

Appointment Profiles Configuration Guide

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The **Appointment Profiles** section under **Self-Scheduling** lets practices configure which appointment profiles patients can book and how each option appears. Each profile combines a DrChrono appointment profile with a patient-facing label and booking settings, including eligible providers, rooms, minimum scheduling notice, and insurance settings.

Key configuration options

Main profile settings

- **Appointment Profile:** Select the appointment profile to configure, such as New Patient, Therapy, or Consultation.
- **Label:** Enter the name patients see when booking, such as "Therapy (60 min)" or "Virtual Consultation." Use a clear name that accurately describes the visit.
- **Active:** Turn on the profile to make it available for self-scheduling. Turn it off when patients should no longer book this option.
- **Virtual Event:** Turn this on for a virtual appointment profile. Review the practice's telehealth configuration separately to confirm how visit links are provided.
- **Price:** Enter the appointment price, if applicable.
- **Additional Settings:** Select **Show** to expand the booking settings for that profile. Select **Hide** to collapse them.

Additional booking settings

- **Providers:** Select the providers eligible to offer this appointment profile.
- **Rooms:** Select the exam rooms associated with this appointment profile. Check the location shown in each room name.
- **Additional Patient Information:** Turn this on when extra patient information needs to be collected during booking. This only adds the ZIP Code and State demographics.
- **Minimum Scheduling Notice:** Set how far in advance patients must book. Select **Not required** if this profile doesn't need a minimum notice period.
- **Insurance Settings:** Choose whether to request insurance information for this profile. **Location Default** uses the insurance setting configured for the location.

Manage the profile list

- **Add:** Select **Add** to create another profile entry, and then select its appointment profile and configure its settings.
- **Search and page controls:** Use the search box to find a profile and the arrows to move between pages.
- **Delete:** Use the trash icon to remove a profile entry from this configuration. Review the entry carefully before removing it.

Example

- **Scenario:** A practice wants patients to book virtual consultations with selected providers.
- **Setup:** Select **Consultation**, enter "Virtual Consultation" as the **Label**, and turn on **Active** and **Virtual Event**. Under **Additional Settings**, select the eligible providers and rooms, set the minimum scheduling notice, and

review the insurance requirement.

- **Outcome:** Patients can identify the virtual consultation option and book according to the configured profile settings and available schedules.

Before going live

Confirm:

- **Profile accuracy:** Each appointment profile has the correct label, active status, virtual setting, and price.
- **Booking rules:** Providers and rooms are correct, and patient information, scheduling notice, and insurance settings match the practice's needs.
- **Availability: Scheduling Templates** and other availability settings support the times intended for each profile.
- **Patient experience:** Complete a test booking to review the labels, available slots, requested information, and virtual visit instructions.



If you require further assistance, contact our Customer Support team via in-app chat, email us at support@drchrono.com, or call us at (844) 569-8628.
