



# Account Settings

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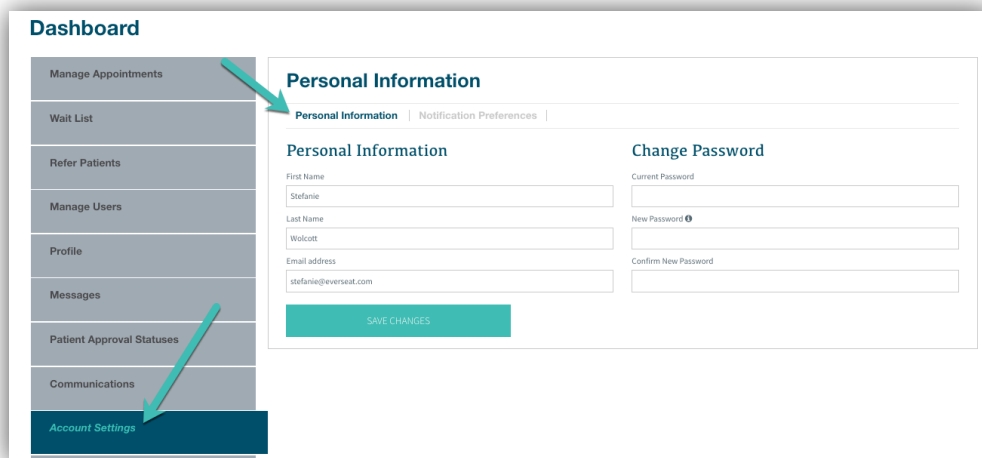
## Personal Information

### Purpose:

Update your user information (name, email) or change your password.

### Directions for Updating Personal Information:


Step 1: Click the ‘Account Settings’ tab and select the ‘Personal Information’ page.





Step 2: Update your personal information or change your password using the fields provided. Click 'Save Changes' when done.

Personal Information	Change Password
First Name <input type="text" value="Stefanie"/>	Current Password <input type="password"/>
Last Name <input type="text" value="Wolcott"/>	New Password ⓘ <input type="password"/>
Email address <input type="text" value="stefanie@everseat.com"/>	Confirm New Password <input type="password"/>
<input type="button" value="SAVE CHANGES"/>	





## Notification Preferences

### Purpose:

This page allows your practice to customize how people are contacted when appointments are requested or deleted.

### Best Practices and Examples:

- Customize if you want appointment notifications to be sent as an email, phone call, and/or SMS (text)
- Send appointment requests to a general email for your location regardless of which provider was selected
- Alert providers when their appointments are requested

### Directions for Updating Notification Preferences:

Step 1: Click the 'Account Settings' tab and select the 'Notification Preferences' page.

The screenshot shows the Everseat dashboard interface. On the left is a sidebar menu with the following items: Manage Appointments, Wait List, Refer Patients, Manage Users, Profile, Messages, Patient Approval Statuses, Communications, and Account Settings. The 'Account Settings' item is highlighted in a darker blue, and a red arrow points to it. The main content area is titled 'Notification Preferences' and has a sub-tab 'Notification Preferences' selected, also indicated by a red arrow. Below the title, there is a section for 'Administrators' with a heading 'Example Manager' and 'Stefanie Wolcott'. Each manager has a row of checkboxes for 'Email', 'Phone', and 'SMS' and corresponding input fields. The 'Example Manager' row has 'Email' checked and a field containing 'stefanie+example@everseat.com'. The 'Stefanie Wolcott' row has 'Email' checked and a field containing 'stefanie@everseat.com', 'Phone' checked and a field containing '+16672125727', and 'SMS' unchecked with an empty field. Below this is a section for 'Locations' with a heading and a row of checkboxes for 'Email', 'Phone', and 'SMS'.



**Step 2:** The available notification recipients include your Everseat’s administrators, locations, managers, and providers.

To notify your administrators of any appointment requested or deleted anywhere in your practice (for all locations and all providers), provide the administrator’s preferred contact method (i.e. their email address or phone number) and select the check box next to the contact method. For instance, if the administrator would like to receive email notifications, the field must contain an email address and the checkbox next to ‘Email’ must be selected.

Settings can be personalized for each administrator or you can select ‘Change All’ to apply a contact method to all administrators.

A screenshot of the Everseat 'Administrators' settings page. The page title is 'Administrators' in bold blue text. Below the title is a subtitle: 'Selected administrators receive notifications when an appointment is requested or deleted anywhere in the Practice.' There are three radio buttons for 'CHANGE ALL:': 'Email' (checked), 'Phone', and 'SMS'. A red arrow points to the 'Email' radio button. Below this are two administrator entries. The first entry is for 'Example Manager' and has three input fields: 'Email' (checked) with the value 'stefanie+example@everseat.com', 'Phone' (checked) which is empty, and 'SMS' which is empty. The second entry is for 'Stefanie Wolcott' and has three input fields: 'Email' (checked) with the value 'stefanie@everseat.com', 'Phone' which has the value '+16672125727', and 'SMS' which is empty.

**Step 3:** To set up a recipient for appointments requested or denied for a particular location, update the ‘Locations’ section. For example, you can provide a front desk email to be alerted whenever appointments are requested for that location.



