

# Online Scheduler Settings

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## Summary

Patient Communicator allows your practice to highly customize the Online Scheduler.

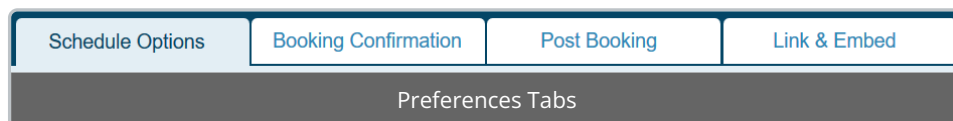
Most of the options for customization are available here.

## Enable Online Scheduler

See [Online Scheduler Settings>Provider Hours > Online Scheduler](#) to view and test all enabled settings on the OLS Patient Site.

## Set Preferences

To select your preferences, click on one of the tabs.



## Schedule Options Tab

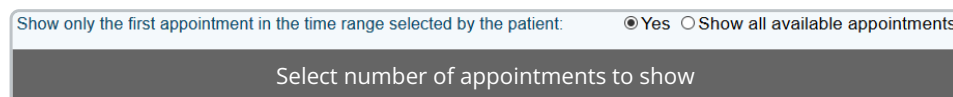
### Show Number of Appointments in the Time Range Selected by the Patient

*Show only the first appointment in the time range selected by the patient*

When using the OLS Patient Site, patients will select their preferred appointment time and select how many hours before or after the preferred appointment time they are willing to accept an appointment.

Here, your practice may choose to show only the first available appointment in the patient's selected time range or all available appointments in that time range.

Default position is **Yes** (only show 1st appointment).



### Show the Number of Appointments Available

*Show the number of appointments available*

During the patient booking process, the patient will be shown calendar pages with color coded days to indicate when appointments are available in the time range the patient has requested. Color coding indicates appointment availability of the patients preferred appointment.

The practice can decide to show numerically the total number of available appointments for the time range selected. Default position is **Yes**.

|  |   |
|--|---|
| Show the number of appointments available per day: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Appointments Available for Time Range Selected     |   |

## Allow Patients to View Available Appointments Without Registering/Signing In

*Allow patients to view available appointments without registering/signing in*

Selecting **Yes** for this option allows a patient using the *Patient Site* to view available appointments before either registering (all patients booking appointments for first time must register-see *Online Scheduler Patient Site*) or logging in (if registered previously).

Default position is **Yes**. Selecting **No** will require your patient to either register or log in to view available appointments.

|   |   |
|---|---|
| Allow patients to view available appointments without registering/signing in: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Register/Sign in visibility options   |   |

## Allow Patients to be Put On A WaitList

*Allow patients to waitlist an appointment time if it is currently unavailable*

You may allow patients to be added to a waitlist if the patient doesn't find their desired appointment time available.

When the patient requests being waitlisted, the patient will appear in the *Waitlist Requests* window on the Homepage. Default position is **Yes**.

|  |   |
|--|---|
| Allow patients to waitlist an appointment time if it is currently unavailable: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Waitlist Options   |   |

See [Waitlist Requests](#) for details.

## Allow Patients to Book Appointments on the Same Day

*Allow patients to book appointments for Today*

A patient has the ability to schedule an appointment on the same day they access the *OLS Patient Site*. If you do not want to allow the patient the ability to schedule an appointment for same day, select **No**. Default position is **Yes**.

|  |   |
|--|---|
| Allow patients to book appointments for Today: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Same Day Appointment Options                   |   |

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## Amount of Calendar Months of Appointments the Patient will see at a time

While the patient is viewing available appointments on the *OLS Patient Site*, they will see a screen showing a number of calendar months.

Choose how many calendar months to show the patient at one time. Default amount is **2**. Click the arrow to choose up to 8 months from the drop down menu.

Amount of calendar months of appointments the patient will see at a time:

2

▼

Calendar Months Viewable Options

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## Default Preferred Appointment Time

### *Default Preferred Appointment Time*

Choose the default time your patient sees when choosing a preferred appointment time. Default is 9 AM, but you're earliest available appointment time is recommended. The patient may choose a preferred appointment time.

Default Preferred Appointment Time:

9:00 AM

Set Default Proffered Appointment Time

## Default Amount of Hours to look before and after the preferred appointment time

### *Default amount of hours to look before and after the preferred appointment time*

Choose the default search range before and after the preferred appointment time to search for available appointments. The patient may choose a preferred time range.

Default amount of hours to look before and after the preferred appointment time:

1

▼

Default Available Appointment Search Range

## Booking Confirmation tab

*Send patients an email confirmation or SMS confirmation after booking an appointment.*

If you want to send an acknowledgement of the booking to your patient by email or SMS, Choose **Yes**. Default position is **Yes**.

There are two template options. If the patient's appointment is written directly to your PMS, they will be sent a booking email confirmation. If the patient's appointment is not written to your PMS it is seen as a requested appointment and will send an *SMS Request* acknowledgement.

Send patients an email confirmation after booking an appointment: ☒ Yes ☐ No

Choose booking email confirmation template: OLS Confirmation 1 ▼  
[Preview](#)

Choose email appointment request template: OLS Request 1 ▼  
[Preview](#)

Send patients an SMS confirmation after booking an appointment: ☒ Yes ☐ No

Choose booking SMS confirmation template: Sms Confirmation ▼  
[Preview](#)

Choose SMS appointment request template: Sms Request ▼  
[Preview](#)

Template Options

## Post Booking Tab

### Write the appointments selected by your patients automatically to your PMS

*Write the appointments selected by your patients automatically to your PMS:*

If this option appears, you may choose to write the booked appointment selected by EXISTING patients directly into the practice management software (PMS).

