Online Patients

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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 <u>PMS</u> 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.

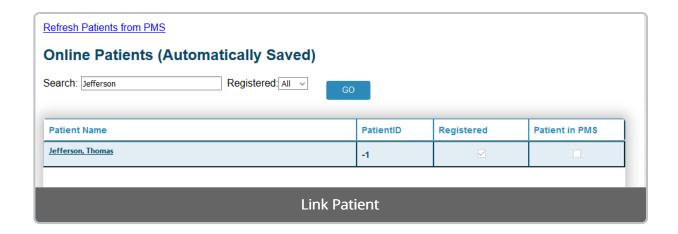
A new patient requesting an appointment requiring linking will be recognized by the *Patient ID* of -1 in the Online Appointments window on the Home Page .

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



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



- **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.

