

Scheduling Clients: Step by Step Instructions

10 Steps [View most recent version on Tango.us](#) 

Created by

Progress Counseling Group

Creation Date

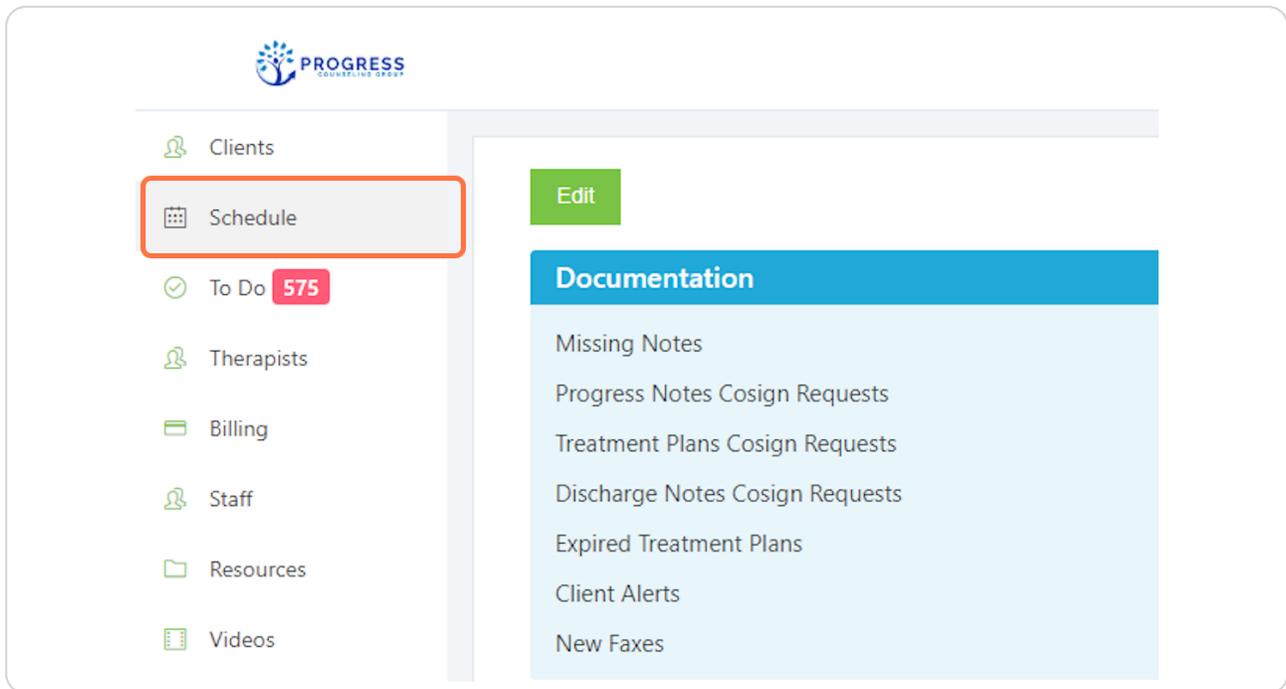
July 16, 2023

Last Updated

October 21, 2023

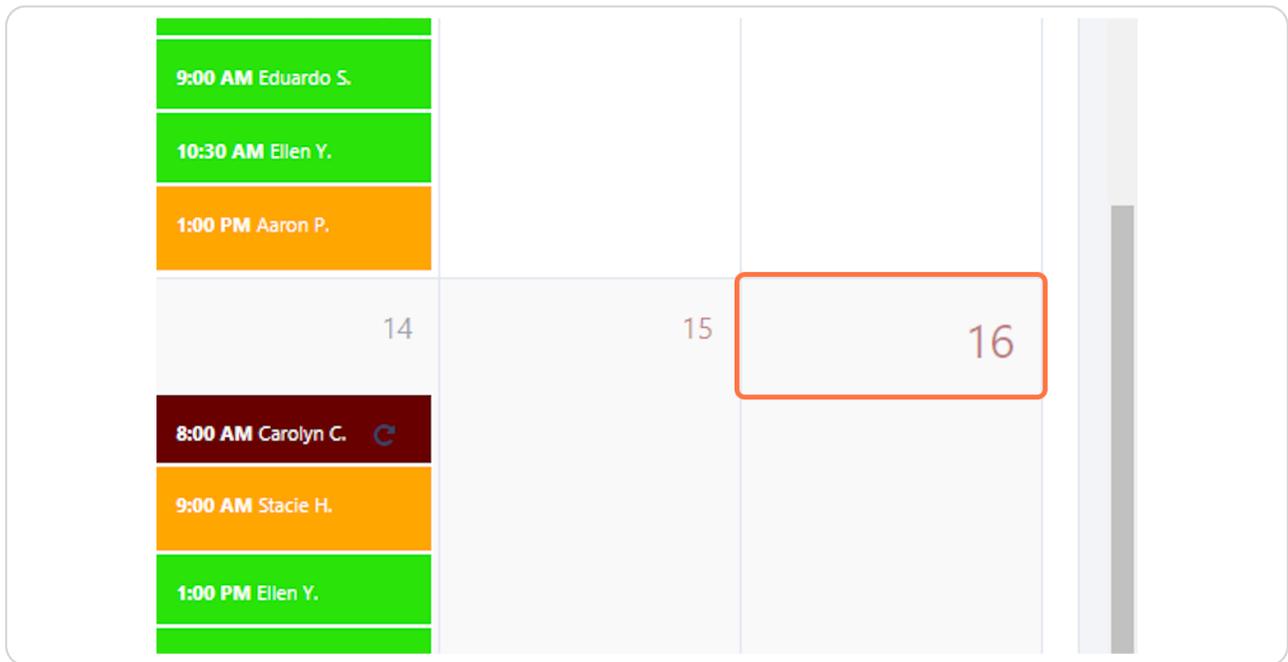
STEP 1

Click on Schedule



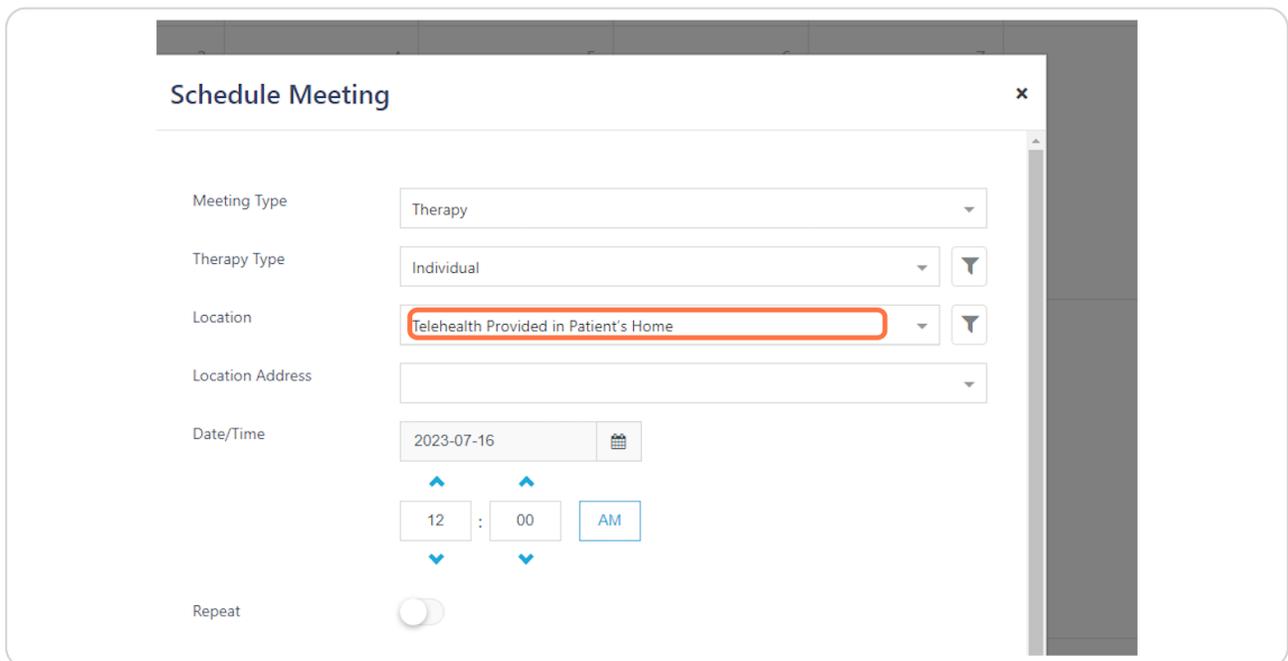
STEP 2

Click on Date to Schedule



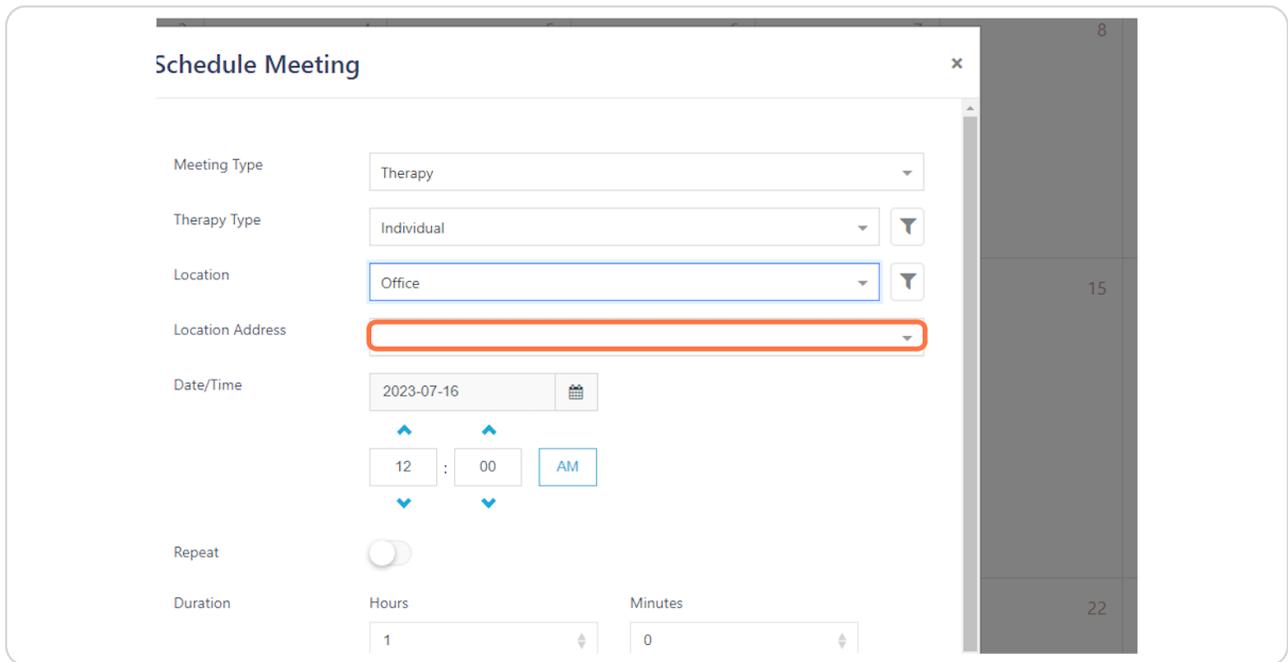
STEP 3

Select Location



STEP 4

Select Address - In Office Appointments Only

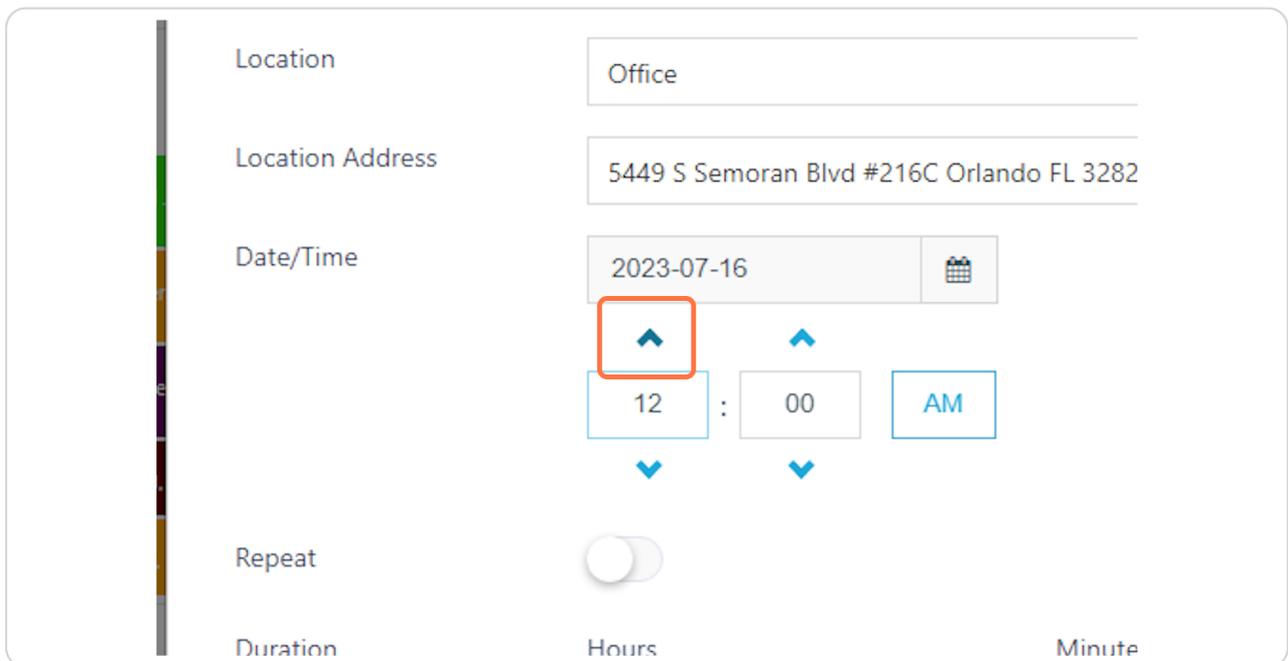


