Automatically Sending OnPatient Invitations through Reminders and Appointment Confirmation

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You can automatically invite patients to connect with you through OnPatient prior to their appointment through a reminder email or the scheduling widget.

1. Go to Account > OnPatient Settings.

2. Navigate to the Communication tab. Check the **A**llow patients to connect without an invitation box and click Update OnPatient Settings.

Connecting with an Email Reminder

When a patient receives a reminder email, there is a link for appointment details and information.

The patient's cell phone number must be entered in the chart to access the invitation correctly.

The appointment details link will direct the patient to a page containing their appointment information, along with a button to sign up for OnPatient.

The invitation link is valid for 7 days. After it expires, you will need to re-invite / resend the invitation.

By clicking the Sign up for OnPatient button, they will be taken to the OnPatient Sign Up page to create an account with the email and Social Security Number or the email, date of birth, and **cell phone** number entered in their chart.

Connecting through the Scheduling Widget

When a patient schedules an appointment using the scheduling widget, they will receive an email to confirm their

appointment.

Please confirm your appointment with Dr. James Smith.

○ **reminders@drchrono.com** <reminders@drchrono.com>
To: sample@sample.com

Dear Sample Patient,

This is a notification that you have requested an appointment with Dr. James Smith on Tuesday October 25 at 10:00AM.

Please click on this confirmation link to finalize your appointment:

CONFIRM

Please copy and paste the link into your browser if you are not able to directly click the link.

https://www.drchrono.com/for_patients/confirm_online_appointment_request/58085c25-c8e7-4c21-9f18-6041d512fd7f

If you don't confirm your appointment within the next hour your appointment request will be cancelled.
Please call (443) 555-5555 if you encounter any problems or if this appointment refers to an emergency.

Regards,
Family Practice

If you did not request this appointment please contact Dr. James Smith at (443) 555-5555

After confirming the appointment, the patient will be taken to a reminder website. They will be prompted to Sign up for OnPatient.

The invitation link is valid for 7 days. After it expires, you will need to re-invite / resend the invitation.

Appointment with **James Smtih**
October 05, 2020 at 1:00 p.m.

Doctor	James Smtih
Office	225 Schilling Circle
	21212, MD Baltimore
When	October 05, 2020 at 1:00 p.m.
Website	http://www.drchrono.com
Contact	(443) 555-5555

Your doctor uses **OnPatient** as your **Patient Portal**. Sign up to view your medical record, create appointments & message your doctor.

Sign up for OnPatient

This invitation expires on October 12, 2020

By clicking the Sign up for OnPatient button, they will be taken to the OnPatient Sign Up page to create an account with the email, date of birth, and phone number they entered into the widget.

For patients to be able to confirm their appointments through the widget, please ensure the No confirmation emails setting is unchecked under Account > Offices > Online Schedule.