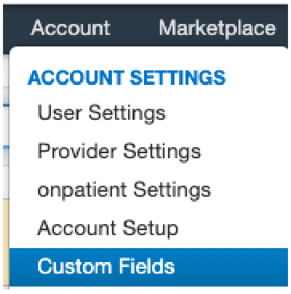
How do I create a custom appointment status?

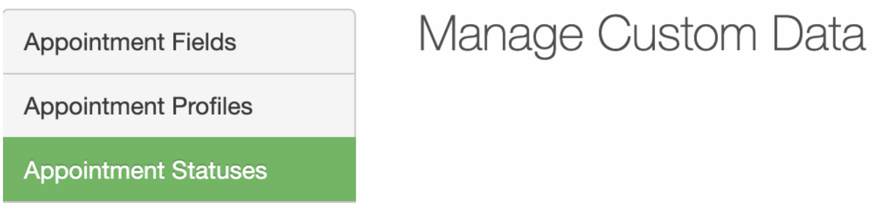
07/08/2024 7:46 pm EDT

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.

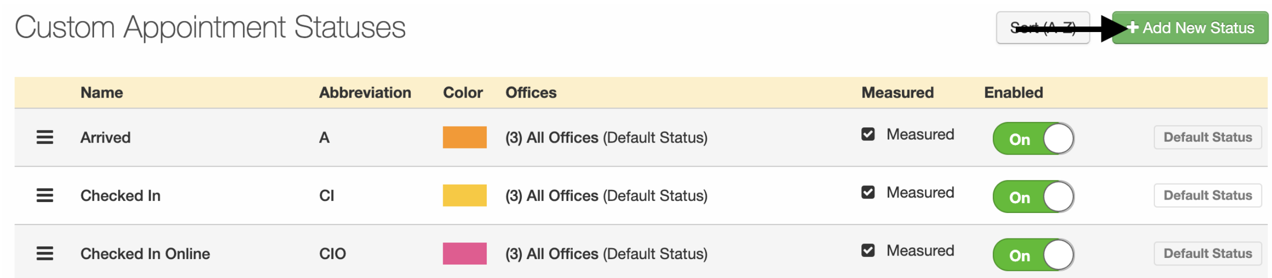
1. Go to **Account** > **Custom Fields**.



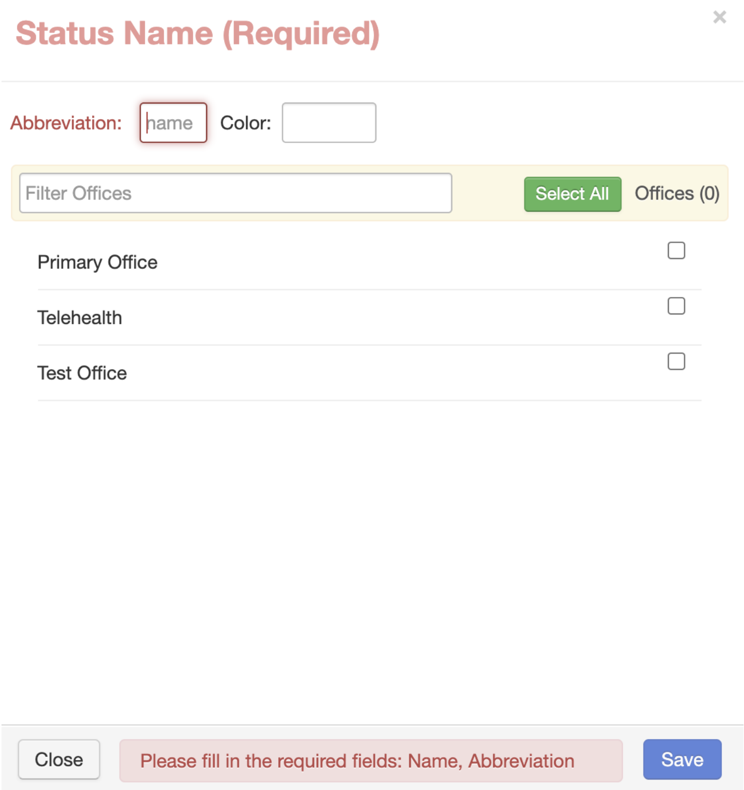
2. Select **Appointment Statuses** from the menu on the left.



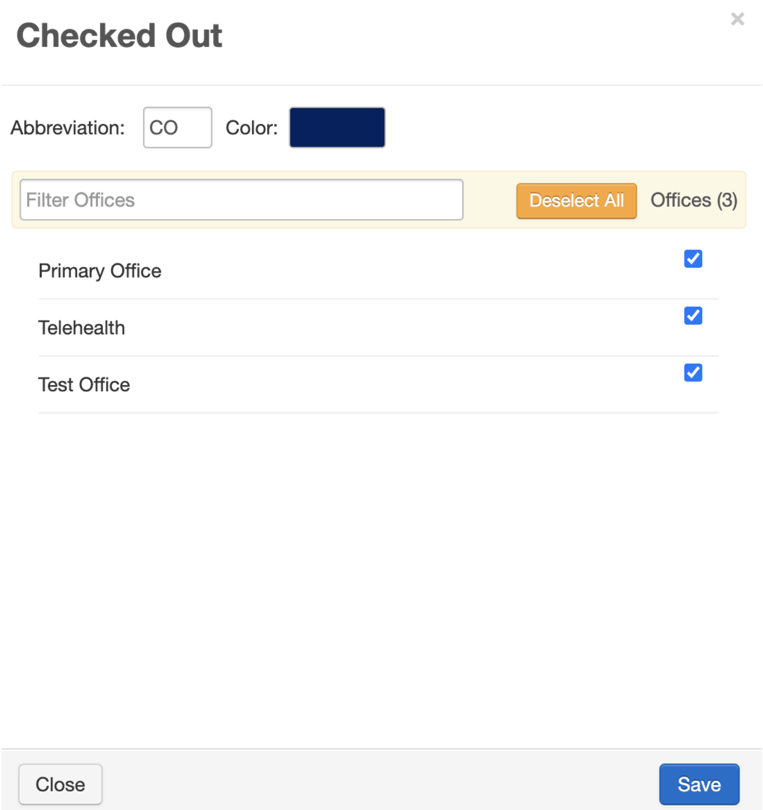
3. Click **+Add New Status**.



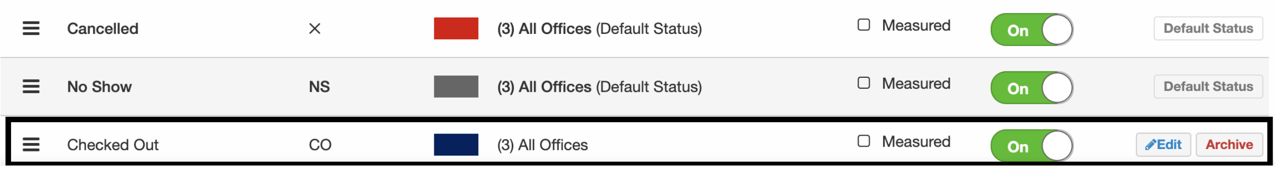
4. Enter a **Status Name** and **Abbreviation**. You can also choose a **Color**. In order for the status to appear in the **Status** dropdown in the appointment window, select at least one office. Click **Save** when complete.



Here is an example of a completed custom status.



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



- 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.