The screenshot shows a 'Schedule Meeting' form with the following fields and values:

- Meeting Type: Therapy
- Therapy Type: Individual
- Location: Office
- Location Address: (highlighted with a red box)
- Date/Time: 2023-07-16, 12:00 AM
- Repeat: (toggle off)
- Duration: 1 Hour, 0 Minutes

STEP 5

Confirm Date - Set time



The screenshot shows a 'Schedule Meeting' form with the following fields and values:

- Location: Office
- Location Address: 5449 S Semoran Blvd #216C Orlando FL 3282
- Date/Time: 2023-07-16, 12:00 AM (the '12' is highlighted with a red box)
- Repeat: (toggle off)
- Duration: (Hours and Minute fields)

STEP 6

Type client's name

The screenshot shows a web form for creating a meeting. The 'Clients' field is active, with a search input containing 'clien'. A dropdown menu is open, showing suggestions: 'client name', 'test client', and 'My Meeting'. The 'client name' option is highlighted with a red border. Other fields include 'Repeat' (toggle), 'Duration' (Hours: 1, Minutes: 0), 'Provider' (Michael Moore, LCSW), 'Search by Account' (search accounts...), 'Observers', 'Title' (My Meeting), and 'Comment'. A vertical scrollbar on the right shows page numbers 22 and 29.

STEP 7

Select the client

The screenshot shows the same web form as in Step 6. The 'Clients' field still contains 'clien', but the dropdown menu now has 'client name' selected and highlighted with a red border. The 'test client' and 'My Meeting' options are still visible. At the bottom right, there are 'Close' and 'Save changes' buttons. The vertical scrollbar on the right shows page numbers 22 and 29.

