

Online Scheduling Quick Start Guide



For Edge Cloud



In order for Online Scheduling to function, grid templates need to be classified. If you need assistance classifying your grids, review the *Schedule Setup and Design* webinar on our webpage, support.ortho2.com > Visual Help > Edge Cloud > Scheduler > Schedule Setup and Design.

Setting Up Your Editors

Offices Editor

In this editor, you can add your company's logo. Under the Logo heading, use the browse icon  to locate the logo. Use the copy icon  to use this logo for each additional location. Alternatively, use a different logo in each location. This logo will appear on the online form prospective patients fill out.

When prospective patients schedule an exam online, an automated email will be sent to them. Use the Scheduling Email field in this editor as the reply address for the automated email. Just as the logo, this email address can be different for each office location.

Scheduler Templates Editor

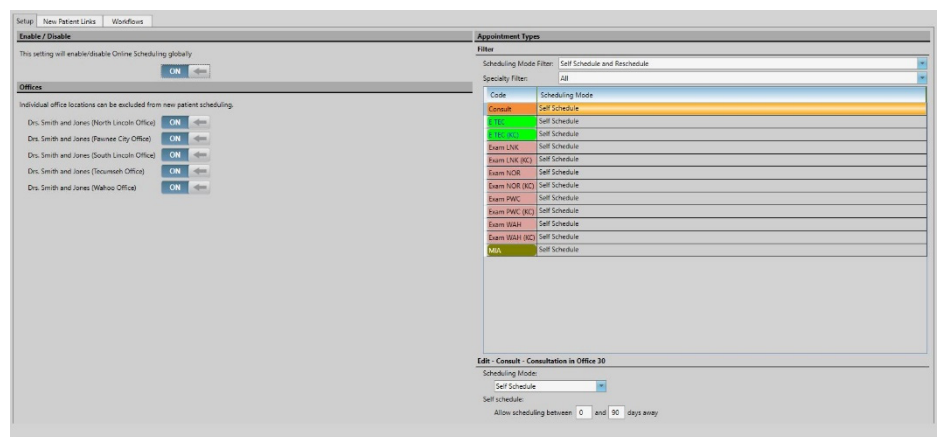
Each template needs to have the correct time zone selected. These should be already set to your current time zone, but it should be checked before enabling Online Scheduling.

In addition, each template needs to have the chairs assigned to an office. Review how to do this by watching the video tutorial mentioned at the top of this page.

Online Scheduling Editor

Setup Tab

Enable/Disable and Offices: Enable or disable Online Scheduling by clicking the arrow by Off. Do the same for each office location that will support this feature.

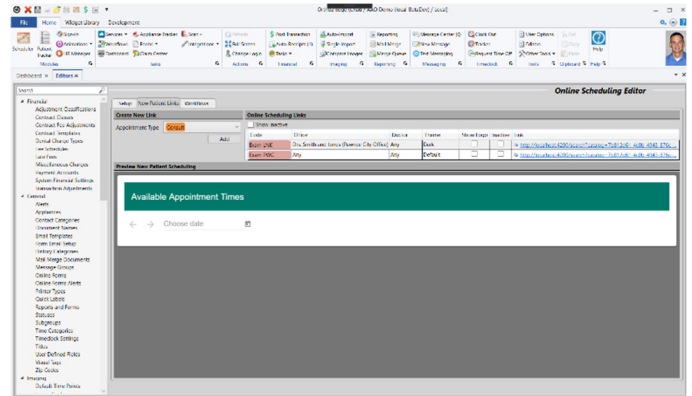


Appointment Types: By default, each procedure under Appointment Types in this tab will be set to Not Allowed. To view your procedure list, select Not Allowed in the Scheduling Mode Filter. Find the procedure that prospective patients can schedule online, and use the drop down menu to select Self Schedule. Use the fields below the Appointment Types to set the number of days out a prospect can schedule an appointment.

New Patient Links Tab

Create New Link: Use the drop down arrow to select the procedure you'd like to create a link for. Click Add.

Online Scheduling Links: Use the drop down menus to select the appropriate Office, Doctor, and Color Theme. Click Show Web Logo if you would like to include the logo in the scheduling option. A link will be created for each procedure that you enable. The link will remain the same even if you later go back and change the options for the procedure (i.e. which doctor/office the procedure is for). Links can also be inactivated. Click Save in Edge Cloud.

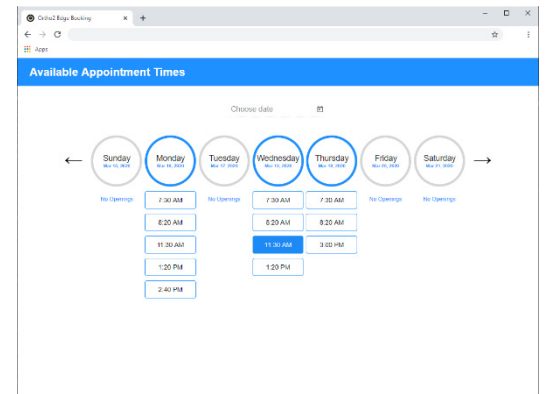


Preview New Patient Scheduling: Once you click save, you will be able to see a preview of how Online Scheduling will look on your website.

Using Online Scheduling

Once your editors are set up, use the link(s) created in the New Patient Links tab of the Online Scheduling editor to add Online Scheduling to your website. Talk to your website developer about different options on how it can be added to your website.

Prospective patients can now select an appointment from your website to schedule. If you have more than one office location, and didn't assign an office when creating the self-schedule links, the prospect will be asked which office they are scheduling with before they can select a time.



Once the appointment is selected, prospective patients fill out a brief form, and the appointment will be added to your scheduler. Prospects have five minutes to complete the form, or add additional time to do so. Appointments that are being booked online will not appear in the Smart Scheduler when you are scheduling simultaneously in the office. Prospects will receive an email confirming their appointment after the form is completed.

Online Scheduling and Edge Cloud Scheduler

Prospects who use Online Scheduling are considered pending – meaning they don't have a patient record yet. In addition, there is an extra icon in the Scheduler indicating the appointment was scheduled online.

Right click on the appointment in the scheduler and click Convert to Full Patient to bring up the Edit Pending Patient window. This window has various patient information fields and a notepad.

11 AM	00	xxxx	restricted	
	10	Exam LNK - Emma Smith		A1
	20			xxxx
	30			A2
	40	Observation		
	50	Observation		xxxx
12 PM	00	xxxx	restricted	xxxx

All entries made in the notepad will be added to the patient's folder once it has been created. After entering notes in the notepad, click Save to save them. If you have all of the biographical information filled out and want to promote the prospective patient into a full patient, click Promote to create a patient folder.