Appointments Guide

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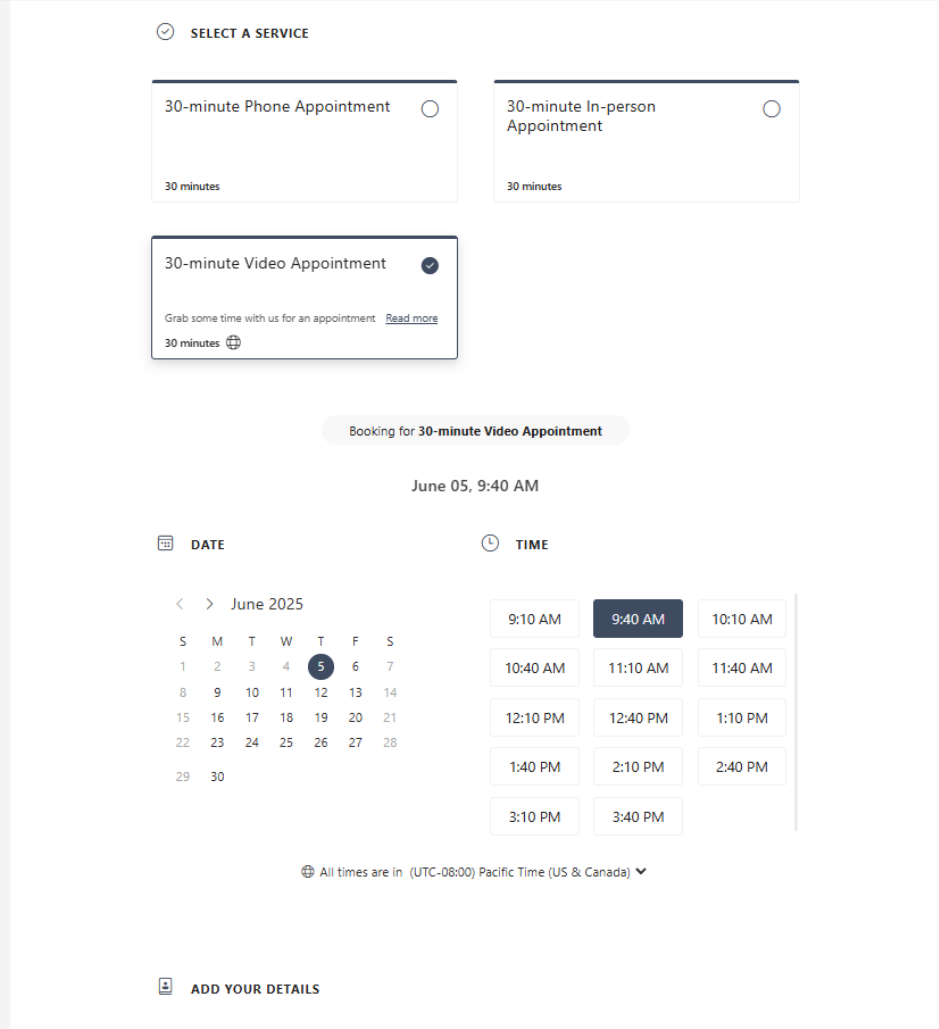
Scheduling an Appointment

Choose the meeting type, date, and time for your appointment.



After selecting your appointment type, date, and time, scroll down for additional fields. You will be asked to provide some information. All required fields are marked with an asterisk (*). Please provide as much information as possible to help us prepare for your appointment.

Once you complete the required fields, select the Book button.

