Online Booking

I. Portal Name Registration

To start using online booking, you will need to set a site name and a URL for your site.

Open the Admin panel and scroll to the IndiviCare Section to find **Portal Name Registration**.

IndiviCare
Audit Log Report
IndiviCare Log
Credentials
Default HCV Account
Link
Notify Manager
Portal Name Registration
Preventions
Workqueue

From this page, you can set the name of the clinic that will be displayed when patients access the link as well as the final portion of the URL.

In the **Clinic Name** field, set the name to be displayed when a patient is accessing the link to make an online appointment. **(A)**

In the **New Portal Name**, set the final portion of your online booking URL that will help identify your site. Click 'Save' to create the new URL. **(B)**

If you are attempting to use a URL that has already been saved or created elsewhere, you will be notified that the name is unavailable.

New Portal Name

examplesite	Save

❌ Name unavailable, please choose another

To apply the URL, click the 'default' button next to the selection. This will be your active link for patients for online booking. **(C)**

Portal Name Registration | Close

Online Booking Portal URL

https://portal.indivicare.ca:19053/b/trainingmanual

Please note that the portal url is generated based on default name selected below.

Clinic Display Name

| Clinic Name | **(A)** | Save |

New Portal Name

| Enter a portal name | **(B)** | Save |

Please Note:
- Portal names may only contain lowercase letters, numbers and dashes.
- Saved names are permanent.

Registered Names

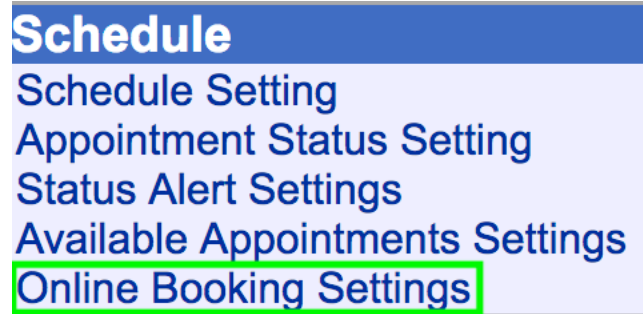| Default | 14 |
Default	indivicasupportservicetest
Default	examplesite
(C) Default	trainingmanual

You can copy the link at the top of the page or click on it to be taken to the online booking portal to see what it looks like and for testing.

II. Online Booking Settings

Before you give the link out to patients, consider changing the default settings for online booking. When making any changes, always remember to click **Save** in the bottom right corner of the Online Booking Settings window.

To begin, open the Admin and open **Online Booking Settings** in the Schedule section.

Schedule
Schedule Setting
Appointment Status Setting
Status Alert Settings
Available Appointments Settings
Online Booking Settings

The **General** settings include:

General

4 ⌄ Demographic appointment threshold (in hours)

⚪ Create unmatched demographics

🟢 Confirm appointments automatically

i.   **Demographic appointment threshold (in hours).** This value how close to another, already-existing appointment of their own that a patient could book another appointment. For example: If your threshold is set to 4 hours, a patient who booked on 1pm would not be able to book another appointment through online booking slot before 5pm.

ii. **Create unmatched demographics.** This toggle (disabled by default) would allow a patient who does not successfully match to an existing chart on your site to create a new demographic chart when booking online.

iii. **Confirm appointments automatically.** This toggle (enabled by default), sends a confirmation email to a patient confirming that their appointment was created in their selected time slot. If you disable this function, you will be able to manually select whether an appointment made through online booking is confirmed or rejected.

Appointment Creation

Mark the required fields.

- ● Patient First Name
- ● Patient Last Name
- ● Patient Gender
- ● Patient DOB
- ● Patient HIN
- ● Patient Phone Number
- ● Patient Email
- ● Reason

Appointment Creation toggles dictates which fields are mandatory for the patient to fill out when they are creating an online booking appointment. The patient can still fill out these information fields if you have chosen not to make them mandatory. Mandatory fields are marked with a red asterisk (*) from the patient's perspective.

Appointment Auto Confirmation

Mark the required fields.

- ● Patient First Name
- ● Patient Last Name
- ● Patient Gender
- ● Patient DOB
- ● Patient HIN
- ● Patient Phone Number
- ● Patient Email

Appointment Auto Confirmation switches dictate which fields will be used for sending the automated appointment confirmation email. The information the patient enters will be checked against the information on their demographic page and if the required fields are met, they will be sent a confirmation email when booking. This also requires that they a) have a saved email and b) that your site has 'confirm appointments automatically' checked off.

Demographic Creation

Mark the required fields.

Disabled fields are required by the system for demographic creation.

- ● Patient First Name
- ● Patient Last Name
- ● Patient Gender
- ● Patient DOB
- ● Patient HIN
- ● Patient Phone Number
- ● Patient Email

Demographic Creation toggles are only relevant if your site has elected to allow new charts to be created through online booking. If a new chart is to be created when the patient is booking online, they will need to provide the information that is toggled on.

