

Appointment Types

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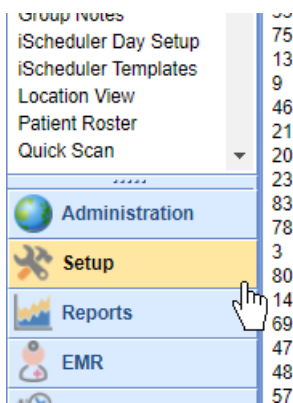
An Appointment Type is used to determine what service is being performed during a scheduled visit.

The list of appointment types is customized for your practice. This article will explain how to add new appointment types to the application along with the associated features available.

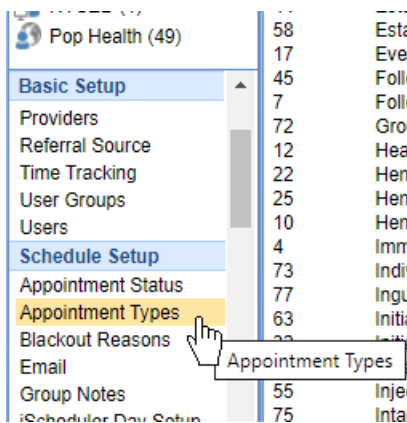
Add a New Appointment Type

To add a new appointment type to the application, follow these steps:

1. Open the **Setup** portal



2. Select **Appointment Types** from the setup list under the Schedule Setup section



3. Enter the Appointment Type Values in the work area

Appointment Type Values

Duration minutes

Lead Time hours MML Lead Time hours

Default Comment

Default Complaint

Lock Placeholder Telemedicine AlertMD Referral Indicator

Exclude Task Overwrite Intake Co-Pay with Procedure Fee

Popup Text

Color

Insurance Profile Assignment

Ins. Profile

Superbill Additions

Procedure #1

Procedure #2

Procedure #3

Procedure #4

Procedure #5

Cost Estimator Procedures

Procedure #1

Procedure #2

Procedure #3

Procedure #4

Procedure #5

Intake Assignment

Intake

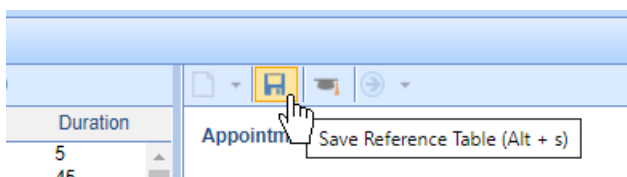
Batch 270 Eligibility Service Types

Service Type

Security

User Groups

4. Click **Save**



The appointment type has now been added to the system. Please note, the appointment type may not show up in the iScheduler yet. It is usually necessary to [associate the new appointment type with a resource](#).

Appointment Type Values

There are several settings and values related to an appointment type that determine how the applications responds when an appointment is added with this type.

Value	Example	How it is used
Name	New Patient Visit	The description of the appointment. This will show up in dropdowns and reports.
Duration (Mins)	30	The default duration of the appointment.
Lead Time (hours)	2	Used to determine how far in advance this type of appointment can be scheduled by users of the application.
MML Lead Time (hours)	24	Used to determine how far in advance this type of appointment can be scheduled by patients in MyMedicalLocker.

Value	Example	How it is used
Default Comment	Be sure to provide new patient packet.	Used to automatically set the Comment field on the appointment edit window.
Default Complaint		Used to automatically set the Chief Complaint field on the appointment edit window.
Lock Placeholder	Checked or not Checked	
Exclude Task	Checked or not checked	If checked, users will not be prompted to complete a Superbill or SOAP Note for this appointment.
Telemedicine	Checked or not checked	If checked, this appointment type will change how the patient appointment is viewed in the patient portal. When selected, these types of appointments will provide details on how to download the AnywhereCare app and what to expect at the time of visit.
Overwrite Intake Co-Pay with Procedure Fee	Checked or not checked	If checked, a user must setup a procedure code in the Superbill Additions section. This is used in the Intelligent Intake process. This option will overwrite the Co-Pay amount with the fee from the selected procedure code. This allows a practice to set a specific payment amount based on the type of visit.
Popup Text	Ensure the patient completes labs prior to appointment.	Used to generate a scheduling alert for the person creating an appointment. Helpful when you want to remind the front desk to take specific actions when scheduling this appointment.
Color	Light Red	Used to define how appointments show up on both the EMR and iScheduler. The following settings may be used: <ul style="list-style-type: none"> • User Setting: EMR Primary Appointment Color (Background) • User Setting: EMR Secondary Appointment Color (Right Side Bar) • Company Setting: iScheduler Primary Appointment Color (Background) • Company Setting: iScheduler Secondary Appointment Color (Right Side Bar)
Superbill Additions (Provider 1-5)	81003	Used to send specific CPT code to the superbill for this type of appointment.
Intake	New Patient Intake	Used to auto-assign the appropriate Intelligent Intake template when this appointment is scheduled.
Batch 270 Eligibility Service Types	Physician Visit - Sick, Physician Visit - Well	Used when batch eligibility is ran. If the specific options are selected in this list, a Batch Eligibility request will fail if that service type is not active for that patient.
Security - User Groups	Surgery Scheduler	Used to limit which users can add or change these types of appointments. Helpful when you need to control how some sensitive types of appointments are scheduled.