

COMMUNITY CARE, WITH ROOM FOR THE JOURNEY

# From a conversation to a community appointment

Help a client find the right visit while considering the practitioner's availability, existing appointments, and travel to and from the client.

## 1 · ASK

Describe the client, service, visit address, and preferred day in AI chat.

## 2 · REVIEW

Compare a proposed visit with its travel time and surrounding schedule.

## 3 · BOOK

Open the appointment form, review the details, and choose Save.

WHEREVER THE CONVERSATION STARTS

# Keep the conversation moving

Staff can use AI chat while speaking with a client or reviewing a request that arrived by email or text.

## On a call

Confirm the service, visit address, and preferred dates together. Ask AI to check a community appointment option while you speak.

## From an email

Review the intake and client record, confirm missing details, then use the same scheduling check for a visit at the client's location.

## From a text

Confirm the client and visit details from the conversation, then review an appointment option before booking.

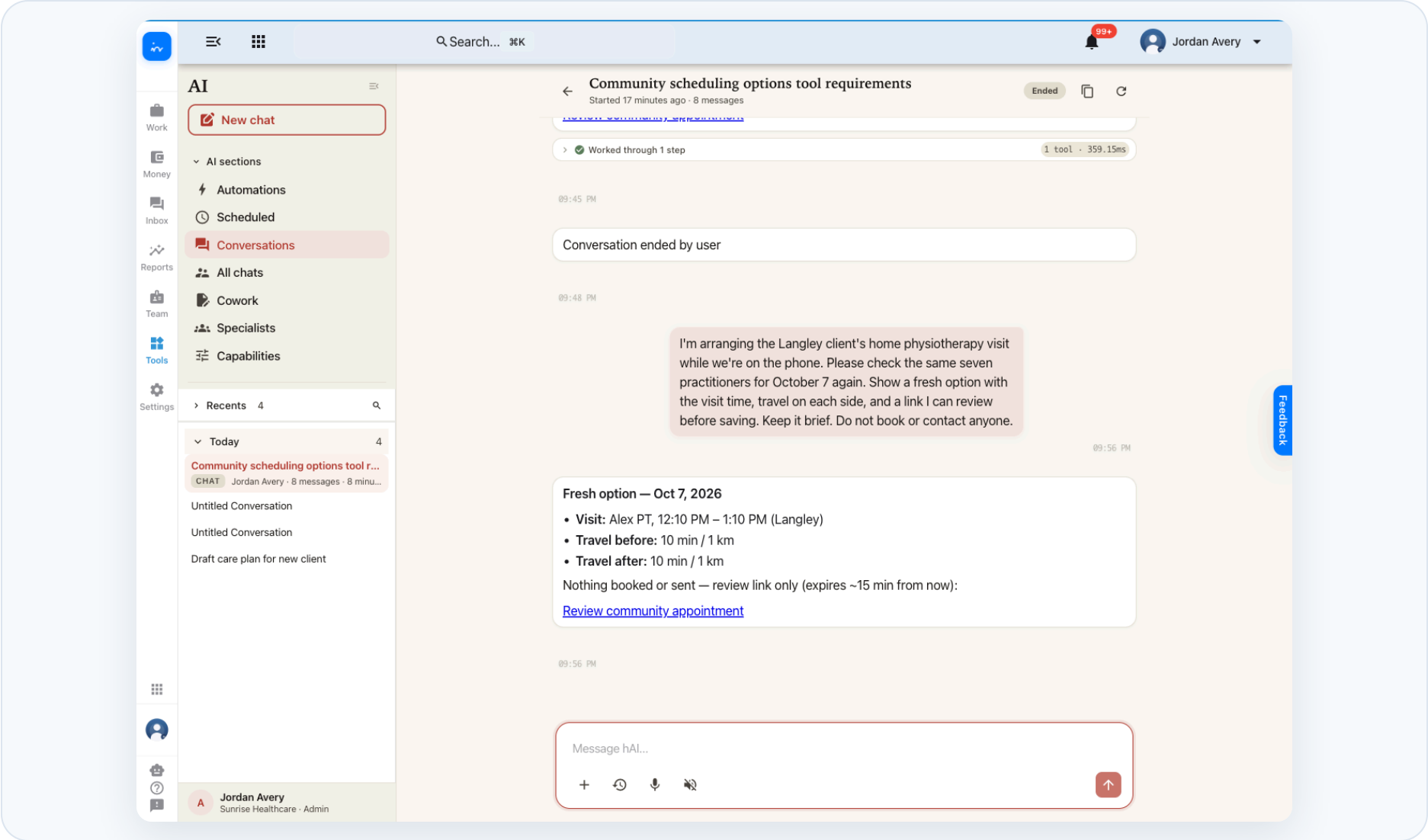
"Find a one-hour home physiotherapy visit in Langley next Wednesday, allowing time for travel on either side."

Use the same community scheduling workflow wherever the conversation starts. The email and phone/SMS intake guides cover the preceding intake steps.

1

# Find a visit that fits the day

AI checks the eligible practitioners and proposes Alex's 12:10–1:10 p.m. visit, with 10 minutes of travel before and after. The surrounding gap still has 40 minutes to spare.



## 2

## Review the appointment before booking

The review link opens the existing appointment form with the client, practitioner, service, date, and duration selected. The calendar preview lets staff see the visit alongside the rest of the day.