Patient Matching

Mark the required fields.

◯ Patient First Name	🟢 Patient Last Name	🟢 Patient Gender	🟢 Patient DOB
🟢 Patient HIN	◯ Patient Phone Number	◯ Patient Email	

Patient Matching toggles dictate which information fields must **exactly** match the information on the patient's demographic chart in order for the patient to be able to book an appointment. If you find that patients are having difficulties with matching with a specific field (eg: they are providing a colloquial first name instead saved name on their chart) you can toggle these options off to allow more lenience when matching.

Confirmation/Cancellation Template

◯ Combine confirm/reject templates

The **Confirmation/Cancellation Template** toggle allows you to use a single template for both the Confirmation/Cancellation emails that are sent in response to online booking. If this is toggled 'on', only one template will be shown.

Rejection Template

IndiviCare **PORTAL** Appointment ${online_booking_status}

The following pending appointment was ${online_booking_status} at ${date} by ${current_user_name}.

Rejection Template is the email that is sent when a user manually rejects an appointment made via online booking. This is only relevant for sites who have chosen to toggle 'confirm appointments automatically' **off**.

Confirmation Template

Confirmation Template is the body of the email that is sent when an appointment is either automatically or manually confirmed when a patient makes an appointment through online booking.

III. Template Management

Begin by opening the Admin panel and heading to **Schedule Setting** in the Schedule section.
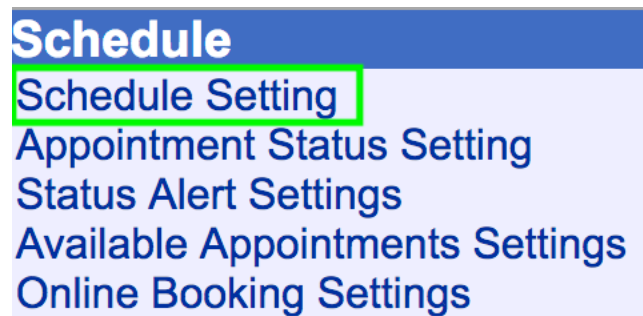
Choosing which times are available for patients to book online is a combination of Template Code Settings, Templates, and schedules that you have applied the templates to.

If your site already uses templates to dictate which time slots are available for certain kinds of appointments, this will look familiar. You will either be modifying an existing template code or creating new ones for use with Online Booking here.

Begin by clicking on **Template Code Setting**

Select a provider:

---None---

Or do:

Holiday Setting

Template Code Setting
Template Setting for   Public

If you have an existing code you would like to work with, pick it from the drop-down menu, then click **Edit** to populate it's information.

Template Code: ✓ 1 |15 Minute Appointment   Edit
                   2 |30 Minute Appointment
                   3 |45 Minute Appointment

If you would like to create a new code, skip this first step. In either case, you will then fill in the information in the next fields to define the duration, name, and other details of the appointment. More information can be read in our training manual called **Schedule Setting** which is available from our training materials page. You can access this page by clicking **Resources** or **Help** from the main schedule page.

I N D I V I C A

Template Code: | 1 |15 Minute Appointment ⬍ | Edit

Appt Template Code	
Code:	O
Description:	15 Minute Appointment
Duration:	15 mins.
Color:	pink e.g. #1b2c3d, ivory.
Booking Limit:	1 Not available with online booking.
Online Booking:	⦿ Enabled ○ Disabled ☐ Default
Limit Type:	⦿ Off ○ Warning ○ Same Day ○ Same Week

Delete   Save   Exit

Code: only one char.
Description: less than 40 chars.
Duration: unit is minute.
Color: html code for background color.
Booking Limit: # of simultaneous appts in slot
Online Booking: if enabled schedules with this code will be available
for online booking

W3Schools Color Chart

The **Code** is the single-character code to be used later when setting up your template. This is a case-sensitive field, so mark down whether you use an upper or lower-case letter for this code.

The **Description** will be shown to patients when they are picking which appointment type they want to book.

Duration is the length of the appointment in minutes.

Color dictates the colour of the tab shown on the schedule slot. You can either write out the colour or use the 'W3Schools Color Chart' to find a hex code for a specific shade of the colour you want to use.

Booking Limit is not used for online appointments. To set the limit on the number of available online booking appointments that can be made for a physician, they will go to **Pref**(erences) and click on 'Online Booking', which will allow them to increase the number of appointments that can be made in a time slot.

Online Booking dictates whether or not this appointment code can be used with online booking. If you check off the 'Default' tab, this appointment will be the automatically-selected appointment type when a patient selects you as the provider for online booking.

Limit Type allows you make sure an appointment can only be made within a certain time period of the day that the patient has selected. If you do not want to set a limit, choose 'Off'.

Click Save to create or edit your template.

Now that you have a template code, you will need to add it to a schedule template. Return to the main Schedule Setting page, then click on **Template Setting** for **Public**.

! Online Booking only currently functions with the Templates in the Public section. We are working on adding provider-specific template options. !

