# Wait List

**Purpose:**

This feature allows practices to add patients to a wait list. Wait listed patients are automatically notified via text message when an appointment that meets their criteria (provider, time, date, etc.) becomes available.

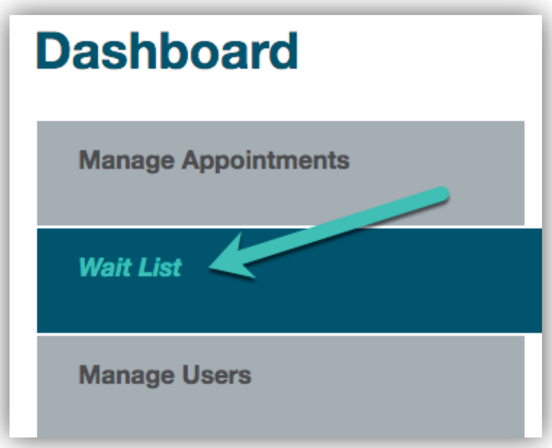
**Best Practices and Examples:**

Practices may add patients to the wait list in the following situations:

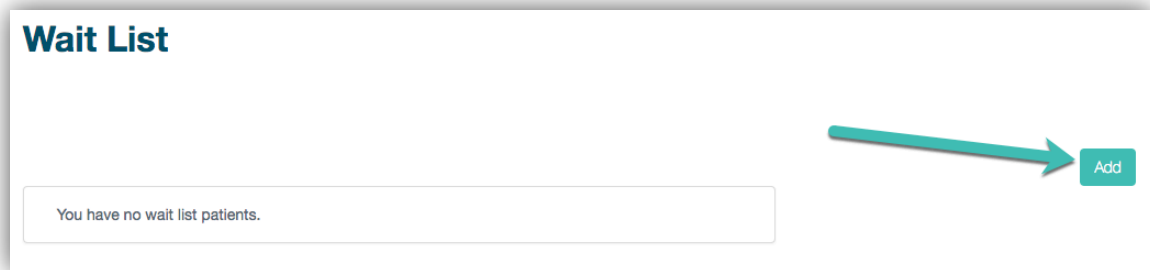
1. A patient has an appointment scheduled but wants to be notified if an earlier date becomes available
2. A patient is looking to schedule an appointment for a specific day of the week or time (i.e.: Monday mornings or Tuesday and Thursday afternoon)
3. A patient will be on vacation next week but wants to be alerted of open appointments for when they return

**Directions for Adding Patients to the Wait List:**

Step 1: Go to the Wait List tab on the dashboard.



Step 2: Select ‘Add’ to add a patient to the Wait List.




Step 3: Complete the information in the form (example on next page).