STEP 8

Click on dropdown

Duration: Hours: 1, Minutes: 0

Provider: Michael Moore, LCSW

Search by Account: search accounts...

Clients: client name

client name's services: **[Red box highlights dropdown menu]**

Observers: no observers selected

Title: client n.

Comment:

15

22

STEP 9

Select correct service code

Provider: Michael Moore, LCSW

Search by Account: search accounts...

Clients: client name

client name's services: **[Red box highlights 'INDIVIDUAL COUNSELING']**

Observers: INDIVIDUAL COUNSELING

Title: Initial 15 Minute Consultation [Phone or Virtual]

Comment: No Show / Late Cancellation Fee

Payment Required Before Joining Session: Payment before session can not be requested. There is no payment due or multiple clients are attending the session.

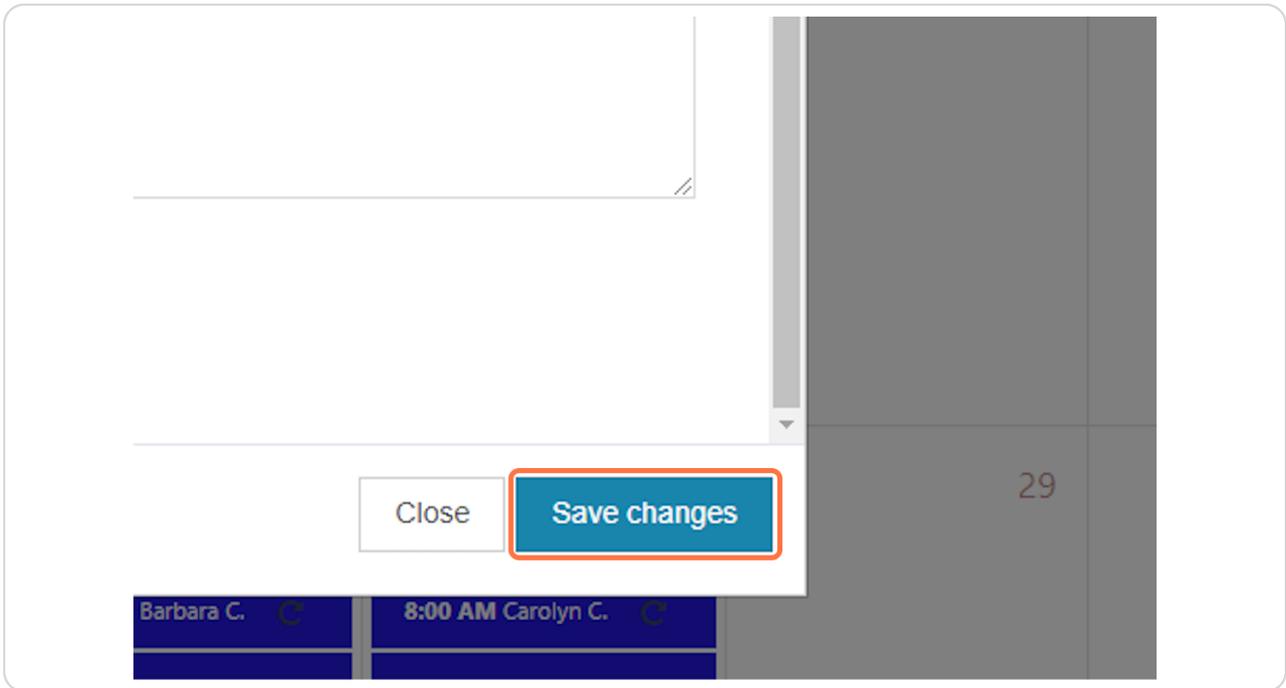
15

22

29

STEP 10

Click on Save changes



Tango

Never miss a step again. Visit [Tango.us](https://tango.us)