Set up your visit types and booking link

Build each kind of visit once: its length, providers, rooms, price and forms. Then turn on the link patients book from.

Setup guide · For Owners, Managers · aminova.health/university/visit-types-and-booking-link

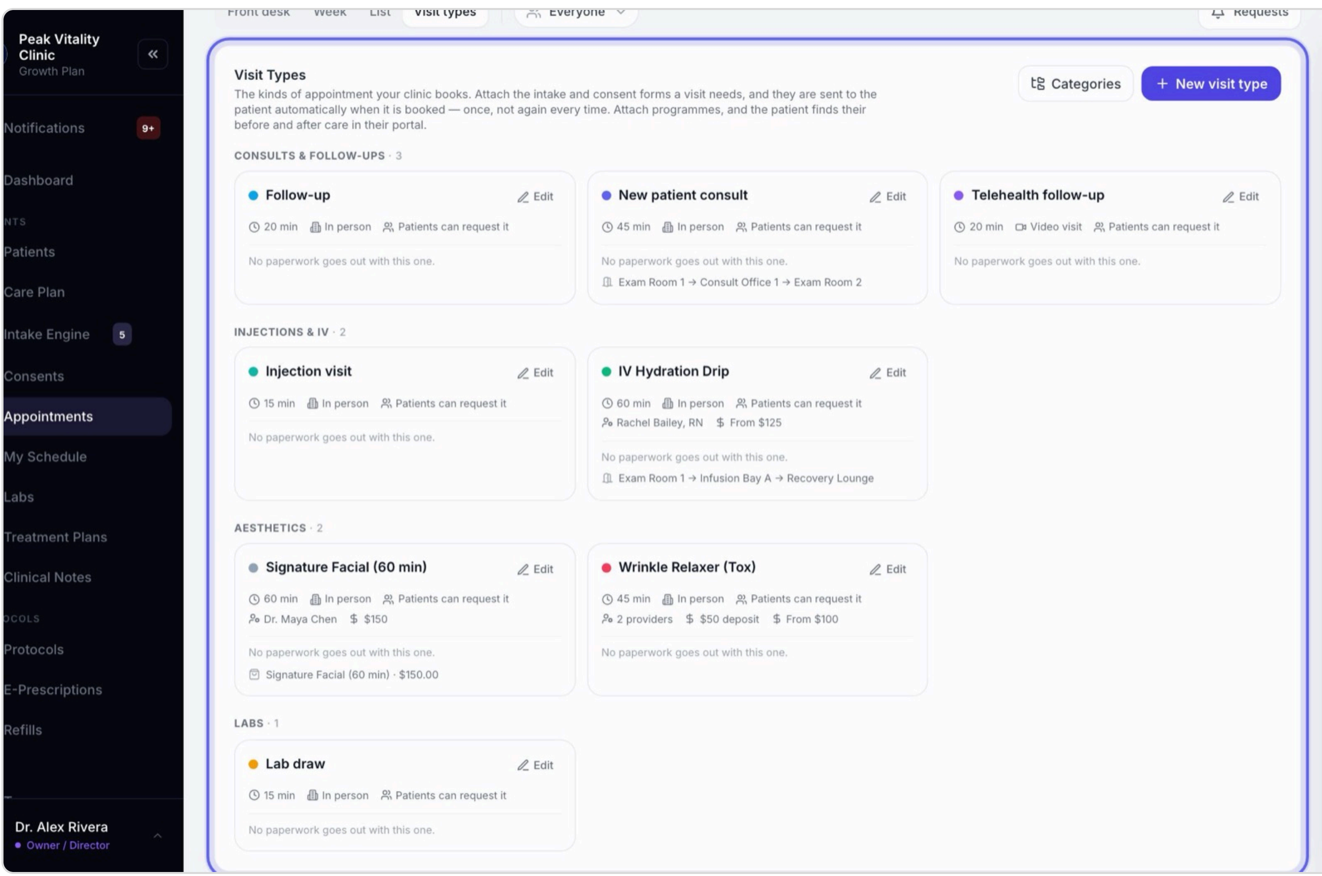
1. WHAT A VISIT TYPE IS

A visit type is one kind of visit you offer, like a new-patient consult, an IV drip or a follow-up. It holds everything about that visit: how long it takes, who sees it, which rooms it uses, what it costs, and which forms go to the patient.

Set each one up once. Every booking of it, at the front desk, in the patient app or on your booking link, fills in on its own.

