ClinicOffice

Patient Booking Guide

SECTION 1

Introduction to ClinicOffice Patient Booking

The Patient Booking is part of the ClinicOffice Online Services and it allows for patient's to book via your website. The Patient Booking can either be linked to a button on your website or placed into an 'iframe' on your site. The Patient Booking caters for the following:

- It allows patients to book appointments
- Patients can cancel appointments
- They can view their appointment history
- They can view their finances with yourself such as invoices and payments made
- View basic information about themselves such as their name, address, dob and contact details
- The ability for patients to upload needed documents to the clinic and view documents pertaining to themselves
- They can send a message to the clinic which is received as an email
- Change their password

Although the Patient Booking has all the above features you can disable different parts if you do not want them to have access to it. For example, you can prevent then from seeing past appointments, their details you have on record or their finances.

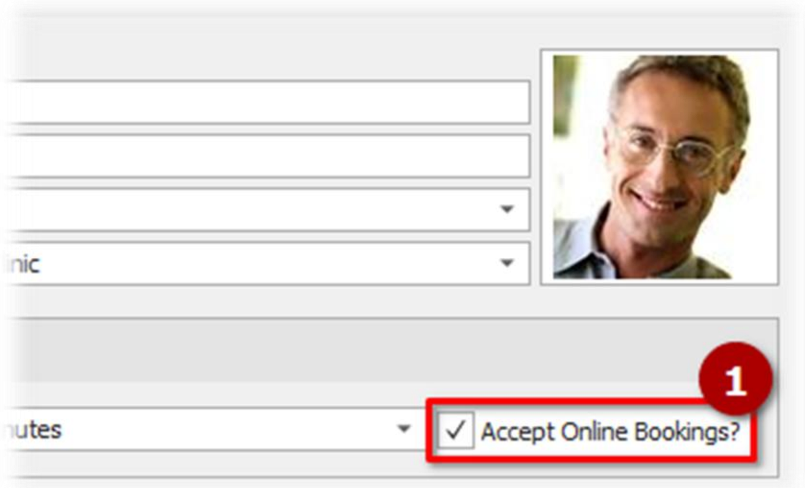
Preparing the Patient Booking

Before patients can start using the Patient Booking there are a few settings listed below that we strongly advise checking. This does include setting both within the main ClinicOffice application and the Web edition side.

NOTE - You may need to be either the administrator or request that an administrator in ClinicOffice grant you access before you can go through this. You will need access to at least the following sections: '**Staff**' section and editor, '**Types & Categories**'; '**Assign Practitioner to Appt Types**', '**Assign Rooms to Appt Types**'; '**Settings – Clinic**', '**Settings – Global**', and '**Emails – Manage Email Accounts**'.

If your Patient Booking system has already been set up by another user and you wish to go through how the patient logs in and uses the patient booking system, please skip to Section 2 of this guide.

(1) Selecting which staff members can be booked online



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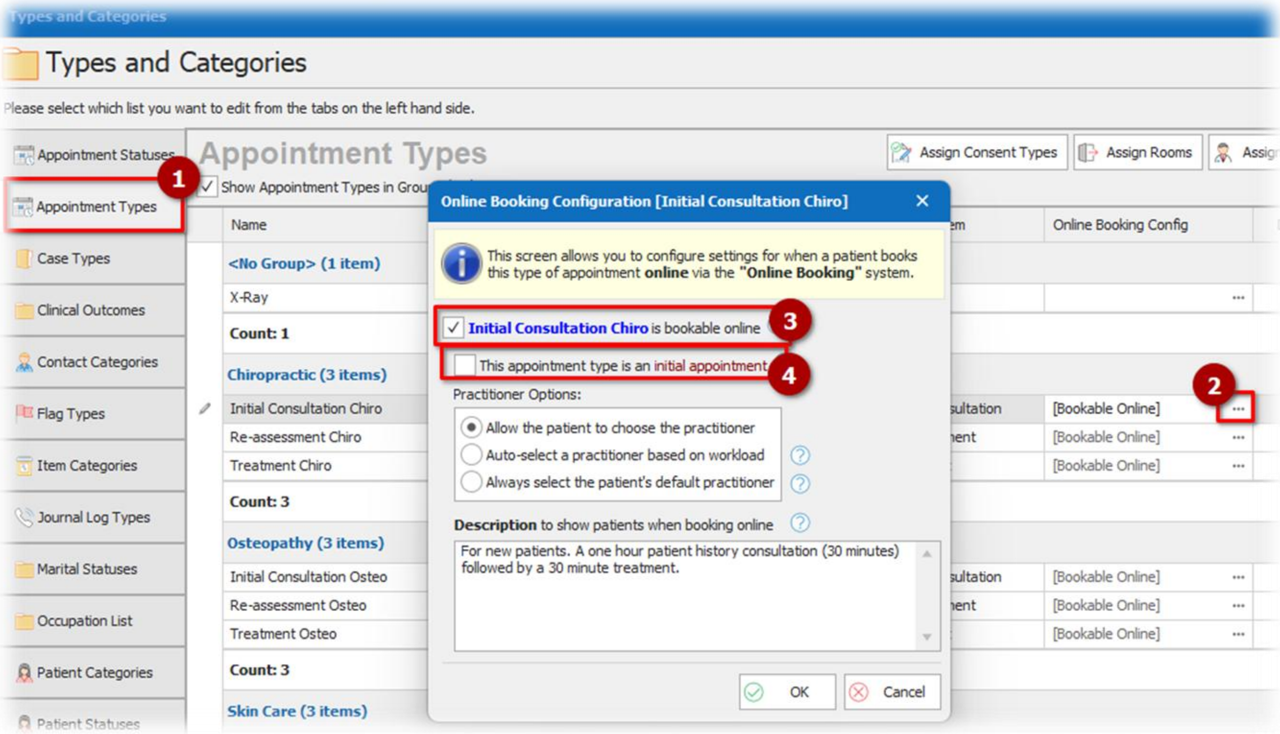
[1] Go to **Staff Members** area in ClinicOffice, open up a Staff Member and you will see the '**Accept Online Booking**' checkbox.

If the box is checked, the Staff Member will be visable online to patients booking their own appointments.

(2) Restricting patient's choice of appointment types online



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Go to: ClinicOffice > **View** tab > **Types and Categories** > [1] **Appointment Types** > [2] **Bookable Online** > [3] **'…is bookable online'**

You can enable/disable a particular appointment types for the online patient booking. You can also nominate an appointment as being an '…**initial appointment**' [4], which can be used so that new patients can only book these appointment types. See the "**Registration**" setting "**New Patient Booking Policy**" under the "Admin Settings" section of this guide.

(3) Assigning Appointment Types to Practitioners

This step is only necessary if certain appointment types can only be handled by specific practitioners.

Go to: ClinicOffice > **View** tab > **Types and Categories** > **Appointment Types** > '**Assign Appt Types -> Practitioners**'

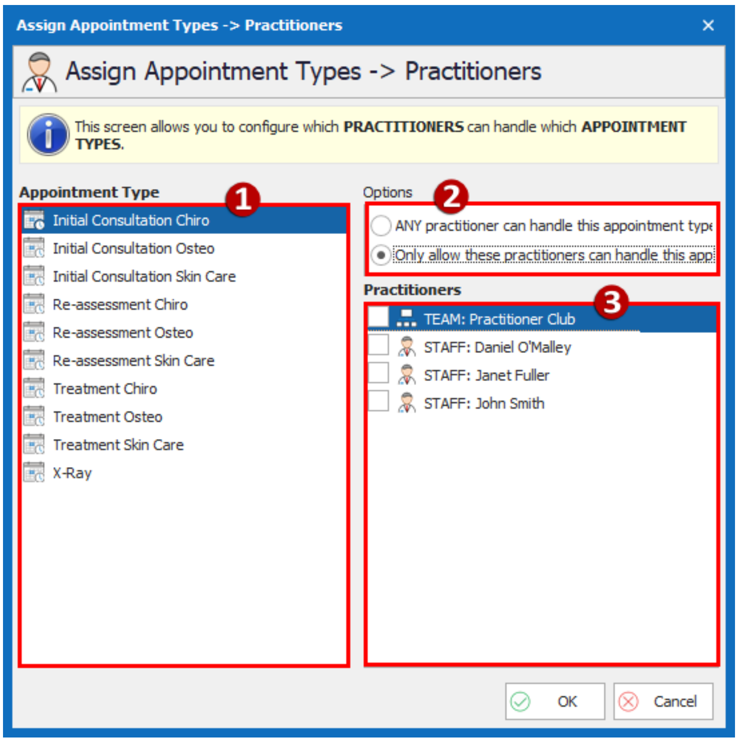
[1] On this left hand panel, please select the appointment type.

[2] Under the **Options**, select "**Only allow these practitioners to handle this appointment type**".

[3] Tick the staff members that can perform this appointment type. Alternatively if you have a predefined staff member group you can select this instead.

