IntakeQ Appointments API

> **Please Note:** The standard PracticeQ subscription includes 10 API requests/minute, max 500/day. Click here (//support.intakeq.com/article/711-api-rate-limits) to learn how to increase your threshold and unlock the power of PracticeQ's flexible API's.

Overview

The IntakeQ Appointment API is composed of HTTP endpoints that can be reached through a REST API. Additionally, you can setup webhooks that are fired when an appointment status changes; giving you the opportunity to watch for changes in realtime and integrate with 3rd party software.

For Intake Forms API, please refer to this article (//support.intakeq.com/article/31-intakeq-api).

Getting Started

To get started, you first need to enable API access (navigate to More > Settings > Integrations > Developer API). That's also where you'll find your API key, used to authenticate your HTTP calls.

> Only the main account owner has access to the API tab.

> Never expose your API key in plain text (config files, source control, etc.).

> Consider setting an IP Allow-List as explained here (//support.intakeq.com/article/200-restricting-access-using-ip-address#api-ip-restriction).

Base URL

All endpoints are located under the following URL: https://intakeq.com/api/v1/ (https://intakeq.com/api/v1/)

An example of a typical API call would look like this:

```
[GET] https://intakeq.com/api/v1/appointments/[appointment-id]
```

Authentication

Every HTTP request needs to contain your API key embedded in an **authentication header** named X-Auth-Key.

```
X-Auth-Key:xxxxxxxxxxxxxxxxxxxxxxxxx
```

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The Appointment Object

Below is the JSON representation of the appointment object, which is used throughout this API.

```json
{
    "AppointmentPackageId": null,
    "AppointmentPackageName": null,
    "Procedures": [
        {
            "ProcedureCode": "MT001",
            "Price": 100,
            "Quantity": 1,
            "Units": 1,
            "Modifiers": []
        }
    ],
    "Id": "65fdd9d69c7e50a54b3090aa",
    "ClientName": "Ezekiel King",
    "ClientEmail": "max+ezekiel.king@intakeq.com",
    "ClientPhone": "(905) 875-7338",
    "ClientDateOfBirth": "1970-06-09",
    "ClientId": 7,
    "Status": "Canceled",
    "StartDate": 1711145400000,
    "EndDate": 1711149000000,
    "Duration": 60,
    "ServiceName": "One Hour Massage",
    "ServiceId": "f498b5a1-3ac0-4b10-ba4d-a67b9575728c",
    "LocationName": "Main Office",
    "LocationId": "1",
    "Price": 125,
    "PractitionerName": "Iona Blankenship",
    "PractitionerEmail": "max+iona.blankenship@intakeq.com",
    "IntakeId": null,
    "DateCreated": 1711135190118,
    "CreatedBy": "Max Quagliotto",
```

```json
"BookedByClient": false,
"StartDateIso": "2024-03-22T22:10:00.0000000Z",
"EndDateIso": "2024-03-22T23:10:00.0000000Z",
"StartDateLocal": "2024-03-22T18:10:00.0000000",
"EndDateLocal": "2024-03-22T19:10:00.0000000",
"StartDateLocalFormatted": "3/22/2024 at 06:10:00 PM",
"PractitionerId": "6294e7629c4ba84c147d7f5b",
"InvoiceId": "65fdd9e89c7e50a54b3090ae",
"InvoiceNumber": 168,
"ClientNote": "(905) 875-7338",
"PractitionerNote": null,
"TelehealthInfo": {
            Id: "xyz",
            StartUrl: "https://mydomain.intakeq.com/videocall/123",
            Invitation: "Please join the video call using the link below: ....",
            Provider: "IntakeQ", //or Zoom
            InvitationCode: "123456"
    },
"Procedures": [
    {
        ProcedureCode: "11901",
        Price: 90,
        Units: 1,
        Modifiers: ["26"]
    }
],
"AttendanceConfirmationResponse": "None",
"ReminderType": "OptOut",
"CustomFields": [],
"SessionStart": null,
"SessionEnd": null,
"ExternalClientId": null,
```

```
    "ExternalPractitionerId": null,
    "ExternalServiceId": null,
    "LastModified": 1711135208565,
    "PlaceOfService": "11",
    "AdditionalClients": [
        ClientId: 9999,
        ClientName: "Name Test",
        ClientEmail: "test@email.com",
        ClientPhone: "2222222222",
        IntakeId: "00000000-0000-0000-0000-000000000000", //GUID


    ]
    "FullCancellationReason": "Client Canceled - No Reason Given",
    "CancellationReasonNote": null,
    "CancellationDate": "2024-03-22T19:20:08.5650000Z"
}
```

Let's look at each property individually:

Field	Explanation
Id	The ID of the appointment.
ClientName	The name of the client.
ClientEmail	The email of the client.
ClientPhone	The client's phone number.
ClientId	The client's ID assigned by IntakeQ.

