

## **F11: Scheduling PT and Additional Services**

(Covers scheduling, approving, consuming, editing, canceling, and other functions related to PT and Additional Services.)

1. Overview
2. Scheduling a PT Session
3. Approving a PT Session
4. Consuming a PT Session
5. Editing a PT Session
6. Cancelling a PT Session
7. Scheduling Outside of Normal Working Hours

### **Overview**

This course covers various functions related to PT and Additional Services, but does **not** cover the selling of these services.

For information on selling PT and Additional Services, please review course [F105](#)

### **Scheduling a PT Session**

1. Click **Customers >Search**, then enter the member's name; this takes you to their member record.
2. Click on the **PT Scheduling** tab. You will see all of the member's PT sessions. In the example below, the member has 10 PT sessions, all of which are unscheduled:
3. To schedule a session, click on the **Book** link (under the *Action* column) next to that session. This will open the scheduling calendar:

General
Contact Info
History
Billing
PT Scheduling



**John Smith**  
 Nickname :-  
 Phone: 281-330-8004  
 Birthday: 4/15/2000  
 Group :-  
 Insurance Company :-

Bar Code : 61291602773  
 Source :-  
 Gender : Male  
 Member since: 2/16/2016  
 Last Visited :-  
 Contract End Date: Auto Renew

Agreement ID : 21507513  
 Membership Plan : Single - Reciprocal  
 Membership Category : Reciprocal  
 Number of Members : 1  
 Is Primary : Yes  
 Billing Type : Recurring  
 Current Status : Freeze

**Member PT Scheduling**

Agreement Number  Status Select Search View All

Rows 1-8 of 8 (Page 1 of 1)  Go to page 1 20 Records/Page

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100206	6 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100205	5 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100204	4 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100203	3 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100202	2 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	

= Void Session(s)

- Double-click the day you wish to book. This will open a window where you will be able to select various options, such as the Fit Pro, the time for the session, and whether you wish email confirmations sent to the member and/or the Fit Pro:

	<b>John Smith</b>	<b>Bar Code :</b> 61291602773	<b>Agreement ID :</b> 21507513
	<b>Nickname :</b> -	<b>Source :</b> -	<b>Membership Plan :</b> Single - Reciprocal
	<b>Phone:</b> 281-330-8004	<b>Gender :</b> Male	<b>Membership Category :</b> Reciprocal
	<b>Birthday:</b> 4/15/2000	<b>Member since:</b> 2/16/2016	<b>Number of Members :</b> 1
	<b>Group :</b> -	<b>Last Visited :</b> -	<b>Is Primary :</b> Yes
	<b>Insurance Company :</b> -	<b>Contract End Date:</b> Auto Renew	<b>Billing Type :</b> Recurring
			<b>Current Status :</b> <u>Freeze</u>

Employee  Customer

NOTE : Please double click on a day to book it.

Feb, 2016							Day	Week	Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
31	01 Feb	2	3	4	5	6			
7	8	9	10	11	12	13			
14	15	16	17	18	19	20			
21	22	23	24	25	26	27			
28	29	01 Mar	2	3	4	5			

- Click **Save**. You will receive a confirmation message that the session was saved successfully. Click **OK**.

Schedule Appointment ?

Customer  \*  
 Fit Pro  \*

Set Date and Time

Session Type  \* When  To

Notify

Send Confirmation to Member  
 Send Confirmation to Fit Pro

## Approving a PT Session

PT Session must be approved after they have been scheduled. Follow these steps:

1. Click **Customers > Search**, then enter the member's name; this takes you to their member record.
2. Click on the **PT Scheduling** tab.
3. Click on the icon in the *Action* column (as highlighted below):

General
Contact Info
History
Billing
PT Scheduling



**John Smith**  
 Nickname : -  
 Phone: 281-330-8004  
 Birthday: 4/15/2000  
 Group : -  
 Insurance Company : -

Bar Code : 61291602773  
 Source : -  
 Gender : Male  
 Member since: 2/16/2016  
 Last Visited : -  
 Contract End Date: Auto Renew

Agreement ID : 21507513  
 Membership Plan : Single - Reciprocal  
 Membership Category : Reciprocal  
 Number of Members : 1  
 Is Primary : Yes  
 Billing Type : Recurring  
 Current Status : [Freeze](#)

**Member PT Scheduling**

Agreement Number  Status Select Search View All

Rows 1-8 of 8 (Page 1 of 1) Go to page 20 Records/Page

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Approved	2/16/2016	<a href="#">Edit</a>	Consumed
<input type="checkbox"/>	817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100206	6 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	

= Void Session(s)

## Consuming a PT Session

Once a member has completed a session, it must be marked as "Consumed." The Fit Pro will not receive their commission until this has been done.

1. Click **Customers > Search**, then enter the member's name; this takes you to their member record.
2. Click on the **PT Scheduling** tab.
3. Click the **Consumed** link (under the *Approved*) column, as shown below:

General | Contact Info | History | Billing | **PT Scheduling**



**John Smith**  
 Nickname : -  
 Phone: 281-330-8004  
 Birthday: 4/15/2000  
 Group : -  
 Insurance Company : -

Bar Code : 61291602773  
 Source : -  
 Gender : Male  
 Member since: 2/16/2016  
 Last Visited : -  
 Contract End Date: Auto Renew

Agreement ID : 21507513  
 Membership Plan : Single - Reciprocal  
 Membership Category : Reciprocal  
 Number of Members : 1  
 Is Primary : Yes  
 Billing Type : Recurring  
 Current Status : [Freeze](#)

**Member PT Scheduling**

Agreement Number  Status

Rows 1-8 of 8 (Page 1 of 1)     Records/Page

= Void Session(s)