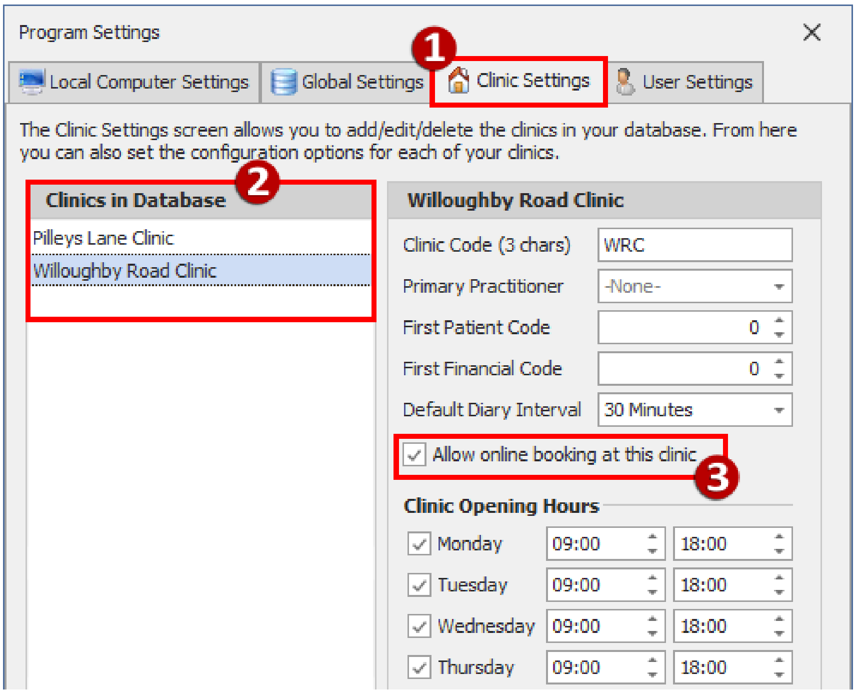
[4] Once you are finished selecting who can perform this type appointment, go to the next appointment type and repeat step 1 to 3 again.

The system Patient Booking system will now know who can perform what appointment type.



(4) Selecting which clinic's are bookable online

Go to: ClinicOffice > **View** tab > **Program Settings** > [1] **Clinic Settings**



From this screen (shown to the LEFT) you will need to select the [2] clinic you wish to be bookable online and then tick the option [3] '**Allow online booking at this clinic**'.

If you do not want the patient to select the practitioner in the booking process then you will need to make sure that a "**Primary Practitioner**" is set for the clinic.

NOTE: You will still need to do this even if you just have the one clinic.

You will note that from the Clinic Settings screen there is the option to set the opening hours. The Patient Booking system will never look at these hours as it references the practitioners working hours. The opening hours on the Clinic Settings are purely used for the Room view when a staff member logs into either the ClinicOffice Hosted edition or the Web edition.

(5) Configuring a default email

You will need to do this so that the booking system knows which email account to send messages from, such as sending out booking confirmations. The setup process for this will vary depending on whether you have the Email Manager module or not for ClinicOffice.

Setup Without Email Manager

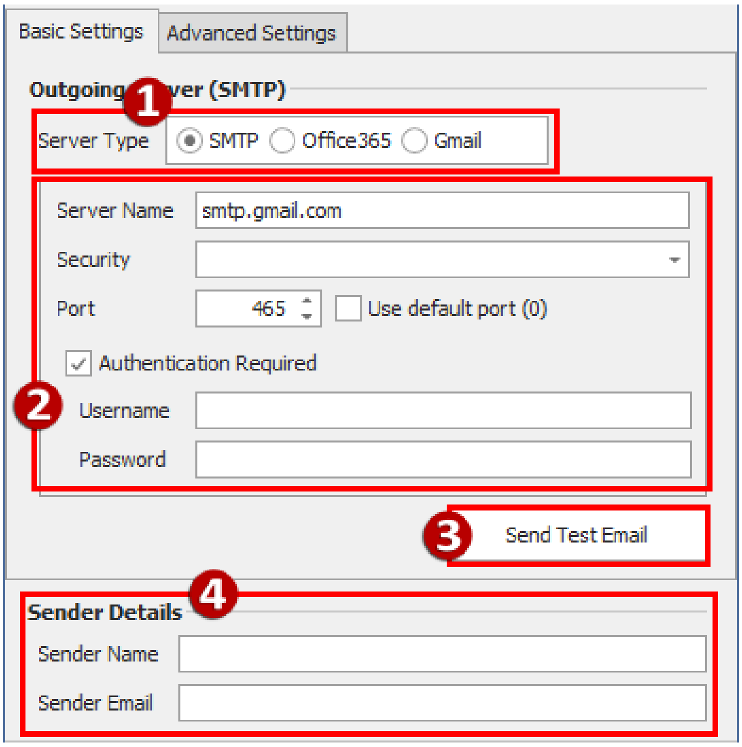
Go to: ClinicOffice > **View** tab > **Program Settings** > **Global Settings** > **Setup Email**

[1] Select **Server Type** which can be **SMTP** for most email accounts but if you a **Office365** Business Account or a **Gmail** account you can select these.

[2] If you select either Office365 or Gmail, just login to your account but if you selected SMTP, please enter in the server details for your email. If you are not too sure what these are, please contact the company that provides you with your email. The username and password are the account details for your email.

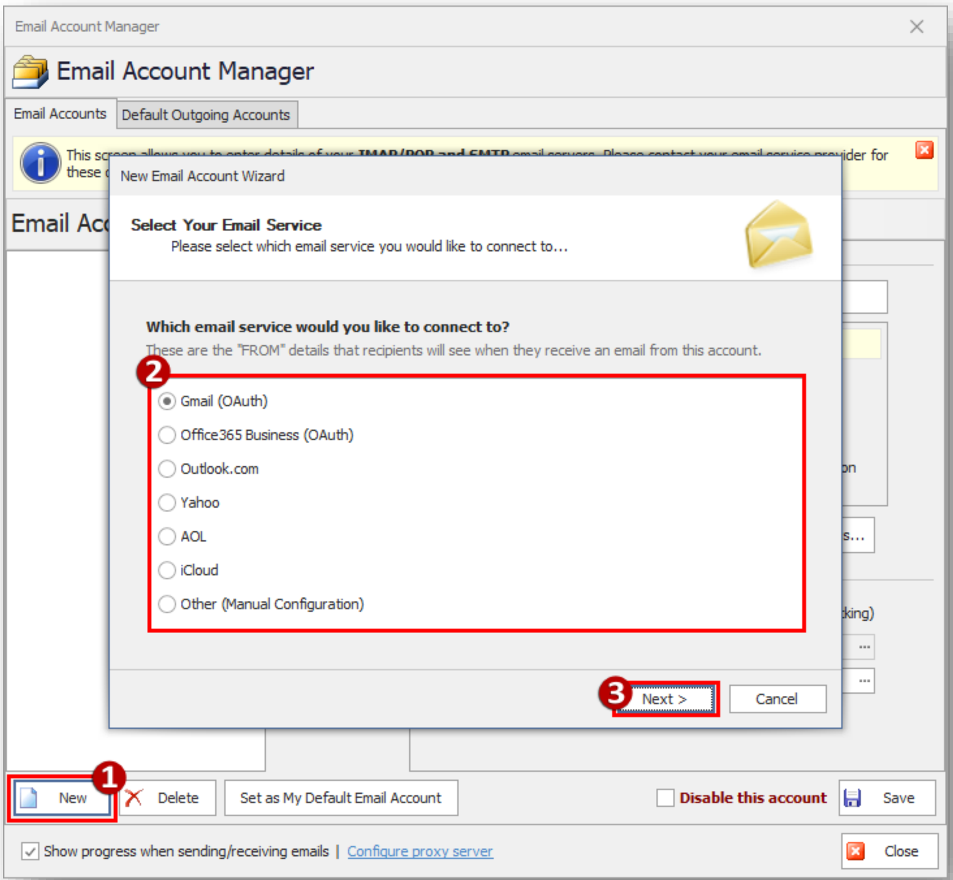
[3] Click **Send Test Email** to make sure that the account details are correct and working. This way the Patient Booking system will be able to use your email account correctly.

[4] Specify the **Sender Name** and **Sender Email**. This can be your company name and again your email.



Setup With Email Manager

Go to: ClinicOffice > **View** tab > **Program Settings** > **Global Settings** > **Setup Email**



[1] Click the **New** button to open the New Email Account Wizard

[2] Select the email service that you use from the predefined list or click other if your email provider is not there

[3] Click the **Next** button and on the next screen it will vary depending on what you selected in the previous step. The difference are mentioned below.

Office 365: If you select this then then you just need to login to either of these accounts.

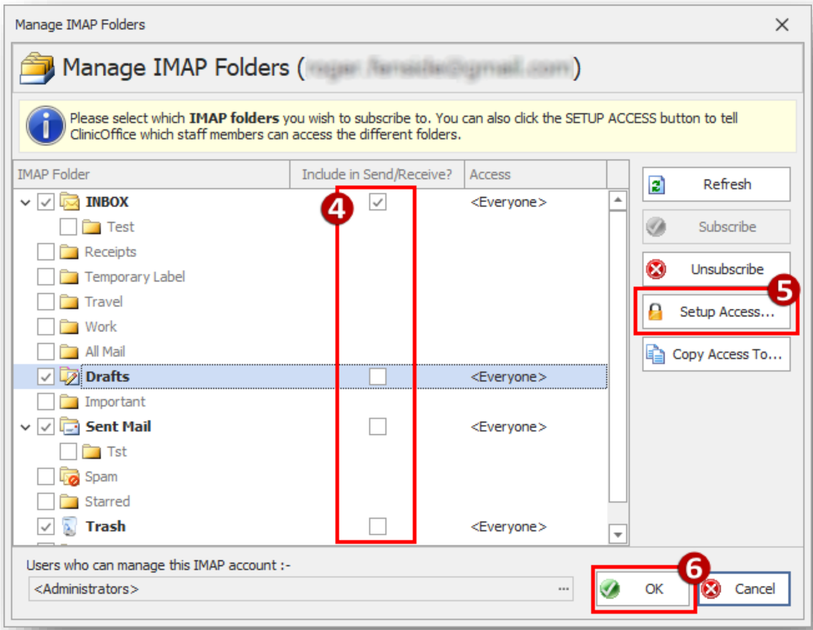
Gmail: If you select this then then you need to generate an '**App Password**' and enter this in, along with your email to connect ClinicOffice to your email account.

