

Configurations- Appointment Defaults

- Add appointment types and configure preferences for each appointment type on the “Configurations” tab and “Appointment Defaults” page
- Set up general preferences that will apply to all appointment types. These settings will apply only to appointment types created *after* setting up the general settings, not to existing appointment types.
- Each appointment type can also be customized and changed from the general settings.
- Remember to save any changes you make. Select “Save” at the bottom of the page.






General Appointment Settings




- Below the list of appointment title/types, are general preferences
- General appointment notes apply to future, newly created appointment types
- Add notes that apply to all appointment types. Include information about what to bring to the appointment, when to arrive, office policies, where to park, etc.
- To add a new note, enter content and select “Add”




General Appointment Notes ?

Add common notes for your appointments. Drag and drop notes to reorder.

[Adding a url?](#) 

Please bring your most up to date insurance card, ID, and copay for your visit  [edit](#)  [remove](#)  [preview](#)

Please arrive 15 minutes early  [edit](#)  [remove](#)  [preview](#)

Failure to arrive for this appointment will result in a no show fee for missed appointment.  [edit](#)  [remove](#)  [preview](#)

We validate parking in the North garage

Add

General Appointment Settings

- To see directions to add a link, select “Adding a url?”
- Select “preview” to see an example of what your note with the link will look like. In the example, “our website” is a link for patients to click on to be sent to a web address to fill out new patient forms.




The screenshot shows the 'General Appointment Notes' section of a software interface. A dark tooltip box on the left contains the text: 'Type url or [label](url) and it will create a link to the url called label.' Below this, the title 'General Appointment Notes' is followed by a question mark icon. A sub-header 'Adding a url?' with an information icon is visible. The main text area contains the note: 'Please visit [our website](yourpracticewebsite.com) to complete new patient forms'. To the right of this text are three icons: a green pencil for 'edit', a grey 'x' for 'remove', and an eye for 'preview'. Below the text area is a preview box showing the rendered note: 'Please visit our website to complete new patient forms', where 'our website' is a blue hyperlink.

Type url or [label](url) and it will create a link to the url called label.

General Appointment Notes ?

appointments. Drag and drop notes to reorder.

Adding a url? i

Please visit [our website](yourpracticewebsite.com) to complete new patient forms  edit  remove  preview

Please visit [our website](#) to complete new patient forms

General Appointment Settings

- **Unintegrated Accounts Only** Set the general appointment interval to make posting appointments easier. For example, when the appointment interval is set to 5 minutes, appointment times are listed every 5 minutes to be selected when adding an appointment.

General Appointment Interval

Set the default appointment time interval for managing appointments

5 minutes

Start

02/27/2018 11:00am

February 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3

11:00am
11:05am
11:10am
11:15am
11:20am
11:25am

Never

➔ 5 minutes

Start

02/27/2018 11:00am

February 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3

11:00am
11:15am
11:30am
11:45am
12:00pm
12:15pm

Never

➔ 15 minutes

General Appointment Settings

- Set a general appointment duration for the default length of each appointment. If your appointment types vary in length, choose the most common duration to make setting up new appointment types easier and faster.
- Patients do not see the duration, only your staff can see the duration.

General Appointment Duration

Set the default length of your appointments

- Expiration is the time at which the appointment is no longer available or the lead time before the appointment starts. For example, a noon appointment with an expiration of 1 hour cannot be booked after 11 am, an hour before the appointment time.
- Choose an expiration time that is lower, for example 30 minutes or an hour, to allow patients to fill cancellations and book last minute appointments.
- To let patients book right up to start of the appointment, choose 0 minutes.

General Appointment Expiration

Set the length of time before your appointments expire.

General Appointment Settings

- Select where you would like to make appointments available.
 - Post To App- Available on the Everseat website, mobile app, and iframes
 - Post to Wait List- Available via text message to patients on the digital wait list
 - Post To Referral Tool- Available to referring providers
- You may see two options instead of three. (Please contact Everseat if you would like access to more places to post your appointments.)
- If you do not see any options, your appointments are available in only one of the places to post and this option does not need to be set.

Where to post General Appointment

Where should a general appointment be listed?

Post To App

Yes 

Post To Wait List

Yes 

Post To Referral Tool

Yes 

General Appointment Settings

- An example of the default wait list message is “Main Street Practice has an open appointment for Follow Up with Dr. James Phillip, MD on Wednesday, February 21, 2018 at 1:45 pm at their Albany location. Reply with the code 123456 to book this appointment.”
- Leave the wait list message box blank to use the default.
- If you would like to change the text message, use the keywords (found by clicking the “?”) and preview your message after entering it.

Wait List Message

These keywords can be used to put appointment specific information in your message.