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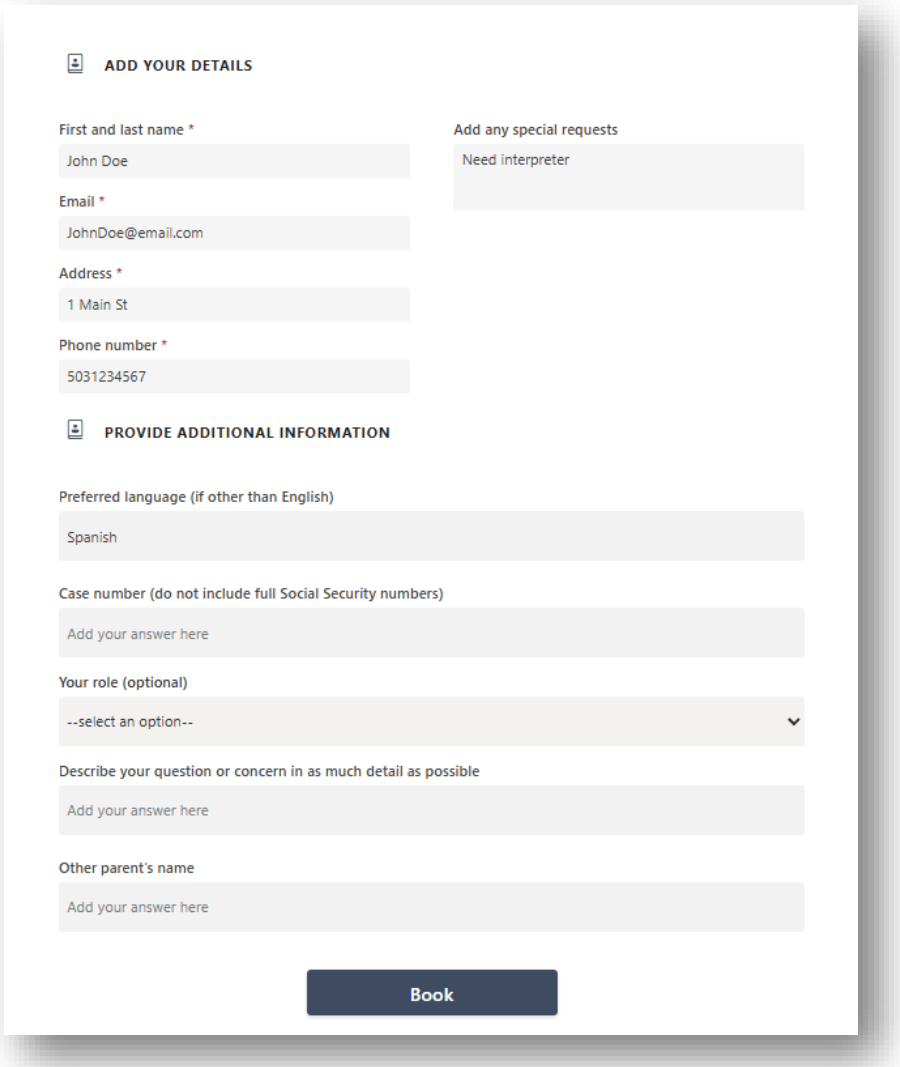

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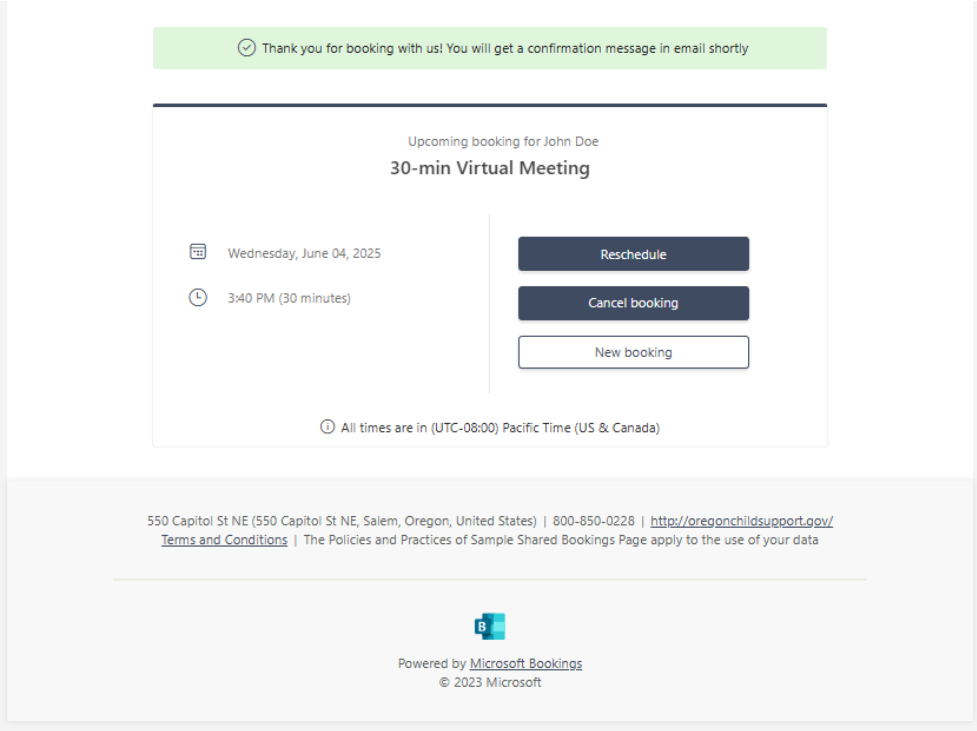
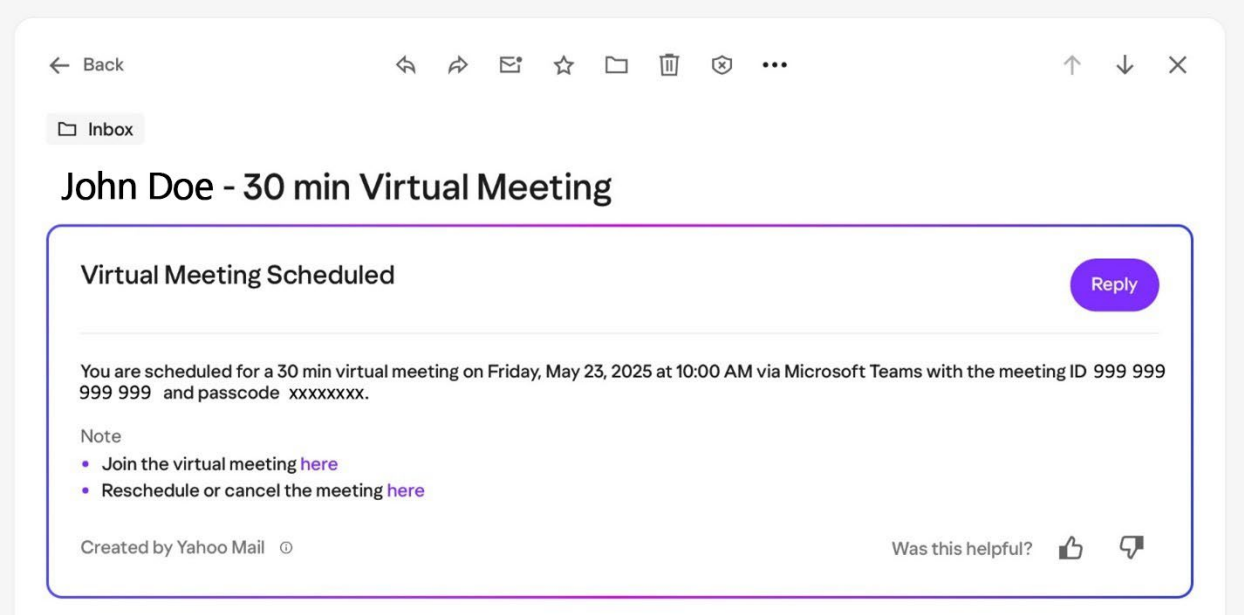
You will get a message at the top of the page confirming your appointment is booked.