Status	Possible values:
	Confirmed – The appointment has been confirmed (either manually or automatically).
	WaitingConfirmation – The appointment has not been confirmed by the staff.
	Declined – The appointment has been declined by the staff.
	Canceled – The appointment has been canceled.
	Missed – The appointment has been marked as missed by the staff.
StartDate	When the appointment is scheduled for in Unix timestamp.
EndDate	When the appointment ends in Unix timestamp.
Duration	An integer representing the appointment duration in minutes.
ServiceName	The name of the service.
ServiceId	The ID of the service.
LocationName	The name of the location.
LocationId	The ID of the location.
PractitionerEmail	The email of the practitioner associated with this appointment.

PractitionerName	The name of the practitioner associated with this appointment.
Price	The appointment price.
IntakeId	If this appointment is associated with an intake form, this field will provide the IntakeId that can be used to retrieve the form using the Intake Forms' API.
DateCreated	When the appointment was created in Unix timestamp.
BookedByClient	Will be true when the appointment was created by the client using the booking widget, or false when the appointment was created by the staff.
CreatedBy	The name of the person who created the appointment. It can be the name of a client or of a staff member.
AppointmentPackageId	If this appointment is part of a package, this filed will contain the ID of the package.
AppointmentPackageName	If this appointment is part of a package, this filed will contain the name of the package.

TelehealthInfo	If this is a telehealth appointment (either IntakeQ or Zoom), this property will contain information such as Start URL and the Invitation Code.
AttendanceConfirmationResponse	The confirmation response for the appt. 0=None, 1=Confirmed, 2=Cancelled

Query Appointments

Use this method to query appointments in your organization. The results will be ordered by Date in descending order.

```
[GET]
/appointments?client=[searchString]&startDate=[yyyy-MM-dd]&endDate=[yyyy-MM-dd]&status=[status]&practitionerEmail=[practitionerEmail]&page=[pageNumber]&updatedSince=[yyyy-MM-dd]&deletedOnly=[bool]
```

This method accepts the following query string parameters:

- **client (optional)** – A string used to search the client by name or email. Partial matches will be respected, so a search for "Paul" will return appointments for clients with Paul in their names. Likewise, a search for "paul.smith@gmail.com" will return appointments for that specific client.

- **startDate (optional)** – Return only appointments that are scheduled for after the specified date. Use the following date format: yyyy-MM-dd (ex.: 2016-08-21)

- **endDate (optional)** – Return only appointments that are scheduled for before the specified date. Use the following date format: yyyy-MM-dd (ex.: 2016-08-21)

- **status (optional)** – Possible values are "Confirmed", "Canceled", "WaitingConfirmation", "Declined" and "Missed".

- **practitionerEmail (optional)** – Use this to get appointments for a specific practitioner. The email must match the email used in the practitioner IntakeQ account. If empty, appointments for all practitioners in the organization will be returned.

- **page (optional)** – This method returns a maximum of 100 records. Use the page parameter to implement paging from your end. Use 1 for page 1, 2 for page 2, etc.

- **updatedSince (optional)** – Returns only appointments that have been changed after a given date.

- **deletedOnly (optional)** – Returns only appointments that have been deleted. Deleted appointments can be retrieved up to 10 days after they have been deleted. Appointments that have been deleted more than 10 days prior cannot be retrieved anymore.

This method returns a JSON object representing an array of appointments.

```
[{
    Id: "123",
    ClientName: "test",
    ClientEmail: "test@email.com",
    ClientPhone: "(222) 222-2222",
    ClientDateOfBirth: "1988-05-23",
    ClientId: 9999,
    Status: "Confirmed",
    StartDate: 1458526480368, //Unix timestamp in milliseconds,
    EndDate: 1458526484236, //Unix timestamp in milliseconds,
    Duration: 90, //minutes
    Service: "Initial Consultation",
    Location: "Manhattan Office",
    Price: 100.00,
    PractitionerEmail: "test@email.com",
    PractitionerName: "FirstName LastName"
    DateCreated: 1458526532654, //Unix timestamp in milliseconds
    IntakeId: "00000000-0000-0000-0000-000000000000", //GUID
    ExternalClientId: "xxxx",
    BookedByClient: true,
    CreatedBy: "John Smith"
},...
]
```

This method returns a maximum of 100 records. If needed, use the page query string parameter to implement paging from your end.