Select a provider:

---None---

Or do:

Holiday Setting

Template Code Setting
Template Setting for Public

From here, you can either edit an existing template or create a new one. To Edit a template, pick it from the drop-down list and click 'Edit'.

Edit

15 Go

Begin by choosing the duration of each time slot. For example: If you normally use 10 minutes per appointment, set it to '10', then click Go.

Provider: Public	P:15 all day |	⬍	Edit

	15 ⬍	Go

Add A Template

Template Name:	Onlinebooking M-T-W	(<20 chars)	
Summary:	15 min, 30 min, Telephone		**Template Code**

00:00	_	_	_	_	01:00	_	_	_	_	02:00	_	_	_	_	03:00	_	_	_	_
04:00	_	_	_	_	05:00	_	_	_	_	06:00	_	_	_	_	07:00	_	_	_	_
08:00	_	_	_	_	09:00	1	1	1	1	10:00	2	2	2	2	11:00	2	2	2	2
12:00	_	_	_	_	13:00	o	o	o	o	14:00	o	o	o	o	15:00	_	_	_	_
16:00	_	_	_	_	17:00	_	_	_	_	18:00	_	_	_	_	19:00	_	_	_	_
20:00	_	_	_	_	21:00	_	_	_	_	22:00	_	_	_	_	23:00	_	_	_	_

Delete		Save	Exit

The **Template Name** will be what is displayed when you are applying it to your schedules.

Summary is shown as a description when applying the template to your schedule as well.

You can click on **Template Code** to remind yourself which code you have available on your site.

To begin applying your codes to the schedule, put the letter or number in the spot you want to make available. In the above screenshot, each empty box is a 15 minute time slot. The 'O' code is a 15 minute, online-booking available template code.

Once you have filled in all the slots you want to apply template codes to, click Save.

Next, return once more to **Schedule Setting**. Pick the schedule you are going to modify from the list of providers.

Select a provider:

---None--- ⬍

Or do:

Holiday Setting

Template Code Setting
Template Setting for   Public ⬍

Any currently applied templates will be shown on the left. Available templates are shown on the right.

Click on the name of the template to select it and a preview of the codes that are affecting time slots will be shown on the right in a small side-bar. Click the ' << ' button to apply the template to a day on the schedule.

Click 'Next' to move on to the calendar screen where you can make modifications to specific days of the year if you need to. Click 'Next' again to finalize the changes and apply them to your schedule.

IV. Patient and Front-Desk Perspective

When you are ready to begin giving out your link to patients, they may have some questions about creating an appointment on your site. From their perspective, the process should look approximately follow these steps:

1. The patient accesses your site's online booking link, which you have provided to them either in a Mass Mailing distributed notification, or some other method of your choosing.

2. The patient picks the provider whose schedule they want to book with and the appointment type. If an appointment type has been set as a default by the physician, it will already be selected. They also set a date range to search for available appointments. At the moment, only one week from the start date can be shown at a time.

3. They then select the date and time slot where there is an available appointment

4. Then fill in their demographic information. Any fields with a red asterisk are mandatory.

When done, the patient can scroll to the bottom and click 'submit' to book. If there's any mismatch of information, the patient will receive a message saying **Unable to match patient record**, at which point they should make corrections or contact the office to inform them of any demographic information changes.

5a. If the patient has a saved email and your site has 'automatically confirm appointments' enabled, the patient will be sent a confirmation email from **noreply@indivicare.ca** using the template you have saved in **Admin > Online Booking Settings**.

The schedule screen will also be updated with the appointment that was created.

5b. If your site is not sending automatic appointment confirmations, an appointment will be created on the main schedule page with 'online booking pending'.
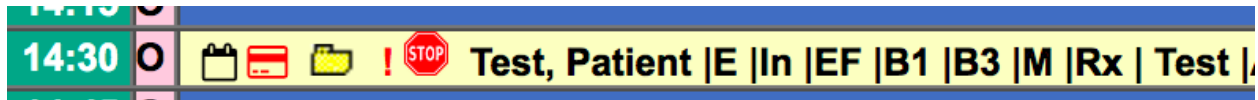
You can then click on the appointment to open it, then either Confirm or Reject the appointment by selecting it from the drop-down menu on the right side of the window.

You can then update the appointment by clicking **Update Appt**. Do not click **Update & Notify** or **Update & Remind**, as those will send out the templates you have saved for appointments in Notify and may confuse the patient.

If rejected, the appointment status will be updated to cancelled on your schedule and the patient will receive an email from noreply@indivicare.ca stating that their online booking attempt has been rejected.

If, for any reason, you need to restrict a patient's ability to use the online booking function, you can do so from their master demographic by checking off the 'Deny Online Booking' option in the bottom right of the chart.

Appointment Information

Deny Online Booking ☑

If a patient with this setting enabled attempts to make an online booking appointment, they will receive a message saying: **Online booking is not available for this patient. Please contact the clinic directly to arrange an appointment.**