The screenshot displays the 'New Appointment' form in the InToday software. The interface includes a top navigation bar with a search bar and user profile (Jordan Avery). The left sidebar contains icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main form is titled 'New Appointment' and includes a sub-header 'Schedule time with your client'. The form is divided into sections: 'When' (Date: 2026-10-07, Time: 12:10 PM), 'Who' (Practitioner: Community Experiment Alex PT, Client: Community Experiment Langley Target [Community Experiment Synthetic]), 'What' (Service: Community Experiment PT Home Visit), and 'Duration'. A 'Calendar Preview' panel on the right shows a live schedule view for Wednesday, October 7th, with a blue bar indicating the appointment time (12:10 PM) and a green bar indicating the next appointment (14:00 [CELT]CEAP Community Experiment PT Home Visit). A 'Feedback' button is visible on the right side of the calendar preview.

**New Appointment**  
Schedule time with your client

**When**

DATE: 2026-10-07 TIME: 12:10 PM

**Who**

PRACTITIONER: Community Experiment Alex PT

CLIENT: Community Experiment Langley Target [Community Experiment Synthetic]

**What**

SERVICE: Community Experiment PT Home Visit

**Calendar Preview**  
Live schedule view

**Calendar Guide**

Wed 7  
Community Experiment AL...

12:10 Community Experiment Langley Target [Community Experir

14:00 [CELT]CEAP Community Experiment PT Home Visit

Feedback

3

## Keep the destination and travel visible

Confirm the visit address and both travel allowances. Review the visit address and recorded travel allowance, and confirm current travel conditions when needed.

The screenshot displays the InToday Community booking interface. The top navigation bar includes a search bar, a notification bell with 99+ alerts, and the user profile for Jordan Avery. A left sidebar contains icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is divided into sections for travel and location details.

**Travel To Client**

| MINUTES                                                                  | DISTANCE (KMS)     | INVOICE DESCRIPTION     |
|--------------------------------------------------------------------------|--------------------|-------------------------|
| 10<br><small>Max 12 hours (720 min) • Rounds to 1 min increments</small> | Distance to client | Description for invoice |

**Travel Back From Client**

| MINUTES                                                                  | DISTANCE (KMS)       | INVOICE DESCRIPTION     |
|--------------------------------------------------------------------------|----------------------|-------------------------|
| 10<br><small>Max 12 hours (720 min) • Rounds to 1 min increments</small> | Distance from client | Description for invoice |

**More options**

**Location & Attendance**

**Same as last time:** [Use this](#) [×](#)

**ATTENDANCE MODE**

☐ Office ☒ External ☐ Virtual

**ADDRESS**

[Community Experiment Langley Target - 100 Synthetic Demo Lane, Langley, BC \(fictional\)](#) [+ New address](#)

**Clinical Notes** [New Chart Entry](#) [0](#) [>](#)

[CANCEL](#) [SAVE APPOINTMENT](#) [▼](#)

**Feedback**

## 4

## Save the reviewed visit

Staff choose Save Appointment after reviewing the details. The proposal is checked again against the current schedule and recorded travel before the appointment is created.

The screenshot displays the InToday software interface. The top navigation bar includes a search bar, a notification bell with '99+', and the user profile 'Jordan Avery'. The left sidebar contains icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is divided into two sections: 'CLINICAL' and 'FINANCIAL'.

**CLINICAL** Session prep, charting, files

**Appointment Details** 5

|                            |                                                                    |
|----------------------------|--------------------------------------------------------------------|
| BOOKING ID                 | 30720                                                              |
| CREATED BY                 | Community Experiment Alex PT                                       |
| END TIME                   | Oct 7, 2026 1:10 PM                                                |
| ROLE                       | Service Provider                                                   |
| PROFESSION                 | Physiotherapist                                                    |
| ATTENDANCE MODE            | External Location                                                  |
| ADDRESS                    | 100 Synthetic Demo Lane, Langley, BC (fictional) <a href="#">📍</a> |
| EARNED                     | \$0.00                                                             |
| MEETING ALERTS & REMINDERS | Disabled                                                           |
| INVOICE STATUS             | <span>Not Invoiced</span>                                          |

**FINANCIAL** Billing, payouts, coverage, budgets

**Billing** 0

|                                              |                           |
|----------------------------------------------|---------------------------|
| Total Charged                                | \$0.00                    |
| Service charge \$0.00 · Tax \$0.00           |                           |
| Pending invoice                              |                           |
| <a href="#">Community Experiment Synt...</a> | <a href="#">Edit &gt;</a> |
| > Pay breakdown                              |                           |

A vertical 'Feedback' button is located on the right side of the interface.

## CALENDAR AVAILABILITY

# Keep the practitioner's day in view

Community bookings work best when the visit and its travel time are reviewed alongside the practitioner's existing commitments.

### Appointments

Review booked visits before and after the proposed community appointment.

### Working time

Confirm the proposed visit falls within the practitioner's working hours and does not overlap leave.

### Travel

Keep recorded travel before and after the visit visible while choosing the final time.

**Before saving:** confirm the client, practitioner, service, destination, visit time, duration, and travel allowances.

# Start with AI chat. Review before you book.

- ✓ **A connected workflow:** find a community appointment with AI, open its booking details, and save the visit to the calendar.
- ✓ **Careful recommendations:** service eligibility, working hours, leave, occupied time, and known travel all affect whether a visit fits.
- **Travel-aware scheduling:** consider surrounding appointments and recorded travel, and confirm any missing route details. An option does not reserve a slot.
- ✓ **A confirmed result:** the saved visit appears on the practitioner's calendar with its community location and travel details.

## Your team stays in control

Use the conversation to find an option, then review the appointment before committing it to the calendar.

Confirm the final appointment details with the client according to your clinic's booking policy.