

# How to Book Participant Appointments

## 1. Locate the Time Slot

- Select the Appointments tab at the top of the screen.
- Use the Calendar on the left-hand side to navigate to the desired date.
- Click the Green Plus Sign (+) in the specific time slot you wish to book.

## 2. Select the Participant

When the Select Person dialog box appears, you have two options:

### Option A: Search for an Existing Contact

1. On the left side of the box, type the participant's name (or the first few letters).
2. Once the correct name appears in the list, click to select it.
3. Verify the contact information displayed on the right-hand side.
4. Press OK to finalize the appointment.

### Option B: Create a New Contact

If the participant is not found in the search:

1. Enter their First Name, Last Name, and Email Address in the fields on the left.
2. Click the green Add button.
3. Press OK to create the contact and then OK to book the appointment

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## Pro-Tips for Scheduling

- **Partial Searches:** You don't need the full name; typing just the last name or part of the last name often helps find participants more quickly.
- **Verification:** Always double-check the email address on the right-hand side before clicking OK to ensure confirmation emails are sent to the right person.

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