Set Up Online Scheduling for Your Office - Beta

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Turn on online scheduling | Set up online scheduling for an office | Add the scheduling widget embed code to your website

You can use the scheduling widget to add a direct booking link to your website, letting patients schedule appointments while they visit. The scheduling widget is separate from OnPatient appointment scheduling.

Follow the three steps below to set up online scheduling for your office.

Step 1: Turn on online scheduling

The first step in setting up online scheduling is turning on the setting that allows online scheduling via the scheduling widget or OnPatient.

1. Go to **Account** > **Account Settings** > **General**.
2. Scroll down to **Appointment Settings** and select the **Access to online scheduling** checkbox.
3. Go to the bottom of the page and select **Update Entire Profile**.

Step 2: Set up online scheduling for an office

Set up online scheduling for offices by configuring settings and choosing the days and hours patients can book appointments.

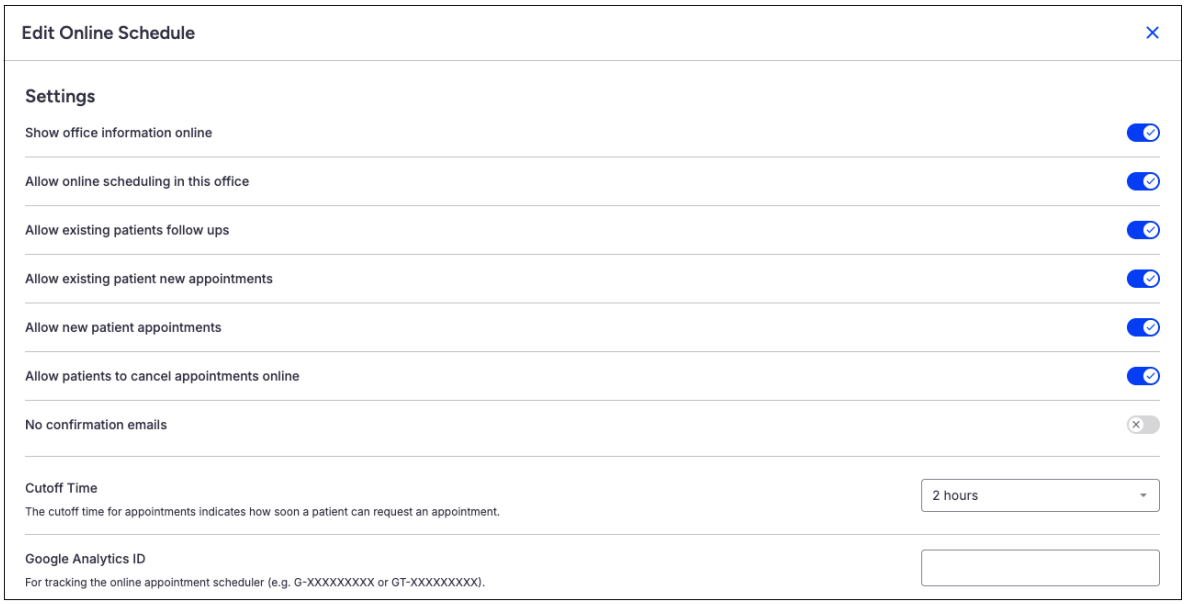
1. Select **Account** > **Practice Management** > **General Management** > **Offices**.
2. Select **View** for a specific office and scroll down to **Online Schedule**.
3. Select **Edit** to open the **Edit Online Schedule** drawer.
4. Turn the **Show office information online** and **Allow online scheduling in this office** toggle switches on.

> If you only turn on **Show office information online**, the online schedule shows in the scheduling widget, but patients can't schedule.