2. OPEN YOUR VISIT TYPES

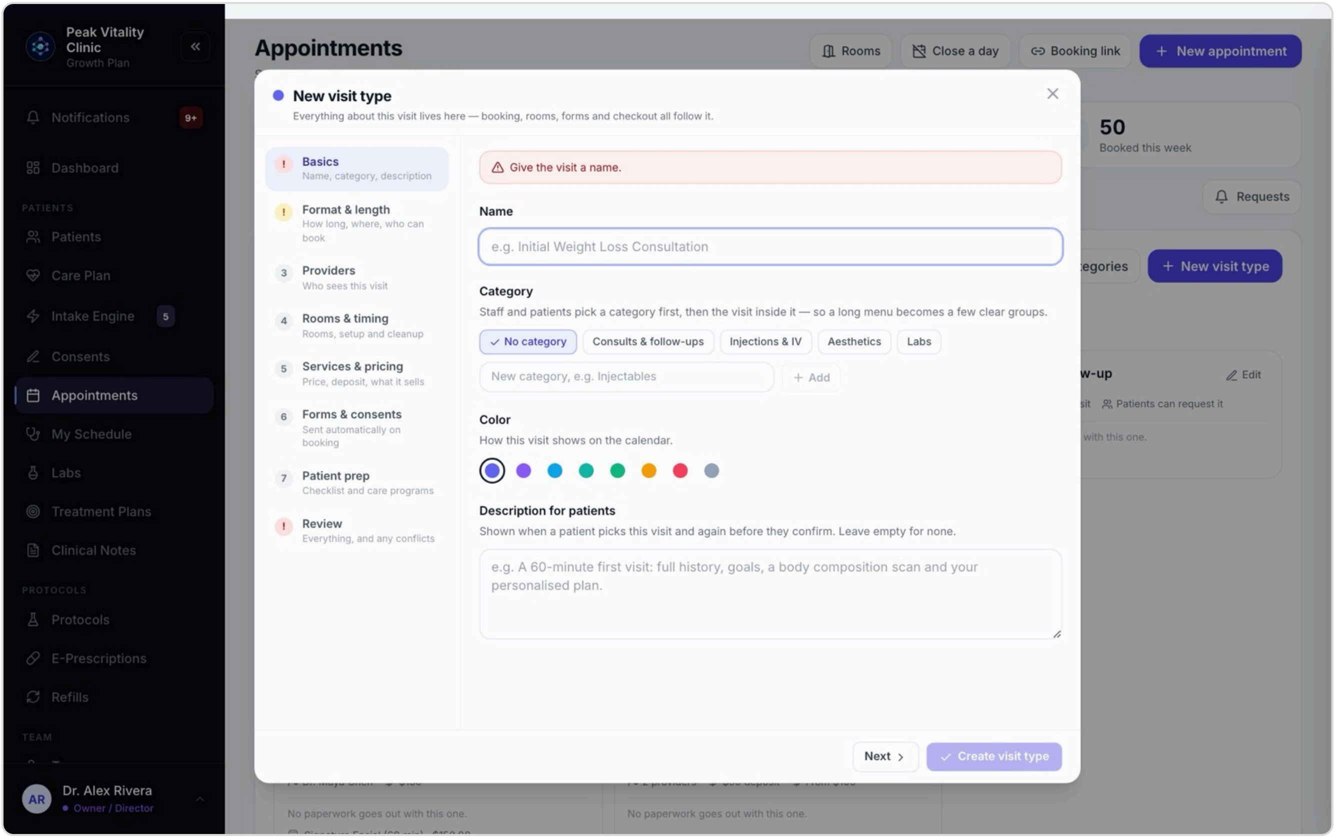
1. Go to **Appointments** in the sidebar.
2. Click the **Visit types** tab.



Appointments → Visit types lists every visit you offer, grouped by category.

3. START A NEW VISIT TYPE

1. Click **New visit type**.
2. The builder opens with its steps down the left side. You can move between them in any order.
3. Nothing is saved until you press **Create visit type** at the end.