You will receive a confirmation email once your appointment is successfully booked.
The email will have a link to manage your appointment if you need to cancel or change it.

If you booked a video meeting, the email will include the link you need to join your virtual meeting.



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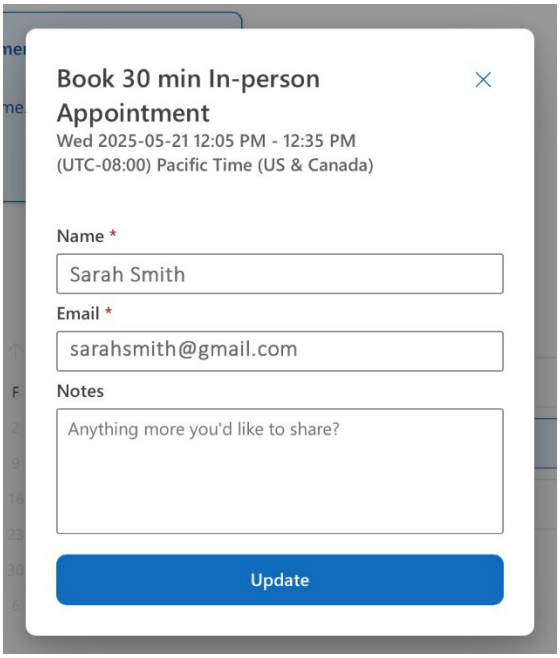
Rescheduling Appointments

If you need to reschedule or cancel your appointment, there is a Reschedule link in your appointment confirmation email. Click the link, and it will open your appointment page.

Select the Reschedule button and pick your new date and time.

Enter your name, email, and any notes you want us to know for your appointment.
After completing the required fields, select the Update button.



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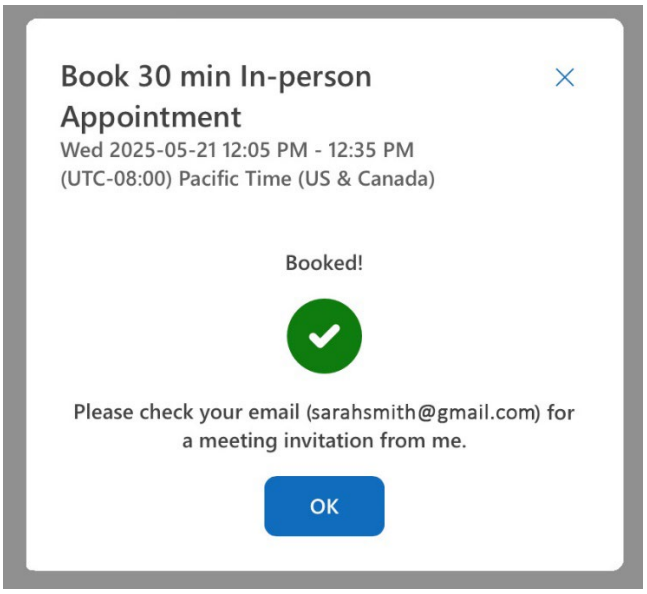
You will get a confirmation your appointment is booked.



