

Providers and Exam Rooms Configuration Guide

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The **Providers & Exam Rooms** section under **Self-Scheduling** lets practices configure how providers appear to patients and which exam rooms are associated with each provider. It also includes an optional telehealth URL, a provider photo, and a description to help patients identify the right provider when booking.

Key configuration options

Provider details

- **Provider:** Identifies the provider associated with the row. Confirm that you're editing the correct provider before changing the settings.
- **Label:** Enter the name patients see when booking, such as "John Stevens" or "Dr. Emily Jones." Use a clear, recognizable name and review spelling and credentials.
- **Photo:** Select **Edit** to add or update the provider photo. Use a clear image of the correct provider and review how it appears in the Web Scheduler.

Exam room assignment

- **Exam Room:** Select the exam room or rooms associated with the provider. Room labels include the office name so you can distinguish rooms across locations.
- **Multiple rooms:** A provider can have more than one room selected. Open the dropdown to review the full list when the field displays "and 2 more" or a similar summary.
- **Remove a selection:** Select the x next to a selected room to remove it from the provider's room list. Review the remaining selections after making changes.

Telehealth and additional settings

- **Telehealth URL (Optional):** Enter the provider's virtual visit link when using a single link per provider. Verify the link and review the **Telehealth** configuration to confirm how virtual links are provided to patients.
- **Additional Settings:** Select **Show** to expand the provider's additional settings. Select **Hide** to collapse them.
- **Provider Description:** Enter a brief description, such as "Primary Care Doctor," to help patients understand the provider's specialty or role. Keep the description accurate and easy to read.

Find a provider

- **Search and page controls:** Use the search box to find a provider and the arrows to move between pages. Review each provider's settings individually.

Example

- **Scenario:** A practice wants patients to recognize a primary care provider and book appointments in the correct exam room.
- **Setup:** Find the provider's row and enter "Dr. John Stevens" as the **Label**. Select "Primary Office: Exam 1" in **Exam Room**, update the provider photo, and select **Show** to add "Primary Care Doctor" as the description. If

the provider also offers virtual visits using a single provider link, enter the correct **Telehealth URL** and review the telehealth configuration.

- **Outcome:** Patients can recognize the provider by name, photo, and description. The provider's room assignments support booking in the intended office and exam room, together with the practice's other scheduling settings.

Before going live

Confirm:

- **Provider identity:** Each label, photo, and description belongs to the correct provider and accurately reflects their role.
- **Room assignments:** Each selected room belongs to the intended office. Review every selection for providers with multiple rooms, and check any provider whose **Exam Room** field is empty.
- **Configuration consistency:** Provider and room selections align with the **Appointment Profiles and Locations (Offices)** settings for the intended booking flow.
- **Availability:** **Scheduling Templates** and other availability settings match the provider's actual schedule and the rooms they use.
- **Telehealth links:** Any configured provider URL opens the correct virtual visit destination. Confirm that the **Telehealth** settings use the intended source for visit links.
- **Patient experience:** Complete a test booking to review provider names, photos, descriptions, available appointment profiles, and the resulting provider and room assignment.



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