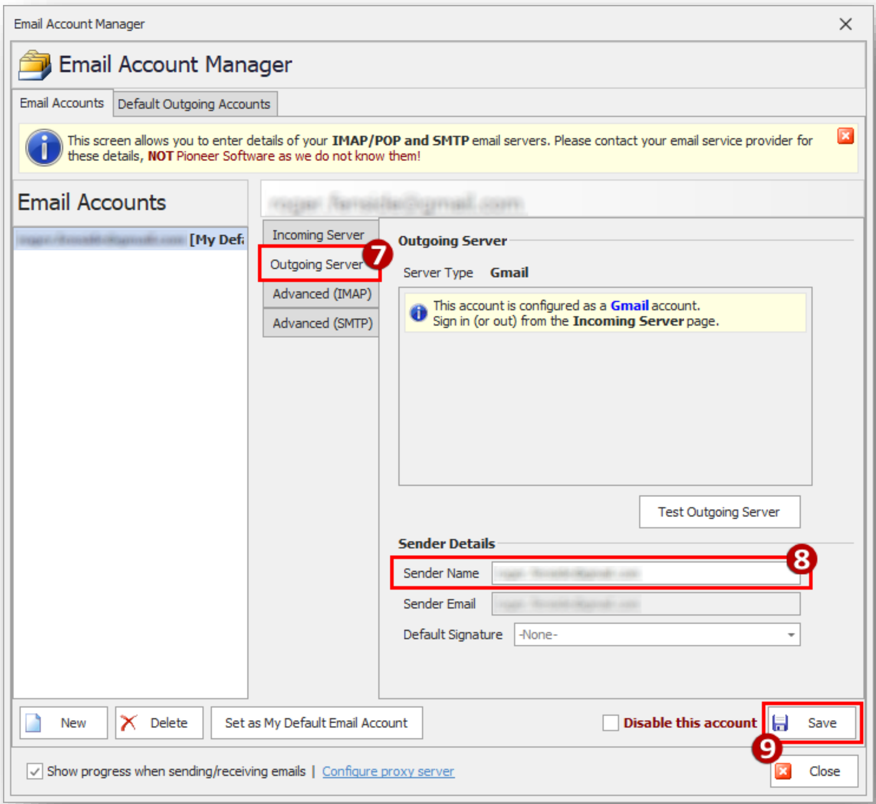
Outlook.com, Yahoo, AOL or iCloud: If you select any of these options then in the next step you will need to specify what you want to name the account and the step after that enter your account address and password and the preferred sender name.

[4] Once you have connected to your email server, select which folder you wish to synchronise with by ticking the '**Include in Send/Receive**' checkbox.

[5] You can specify who has access to these folders by selectin the folder i.e. Inbox and clicking the **Copy Access To...**

[6] Once you are happy with this click **OK**





[7] Go to the **Outgoing Server** tab

[8] Change the **Send Name**

[9] Click **Save** once finished

With ClinicOffice now configured with your business email, the Patient Booking system can utilise this when emailling a booking confirmation message to patients.

(6) Enable Patients to Self-Register

You can allow for new and existing patients to self-register for the Patient Booking service. There is also a way to enable online booking via ClinicOffice. Both options will be discussed below.

Go to: ClinicOffice Web > **Settings** > **Admin Settings** > [1] **Registration**

[2] **Existing patients setup online access** – An existing patient is someone whom already has come for an appointment in the past and you have on record but as of yet they are not registered for the online booking. When you enable this option it will allow them to register themselves.

[3] **New patients can register & setup online access** – When enabled, patients who have never been to the clinic before can register online. You will note that when you enable this, the options 4 to 8 (as shown above) will appear.

[4] **Require Email Confirmation for New Patients** – By default the patient booking system will always require a newly registered patient to confirm their appointment before than can complete their appointment. This generally is recommended. You can select though to disable this if the patient is booking an appointment via something like an iframe or disable it completely so that no validation of their email is required for them to create an account.

[5] **Default clinic for new patients** – Allows you to specify the clinic the new patient will be assigned to after they have registered.

[6] **New patients can select clinic** – Allow the patient to select which clinic they wish to be assigned to. This is useful if you have more than one clinic site.

[7] **Default status for new patients** – Set the patient's default status after they registered.

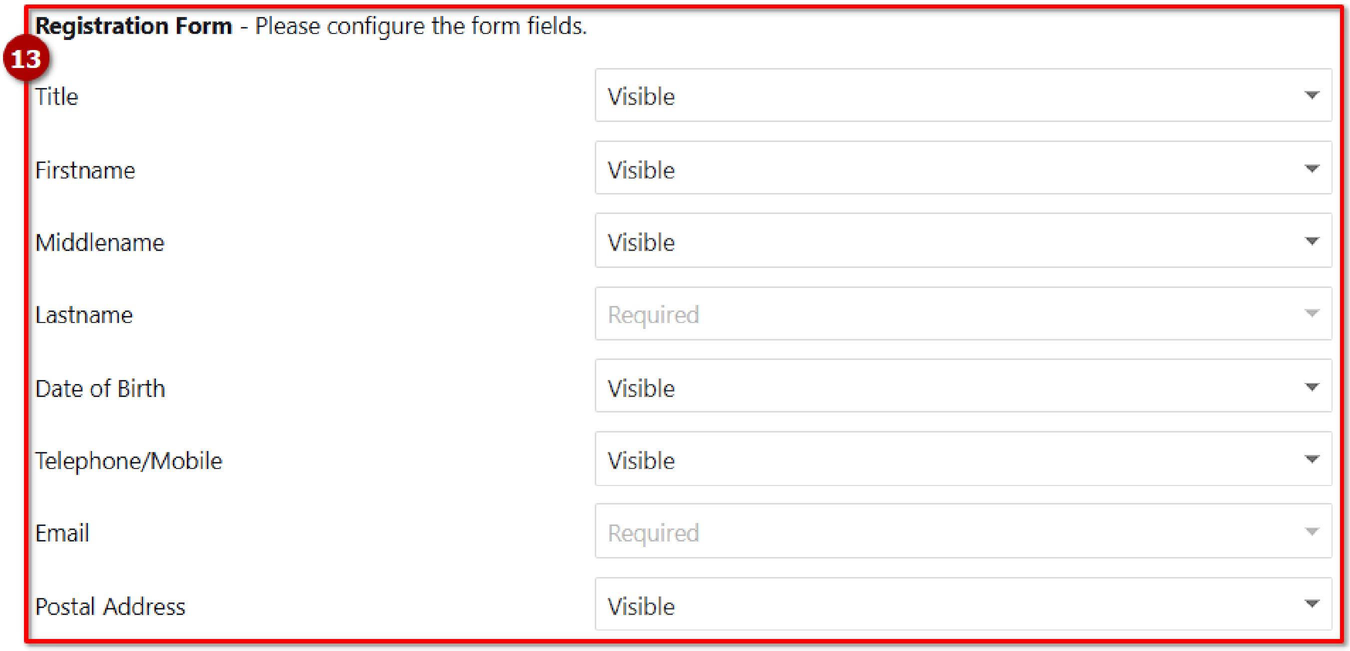
[8] **Default category for new patients** – Set the patient's default category after they have registered.

[9] **New Patients Booking Policy** – Allows you to specify whether a newly registered patient can book an appointment. Alternatively, you can specify that newly registered patients can only book appointments marked as an 'Initial Appointment'. Lastly you can set this so that newly registered patients can book all appointment types, the same way an existing patient can.

[10] **Patients Register Link Text Size** – Increases or decreases the size of the patient registration link on the main login page.

[11] **Allow patients to edit their own details** – Patients will be able to view and edit their name, contact and address information once they have logged in.