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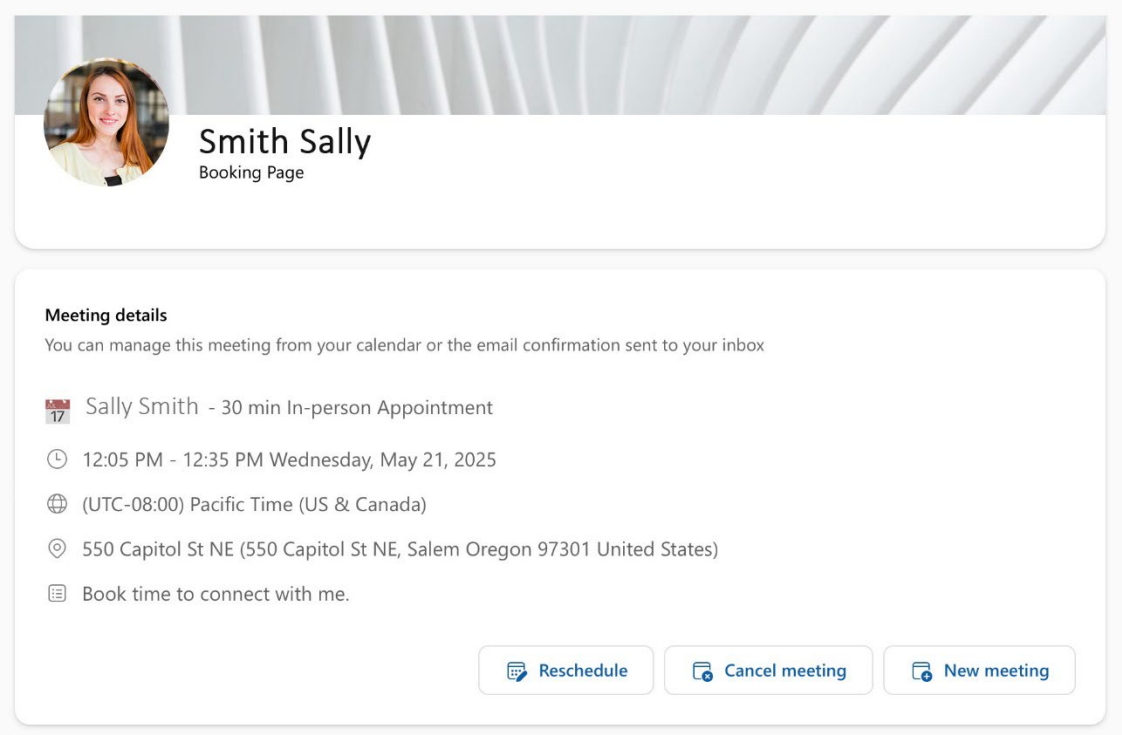
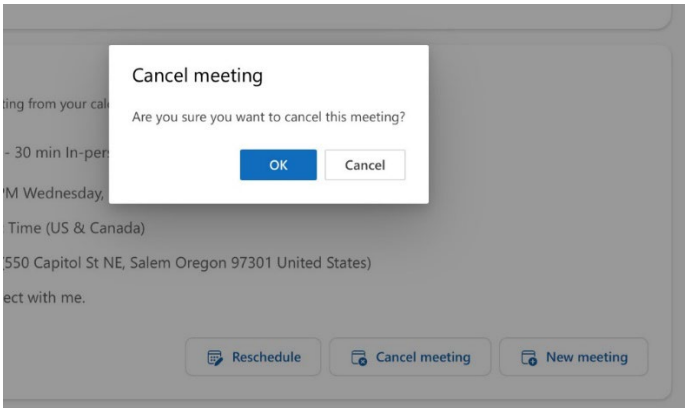
Cancelling Appointments

If you need to cancel an appointment, there is a Reschedule link in your appointment confirmation email. Click the link, and it will open your appointment page.

Select the Cancel meeting button.



You will get a pop-up to confirm your cancellation. Select the OK button to cancel your appointment.