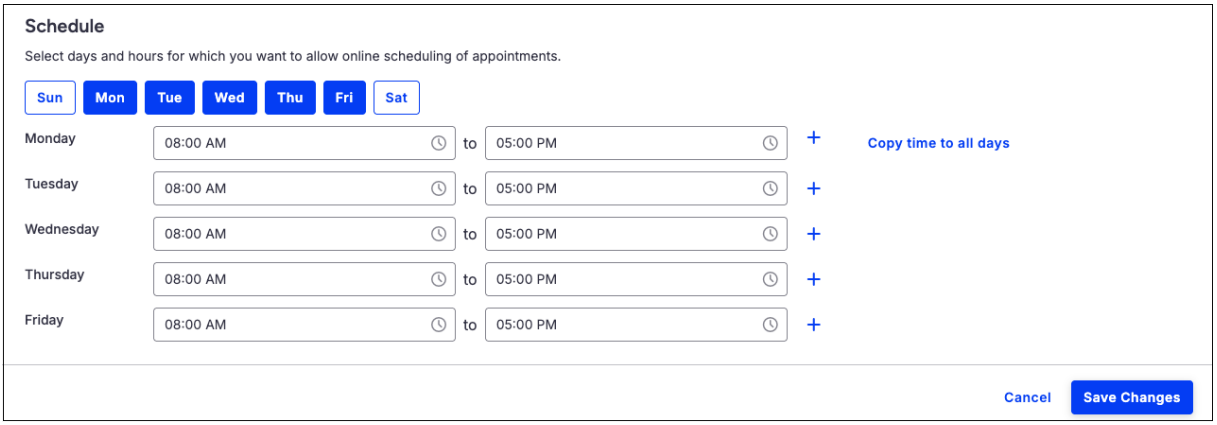
5. Customize the online scheduling settings for this office:
    - Allow existing patients follow-ups
    - Allow existing patient new appointments
    - Allow new patient appointments
    - Allow patients to cancel appointments online
    - **No confirmation emails:** No confirmation emails are sent to patients. If this is turned off, confirmation emails are automatically sent to the patient.
    - **Cutoff Time:** Indicates how soon a patient can request an appointment based on the time range shown

in the dropdown. For example, in the image below, the patient can only see available appointments that are within two hours and not sooner.

- **Google Analytics ID:** Used to track the online appointment scheduler.



6. Under **Schedule**, select the days and hours you want to allow online scheduling of appointments for patients.
7. Select **Save Changes**.



Step 3: Add the scheduling widget embed code to your website

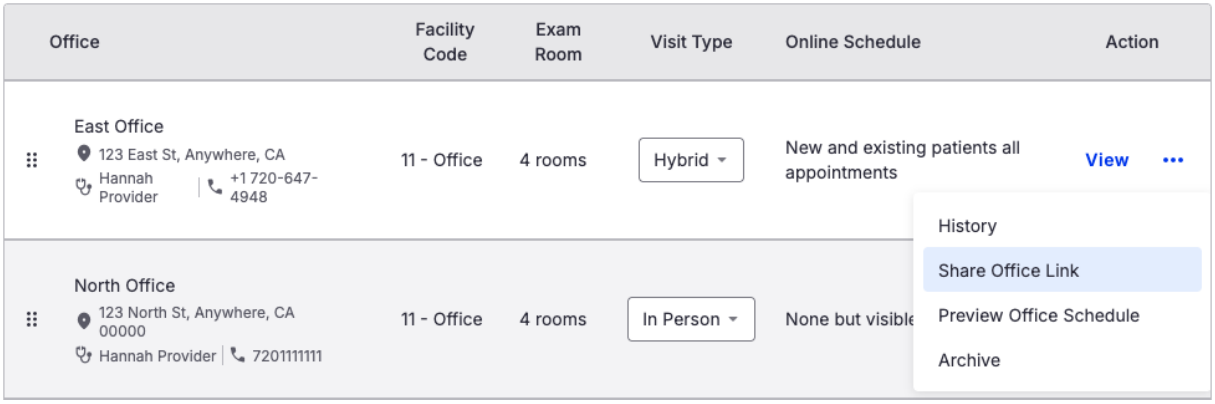
Share Office Link gives you the URLs and embed codes needed to publish or distribute an office's online schedule.

- Add the scheduling widget embed code to your practice's website so your patients can schedule appointments from there directly.
- Copy and paste the schedule URL into an email to share with a patient.

> For steps on previewing the widget, see Preview the scheduling widget.

1. In the office's row, select **More actions** ••• and select **Share Office Link** to open the **Share Online Schedule**

drawer.



The **Share Online Schedule** drawer provides you with everything you need to publish your scheduling widget.

- **All Offices** — A **Schedule URL** and matching **Embed Schedule** iframe code that displays the online scheduling widget for every office at once, with a **Copy** button next to the code snippet for quick copying.
- **Single Office** — The same **Schedule URL** and **Embed Schedule** pair, but scoped to just the office you selected, so patients booking through this link only see availability for that one location.

2. Select **Copy** next to the embed code snippet you want to use and paste it into your practice's website.

> If you don't know how to embed the code snippet into your website, contact your IT specialist or web developer.



Preview the scheduling widget

In the office's row, select **More actions** ••• and select **Preview Office Schedule** to open the office's live patient-facing online booking page in a new browser tab.

Select the office from the **Office** dropdown to see exactly what a patient would see for that office. This preview is a

quick way to verify what patients will experience before you share the link or embed it in your website.

Office's Visit Type	Video Visit Checkbox Behavior
In Person	Not visible to patients
Hybrid	Shown to patients so they can choose between an in-person or telehealth appointment (see image below)
Telehealth	Is preselected