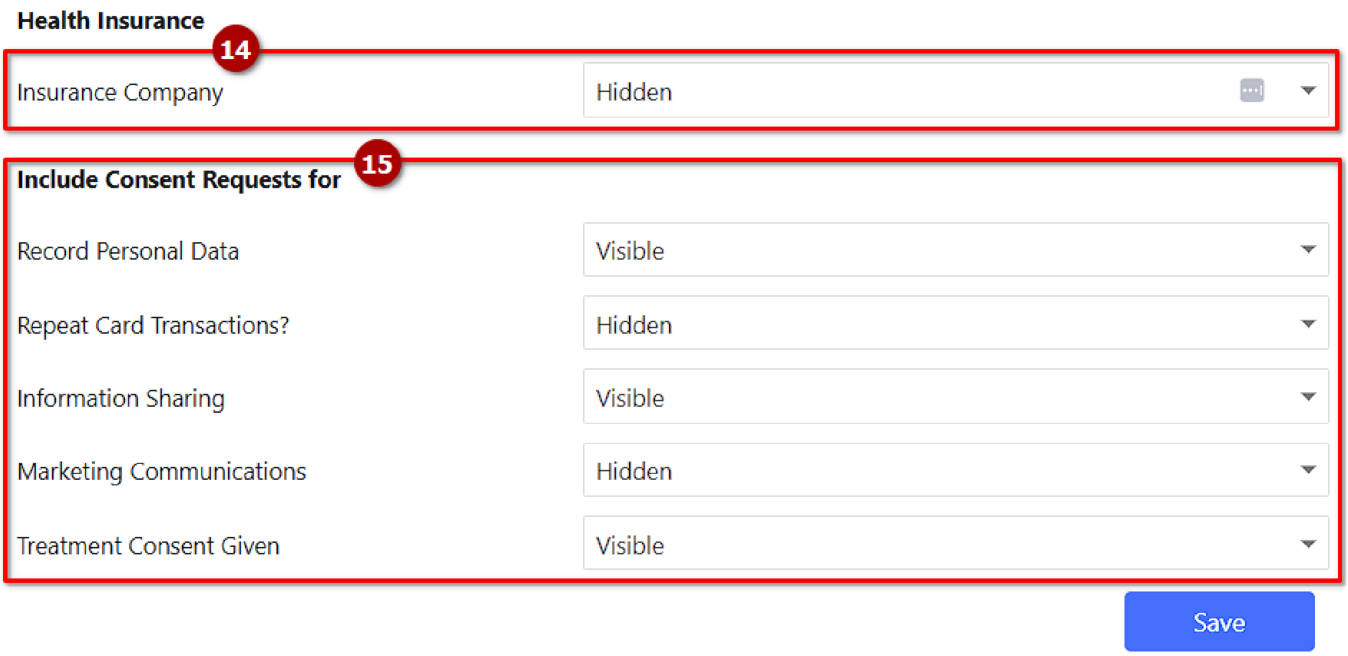
[12] **Email confirmation to patient** and **Email clinic when patient registers** – Both of these options are on by default and allows both the clinic and patient to be emailed the appointment information as soon as the patient has booked an appointment.



Registration Form - Please configure the form fields.

Title	Visible
Firstname	Visible
Middlename	Visible
Lastname	Required
Date of Birth	Visible
Telephone/Mobile	Visible
Email	Required
Postal Address	Visible

[13] **Registration Form** – Allows you to define which fields are required by the patient or are just visible (so optional) or are hidden from the new patient registration form. By default, the only fields that are ALWAYS required are the 'Lastname' and 'Email'.



Health Insurance

Insurance Company	Hidden

Include Consent Requests for

Record Personal Data	Visible
Repeat Card Transactions?	Hidden
Information Sharing	Visible
Marketing Communications	Hidden
Treatment Consent Given	Visible

[14] **Health Insurance** – If you currently use Healthcode with ClinicOffice then you can enable this field so that the patient can specify the insurance company they are with. Note that only the insurance companies you have setup for Healthcode within ClinicOffice will be visible to the patient.

[15] **Include Consent Request for** – Allows you to show any consent fields that you require the patient to give their consent to. For example, permission to record their personal data or for marketing communications.

(7) Enable Two-Factor Authentication (2FA)

This is another optional feature but if you wish to give your staff and patient's an important additional security layer for their accounts then this is certainly worth considering. The Patient Booking system can be set up so that a person can use either their email, SMS or an authentication application like Google Authenticator or Authy.

To enable this go to: ClinicOffice > **View** tab > **Program Settings** > **Global Settings** > **Security Settings**

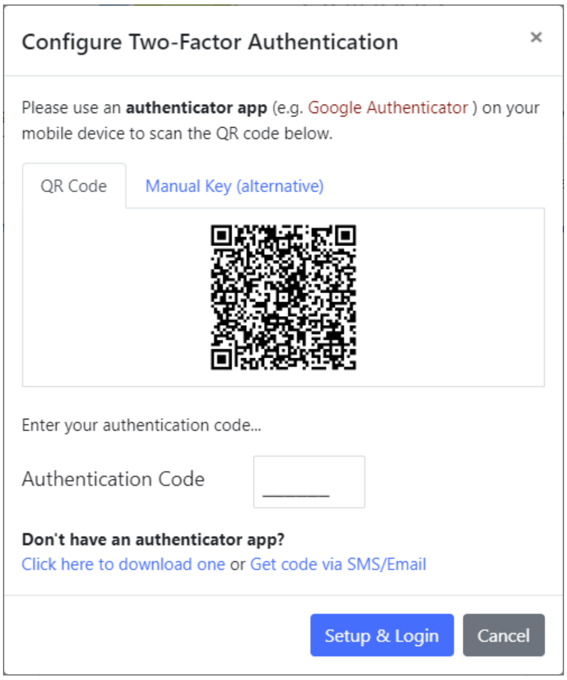
[1] Under the "Two-Factor Authetication (2FA) for PATIENT Logins" select "**Enable Two-Factor Authentication Via Authenticator App or SMS**"

[2] Select the expiry time for the two factor authentication (between 0 to 168 hours)

[3] Click **OK**

When a patient goes to logon for the first time after this change has been made they will be presented with the screen to the right. From this they can go into their authenticator app and select to add a new account. From there they can then scan the QR code presented on the 'Configure Two-Factor Authentication' screen, enter the authentication code that the application presents and click the **Setup and Login** button.

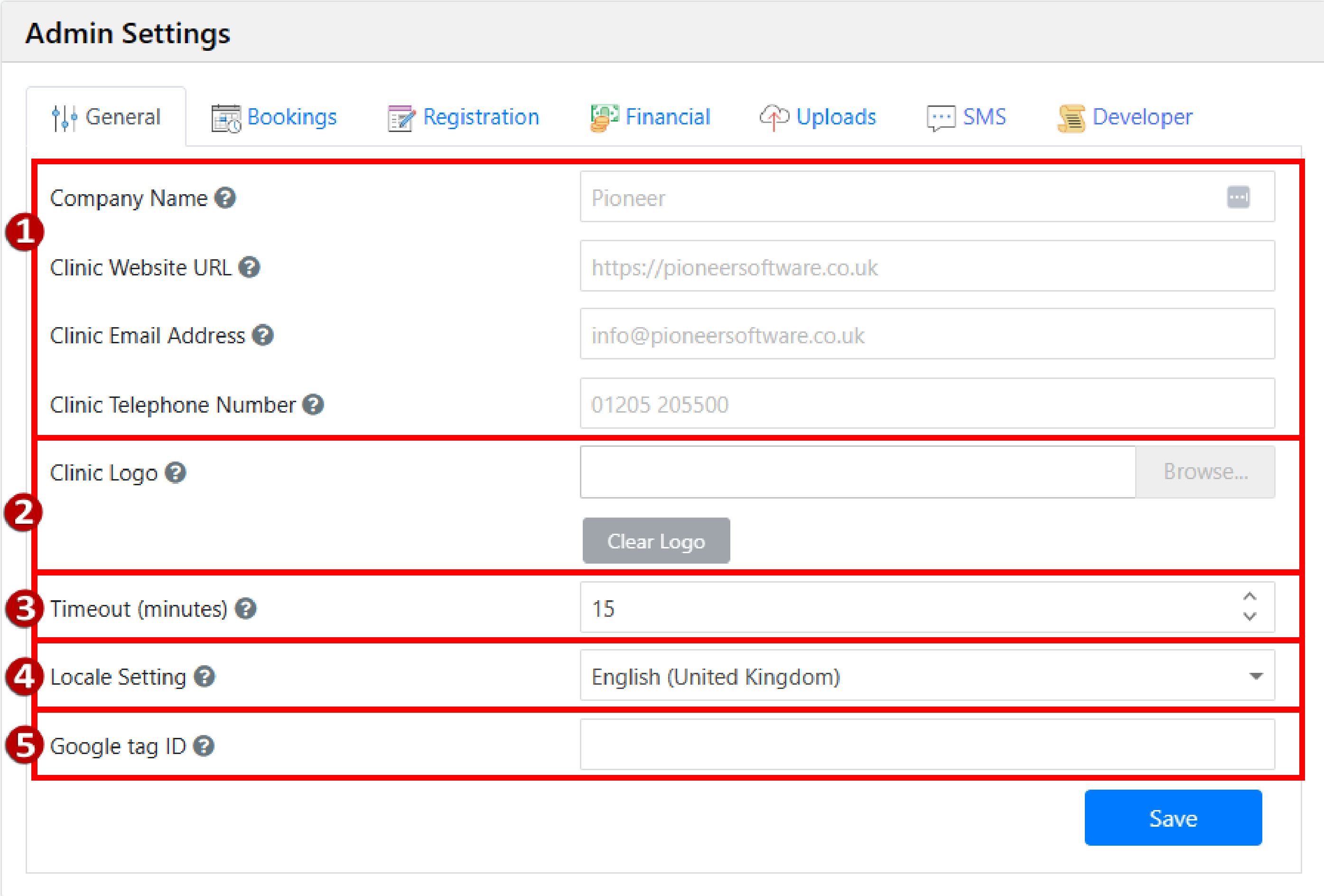
This screen does provide a link for the patient to download an authentication app. Alternatively they can select to get a code via SMS or Email.



