. Click the **Add** button .
3. Add appointment types using the table definitions below.

| Field | Description |
|---|---|
| Visit Type | Indicates the name of the type of appointment. |
| Description | Provides a more detailed description of the type of appointment. |
| Duration | Indicates the length of time for the appointment. |
| Sort # | Indicates the order that the appointment types will appear in on a drop-down list. |
| Appt Line Color | Displays the color that will appear on the left hand side of the appointment box. |
| Department | Lists the department for the type of appointment. |
| Purpose | Further categorizes the appointment type (optional). |
| Archive | Entries no longer in use can be archived. Select this checkbox when you are no longer using this appointment type. |

4. Click the Save button .
5. Once all changes are made, click the **Exit** button .




| Visit Type | Description | Duration | Sort | Appt Line Color | Department | Purpose | Archived |
|---|---|---|---|---|---|---|---|
| PROCEDURE | PROCEDURE | 30 | 0 | Yellow | Providers | Procedures | ☐ |
| SICKVI | SICK VISIT ESTABLISHED | 5 | 0 | Red | Providers | Non-Preventive Encounte | ☐ |
| WELL VISIT, NEV | WELL VISIT, NEW | 30 | 3 | | Providers | Preventive Encounter | ☐ |
| NEWBORN EXAI | INITIAL NEWBORN VISIT | 30 | 4 | | Providers | Non-Preventive Encounte | ☐ |
| SICKVISIT, NEW | SICK VISIT, NEW | 30 | 4 | | Providers | Non-Preventive Encounte | ☐ |
| WELL VISIT, EST | WELL VISIT, ESTABLISHEC | 30 | 4 | Blue | Providers | Preventive Encounter | ☐ |
| NURSE VISIT | IMMUNIZATION/SHOT | 15 | 5 | Fuchsia | Nursing | Nurse-Only Encounter | ☐ |
| CONSULT | CONSULTATION | 15 | 6 | | Providers | Consultation | ☐ |
| LACTATION, EST | LACTATION, ESTABLISHEI | 15 | 9 | Aqua | Nursing | Non-Preventive Encounte | ☐ |
| LACTATION, NE\ | LACTATION, NEW | 30 | 10 | Aqua | Nursing | Non-Preventive Encounte | ☐ |
| SICK VISIT, EXT | SICK VISIT, EXTENDED | 30 | 11 | | Providers | Non-Preventive Encounte | ☐ |
| WELL VISIT, EXT | WELL VISIT, EXTENDED | 45 | 12 | | Providers | Preventive Encounter | ☐ |
| DISTANT,EST | DISTANT, EST | 15 | 24 | | Providers | Telehealth Encounter | ☐ |

Number of Rows: 17

## Edit Appointment Types

1. Access the Appointment Types and Zones window by following the path above.
2. Select the **Appointment Types** tab.
3. Select the Appointment Type to modify.
4. Click the **Edit** button .
5. Edit any field (Visit Type, Description, Duration, Sort #, Appt. Line Color, Department, etc).
6. Click on the **Save** button.
7. Once all changes are made, click the **Exit** button.

Version 14.10

> **Utilities > Manage Practice > Appointment Preferences**

## Overview

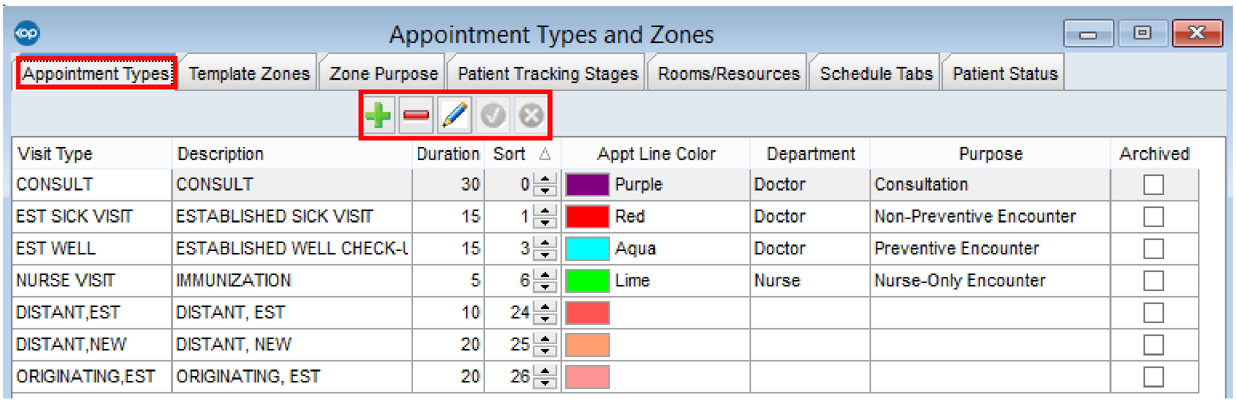
The information on the page will instruct you on how to create Visit Types used to schedule appointments.

## Add Appointment Types

1. Click the Utilities button on the menu toolbar.
2. Select **Manage Practice**.
3. Select **Appointment Preferences**.
4. Click the **Appointment Types** tab.
5. Click the **Insert Record** button .
6. Add appointment types using the table definitions below.

| Field | Description |
|---|---|
| Visit Type | The name of the "type" of appointment being made |
| Description | A more detailed description of the "type" of appointment being made |
| Duration | The length of time for the appointment |
| Sort # | What order the appointment types will appear in on a dropdown list |
| Appt Line Color | The color selected will appear on the left hand side of the appointment box |
| Department | What department this type of appointment falls under |
| Purpose | Further categorizes the appointment type (optional) |
| Archive | Entries no longer in use can be archived |

7. Click the **Post Edit** button .
8. Once all changes are made, click the **Exit** button .




## Edit Appointment Types

1. Select the **Appointment Types** tab.
2. Click to highlight the item to modify.
3. Click the **Edit Record** button .
4. Edit any field (Visit Type, Description, Duration, Sort #, Appt. Line Color, Department, etc).
5. Click on the **Post Edit** button.
6. Once all changes are made, click the **Exit** button.