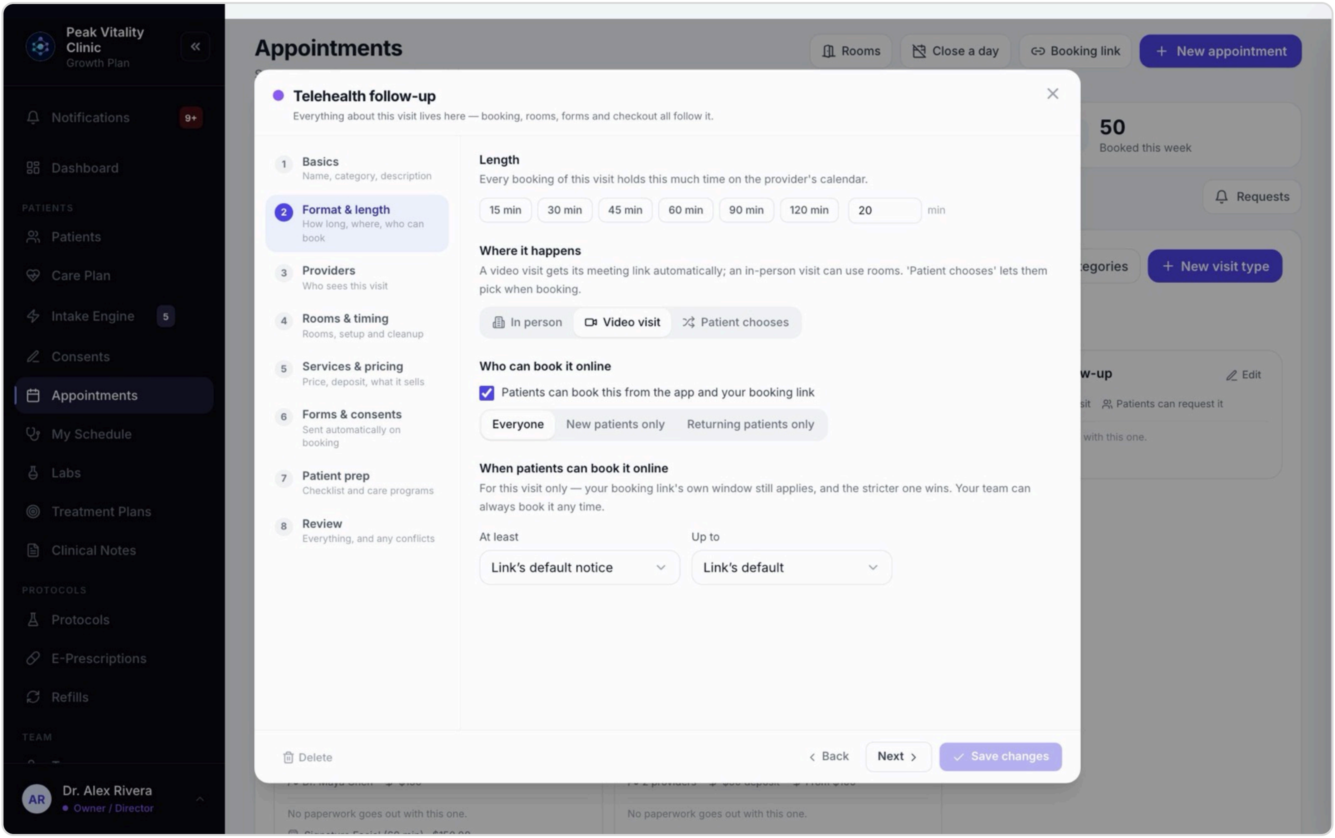
The visit type builder. Each step on the left is one part of the visit.

4. BASICS

1. Give it a **Name** patients will recognize, like “New patient consult”.
2. Pick a **Category**. Staff and patients choose a category first, then the visit inside it.
3. Choose a **Color**. It is how this visit shows on the calendar.
4. Add a short **Description for patients** if you like. They see it when they pick the visit.

5. FORMAT AND LENGTH

1. Set the **Length**. Every booking holds this much time on the provider’s calendar.
2. Choose **Where it happens**: in person, video, or let the patient choose. A video visit gets its meeting link automatically.
3. Choose **Who can book it online**: everyone, new patients only, or returning patients only.
4. Optionally set **When patients can book it online**, like at least 24 hours ahead. Your team can always book it any time.