Admin Settings

Many options pertaining to the Patient Booking can be found via the **Admin Settings** within the Web edition so it is worthwhile going through this has there are many options available for the patient they you might not be aware of at first glance.

To get to this, go to: **Staff Diary** > **Settings** > **Admin Settings**



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[1] **General**: Change basic settings for your Web Diary such as the Company Name and contact information.

> ***NOTE*** the '**Clinic Email Address**' is the email address used to copy in the clinic on things such as patient bookings so please ensure this is correctly set.

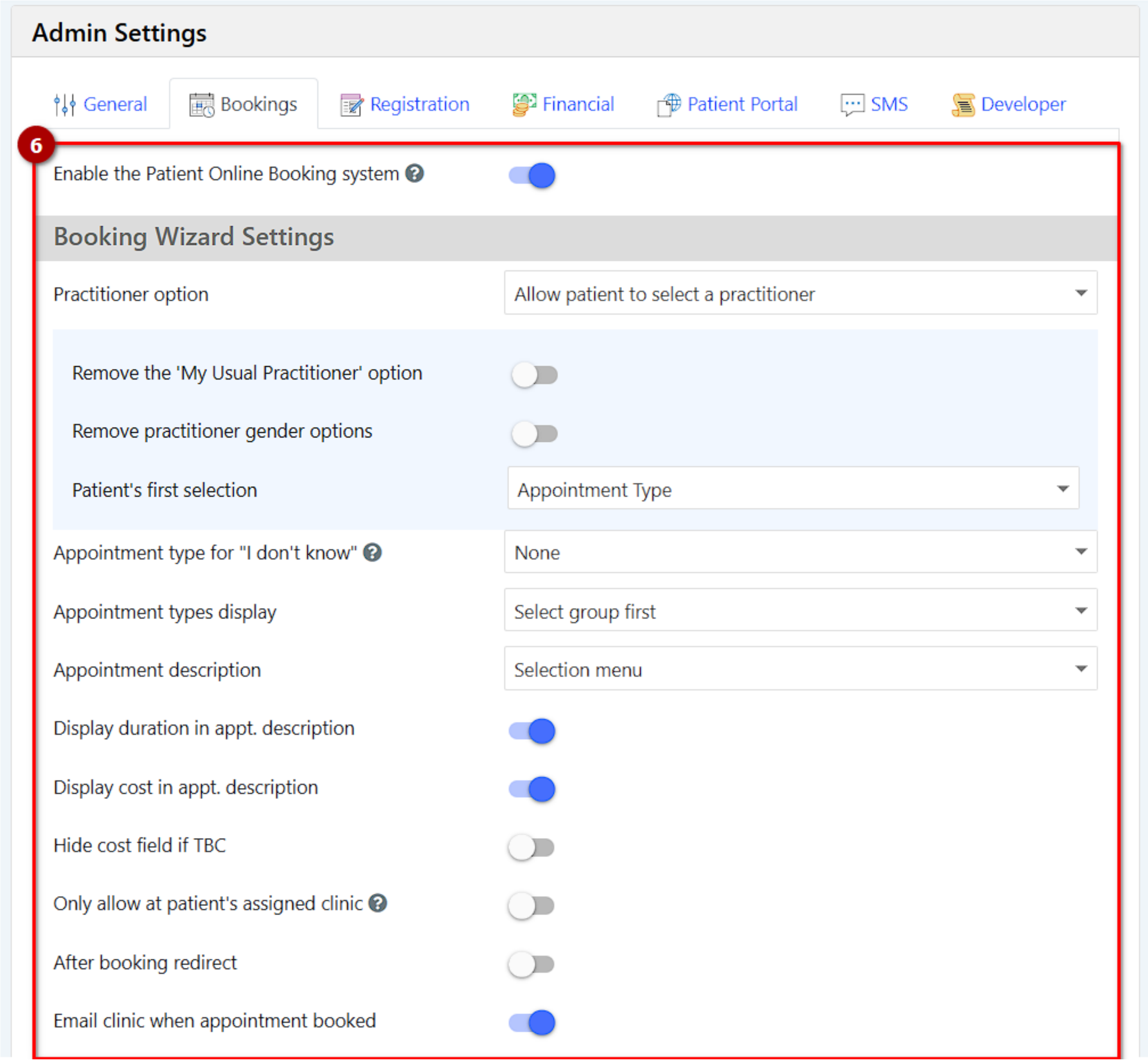
[2] From here you can set the logo that appears at the top of the Web edition and Patient Booking system. To do this, click **Browse** to locate an image on your computer to use as your preferred logo. Click the **Clear Logo** button if you wish to remove the logo you have uploaded.

[3] Users are logged out after a period of inactivitiy, from here you can specify that time period. The limit to how long an inactive session will stay logged in is 1 hour (60 minutes).

[4] Through the **Locale Setting** field you can specify your clinic's location. This will change things such as the date formatting on the diary and the currency based on this setting.

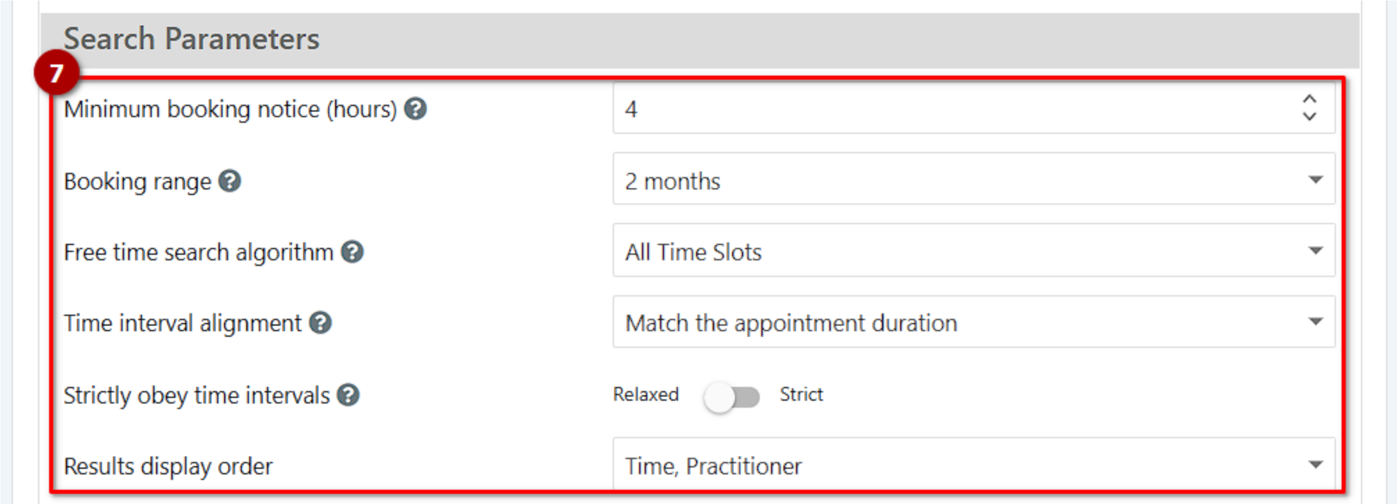
[5] The Google tag ID allows you set your Google tag integration for things such as Google Analytics to record when an appointment has been booked.

[6] The **Bookings** section has more specific settings to restrict/ change the choice of appointments for Patients booking online.



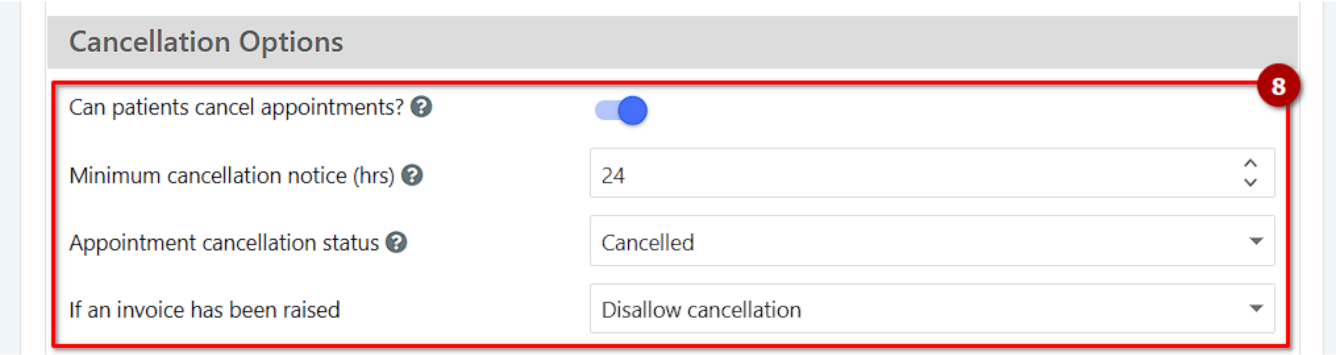
Enable the Patient Online Booking System	This allows for patients to book appointments online. So, if you would prefer for patients not to book online and not to use the Patient Booking, just switch off this setting.
Booking Wizard Settings	
Practitioner Option	Select whether to allow the patient to select a practitioner or only allow them to select appointments based on the availability of the patient's default practitioner. You can also select "Always offer availability for ALL practitioner" which will bypass the option for selecting a practitioner but will allow a patient to select an appointment based on the availability of all practitioners.
Remove the 'My Usual Practitioner Option'	By default the patient can select to book an appointment with whichever practitioner they like. If this option is ticked it will remove the marker next to the practitioner they are assigned to when selecting the practitioner. This does not prevent them from booking an appointment with that practitioner but it will not state that the practitioner is the usual pracititoner either.
Remove practitioner gender options	By default when a patient is booking an appointment and selecting their practitioner they can choose by gender. If you tick this option it