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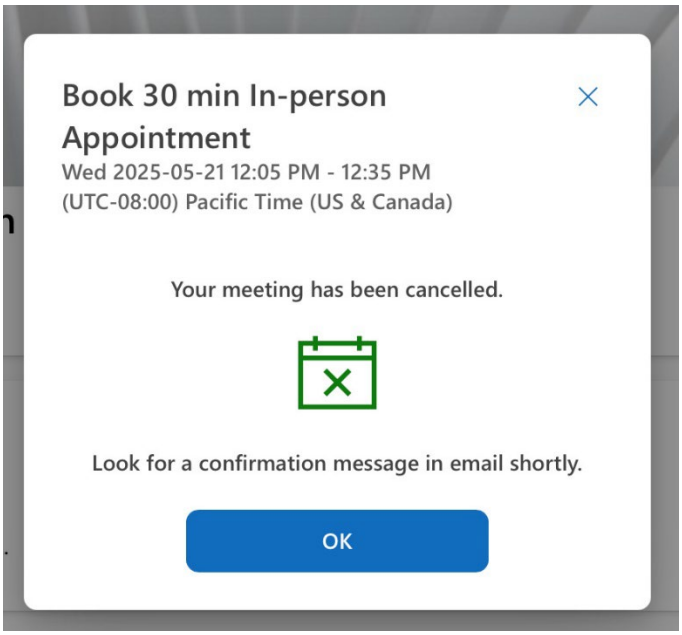
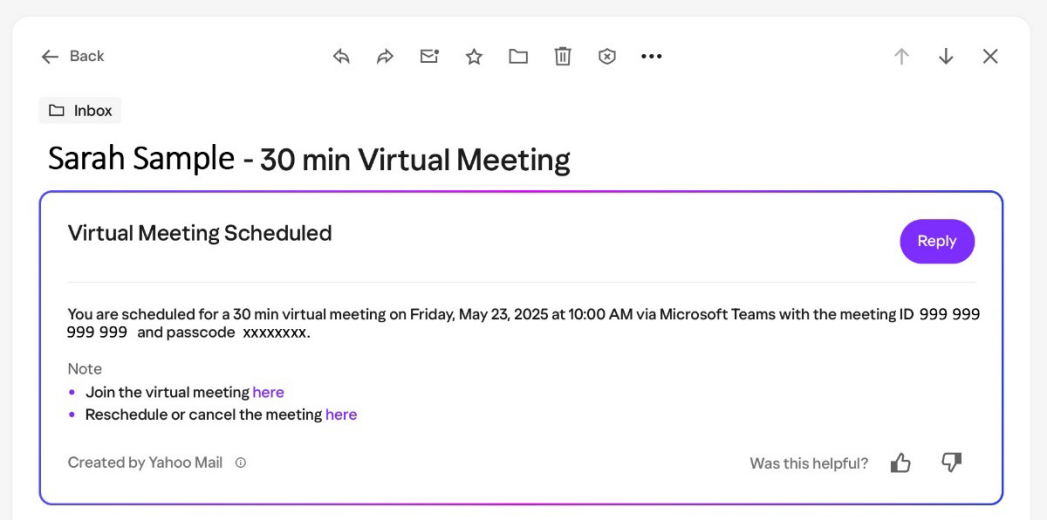
The pop-up will change to a confirmation message that your meeting was cancelled.



Joining a Video Appointment

Click the link in your confirmation email to join your meeting.



Next, you'll be prompted to join via your browser or the Teams app. Not all devices allow you to join via browser. The app may be the only option presented. There's also a link to download Teams if you choose to use the app and do not have it.

