



## 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.

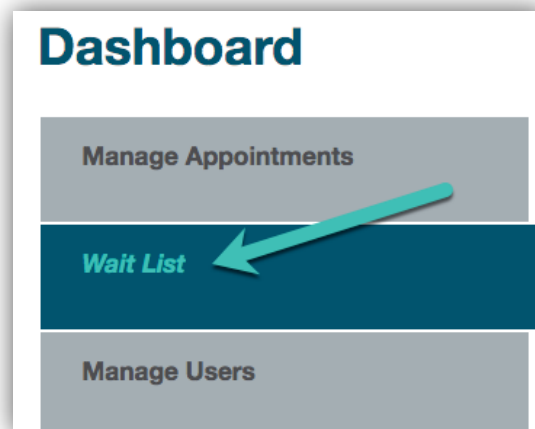
### **Best Practices and Examples:**

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

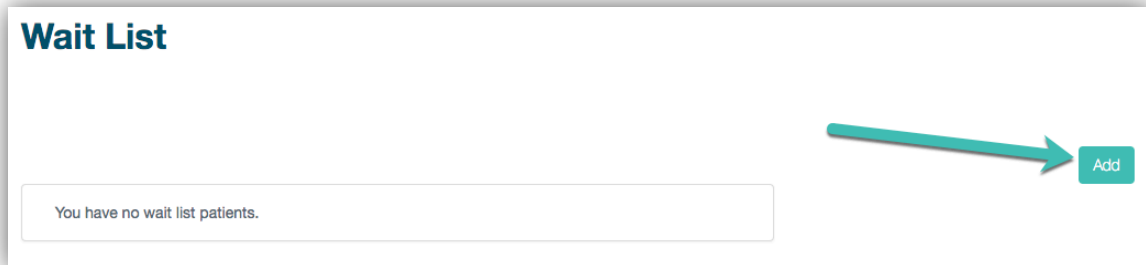
### **Directions for Adding Patients to the Wait List:**

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).



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.

The screenshot shows the 'Add a Wait List Patient' form with the following fields and callouts:

- 1:** Points to the First Name, Last Name, and Phone Number fields.
- 2:** Points to the Providers, Locations, and Appointment Types dropdown menus.
- 3:** Points to the 'Earliest date to notify patient about (mm/dd/yyyy)' field.
- 4:** Points to the 'Date to remove from list (mm/dd/yyyy)' field.
- 5:** Points to the 'Available Day/Time combinations for patient' section, which includes two time slot selection boxes and an 'Add Another Day/Time' button.

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.

A screenshot of the 'Add an appointment' form in a teal-themed interface. The form is titled 'Add an appointment' in white text on a dark teal background. It contains several sections: 'Name your appointment' with a text input field containing 'Follow Up'; 'Provider' with a dropdown menu showing 'Camille Hayes, MD'; 'Post to App' with a checked checkbox; 'Post to Wait List' with a checked checkbox and a red arrow pointing to it; 'Post to Referral Tool' with a checked checkbox; 'Categories' with a text input field containing 'Family Physicians'; 'Special notes' with a text input field containing 'x Call office for more details.'; 'Start' with a date and time input field containing '10/30/2018 03:00pm'; 'End' with a date and time input field containing '10/30/2018 03:30pm'; 'Expires at' with a date and time input field containing '10/30/2018 03:00pm'; 'Repeat this appointment' with a dropdown menu showing 'Never'; and 'Number of times to repeat this appointment' with an empty text input field. At the bottom, there is a large teal 'POST' button and a smaller teal link 'Post and duplicate'. A close button 'X' is in the top right corner.

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



A screenshot of the Everseat configuration interface. On the left is a sidebar with a 'Configurations' menu item highlighted in teal, with a teal arrow pointing to it. Below it are 'Integrations', 'Analytics', 'Invite Patients', and 'Invite Providers'. Under a 'MORE' section are 'Appointment Calendars', 'Training Videos', and 'Contact Support Team'. The main content area is titled 'Appointment Duration for Follow Up' and contains several sections: 'Appointment Duration for Follow Up' (30 minutes), 'Appointment Expiration for Follow Up' (0 minutes), 'Categories for Follow Up' (empty), 'Integration Sync for Follow Up' (Yes), 'External Appointment Name' (Follow Up), 'Alternative External Identifiers' (empty), and 'Where to post Follow Up' (Yes for Post To App, Post To Wait List, and Post To Referral Tool). A teal arrow points to the 'Post To Wait List' option.

## 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.

