

Appointment Types

Define the kinds of appointments agents and AI can book, how long each blocks, when each can be booked, and whether booking creates a task.

Path Agency Settings › Appointment types

Audience Agency admins who own scheduling and the task board

Version 1.1 · September 2026 · External

What this guide covers

Appointment Types replace the one-size-fits-all callback with kinds you define: AEP Callback, Materials Check, Enrollment Follow-Up. Each type carries its own duration, booking window, and an optional fulfillment task. Agents pick the type when they schedule; channel (call vs in person) is still chosen on the appointment itself.

	ZERO TYPES	ONE TYPE	TWO OR MORE TYPES
What agents see	Booking looks like today. No picker.	Still no picker. The single type attaches quietly.	A required type picker when scheduling.
Duration and availability	Agency defaults.	The type's settings apply.	The chosen type's settings apply.
Fulfillment task	None. Generic bookings do not create tasks.	Created if the type has it on.	Created per the chosen type.

BEFORE YOU START

You need admin access to **Agency Settings**. If you want a type to create a task on booking, the task category it should land in must already exist under **Processes › Task Categories**. Decide your types before you build: two is the threshold that turns on the picker for every agent on the floor.

1. What this is

Instead of every booking looking the same, you define the kinds your floor allows. Agents then select from those kinds when they schedule from the Appointments tab, from Schedule a Callback on a call, or through AI booking.

Type is the kind of appointment. Channel is how it will be held. They are separate fields, and channel stays on the appointment. Do not create a "Phone" type and a "Field" type to stand in for channel.

Appointment types
Kinds agents and AI can book (AEP Callback, Materials Check). Channel (call vs in person) stays on the appointment. With zero or one type, booking looks like today: no picker. Two or more types is when agents get a required kind pick. Task categories are optional per type; agents never pick a task category.

+ New appointment type

Appointment type	Key	Channel	Completion task	Duration	Availability	
AEP Callback	aep_callback	Agency default	No completion task	35 min	Agency default	

Figure 1. Appointment types with one type configured. Key, channel, task, duration, and availability are visible per row.

Each row shows what that type will do when booked:

COLUMN	WHAT IT SHOWS
Appointment type	The label agents see in the picker.
Key	System identifier generated from the name, for example <code>aep_callback</code> . Used in reporting and integrations.
Channel	Agency default unless the type sets its own. Call vs in person is still recorded on each appointment.
Completion task	No completion task, or the task category a booking creates a task in.
Duration	Minutes blocked on the calendar when this type is booked.
Availability	Agency default, or the type's own notice, date, and hours limits.

2. When to use it

- You want reporting or ops visibility by appointment kind: callbacks vs materials checks vs AEP follow-ups.
- You want agents limited to the appointment kinds your floor coaches to.
- Different kinds need different calendar blocks. A materials check is 15 minutes; an AEP callback is 35.
- A kind should only be bookable inside a window, for example AEP callbacks only between the earliest and latest dates you set.

- You want a task created on booking so the appointment gets worked after the call, routed to a category without the agent choosing one.

If you only need generic callbacks, no calendar control, and no tasks, leave types empty. Nothing changes for agents.

3. Set up a type

1. Open **Agency Settings** and go to **Appointment types**.
2. Click **New appointment type**. The edit panel has three sections: Basic Information, Fulfillment task, and Availability.
3. Fill in **Basic Information**:

CONTROL	SET IT TO
Name	What agents see in the booking picker. Use floor language, for example AEP Callback. The key is generated from it.
Duration	Time blocked on the calendar when this type is booked. Pick the length the call actually takes, not the shortest slot.

Edit appointment type

Basic Information

Name*

AEP Callback

What agents see in the booking picker.

Duration

35 minutes

Time blocked on the calendar when this type is booked.

Fulfillment task

☐

Create a task when this type is booked

Optional. The task lands in the category you pick so the appointment gets worked after the call. Agents never pick the category themselves.

Availability

Minimum notice

Maximum days out

Cancel

Save changes

Figure 2. Edit appointment type: Basic Information and the Fulfillment task toggle.

4. Set **Fulfillment task**:

CONTROL	SET IT TO
Create a task when this type is booked	Off for a plain calendar entry. On to create a task on booking; then pick the task category it lands in. Agents never see or pick the category.