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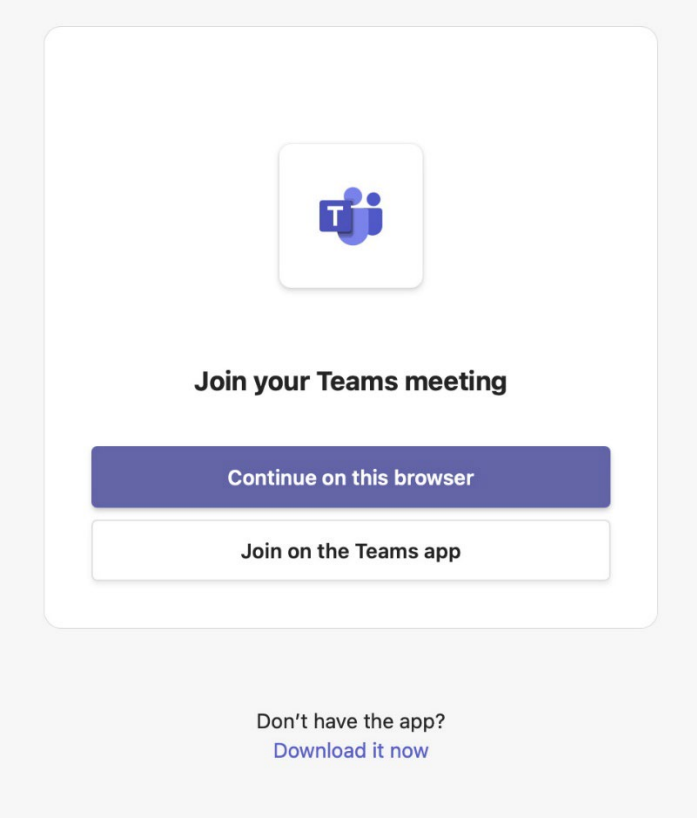
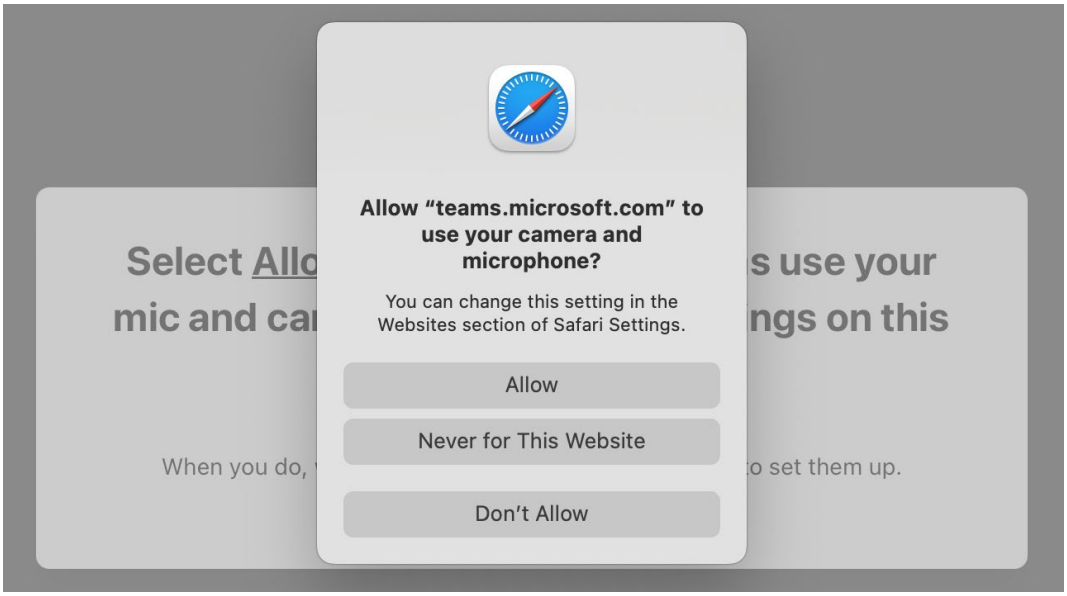


You may be prompted to give Teams permission to use your camera and microphone.



Teams will open and you can type in your name and adjust your audio and video settings before you're connected to your video appointment.

