everseat

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.

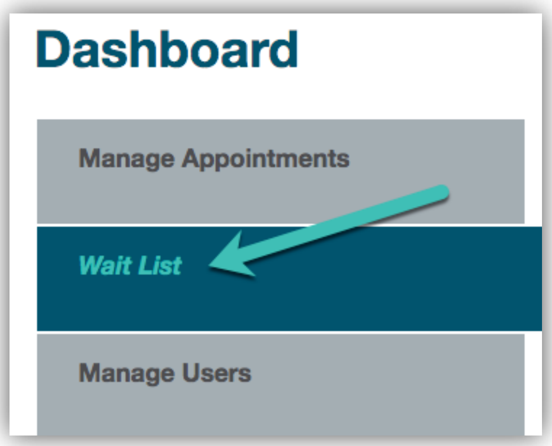
Best Practices and Examples:

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

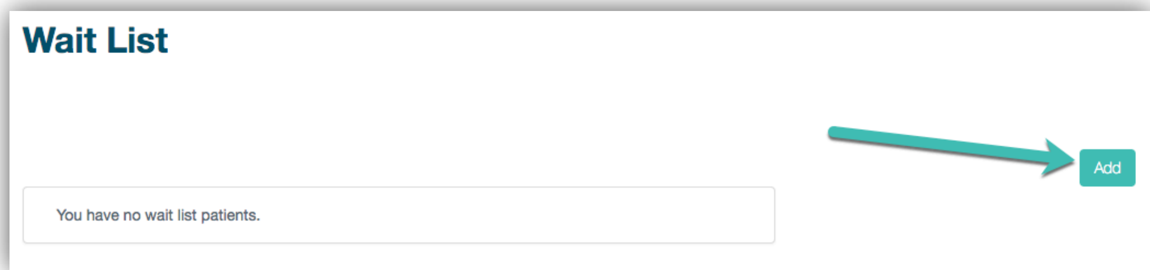
1. A patient has an appointment scheduled but wants to be notified if an earlier date becomes available
2. A patient is looking to schedule an appointment for a specific day of the week or time (i.e.: Monday mornings or Tuesday and Thursday afternoon)
3. A patient will be on vacation next week but wants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

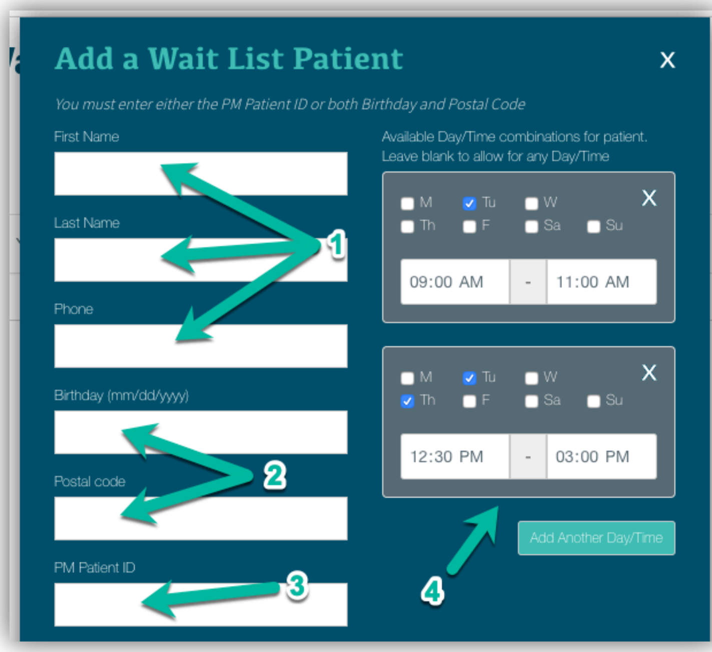


Step 2: Select 'Add' to add a patient to the Wait List.