Keyword	Translation
{seat name}	Name of the appointment
{personnel name}	Full name of the provider including title
{start date}	Date of the appointment <i>i.e. Sunday January 1, 2017 at 1:45 pm</i>
{location name}	Name of the office that the appointment is at
{provider name}	Name of the provider

"Reply with the code code to book this appointment." will be included at the end of every message.

[Close](#)

Wait List General Appointment Message ?

Message that is sent to wait list users when a wait list general appointment is posted

{provider name} has a new appointment available with {personnel name}! It is for a {seat name} at {start date} at our {location name} location.

 [.preview](#)

Provider Name has a new appointment available with *Personnel Name*! It is for a *Seat Name* at *Day Month, Year at Time* at our *Location Name* location. Reply with the code *code* to book this appointment.

General Appointment Settings

- To set a custom reminder message, enter a new message. For more info about custom reminder messages, see the guide at everseat.com/training under the “Configurations” section.

Reminder General Appointment Message ?

Message that is sent to users when their appointment is upcoming

Leave blank to use Everseat default message

 [.preview](#)



Appointment Type Settings



Appointment title/types ?

Make a list of common appointment types for creating new appointments faster.

Follow-Up  [edit](#)  [remove](#)

New Patient  [edit](#)  [remove](#)

Problem  [edit](#)  [remove](#)

Sick Visit  [edit](#)  [remove](#)

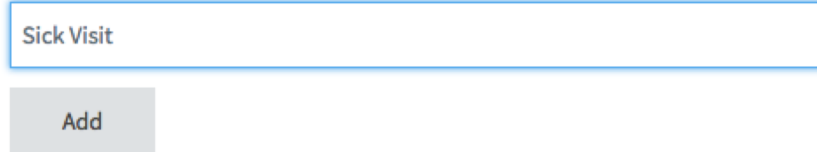
Wellness Visit  [edit](#)  [remove](#)

Add

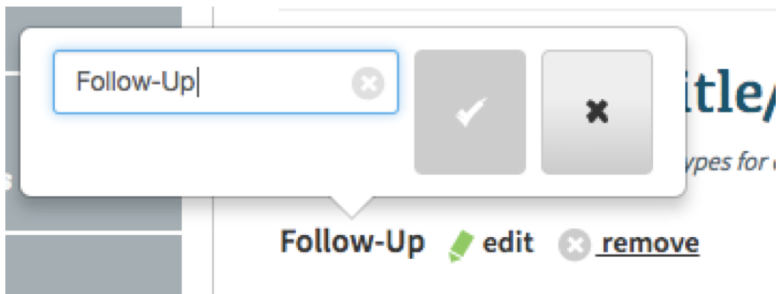
- **Unintegrated Accounts Only** Adding appointment types makes posting appointments faster. You can select one of the appointment types you set up on the “Configurations” tab in the “Add an appointment” window and many of the fields will populate based on the defaults you set up.
- **Integrated Accounts Only** Appointment titles are what patients will see when they look at your appointments. The titles can differ from their corresponding appointment type in your practice management system.
- **Integrated Accounts Only** For many integrations, appointment types from your practice management will sync with Everseat, so you do not need to create appointment types manually. You can edit the appointment titles to be more patient-friendly.

Appointment Type Settings

- To add a new appointment title/type, enter the name you would like to use and select “Add”

A screenshot of a web interface for adding a new appointment type. It features a text input field containing the text "Sick Visit" and a grey button labeled "Add" positioned directly below the input field.

- To edit the name of an appointment type, select “edit.”

A screenshot showing the editing process for an appointment type. A modal dialog box is open, displaying a text input field with "Follow-Up" and a close button (X). Below the input field are two buttons: a checkmark button to confirm the edit and a close button (X) to cancel. In the background, the "Follow-Up" appointment type is visible with its own "edit" and "remove" controls.

- To set up preferences for a particular appointment type, select the name so that it is highlighted blue.

Follow-Up  edit  remove

Appointment Type Settings



Appointment title/types ?

Make a list of common appointment types for creating new appointments faster.

Follow-Up  [edit](#)  [remove](#)

New Patient  [edit](#)  [remove](#)

Problem  [edit](#)  [remove](#)

Sick Visit  [edit](#)  [remove](#)

Wellness Visit  [edit](#)  [remove](#)

Add

- The more detailed the appointment titles, the easier it will be for patients to select the correct type. For example, consider writing “Follow-Up for One Condition for Existing Patients” instead of “Follow-Up.”
- Limiting the number of types also makes it easier for patients to choose one. If many of your appointment types are the same length in duration, consider using one appointment type in Everseat to cover both of them. For example, “New Patient or Annual Physical.”