5. Set **Availability**. Leave everything empty to inherit the agency default. Fill in only the limits this type needs:

CONTROL	SET IT TO
Minimum notice	Minutes from now before the first bookable slot. Stops same-minute bookings that nobody can take.
Maximum days out	How far ahead agents can book this type.
Earliest bookable date / Latest bookable date	Hard window. For a seasonal type such as an AEP callback, set both to the enrollment period so nothing lands outside it.
Limit to specific days and hours	Off means any day within the limits above. On exposes Time zone and Bookable hours.
Time zone	Required when the limit is on. The hours below are read in this zone, not the agent's or the beneficiary's.
Bookable hours	Day toggles plus a start and end time. Click Add hours for a second block, for example a shorter Saturday window.

Availability

Minimum notice: e.g. 60
Minutes from now before the first bookable slot.

Maximum days out: e.g. 30
How far ahead agents can book this type.

Earliest bookable date: mm/dd/yyyy

Latest bookable date: mm/dd/yyyy

☐ **Limit to specific days and hours**
Off means agents can book any day, within the notice and date limits above.

Cancel Save changes

Figure 3. Availability with the day-and-hour limit off.

Availability

Minimum notice: e.g. 60
Minutes from now before the first bookable slot.

Maximum days out: e.g. 30
How far ahead agents can book this type.

Earliest bookable date: mm/dd/yyyy

Latest bookable date: mm/dd/yyyy

☒ **Limit to specific days and hours**
Off means agents can book any day, within the notice and date limits above.

Time zone*
Eastern
Hours below are in Eastern time.

Bookable hours
+ Add hours

Mon Tue Wed Thu Fri Sat Sun
09:00 AM to 05:00 PM

Figure 4. Availability with the limit on: Eastern, Mon to Fri, 9:00 AM to 5:00 PM.

6. Click **Save changes**. Repeat for each kind you want available.
7. Add at least two types if you want the required picker. With one, booking stays picker-free and the single type attaches silently.

TIME ZONE IS A FLOOR DECISION

Bookable hours are evaluated in the time zone on the type. A national floor with agents in three zones and an Eastern type will see agents in Pacific offered 6:00 AM slots. Pick the zone of the people taking the appointment, and say so in the type name if it is not obvious.

4. What agents and AI do

When two or more types exist, every booking path (Appointments tab, Schedule a Callback on a call, AI booking) includes a required type selection. Agents pick the kind; the type's duration and availability shape the slots offered; channel is chosen on the appointment as before.

With zero or one type, the schedule flow matches the existing experience. No extra step.

5. Fulfillment tasks

Until you add an appointment type, bookings stay generic and do not create tasks. Once a type has **Create a task when this type is booked** on, each booking of that type creates a task in the category you mapped. Agents do not choose the category; it rides along with the type.

Map a category when your task board should route those completions automatically. Leave it off for kinds that are just calendar holds.

6. Tips and gotchas

- **Naming.** Use names agents recognize on the floor. They pick under time pressure; internal jargon in the label slows them down.
- **Type is not channel.** Call vs in person remains on the appointment. Do not create separate types to mean phone vs field.
- **Keep the list short.** Start with the two or three kinds you coach to. You can add more later.
- **First-type side effect.** If tasks suddenly appear after you add your first type with the fulfillment toggle on, that is expected. Generic bookings never created them.
- **Duration drives the calendar.** A 35-minute type blocks 35 minutes. If agents complain about back-to-back overlap, the duration is too short, not the calendar.
- **Availability is per type, not per agent.** These limits apply to everyone booking this type. Agent-level calendars still apply on top.
- **Seasonal types.** Set earliest and latest bookable dates on AEP types so the window closes itself. Do not rely on someone remembering to delete the type.

7. Quick reference

CONTROL	WHERE IT LIVES / WHAT IT DOES
Where	Agency Settings › Appointment types
Add	New appointment type
Picker appears	Only when 2 or more types exist
Channel	Still call vs in person on the appointment; type can show a default
Duration	Per type; minutes blocked on the calendar
Fulfillment task	Per type toggle; task category is applied, never chosen by the agent
Availability	Per type: minimum notice, maximum days out, date window, days and hours in a set time zone
Empty state	Generic bookings; agency defaults; no tasks from types

Pairs with existing appointment scheduling (Appointments tab and Schedule a Callback on a call). Types change how detailed those bookings can be, not where they are made.