### Locations

*Selected locations receive notifications when an appointment is requested or deleted for an appointment at their location.*

CHANGE ALL:      Email       Phone       SMS

#### FCH - Ornn Office

Email <input checked="" type="checkbox"/>	Phone <input type="checkbox"/>	SMS <input type="checkbox"/>
<input type="text" value="stefanie@everseat.com"/>	<input type="text" value="+16672125727"/>	<input type="text"/>

#### FCH - Ivern Office

Email <input checked="" type="checkbox"/>	Phone <input type="checkbox"/>	SMS <input type="checkbox"/>
<input type="text" value="stefanie@everseat.com"/>	<input type="text" value="+16672125727"/>	<input type="text"/>

Step 4: Like administrators, individual managers can also receive notifications for requested or deleted appointments. However, managers will only receive notifications for locations or providers they manage.

### Managers

*Selected managers receive notifications when an appointment is requested or deleted if the appointment belongs to a provider and location that they manage.*

CHANGE ALL:      Email       Phone       SMS

#### Example Manager

Email <input checked="" type="checkbox"/>	Phone <input checked="" type="checkbox"/>	SMS <input type="checkbox"/>
<input type="text" value="stefanie+example@everseat.com"/>	<input type="text"/>	<input type="text"/>

Step 5: If providers would like to be notified of requested and deleted appointments, they can be notified of their own appointments via the 'Providers' section. These notifications are typically turned off.



### Providers

*Selected providers receive notifications when an appointment is requested or deleted for one of their appointments.*

CHANGE ALL:      Email       Phone       SMS

**Quinn Johnson, PA**

Email        Phone        SMS

**Camille Hayes, MD**

Email        Phone        SMS

**Zac Santos, MD**

Email        Phone        SMS

**Vladimir Novikov, MD**

Email        Phone        SMS

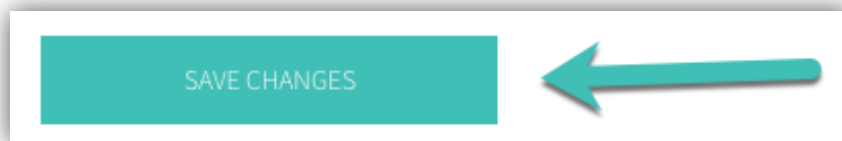
**Orianna Hamilton, MD**

Email        Phone        SMS

**Leona Cole, MD**

Email        Phone        SMS

Step 6: After you have made updates to your notification preferences, click ‘Save Changes’ at the bottom of the page.





## Subscription Information

### Purpose:

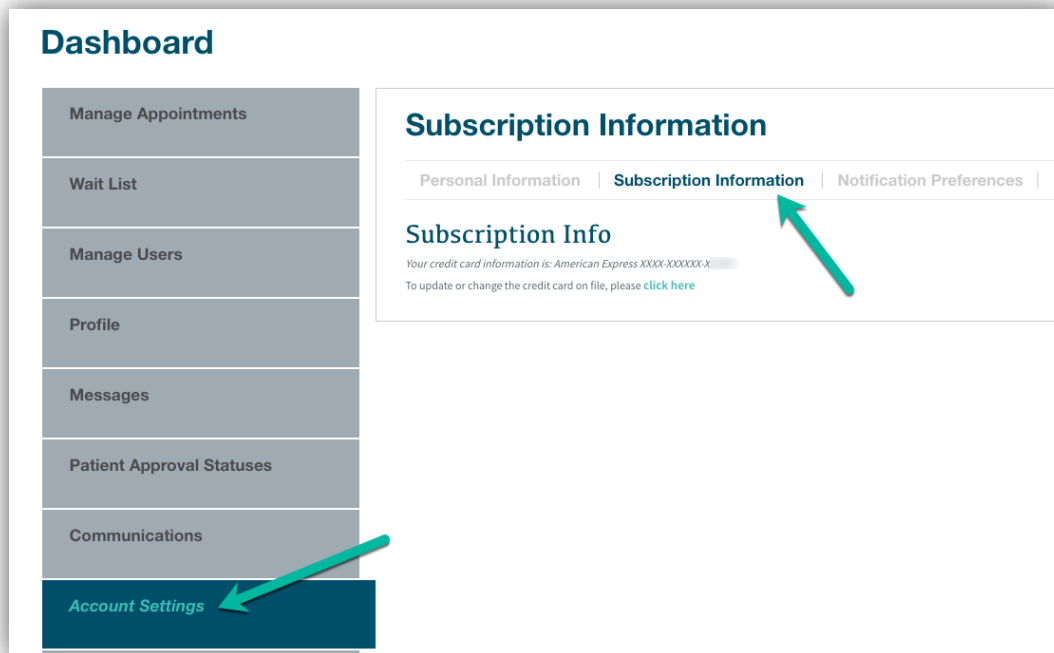
This page allows you to review and edit your credit card information. You will only see this page option if you are paying for your subscription via credit card.

### Best Practices and Examples:

- View which credit card is currently being charged for your Everseat subscription
- Update your credit card information to a new card

### Directions for Updating Notification Preferences:

Step 1: Click the 'Account Settings' tab and select the 'Subscription Information' page.



Step 2: Use the following link to change or update the credit card you have on file.



## Subscription Information

Personal Information

**Subscription Information**

Notification Preferences

### Subscription Info

Your credit card information is: American Express XXXX-XXXXXX-X

To update or change the credit card on file, please [click here](#)