Retrieve an Appointment

Use this method to get a single appointment using its ID.

```
[GET] https://intakeq.com/api/v1/appointments/[appointment-id]
```

Refer to the appointment object (#appointment-object) above for its JSON representation.

Retrieve Booking Settings

Use this method to get a list of Services, Locations and Practitioners for your account.

```
[GET] https://intakeq.com/api/v1/appointments/settings
```

The returned JSON follows the representation below.

```
{
    Locatons: [
        {
            Id: "1",
            Name: "Main Office"
            Address: "123 Main Street, City, State"
        }
    ],
    Services: [
        {
            Id: "00000000-0000-0000-0000-000000000000",
            Name: "Initial Consultation",
            Duration: 90,
            Price: 200.0
        },
        {
            Id: "00000000-0000-0000-0000-000000000000",
            Name: "Follow Up",
            Duration: 60,
            Price: 100.0
        }
    ],
    Practitioners: [
        {
            Id: "00000000-0000-0000-0000-000000000000",
            CompleteName: "Dexter Morgan",
            FirstName: "Dexter",
            LastName "Morgan",
            Email: "dexter@email.com"
        }
```

```
    ]
}
```

Create an Appointment

This endpoint allows you to create a new appointment.

```
[POST] https://intakeq.com/api/v1/appointments
```

To create a new appointment, create a POST request containing the JSON represented below.

```
{
        PractitionerId: "5356eb98c5771321282d2ac4",
        ClientId: 123,
        ServiceId: "00000000-0000-0000-0000-000000000000",
        LocationId: "1",
        Status: "Confirmed", //Confirmed or WaitingConfirmation
        UtcDateTime: 1458526480368, //Unix timestamp in milliseconds
        SendClientEmailNotification: true,
        ReminderType: "Sms" //Accepted values: Sms, Email, Voice, OptOut
}
```

Remarks

- When creating a new appointment, all fields represented above are mandatory.

- SendClientEmailNotification can only be true if the Status is set to Confirmed.

- If the request succeeds, this endpoint will return an appointment object (#appointment-object).

Update an Appointment

This endpoint allows you to update an existing appointment.

```
[PUT] https://intakeq.com/api/v1/appointments
```

To update an appointment, create a PUT request containing the JSON represented below.

```
{
        Id: "5356eb98c5771321282d2ac4",
        ServiceId: "00000000-0000-0000-0000-000000000000", //Optional
        LocationId: "1", //Optional
        Status: "Confirmed", //Optional: Confirmed or WaitingConfirmation
        UtcDateTime: 1458526480368, //Unix timestamp in milliseconds. Mandatory
        SendClientEmailNotification: true, //Optional
        ReminderType: "Sms" //Optional. Accepted values: Sms, Email, Voice, OptOut
}
```

Remarks

- An appointment cannot be changed from Confirmed to WaitingConfirmation

- The API does not support changing the client or the practitioner associated with the appointment.

- Fields like ServiceId, LocationId, ReminderType are only necessary if you are changing them.

- If the request succeeds, this endpoint will return an appointment object (#appointment-object).

Cancel an Appointment

This endpoint allows you to cancel an existing appointment.

```
[POST] https://intakeq.com/api/v1/appointments/cancellation
```

To cancel an appointment, create a POST request containing the JSON represented below.

```
{
        AppointmentId: "5356eb98c5771321282d2ac4",
        Reason: "...", //Optional
}
```

Appointment Webhooks

You can subscribe to specific appointment events in the API settings page.

If you populate the webhook URL in the API settings page, we will send the following JSON object in a POST message every time an event is triggered:

```
{
    EventType: "AppointmentCreated",
    ActionPerformedByClient: true,
    Appointment: { .... }, //refer to the appointment object above
    ClientId: 123,
    PracticeId: "xxxxxx",
    ExternalPracticeId: "xxxxxx", // for partners only
    ExternalClientId: "xxxx" // for partners only
}
```

Let's look at each property individually:

Field	Explanation

EventType	Describes which action triggered this event. Possible values:
	AppointmentCreated - triggered once when the appointment is initially created.
	AppointmentConfirmed - triggered when the appointment is confirmed, either automatically or by a staff member.
	AppointmentRescheduled - triggered when the date/time of the appointment has changed.
	AppointmentCanceled - triggered when the appointment is canceled.
	AppointmentDeclined - triggered when a staff member declined the appointment request.
	AppointmentMissed - triggered when a staff member marks the appointment as missed.
	AppointmentDeleted - triggered when the appointment is deleted.
ActionPerformedByClient	Boolean value indicating whether the action was performed by a client using the booking widget or by a staff member.
Appointment	The appointment object (#appointment-object) as defined above.