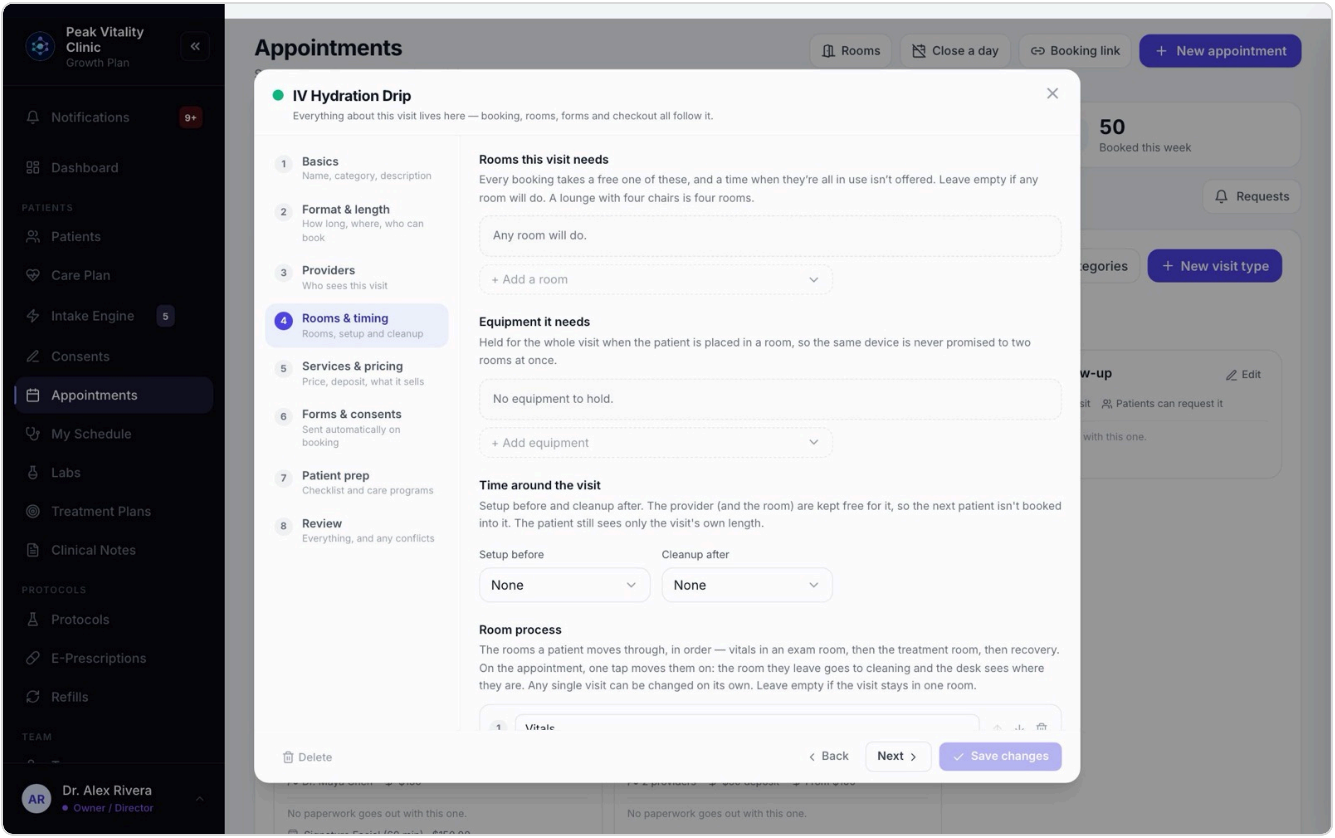
Format & length: how long it is, where it happens and who can book it online.

6. PROVIDERS

1. Add every provider who sees this visit.
2. With more than one, a time is offered when any of them is free, and the booking goes to whoever is.

7. ROOMS AND TIMING

1. Under **Rooms this visit needs**, add the rooms it can use. Leave it empty if any room will do.
2. Add **Equipment it needs** if a device, like a laser, must be free too.
3. Set **Time around the visit**: setup before and cleanup after. The provider and room stay free for it, but the patient only sees the visit's own length.
4. If the patient moves through several rooms, add a **Room process**. See the Room steps manual.



