Scheduling an Online Appointment

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Summary

Your patients will be able to schedule their appointments online once your Online Scheduler (OLS) has been set up and turned on.

See Online Scheduler Settings for details.

 This article shows you what the patient will see once your setup is complete.

Login Screen

Your patients will be directed here by clicking on an email widget, a link sent within an sms text message, or accessed by some other web location using the link provided to your OLS Patient Site.

All first time users of the site wanting to schedule an appointment will be required to register before booking their first appointment. A returning user will only need to login to schedule.

> If you have opted to allow users to view available appointments without registering or signing in, The *View Availability* option will appear.

Registration Screen

Patients booking appointments for the first time will need to register before completing the booking process.

The registration page asks patients for information needed to either make a match with an existing patient or provide you with the information needed to create a new patient of record within your PMS. The answers to the *Patient Registration* questionnaire are always found on the Patient Details screen.

Patient Registration Screen

Booking an Appointment

1. Patients will begin the booking process by accessing the *Appointment Details* screen by either clicking **View availability** on the Login screen, or will be directed to the *Appointment Details* screen after completing the *Patient Registration*.

The patients will choose what they are coming in for based on your set up of Online Appointment Types in the *Online Scheduler Settings* .

2. Once your patients have selected the reason for their visit, they will be asked to select an available provider , select a preferred time for their appointment, and how many hours before or after the preferred appointment time they would accept an appointment. They will then click **View Availability** to access the calendars.

3. Your patient can now select a date where, based on their preferred appoint time, appointments are available, then choose the available appointment time from the drop down list.

4. The patients will then select an appointment. If the patient has opted to view appointment availability before registering or logging in, they will now be directed to do so.

Choose an available appointment: 9:00 AM Dr. David Arquette ▼

To book this appointment, please login or register here.

Appointment Selection

If already registered or logged in, or have completed the login/registration, the patients are then directed the the *Review & Schedule* screen.

Review & Schedule

You're almost done!

Please review the details of your appointment below

Patient:	Mickey Mouse
Date:	Tue November 20 2018
Time:	9:00 AM
Procedure:	Cleaning and Exam

Notes:(Max 1000 characters)

Anything we may need to know

‹ Edit appointment details   Schedule now

Review and Schedule

The patients may then review their selection, add a note to the practice, and complete the booking by clicking **Schedule now.**

5. The completed booking screen now appears. Patient Communicator will send the patient an email and sms with the booking information. The practice receives a notification on the *Homepage* and an email with the registration and appointment information. Any added note made by the patient appears in the *Online Appointments* window on the *Homepage*.

Congratulations!

You have successfully
scheduled your appointment

COMPLETE BOOKING

✏ Click here to write to your calendar

📅 Click here to schedule another appointment

Thanks for booking your appointment. Please contact our office at 555-555-5555 if your insurance information has changes since your last visit.

Booking Complete

- If you have opted to redirect your patient to another website, the **Complete Booking** button be visible.
- If you have included a *Post Booking* message, it will appear at the bottom of the screen.
- Your patient can choose to write the appointment to his or her calendar
- Your patient can restart the booking process to schedule another appointment.