

# Online Patients

Last Modified on 12/23/2018 8:26 am EST

## Summary

It is possible for new patients to your practice to book/request an appointment online using the *Online Scheduler (OLS)*.

Some practice management systems (PMS) do not allow creation of new patient records in the PMS when scheduled online OR the practice may opt to not allow a new patient of record to be created within the PMS and write the appointment directly to the PMS scheduler.

In either of these cases, a new patient requesting an appointment will have to be "linked" after the patient record is created within the PMS.

A new patient requesting an appointment requiring linking will be recognized by the *Patient ID* of -1 in the [Online Appointments](#) window on the [Home Page](#) .

**Note:** A practice that has enabled the feature *Write new patients automatically to your PMS* (which will create a new patient record and book the selected appointment in the PMS) in [Online Scheduler Settings](#) does not need the *Online Patients* feature.

---

## Link a new patient showing a -1 as a patient id in the Online Appointments window

To link a new -1 patient follow the steps below:

1. Go to [Settings > Online Scheduler Settings > Online Patients](#)
2. Click **Refresh Patients from PMS**
3. Enter patient by name in the *Search* box and click **GO**
4. Click on **patient name** to access Patient Details to assist in creating the permanent patient record in your PMS

[Refresh Patients from PMS](#)

### Online Patients (Automatically Saved)

Search:  Registered:

Patient Name	PatientID	Registered	Patient in PMS
<a href="#">Jefferson, Thomas</a>	-1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Link Patient

5. Once you have created the permanent patient record in your PMS, search for and select the new patient in the *Patients* box.

### Link New Online Patients with Patients in PMS

Patients:

Corresponds to:

Enter Patient Name: (Last, First) or (First, Last)

Patients in Pms:

Link Patient in PMS

6. Enter the patient name to the left of Find and click Find
7. The patient name will appear in the *Patients in PMS* box. Click on the name and then Save

The patient is now linked and has a *patient id* allowing the appointment to be written back to PMS (where available) by selecting the patient and clicking the pencil.

## Online Appointments

2 Online appointments



[Go to archives](#)

<input type="checkbox"/>	In PMS	Patient Name	Provider Name	Appt Type	StartTime	Email	Mobile
<input type="checkbox"/>	✓	<a href="#">Joe Goliger</a> (GOLJO000)	Dr. David Arquette	Cleaning and Exam	7/3/18 8:00 AM	joe@mypatientcommunica	(307) 763-5601
<input checked="" type="checkbox"/>		<a href="#">Thomas Jefferson</a> (JEFTH000)	Leonard Varna, MD	New Patient Exam	9/11/18 9:30 AM	joe@mypatientcommunica	1234567890

Online Appointments