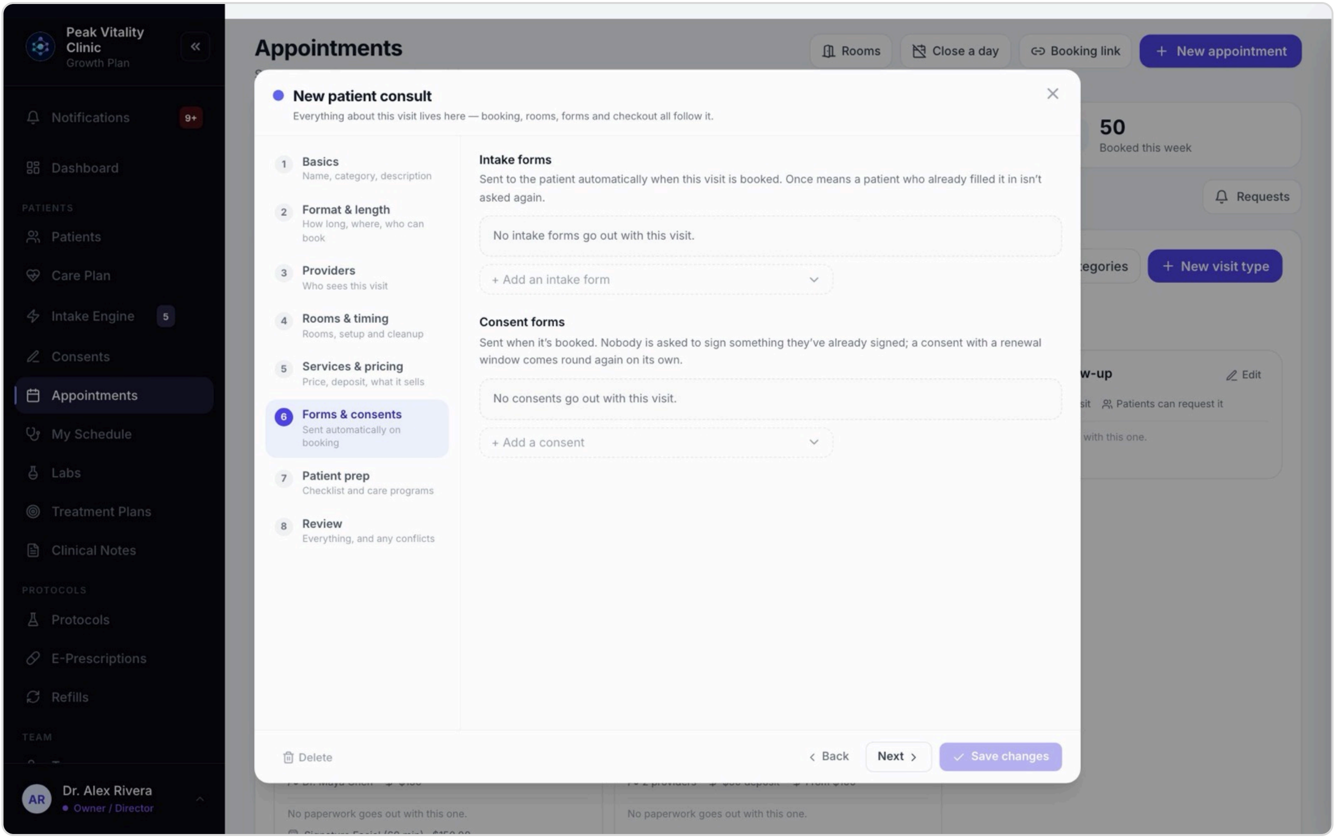
Rooms & timing: the rooms it needs, setup and cleanup time, and the rooms a patient moves through.

8. SERVICES AND PRICING

1. Set the **Price shown to patients**. It is only shown, never charged by itself.
2. Add a **Deposit at booking** if you want one. The time is held until it is paid.
3. Under **What it sells at checkout**, add the services and products that belong to this visit. They are already in the basket when the front desk checks the patient out.

9. FORMS AND CONSENTS

1. Add the **Intake forms** that go out when this visit is booked. Choose **Once** so a patient who already filled it in isn't asked again, or **Every visit**.
2. Add the **Consent forms** to sign. Nobody is asked to sign one they already signed.



Forms & consents are sent to the patient automatically as soon as the visit is booked.