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Approved	2/16/2016	<a href="#">Edit</a>	Consumed
<input type="checkbox"/>	817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100206	6 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	

4. The session will then be marked as Completed:

General | Contact Info | History | Billing | **PT Scheduling**



**John Smith**  
 Nickname : -  
 Phone: 281-330-8004  
 Birthday: 4/15/2000  
 Group : -  
 Insurance Company : -

Bar Code : 61291602773  
 Source : -  
 Gender : Male  
 Member since: 2/16/2016  
 Last Visited : -  
 Contract End Date: Auto Renew

Agreement ID : 21507513  
 Membership Plan : Single - Reciprocal  
 Membership Category : Reciprocal  
 Number of Members : 1  
 Is Primary : Yes  
 Billing Type : Recurring  
 Current Status : [Freeze](#)

**Member PT Scheduling**

Session Status updated successfully

Agreement Number  Status

Rows 1-8 of 8 (Page 1 of 1)     Records/Page

= Void Session(s)

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Completed	2/16/2016	<a href="#">Edit</a>	
<input type="checkbox"/>	817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100206	6 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	

## Editing a PT Session

You can edit the date, time, or Fit Pro for a PT Session. Follow these steps:

1. Click **Customers > Search**, then enter the member's name; this takes you to their member record.
2. Click on the **PT Scheduling** tab.
3. Click the **Edit** link (in the *Action* column) corresponding with the session you wish to edit:



**John Smith**  
 Nickname : -  
 Phone: 281-330-8004  
 Birthday: 4/15/2000  
 Group : -  
 Insurance Company : -

Bar Code : 61291602773  
 Source: -  
 Gender : Male  
 Member since: 2/16/2016  
 Last Visited : -  
 Contract End Date: Auto Renew

Agreement ID : 21507513  
 Membership Plan : Single - Reciprocal  
 Membership Category : Reciprocal  
 Number of Members : 1  
 Is Primary : Yes  
 Billing Type : Recurring  
 Current Status : Freeze

**Member PT Scheduling**

Agreement Number  Status  [Search](#) [View All](#)

Rows 1-8 of 8 (Page 1 of 1) [Go to page](#)  20  Records/Page

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Completed	2/16/2016	<a href="#">Edit</a>	
<input type="checkbox"/>	817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Approved	2/18/2016	<a href="#">Edit</a>	<u>Consumed</u>
<input type="checkbox"/>	817382	3100206	6 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100205	5 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	

= Void Session(s)

## Canceling a PT Session

A PT Session may be cancelled after it is booked and before it is consumed. Follow these steps:

1. Click **Customers > Search**, then enter the member's name; this takes you to their member record.
2. Click on the **PT Scheduling** tab.
3. Click on the empty box on the far left of the corresponding with the session you wish to cancel, as shown in the example below:

	<b>John Smith</b>	<b>Bar Code :</b> 61291602773	<b>Agreement ID :</b> 21507513
	<b>Nickname :</b> -	<b>Source :</b> -	<b>Membership Plan :</b> Single - Reciprocal
	<b>Phone:</b> 281-330-8004	<b>Gender :</b> Male	<b>Membership Category :</b> Reciprocal
	<b>Birthday:</b> 4/15/2000	<b>Member since:</b> 2/16/2016	<b>Number of Members :</b> 1
	<b>Group :</b> -	<b>Last Visited :</b> -	<b>Is Primary :</b> Yes
<b>Insurance Company :</b> -	<b>Contract End Date:</b> Auto Renew	<b>Billing Type :</b> Recurring	<b>Current Status :</b> <a href="#">Freeze</a>

**Member PT Scheduling**

Agreement Number  Status

Rows 1-8 of 8 (Page 1 of 1)     Records/Page

= Void Session(s)

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Completed	2/16/2016	<a href="#">Edit</a>	
<input type="checkbox"/>	817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Approved	2/18/2016	<a href="#">Edit</a>	<a href="#">Consumed</a>
<input checked="" type="checkbox"/>	817382	3100206	6 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input checked="" type="checkbox"/>	817382	3100205	5 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100204	4 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	

- If you scroll all the way to the bottom of the page you will receive the option to cancel with penalty (meaning the member will be charged a session), or without a penalty (meaning the session will not be lost, and may be reused).

### Member PT Scheduling

Agreement Number  Status

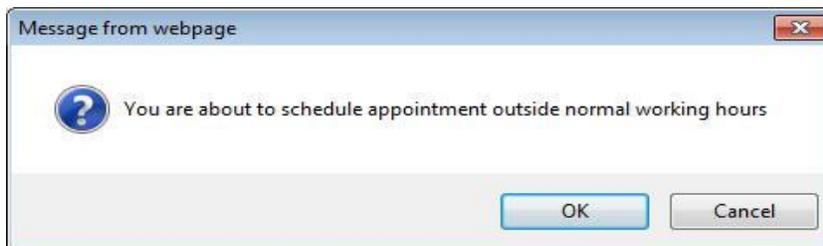
Rows 1-8 of 8 (Page 1 of 1)     Records/Page

  = Void Session(s)

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Completed	2/16/2016	<a href="#">Edit</a>	
<input type="checkbox"/>	817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Approved	2/18/2016	<a href="#">Edit</a>	<a href="#">Consumed</a>
<input type="checkbox"/>	817382	3100206	6 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100205	5 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100204	4 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100203	3 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100202	2 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	
<input type="checkbox"/>	817382	3100201	1 of 8	Classes > Brent...	2/16/2016	80.00	Paid Unscheduled		<a href="#">Book</a>	

## Scheduling Outside of Normal Working Hours

If you schedule a session outside of a Fit Pro's normal working hours, you will receive a message asking for specific approval:



If you click **OK**, the session with the Fit Pro will be booked, even though the Fit Pro does not normally work those hours.