	will remove the patient's ability to select a gender. This is practical if your practitioners are made up of only one gender.
Patient's first selection	Allows you to define what the patient can select first when booking an appointment. Their first option for booking an appointment can either be selecting the preferred practitioner or to select the prefered appointment type. The other options will then follow.
Appointment type for "I don't know"	A patient might not know what appointment type they wish to book an appointment for, so they can select the "I don't know" option. The system still needs to know what the appointment type is so you can define the default here.
Appointment types display	Allows you to change the sort order of the appointment type drop-down list field on the patient's booking screen. There are three different options. 1) **Simple list**: Displays all appointment types in one alpha-numerical sort. 2) **Groups in list**: Groups the appointment types based on appointment type group, which can be set within ClinicOffice under the Types and Categories screen. 3) **Select group first**: Allows the patient to select the appointment type group first, before then selecting the actual appointment type. For example, a multi-disciplinary practice could offer Chiropractic, Osteopathic and Massage type appointments so they would group their appointment types by these. This would mean that a patient would select the group first such as Massage and then select the appointment type such as foot massage.
Appointment description	Displays whether to show the appointment description or not. If you do opt to show it then the description for the appointment type will be displayed along with the appointment type's name when the patient is booking the appointment. To edit the appointment type's description you will need to login to the main ClinicOffice software (Hosted or Local) go to the **Tools** menu > **Types and Categories** > **Appointment Types** and from there change the text within the "**Description**" field.
Display duration in appt. description	When enabled the appointment type's length is displayed along with the appointment's description.
Display cost in appt. description	When enabled the patient will see the default charge amount for each appointment type.
Hide cost field if TBC	If an appointment does not have a default charge assigned to it or the charge is £0 then on booking the appointment the patient would see the term "**TBC**" (to be confirmed) for the price. You can prevent this term from appearing when you tick this option to hide this expression.
Only allow at patient's assigned clinic	When disabled this will allow for a patient to book an appointment at anyone of your clinics. If enabled they will not have a choice of clinic but will be automatically assigned to their default clinic. Note, if you only have one clinic then the patient will not be given an option anyway.
After booking redirect	When enabled the 'URL for redirect after booking' field will become available.
Email clinic when appointment booked	When enabled this emails the clinic when an appointment has been booked by a patient.

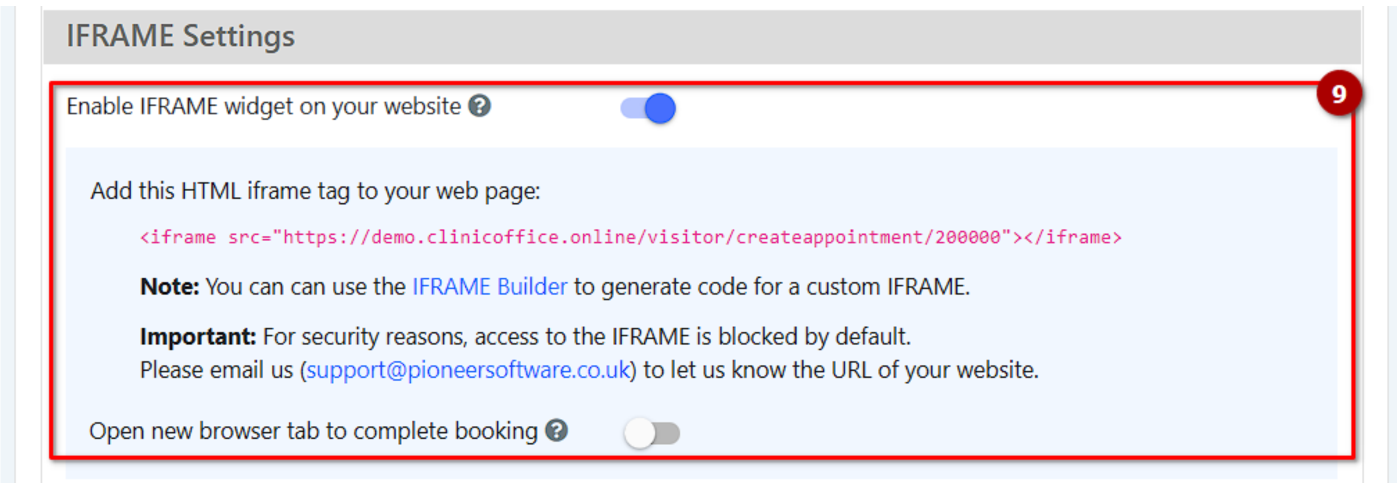


Minimum booking notice (hours)	You can define the minimum number of hours a patient can book an appointment before it commences. This can prevent sudden suprises with patients turning up when you are not expecting them.
Booking Range	Allows you to specify how far into the future you would like a patient to book an appointment.
Free time search algorithm	You can tell the system how to caculate and display the available appointments to the patient. Note that room availibility as well as staff is factored in to any of these. From this you can select from one of the four options below. • **All Time Slots** – This will show all available times to the patient. This means if you have a 30 minute appointment and free time between 13:00 to 15:00 then the system will offer the patient 13:00, 13:30, 14:00 and 14:30. • **Consilidated Start** – This will only show the next available appointment. This means that if you had no appointments between 13:00 to 15:00 it will offer 13:00 only. This is useful when you want to keep all of your appointments in a block. • **Consilidated End** – Similar to 'Consilidate Start' but instead of offering the next available time slot it will show you the last available time slot. For example, if your appointment is 30 minutes long and you have free time between 13:00 to 15:00 then the patient would be offered 14:30 be this is the last 30 minutes available. • **Consilidated Both** – This is a combination of the consilidated start and end. An example of how this works is if there is a 30 minute appointment and you have a free afternoon between 13:00 to 15:00 then they will be offered both 13:00 and 14:30.
Time interval alignment	By default this setting is set to 'Match the appointment duration'. This will mean that if you have an appointment that is 20 minutes long then the times offered will be incremented by 20 minutes. Equally if you have a 30 minute long appointment then the patient will see 30 minute increments of time available. This setting can be changed though to a specific interval. So, for example if you select 15 minutes, then it doesn't matter what how long an appointment type is, such as 20 minutes or 30 minutes, the system will always offer 15 minute increments. You can select between 5 minute intervals up to an hour.
Strictly obey time intervals	When switched onto '**Strict**', the system will only ever offer increments based on the 'Time interval alignment' setting. If you switch this over to '**Relaxed**' it will still obey the intervals set in the

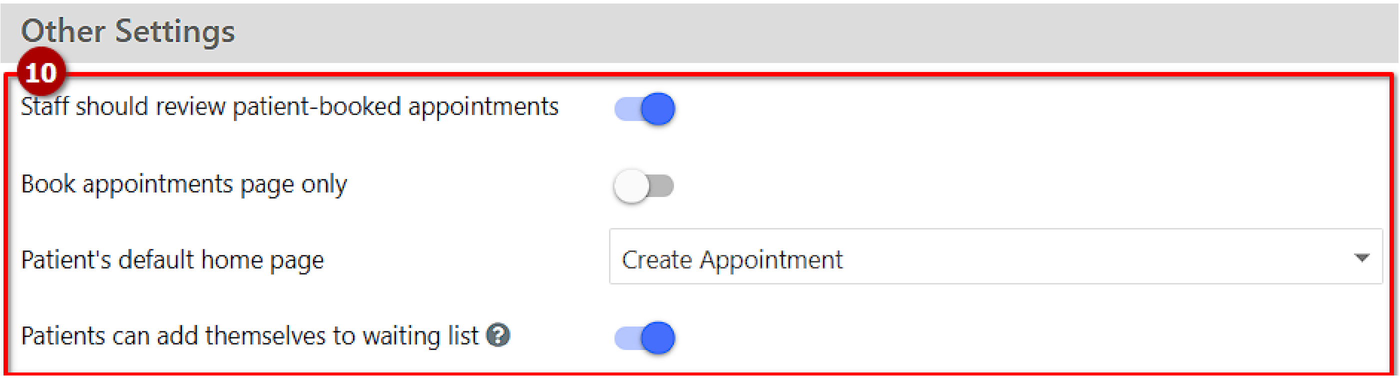
	'Time interval alignment' but if you had a slot of time that will fit the appointment length that does not fit the time interval alignment then it will be offered as an option. For example, if you are looking for 30 minutes intervals but there is a free slot between 13:45 to 14:15 and it is just before another appointment then this will be offered.
Results display order	Select whether to display the appointment available to the patients are ordered by time then practitioner or by practitioner then time.