The booked appointment will appear in the *Online Appointments* window on the [Homepage](#) to make the practice aware of the booked appointment.

An email notification is always sent to the practice with the appointment information whether the appointment has been written to the PMS or not. Default position is **No**.

Write the appointments selected by your patients automatically to your PMS: ☒ Yes ☐ No

Existing Patient Writeback Option

### Write New Patients to your PMS and Create a New Patient of Record

*Write new patients automatically to your PMS (which will create a new patient record and book the selected appointment in the PMS)*

If this option appears, you may choose to write the booked appointment selected by **NEW** patients directly into the practice management software (PMS).

A new patient of Record will be created and the booked appointment will appear in the *Online Appointments* window on the [Homepage](#) to make the practice aware of the booked appointment.

An email notification is always sent to the practice with the appointment information whether the appointment has been written to the PMS or not. Default position is **No**.

Write new patients automatically to your PMS (which will create a new patient record and book the selected appointment in the PMS): ☐ Yes ☒ No

New Patient Writeback Option

## Redirect Patients to a Different Web Page After Booking an Appointment

### *Redirect Patients to a Different Web Page After Booking an Appointment*

It is possible to redirect the patient who has completed an appointment booking to other websites such as your practice website or *Patient Portal* (if the practice has one), *Patient Forms* (if you have them available online), or any other website you choose.

Select **Yes** and enter the URL (web address) the patient is to be redirected to. Default position is **No**. Select **Yes** to enter a URL and give a name to the button. An example of an enabled Redirect is below.

|   |   |   |
|---|---|---|
| Redirect patients to a different page after booking an appointment: |   | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| If yes, please enter URL here:                                      | <input type="text" value="https://patientcommunicator.com/"/> |   |
| Redirect button text:   | <input type="text" value="New Patient Forms"/>                |   |
| Redirect Options  |   |   |

## Show patients a message after booking an appointment

### *Show patients a message after booking an appointment*

It is possible to have a customized message from your practice appear on the screen after a patient has booked an appointment.

Different messages may be created for existing patients that have booked and those patients identifying themselves as new patients.

The messages will appear regardless of the write back option you have chosen. Default position is **No**. Select **Yes** to enter a message. An example of an after booking messages is found below.

|   |   |   |
|---|---|---|
| Show patients a message after booking an appointment: |   | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| If yes, please enter message here:                    | <input type="text" value="Thank you for booking your appointment. If your insurance details have changed, please contact our office."/> |   |
| Enter message for new patient bookings here:          | <input type="text" value="New patients must arrive 15 minutes earlier than their scheduled appointment to complete paperwork."/>        |   |
| Post Booking Message Options                          |   |   |

## Email Address to send Notifications of Online Bookings

### *The email address where notifications of online bookings should be sent to*

When a patient has completed their OLS booking on the *Patient Site*, an email notification will be sent to your practice email address with the appointment details.

The notification includes the date and time of the appointment, the appointment type, provider, and name of the patient. Any notes to the practice from the patient will not be sent via email to protect PHI and will be found in the *Online Appointments* window on the Homepage only.

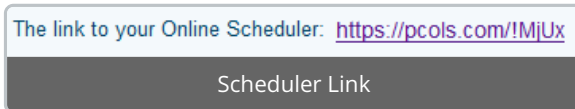
Default setting is blank indicating that the email will be sent to the practice email address you've entered in **General Settings > Office Settings**.

An alternative delivery email address may be entered into the blank field.

## Link & Embed Tab

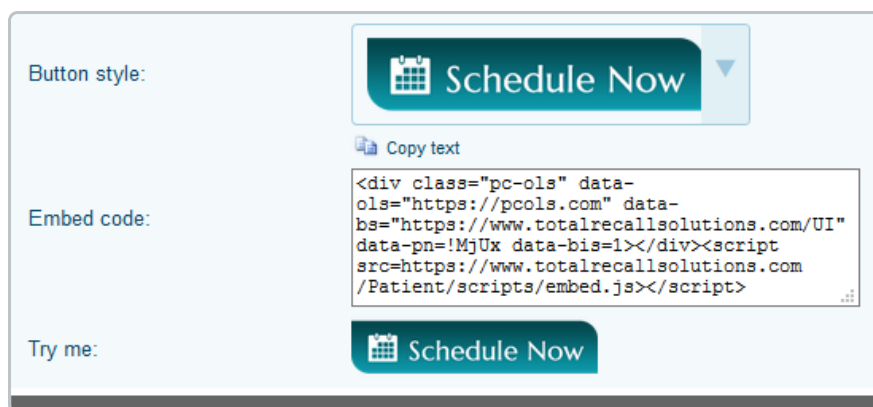
### Link to Online Scheduler

The link to the Online Scheduler site is found at the top of the screen.



You may embed this link on an existing button on your website or anywhere else online you wish to give access to the scheduling site.

You may choose to embed one of our available buttons. Simply select a button and copy and paste the code to the desired online location. The link to the scheduling site is contained in the code.



### Scheduler button Selection and Link

When using one of the Schedule Buttons, patients who have blocked 3rd prty cookies in their browser settings will not be able to schedule an online appointment.

<End of Article>