



Invite Patients

Purpose:

Invite your patients to request appointments through Everseat by sending them an invitation generated through your Everseat dashboard.

NOTE: To add customized information to default email that is sent to patients, refer to the Guide for Communications.

Best Practices and Examples:

- Upload a CSV of your current patients and send invitations to multiple patients at once
- Invite individuals as they request assistance scheduling an appointment to direct them to Everseat

Directions for Inviting Patients:

Step 1: On your dashboard, select the 'Invite Patients' tab.

Step 2: Add the patient information either by uploading a CSV or by entering the client name and email address.

A screenshot of the 'Invite Patients' web form. The form has a white background with a teal header. Below the header, there is a line of small text: 'Invite your current patients to Everseat below. You can upload a CSV file, specify users with the form below, or do both. To add more rows to the form, click the "Add Row" button.' The form contains three input fields: a file upload field with a 'Choose File' button and 'No file chosen' text; a 'Client Name' field; and an 'Email Address' field. A teal 'ADD ROW' button is located at the bottom of the form. Two red arrows are overlaid on the image: one points to the 'Choose File' button, and the other points to the 'Client Name' input field.



Step 3: To add more lines to send the message to multiple patients, click ‘Add Row.’

A screenshot of a form with two columns. The left column has two 'Client Name' input fields, the first containing 'Jane Doe'. The right column has two 'Email Address' input fields, the first containing 'exampleemail@everseat.com'. A teal 'ADD ROW' button is at the bottom left, with a teal arrow pointing to it from the right.

Step 4: To add custom content to the email sent to the recipients, insert your message here. The text will appear below the default Everseat message and before the ‘Sincerely, Everseat’ closing.

This custom content is for one-time emails sent to the recipients you provided. To change the default email that applies to all recipients, refer to the Guide for Communications.

A screenshot of a message editor. At the top, it says 'Message'. Below is a menu bar with 'File', 'Edit', 'View', and 'Format'. Underneath is a toolbar with icons for undo, redo, bold, italic, text color, background color, bulleted list, numbered list, and link. The main area contains the text 'Optionally, add additional information to the e-mail.' with a teal arrow pointing to it from the right. At the bottom right, it says 'POWERED BY TINYMCE'. A teal 'SUBMIT' button is at the bottom left.

Step 5: Click ‘Submit’ to send the invitation.

A teal rectangular button with the word 'SUBMIT' in white, uppercase letters. A teal arrow points to the button from the right.



If a patient is new to Everseat, their invitation will look like the following. Note where your custom message would appear.

everseat

Invitation to Everseat

Hi Stefanie Wolcott,

We're excited to announce that we are now using a self-scheduling platform—Everseat. Everseat allows you to find and schedule appointments with us. It is 100% free and you may use your smart phone or any computer with Internet access.

For Smart Phones: Download the app today from the Google Play Store or the App Store.

After downloading, getting started is as easy as 1, 2, 3.

1. Register. Login to quickly build your profile.
2. Favorite. Find us and tap the star icon.
3. Setup alerts. Tap to get alerted the next time you need an appointment.

For Web: Visit demoapp.everseat.com

1. Register. Click Sign Up and follow instructions
2. Favorite. Tap the star icon
3. Setup alerts. Get alerted by selecting your notification preference.

Earn rewards: Everseat enables you to accumulate points by booking appointments with the scheduling system. Search for the My Rewards section and learn more about this great benefit.

Tell Friends & Family: Share Everseat with your friends and family. Everseat is 100% free – use it as much as you can.

CUSTOM MESSAGE WOULD APPEAR HERE

Sincerely,
Fortune Community Hospital





If a patient is already registered for Everseat, their invitation will look like the following. Note where your custom message would appear.



Check Out Who's Now on Everseat

Hi Stefanie,

We're excited to let you know that another one of your providers—Fortune Community Hospital—has just joined Everseat!

Be sure to Favorite them now & use alerts the next time you need an appointment!

Thanks for using Everseat and [let us know](#) if there are any other providers you'd like to see on the app.

CUSTOM MESSAGE WOULD APPEAR HERE



Sincerely,
Everseat

