Client Portal: Self-Schedule an Appointment

a Quick Reference Guide for Portal Users

If you have any questions about scheduling an appointment via the portal, please contact the office.

1 After logging in, click **Appointments** from the Navigation Menu.

2 Under Client Appointments, click the **New Appointment** button.

3 Select an **Appointment Type** from the drop-down.

> **Note**: If you want to schedule a Telehealth appointment and your Provider offers them, select the appointment type that has the Telehealth checkbox selected.

4 Select who you want to schedule the appointment with from the **Appointment With** drop-down.

5 Click the **Find Times** button.

6 Select an appointment date and time.

> **Optional**: In the **Note to Provider** text field, enter any notes as necessary.

7 Click the **Save** button. Your appointment is displayed under Client Appointments.

> **Note**: To reschedule an appointment, right-click on the appointment and select Reschedule Appointment. Repeat steps 1-7 to schedule an appointment. The original appointment you are rescheduling will be canceled.