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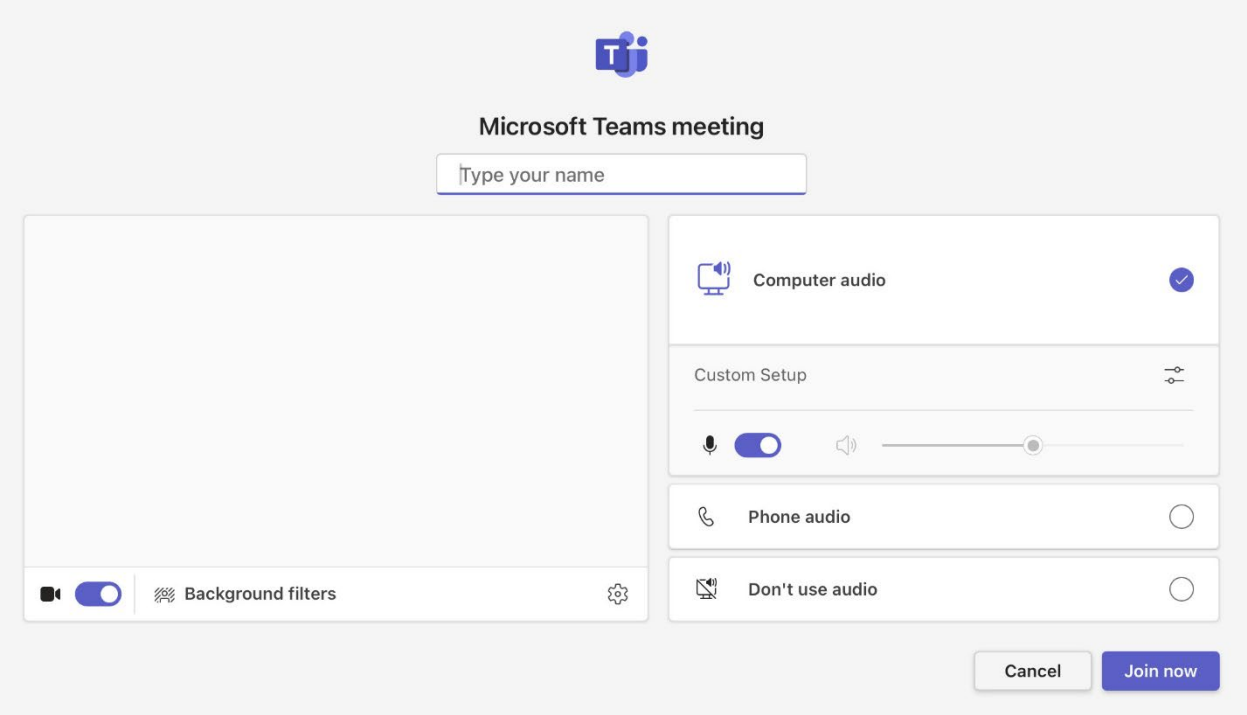
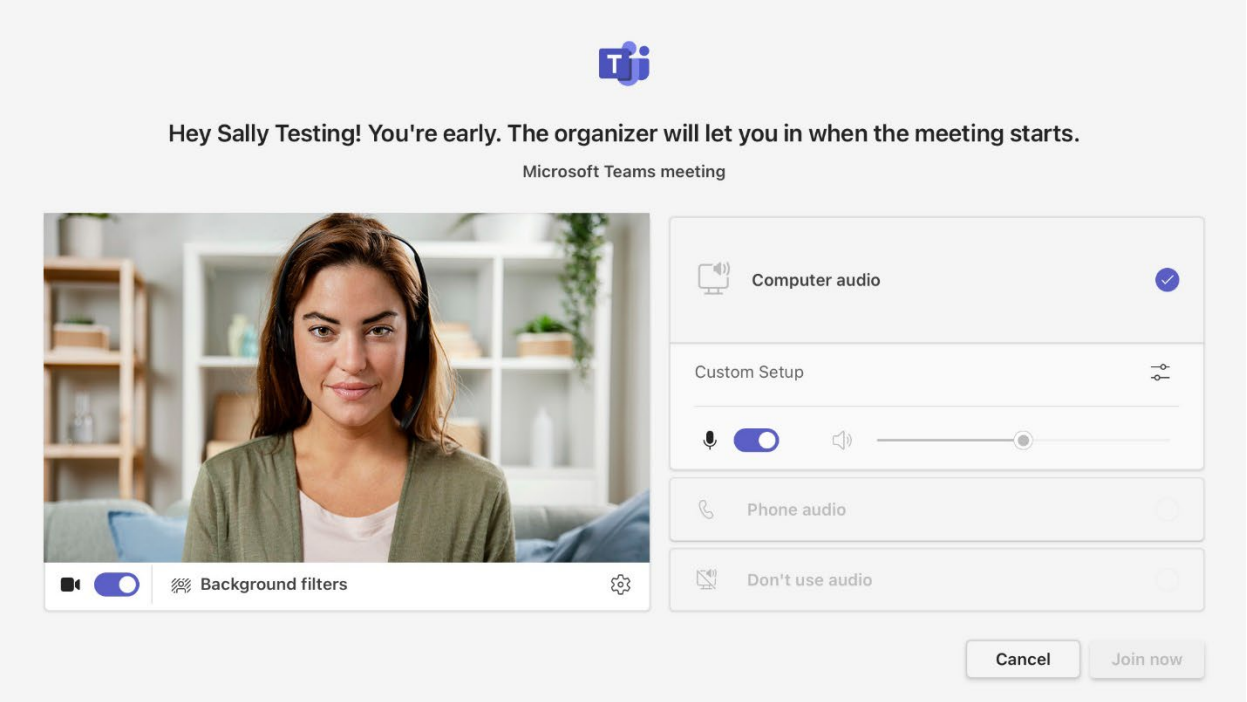
When your settings are set, select the Join now button.



After joining, you will be in a virtual waiting room until the organizer connects you to the video meeting.