Appointment Type Settings

- Patients see notes during the booking process.
- Add notes that are specific to an appointment type. Include information about what the appointment is for, who is is for (new vs existing,) what to bring to the appointment, etc.
- To add a new note, enter the note and select “Add”

Appointment Notes for Follow-Up ?

Add common notes for Follow-Up. Drag and drop notes to reorder.

Adding a url? 

Existing patients only  edit  remove  preview

I need to follow up with my provider about an existing condition.  edit  remove  preview

Add

Appointment Type Settings

- Patients do not see the duration, only your staff can see the duration.
- *Integrated Accounts Only* For athena integrations, you can skip setting up the duration in Everseat. Everseat uses the durations of appointments set up in athena for web scheduling.

Appointment Duration for Follow-Up

Set the default length of Follow-Up

- Expiration is the time at which the appointment is no longer available or the lead time before the appointment starts. For example, a noon appointment with an expiration of 1 hour cannot be booked after 11 am, an hour before the appointment time.
- Choose an expiration time that is lower, for example 30 minutes or an hour, to allow patients to fill cancellations and book last minute appointments.
- To let patients book right up to start of the appointment, choose 0 minutes

Appointment Expiration for Follow-Up

Set the length of time before Follow-Up expire.

Appointment Type Settings

- Optionally, categories can be applied to a specific appointment type.

Categories for Follow-Up

Add categories for Follow-Up.

Cardiologists ✕	Pediatricians ✕	Pulmonologists ✕	Family Physicians ✕	Internal Medicine ✕	Gynecologists ✕
Obstetrics & Gynecology ✕	Primary Care ✕				

- Categories are only needed if you plan to post this appointment type *without* a provider assigned to it. Most integrated accounts do not need to set up categories as appointments are always associated with a provider.

Add an appointment ✕

Name your appointment	Start
<input type="text"/>	10/31/2018 01:00pm
Provider	End
<div><input type="text"/><div>▼</div></div>	10/31/2018 01:30pm
Customer does not see this	

Appointment Type Settings- *Integrated Accounts Only*

- For many integrations, appointment types from your practice management will sync with Everseat. By default, integration sync is set to “No.” Turn this to “Yes” to make appointments available.
 - For some integrations, you will add all appointment types manually. Make sure integration sync is turned to “Yes” for types you add.
- The external appointment name is the appointment type used in your practice management system. Typically, this is the name of the corresponding appointment type or reason; sometimes it is a number. Contact Everseat to confirm what is required for your integration.

Integration Sync for Exam

If an appointment is read from your scheduling software with this name, should we list it in Everseat?

Yes ↕

External Appointment Name

Enter the appointment name or reason as listed in your Practice Management software.

Exam

Appointment Type Settings- *Integrated Accounts Only*

- This section is for the pull forward tool. It only needs to be completed if you are using the tool.
- Alternative external identifiers are for the pull forward tool. For athena integrations, they are appointment types you would like to use. This is different from the appointment reason entered into the external appointment name field.
- Under “Integration Generates Automatic Waitlist”, select “Yes” if you would like to move patients up in your schedule who are booked for that appointment type. Select “No” if you do not want wait list messages to be sent to patients automatically for that appointment type.
- Choose the parameters for which patients you would like to potentially move forward in the schedule.

Alternative External Identifiers

Add alternative identifying ids your Practice Management software uses.

× NEW PATIENT

Integration Generates Automatic Waitlist

Should users who have future appointments be notified of earlier availability?

Yes ↕

The minimum number of days to look ahead in your integration's booked appointments

10

The maximum number of days to look ahead in your integration's booked appointments

20

Appointment Type Settings

- Select where you would like to make appointments available.
 - Post To App- Available on the Everseat website, mobile app, and iframes
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- You may see two options instead of three.
(Please contact Everseat if you would like access to more places to post your appointments.)
- If you do not see any options, your appointments are available in only one of the places to post and this option does not need to be set.

Where to post Follow-Up

Where should Follow-Up be listed?

Post To App

Yes ⇅

Post To Wait List

Yes ⇅

Post To Referral Tool

No ⇅

Appointment Type Settings

- Leave the wait list message box blank to use the general appointment message.
- If you would like to change the text message, use the keywords (found by clicking the “?”) and preview your message after entering it. See page 7 for more info about wait list messages.

Wait List Follow-Up Message ?

Message that is sent to wait list users when a wait list Follow-Up is posted

Leave blank to use general appointment message

 [.preview](#)

- Leave the reminder message box blank to use the general appointment message.
- To set a custom reminder message, enter a new message. For more info about custom reminder messages, see the guide at everseat.com/training under the “Configurations” section.

Reminder Follow-Up Message ?

Message that is sent to users when their Follow-Up appointment is upcoming

Leave blank to use general appointment message

 [.preview](#)