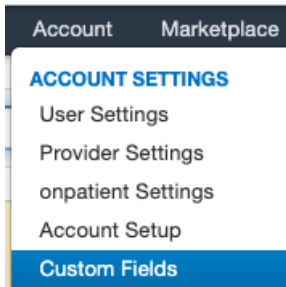


How do I create a custom appointment status?

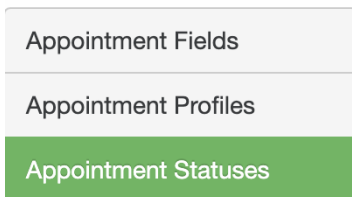
07/08/2024 7:46 pm EDT

You can create your own appointment status(es) to fit the needs of your practice and workflow. The custom appointment status will appear in the status menu in the appointment window.

1. Go to **Account > Custom Fields**.



2. Select **Appointment Statuses** from the menu on the left.



Manage Custom Data

3. Click **+Add New Status**.

Custom Appointment Statuses



Name	Abbreviation	Color	Offices	Measured	Enabled	
☰ Arrived	A	■	(3) All Offices (Default Status)	<input checked="" type="checkbox"/> Measured	<input checked="" type="checkbox"/> On	Default Status
☰ Checked In	CI	■	(3) All Offices (Default Status)	<input checked="" type="checkbox"/> Measured	<input checked="" type="checkbox"/> On	Default Status
☰ Checked In Online	CIO	■	(3) All Offices (Default Status)	<input checked="" type="checkbox"/> Measured	<input checked="" type="checkbox"/> On	Default Status

4. Enter a **Status Name** and **Abbreviation**. You can also choose a **Color**. In order for the status to appear in the **Status** dropdown in the appointment window, select at least one office. Click **Save** when complete.

Status Name (Required)

×

Abbreviation: Color:

Filter Offices	Select All	Offices (0)
Primary Office	<input type="checkbox"/>	
Telehealth	<input type="checkbox"/>	
Test Office	<input type="checkbox"/>	

Close

Please fill in the required fields: Name, Abbreviation

Save

Here is an example of a completed custom status.

Checked Out

×

Abbreviation: Color:


Filter Offices	Deselect All	Offices (3)
Primary Office	<input checked="" type="checkbox"/>	
Telehealth	<input checked="" type="checkbox"/>	
Test Office	<input checked="" type="checkbox"/>	

Close

Save

5. The status will appear after the system **Default Status** menu options.

☰	Cancelled	×	■ (3) All Offices (Default Status)	<input type="checkbox"/> Measured	<input checked="" type="checkbox"/> On	Default Status
☰	No Show	NS	■ (3) All Offices (Default Status)	<input type="checkbox"/> Measured	<input checked="" type="checkbox"/> On	Default Status
☰	Checked Out	CO	■ (3) All Offices	<input type="checkbox"/> Measured	<input checked="" type="checkbox"/> On	Edit Archive

- You can use the () icon to drag and drop the status to a different order.
- The (Measured) checkbox allows you to track the time a patient spends in that status in the Appointments Dashboard (Go to **Schedule > Appointments Dashboard**)
- The enable switch (On) allows you to remove the status from your list in the status menu.
- Clicking the ([Edit](#)) icon will open the status window for you to make changes.
- The ([Archive](#)) icon will inactivate the status from your list.

You can create as many **Custom Appointment Statuses** as needed to accommodate the needs and workflows of your practice.