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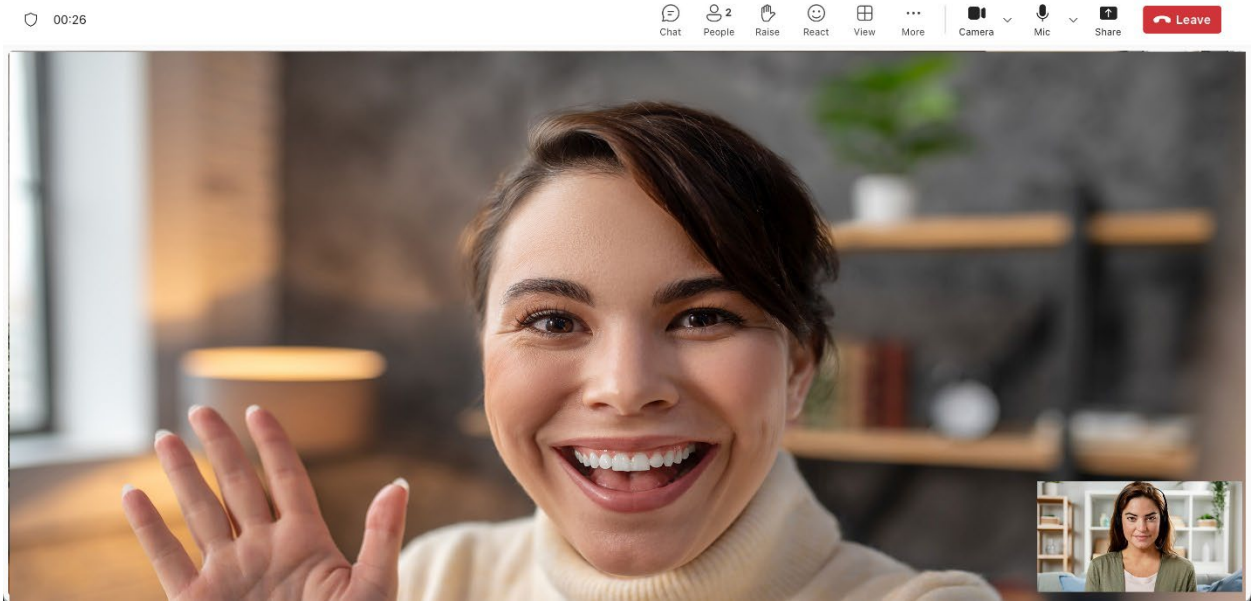
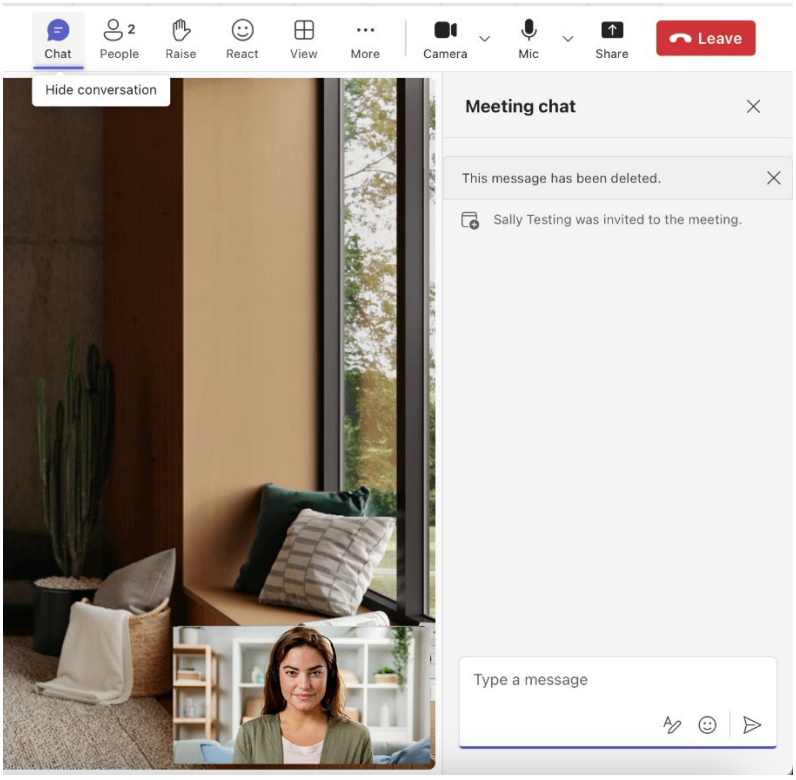
Once the organizer connects you, you will see them on your screen and can begin your meeting.



To access a chat option during your video meeting, select the Chat icon, and the chat panel will display.



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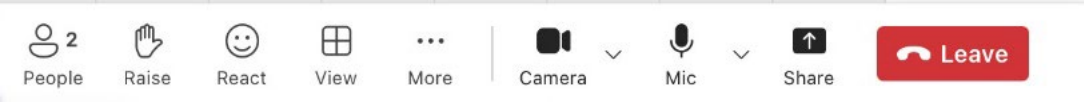
You can share your screen with us during your video meeting. We cannot share our screen with you.

When you are done, select the red Leave button to end your meeting.



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Troubleshooting

If you are having trouble connecting for your video meeting, you can try the following:

- Clear your browser cache and cookies
- Use a different browser
- Make sure the Teams app has permission to your microphone and camera before your video meeting

Processes

If you do not show up for an in-person or video appointment, we will attempt to call you.

After 10 minutes, if we are unable to reach you and you have not joined your appointment, we will leave the appointment, and you will need to reschedule.

Meetings are scheduled for a set amount of time. If your discussion takes longer and we are able, we will continue the meeting. However, if we have another meeting scheduled, we will need to end the meeting at the scheduled time to be respectful of the next person's time.