

Multistate Configuration Guide

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The **Multistate** module lets clinics filter and restrict patient self-scheduling options based on the state configured for locations, appointment profiles, or providers. Its primary goal is to make sure patients can only book appointments that align with state-specific medical licensing, jurisdictional rules, or regional availability.

Key configuration options

Geographic self-scheduling filters

- **States by Location:** Turn on to base self-scheduling availability on the states assigned to each clinic location (hashtag).
- **States by Appointment Profile:** Turn on to filter self-scheduling options based on the states configured for specific appointment profiles.
- **States by Provider:** Turn on to restrict self-scheduling availability according to the states where individual providers are licensed or assigned to practice.

Example

- **Scenario:** A telehealth organization has doctors licensed only in specific states (for example, California and Texas) and needs patients to see only compliant provider options during online booking.
- **Setup:** Turn on **States by Provider**. Go to **3. Providers & Exam Rooms** and include the states for each provider under **Additional Settings**.
- **Outcome:** When booking via the web scheduler, patients see appointment slots and providers that correspond to their selected state.

Before going live

Confirm:

- **Data mapping:** State assignments are properly configured for each location, appointment profile, and provider in the system.
- **Compliance checks:** Selected state filters accurately match current provider medical licenses and regional operational guidelines.
- **Scheduler testing:** Run test bookings for different geographic regions to verify that state filters display the correct providers and visit types.



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