

# 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 **Allow patients to connect without an invitation** box and click **Update OnPatient Settings**.

Doctor

Appointments

Communication

Allow patients to send and receive messages from onpatient

☒

Allow patients to view their clinical notes in CCDA

☒

Allow me to select which custom demographics will be shown on onpatient & Check-In App

☒ If unchecked, no custom demographics will be shown

Automatically send patient statements to onpatient

☒

Show lab results on onpatient

☒ Patients will be able to see the results of labs you order via their onpatient account.

Automate Patient Invite to onpatient

☒ The system will send an email to the patient for onpatient on-boarding after the first appointment.

Show offices on onpatient

☒ Patients on onpatient will be able to view the offices only if this is set to True

Allow patients to connect without an invitation

☒ Allow patients to connect with the OnPatient Portal via the appointment confirmation and reminder emails. Patient SS Number or Phone Number & DOB is required.

Invite all patients now!

Update onpatient Settings

## Connecting with an Email Reminder

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

**Your appointment has been scheduled.**



reminders@drchrono.com <reminders@drchrono.com>

Tuesday, October 25, 2022 at 8:54 AM

To: sample@sample.com

This is a notice that you have scheduled an appointment with Dr. James Smith on Tuesday October 25 at 10:30AM.

You can view more details about this appointment at: [https://drchrono.com/appointment\\_reminder/237df68b-3c4e-446c-8b8a-8154433a10ff](https://drchrono.com/appointment_reminder/237df68b-3c4e-446c-8b8a-8154433a10ff)

If you did not schedule this appointment or there is any problem with the appointment, please call (443) 555-5555.

This appointment scheduling is powered by: <https://drchrono.com>




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.

Appointment with James Smith

October 05, 2020 at 1:00 p.m.



**Doctor** James Smith

**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

Confirm Appointment

Cancel Appointment

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 and Social Security Number or the email, date of birth, and **cell phone** number entered in their chart.



James Smith invites you to access your patient records

Sign up

First name

Last name

Email

Create Password

Already have an account? [Login](#)

Sign up

## 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

Tuesday, October 25, 2022 at 9:06 AM

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](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.

James Smith invites you to access your patient records

## Sign up

First name

Last name

Email

Create Password

Already have an account? [Login](#)

Sign up

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.

## Edit Office

[Basic](#)

[Billing](#)

[Online Schedule](#)

Show this office information  
online



Allow online scheduling in this  
office



Allow existing patients follow ups



Allow existing patient new  
appointments



Allow new patient appointments



Allow patients to cancel  
appointments online



No confirmation emails