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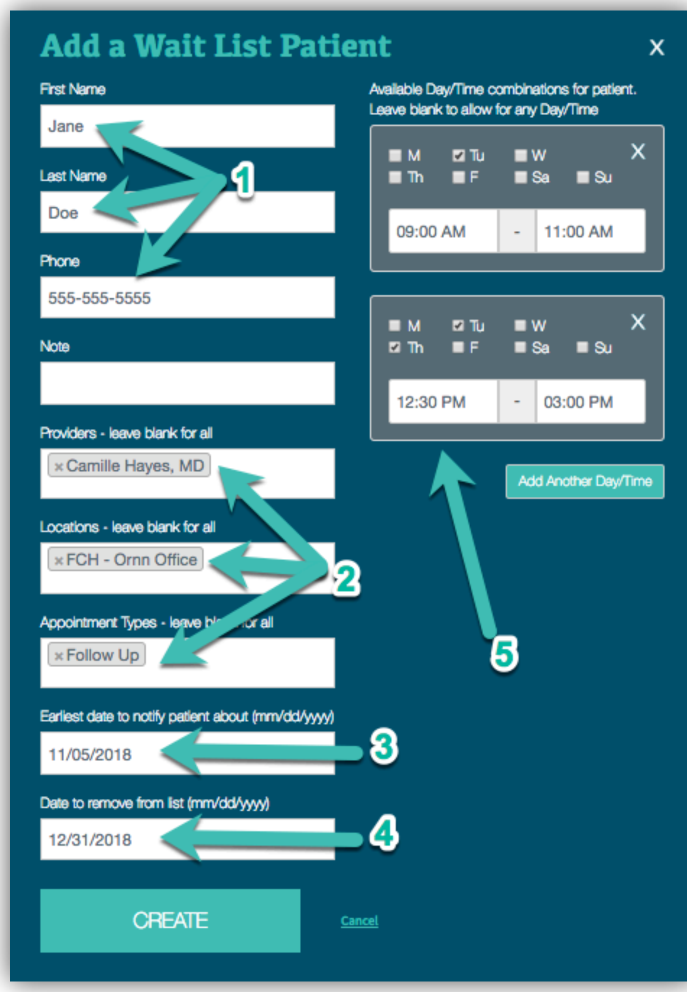
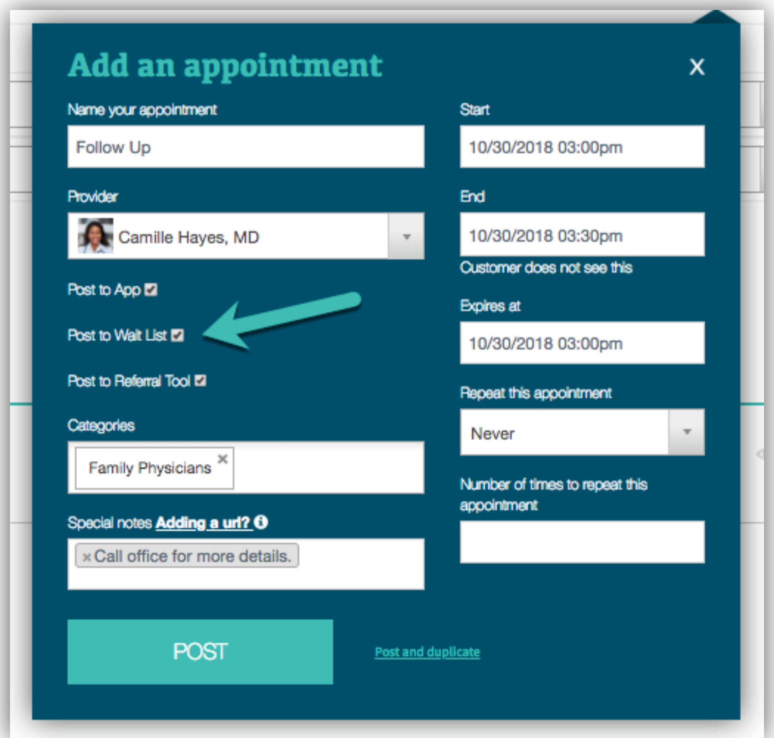
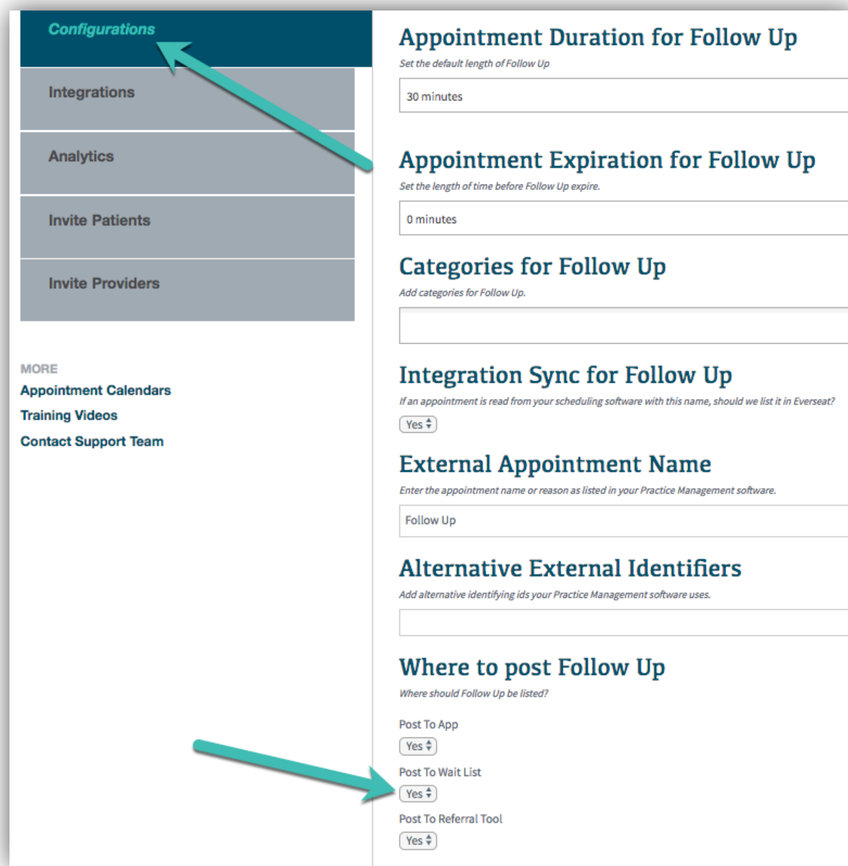
1. First Name, Last Name, and Phone Number are required fields.
2. The fields for Providers, Locations, and Appointment Types may be left blank if the patient does not have a preference. Otherwise, you can select 1 or more options in these fields (in the example above, the wait list request is only for follow-up appointments with Dr. Camille Hayes at the Ornn office).
3. This is the earliest date that the patient will receive notifications of available appointments. The patient will not be notified of appointments that occur before this date.
4. The patient will be removed from the wait list automatically if they book an appointment via Everseat. If not, they will be removed from the list on the date listed in the 'Date to remove from list' field. The patient will only receive notifications about appointments *before* this date. The best date to use in this field is the patient's future scheduled appointment date, if available.
5. You can select days and times that are convenient for the patient. Add as many day and time combinations as needed. The patient will only receive notifications for appointments that match the selected days and times.




Step 4: When posting new appointments, make sure the 'Post to Wait List' option is enabled. This allows text messages to be sent to patients on the wait list. This option can be checked or unchecked for each appointment posted.




Step 5: To change your default and always have the box checked, update the settings for each appointment type to "Post to wait list."




**Directions for Managing Wait List Appointments:**

Step 1: Patients on the wait list will receive a text message when an appointment becomes available that matches their preferences.

Step 2: The patient will reply with a 6-digit code to request the appointment.


Step 3: Respond to the appointment in the Everseat dashboard by either confirming or denying it.

Step 4: The patient will receive a text back letting them know if their appointment is confirmed or denied.

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