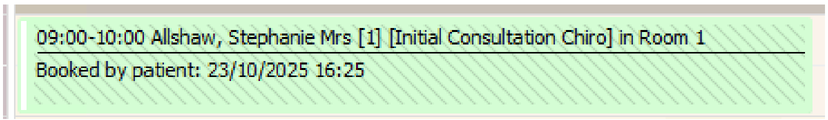


Can patients cancel appointments?	When enabled this will allow patients to cancel appointments that they have booked.
Minimum cancellation notice (hrs)	Prevents patients from cancelling an appointment too close to the time of the appointment.
Appointment cancellation status	Defines the appointment status that would be assigned once a patient has cancelled an appointment.
If an invoice has been raised	From here you can select to "**Disallow cancellation**", "**Allow cancellation**" and "**Allow cancellation & raise a credit note**". If you select the "Disallow cancellation" then if an appointment has an invoice raised the patient will not be able to cancel their appointment via the booking system and instead they will need to contact you. If you select "Allow cancellation" then a patient can cancel their appointment regardless of whether they have an invoice or not. It is still not possible to cancel if the invoice is paid by an insurer. If you select "Allow cancellation & raise a credit note" this will not only allow the patient to cancel their appoitment but will automatically create a credit note so that this can be used against a future appointment. If the invoice is allocated to an insurer then it is still not possible to canel the appointment.

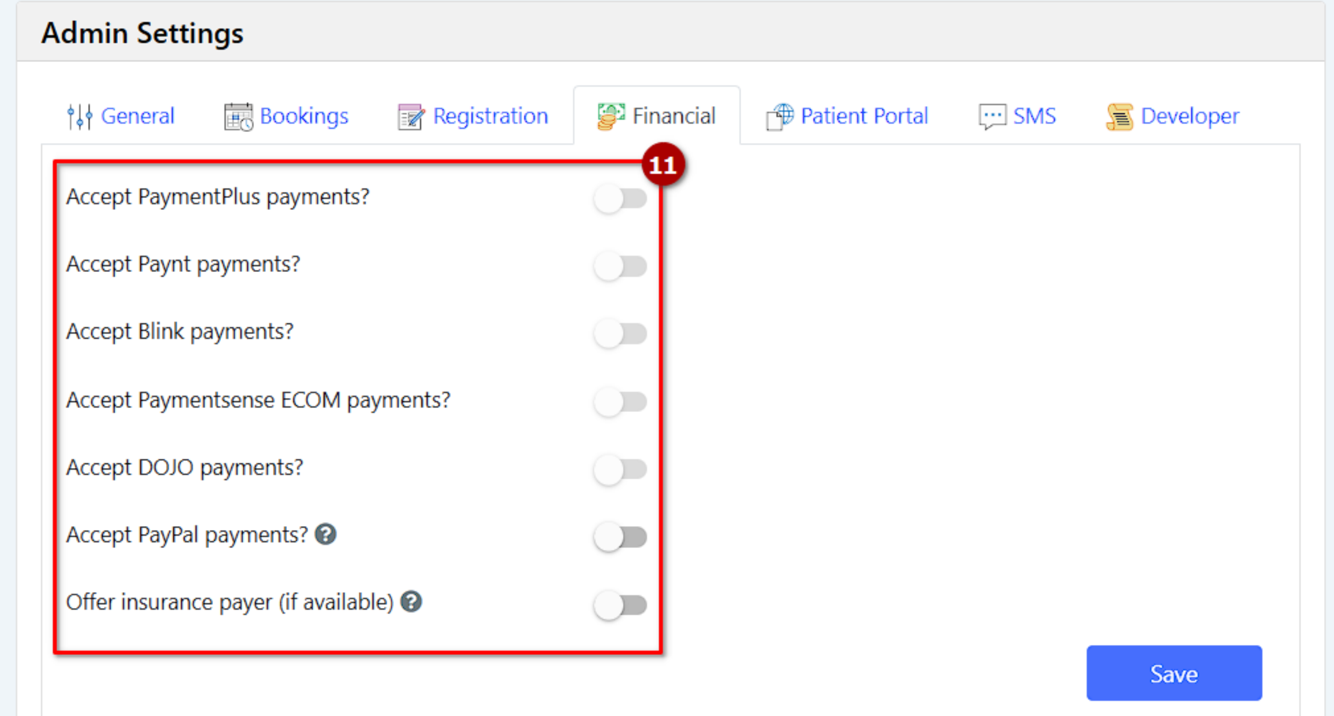


Enable IFRAME widget on your website	This setting enables the iframe feature that will allow you to integrate part of the patient booking screen with your own web page. As the description inidcates, it will allow the patients to search for an appointment before being requried to login. Once enabled you will see the iframe code below this setting. There is also the '**IFRAME Builder**' that you can use to customise what the iframe presents such as only for a specific clinic or practitioner. For more information on using this, please see the section "Booking Page iframe Builder".
Open new browser tab to complete booking	If disabled the patient will be able to login via the iframe to complete booking their appointment. If this setting is enabled then at the point of confirming their booking the patient will be redirected to another tab in their browser to login to the patient booking system. For a more seemless experience for the patient we recommend that this setting is disabled.

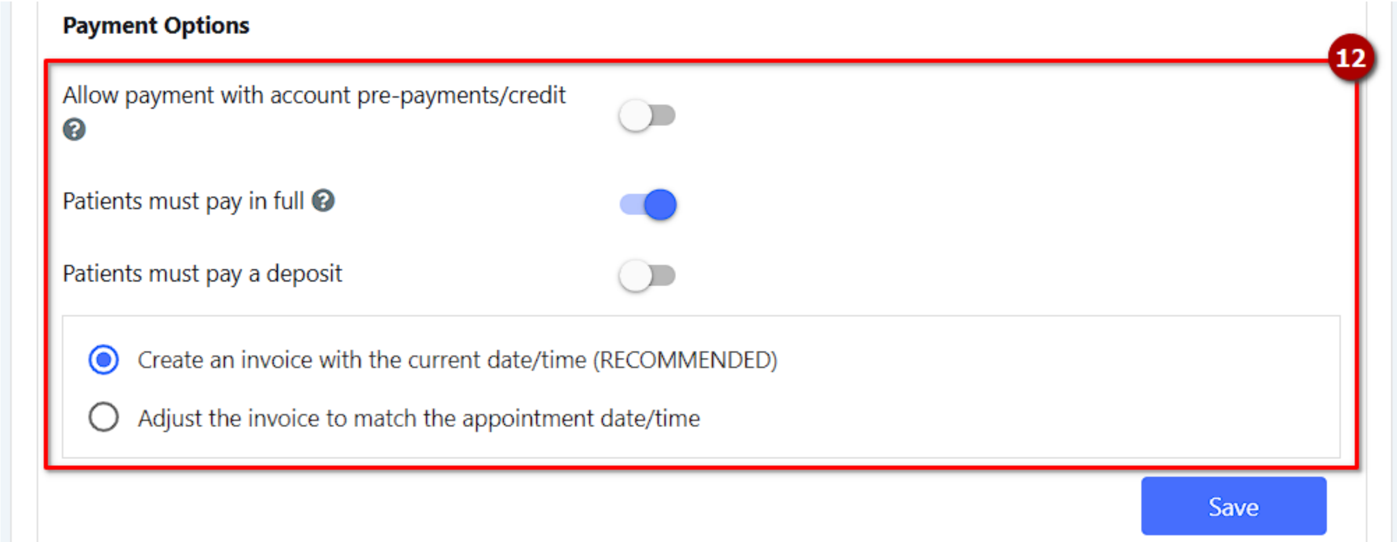


Staff should review patient-booked appointments	When enabled the newly booked appointment will appear visibily differently with a shading over the colour, like the example below.  This will help identify the apppointment being booked online. You can remove this by right-clicking on the appointment and selecting 'Acknowledge Online Booking'. If this option is disabled, the appointments are still booked but will appear in your diary without any pre-shading.
Book appointments page only	When enable this will only allow the patient to access the booking page and disable access to areas such as the 'My Appoinmtments' section for past appointments, their 'Finances', also they will not be able to see the 'Secure Docuements' or 'Upload Document' areas.
Patient's default home page	Allows you to define the default home page for the patient when they login to the Patient Booking system. You can select between the 'Create Appointment', 'My Appointments' and 'Patient Portal Home' areas. Note that this setting is disabled when the setting "**Book appointments page only**" is enabled.
Patients can add themselves to waiting list	If the patient cannot see their prefereed appointment slot then they can add themselves to your waiting list. When this setting is enabled the patient will see a button on the Date/Time page which says "**Join the Waiting List**".

[11] **Financial**. Select your chosen payment method for patients to pay for their appointments online. When one or both payment options are enabled then additional options become available. Note that PaymentPlus, Paynt, Blink, Paymentsense ECOM, DOJO can only be enabled when you have an account and you have these details entered into the main ClinicOffice application. If 'Offer insurance payer…' is enabled then the invoice will be allocated to the patient's insurer.



[12] **Payment Options**. So long as one of the methods of accepting payments has been enabled, you will be presented with further payment options.