10. PATIENT PREP

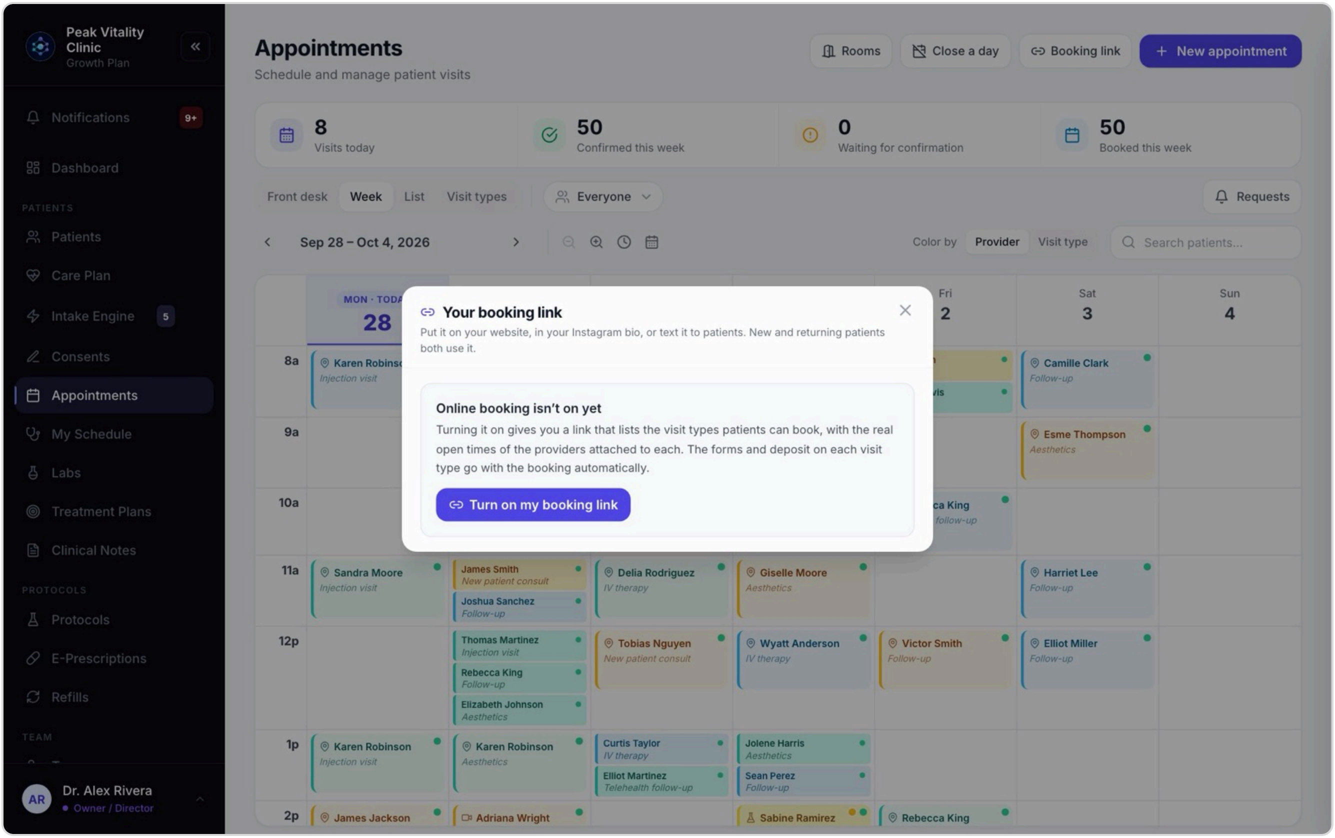
1. Add a **Prep checklist**: what the patient does before the visit, like “Drink water beforehand”.
2. It goes out with the booking confirmation and reminders, and shows on the appointment in their app.

11. REVIEW AND SAVE

1. Open **Review** to see everything about the visit on one page.
2. Anything that doesn’t add up is flagged there, like a provider who has no open times.
3. Press **Create visit type**. It’s ready to book. Editing one later, the button says **Save changes**.

12. TURN ON YOUR BOOKING LINK

1. On **Appointments**, click **Booking link**.
2. Press **Turn on my booking link**. It lists the visit types patients can book, with the real open times of each visit’s providers.
3. Copy **Everything you offer** for your website, or copy **A link for one visit** to share one visit on its own.



Your booking link: press Turn on my booking link to switch it on.

> **Tip.** The link stays the same when you change your settings, so you never have to send it again.

13. SET YOUR BOOKING RULES AND LOOK

1. Open **Settings & look** in the booking link panel.
2. Choose **Confirm instantly**, or **I approve each request** to review each booking first.
3. Set the **Minimum notice**, how far ahead people can **Book up to**, and **Show times every**.
4. Pick which **Clinicians on this link** patients can book with.
5. Under **Look**, add your colors and logo so the page looks like your clinic.
6. Use **Pause** to close online booking for a while without turning the link off.

14. WHERE THE OPEN TIMES COME FROM

The booking link has no hours of its own. It offers times when your providers are scheduled to work.

If you use **Staff Scheduling**, the shifts there decide it. If you don't, it follows your opening hours in **Settings** and each provider's hours under **Team → Set Availability**.

> **Tip.** Seeing times you don't open? Check the shifts in Staff Scheduling first. The standard full-day shift runs 8 to 5.