

# Scheduling an Online Appointment

Last Modified on 02/24/2019 3:26 am EST

## 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.

<div> User Name / Email Address</div> <div> Password</div> <div>Login</div> <div><a href="#">Forgot password?</a></div>	<div>Is this your first time here? If so, please select one of the following options</div> <div> <a href="#">View availability</a> before you register</div> <div> <a href="#">Register</a> and book an appointment</div>
Schedule Appointment	

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**[Back to Login Page](#)

\* denotes a required field.

*Please note: If you have been to this practice before, please be sure to check the YES button on the question below, and to enter all of your personal information **exactly** as it appears in your patient records.*

Have you been to this practice before? \* ☐ Yes ☐ No

First Name \*

Last Name \*

Last 4 Digits of your SSN \*

Home Phone \*

Mobile Phone \*

Work Phone

Email \*


Gender \* ☐ Male ☐ Female

Birthdate \*

User Name \*

Password \*

Confirm Password \*

☐ I'm not a robot   
reCAPTCHA  
[Privacy](#) [Terms](#)

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*.

Appointment Details

What are you coming in for?

Select

Select

Cleaning and Exam

New Patient Exam

New Patient-Cleaning and Exam

Returning Patient Exam

Appointment Details


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.

### Appointment Details

What are you coming in for? Cleaning and Exam ▼

Who would you like to see? Dr. David Arquette ▼

What time do you prefer? 9:00 AM 

Search [- 2 +] hours before or after preferred appointment time

[View Availability >](#)

Appointment Details

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.

#### November 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20 7 avail	21 7 avail	22 7 avail	23 7 avail	24
25	26 7 avail	27 7 avail	28 7 avail	29 7 avail	30	

#### December 2018 ▶ ▶▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3 7 avail	4 7 avail	5 7 avail	6 7 avail	7 7 avail	8
9	10 7 avail	11 7 avail	12 7 avail	13 7 avail	14 7 avail	15
16	17	18	19	20	21	22
23	24	25	26 7 avail	27 7 avail	28 7 avail	29

Choose an available appointment: 8:00 AM Dr. David Arquette ▼

Date Selection

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.