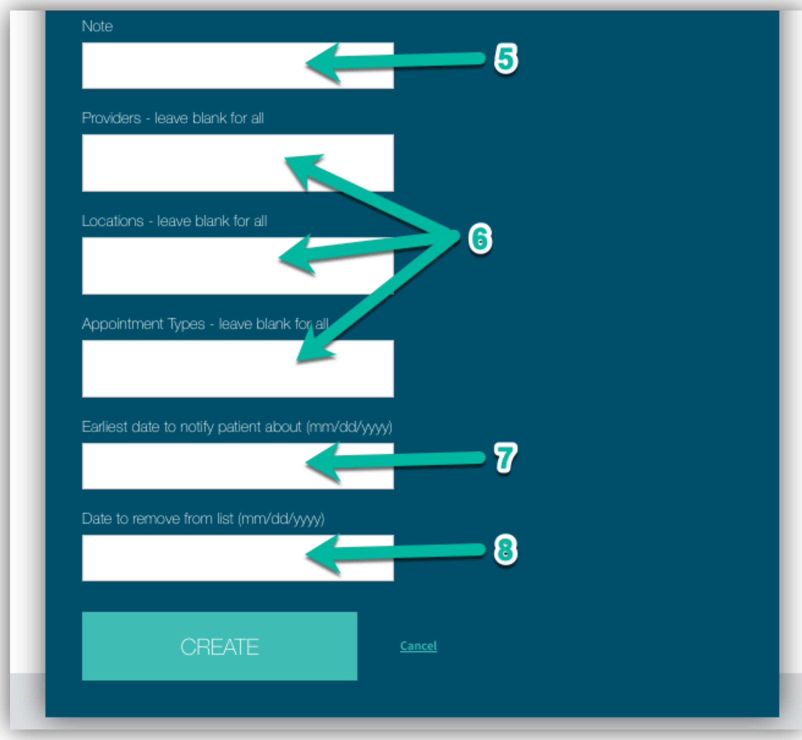


Step 3: Complete the information in the form.

1. First Name, Last Name, and Phone Number are required fields.
2. **OPTION 1:** To match a Wait List Patient with an existing patient record, input the patient's birthday and postal code, **OR**
3. **OPTION 2:** To match a Wait List Patient with an existing patient record, input the patient's PM Patient ID
4. 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.

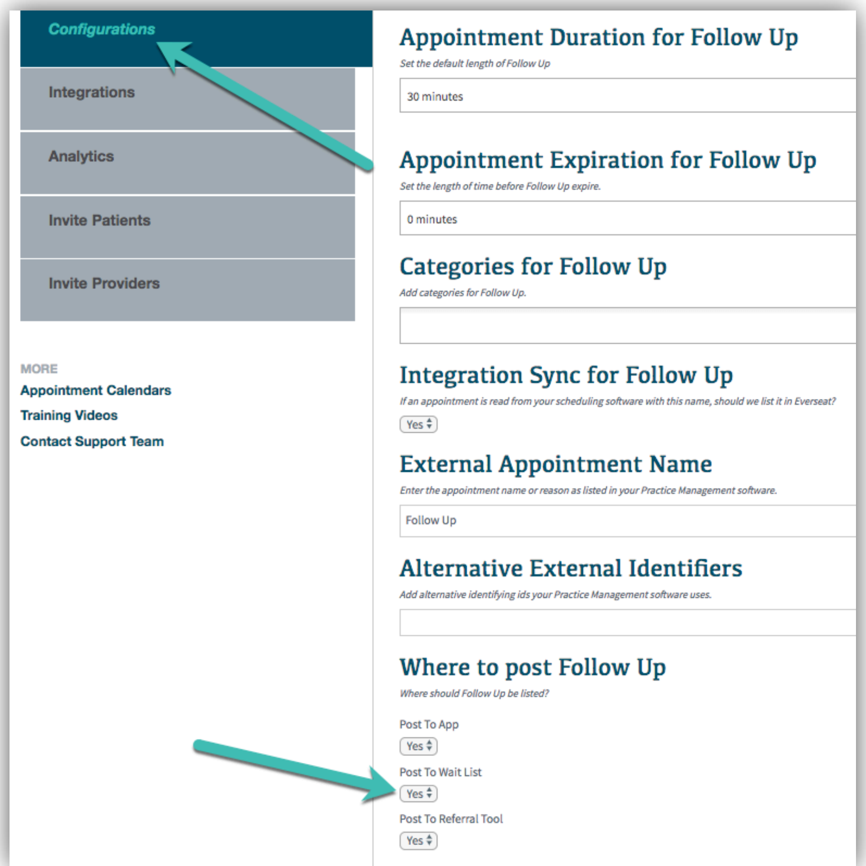


5. The ‘Note’ field is for internal purposes and appears when the patient requests an appointment through the Wait List. Often this is used to provide additional details about the reason for visit.



6. If the patient is looking for a specific provider, location, or appointment type, you can select the options in these fields. Leave them blank to make all options available.
7. This is the earliest date that the patient will receive notifications of available appointments. The patient will only receive notifications about appointments *after* this date.
8. The patient will be removed from the wait list automatically if they book an appointment via the Everseat wait list. 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.

Step 4: To allow your future synced appointments to be available for Wait List patients, go to the ‘Configurations’ tab and update the settings for your appointment types to “Post to wait list.” Select each individual appointment type and set ‘Post to Wait List’ to ‘Yes.’



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.

everseat

Note: Patients cannot receive more than 2 text messages within 24 hours, and messages are sent at least 2 hours apart. This is to prevent patients from receiving too many automated messages.