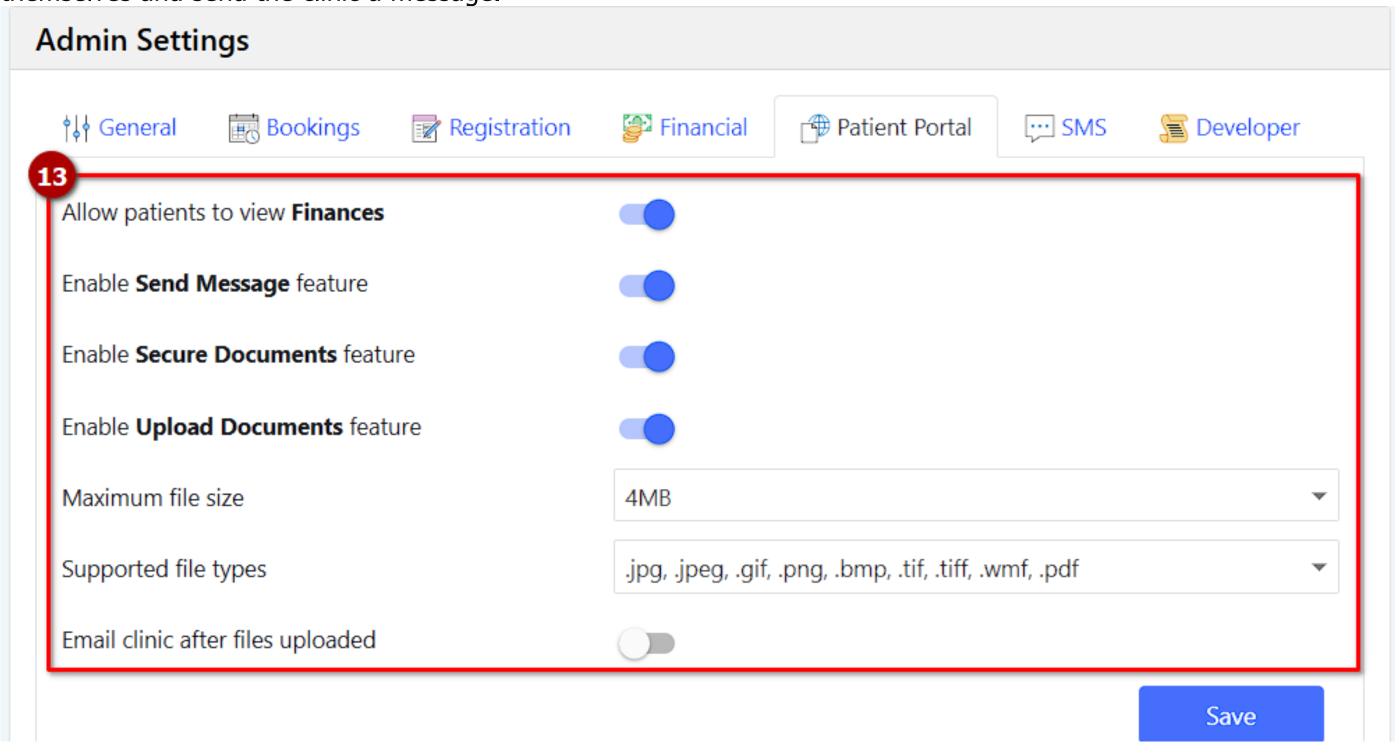
Allow payment with account pre-payments/credit	When this is enabled, if the patient has any excess money or credit on their account they can select to use this when paying for an appointment.
Patient must pay in full	This will force the patient to pay for the treatment before their appointment is booked.
Patients must pay a deposit	This will force the patient to pay a deposit of a specified amount.

If the option "Patients must pay a deposit" has been enabled, then some further options will appear. These are explained in the next table.

Fixed deposit for all appointment types	This allows you to a single deposit amount. No matter what appointment type they book for, the deposit amount will be the same.
Enter deposit for appointment type	When this option is selected then an additional grid will appear that will allow for you to specify the deposit amount for each appointment type separately.
Create an invoice with the current date/time (RECOMMENDED)	This is the default selection and it means that when the payment is taken the invoice date and time will be the same time as when the payment is made. For accounting reasons it is recommended that you stick with this option.
Adjust the invoice to match the appointment date/time	When this option is selected it will default the invoice date and time to the same as the appointment date and time. This is not recommended as the invoice date should match the date of the actual payment made.

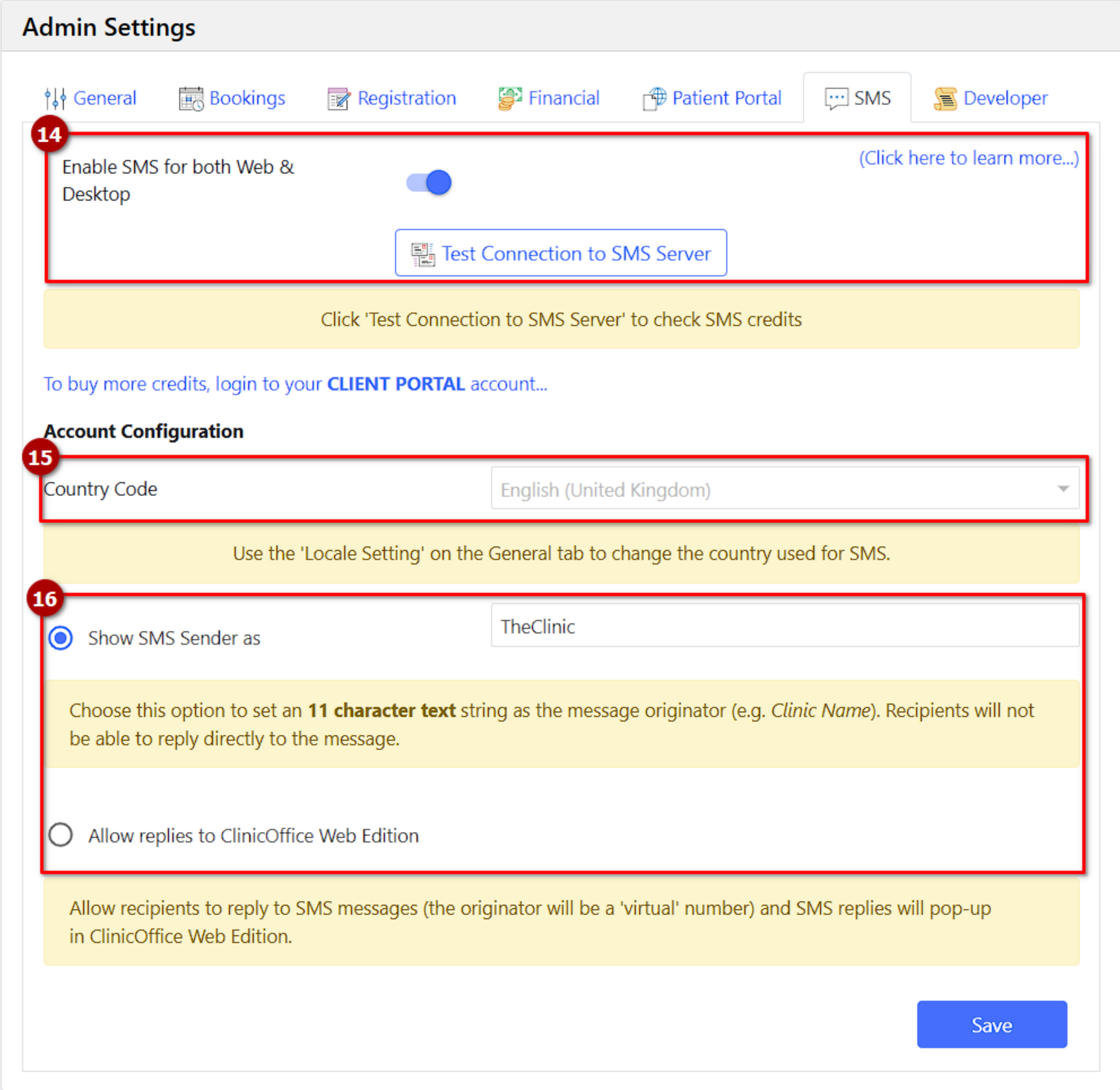
NOTE: If you have selected for patients to pay a deposit then the invoice for the full amount of that treatment type will be created and the deposit will be allocated against it. This means that the invoice will appear as partly paid in your ClinicOffice Diary, waiting for the remainder of the payment.

[13] **Patient Portal** allows for you to specify whether patients can upload documents view files pertaining to themselves and send the clinic a message.



Allow patients to view Finances	When enabled the patient can see their past invoices, payments, refunds and credit notes when they log into the patient booking system.
Enable Send Message feature	Allows patients to send an email to the clinic via the patient booking portal.
Enable Secure Documents feature	Allows patients to view documents you have shared with them from their "Portal – Secure Docs" folder under their "Documents" tab.
Enable Upload Documents feature	Enables the ability for patients to upload their medical files.
Maximum file size	Specify the maximum size of the file that the patient can upload.
Supported file types	Specify the file types of the documents that can be uploaded. For example, images can be '.jpg' or '.png'. Documents can be '.docx' or '.pdf'. Spreadsheets could be '.xlsx'.

Email clinic after files uploaded	This will send an email to the clinic's default email address, specified in ClinicOffice, that a document has been uploaded. It will provide basic information about who it is from and what it is.



[14] **Enable SMS for both Web & Desktop:** This setting synchronizes with the Local/Hosted editions of ClinicOffice. When enabled you will be able to send out SMS messages from the Web edition. You can click the **Test Connection to SMS Server** button to first of test that the Web edition is connected to the SMS service but also to see how many SMS credits you have remaining.

To buy more SMS credits you can click on the blue link further down to login to the **Client Portal**.

[15] **Country Code** allows for you to specify where you are based. This way the system knows what country prefixes to use and where SMS need to be routed to.

[16] **Shows SMS Sender as/Allow Replies to ClinicOffice Web Edition**: You can select one or the other. If you select to "Show SMS Sender" you can specify your company name or a form of it, as you are limited to 11 characters. When this is selected patients cannot reply to the SMS you send them.

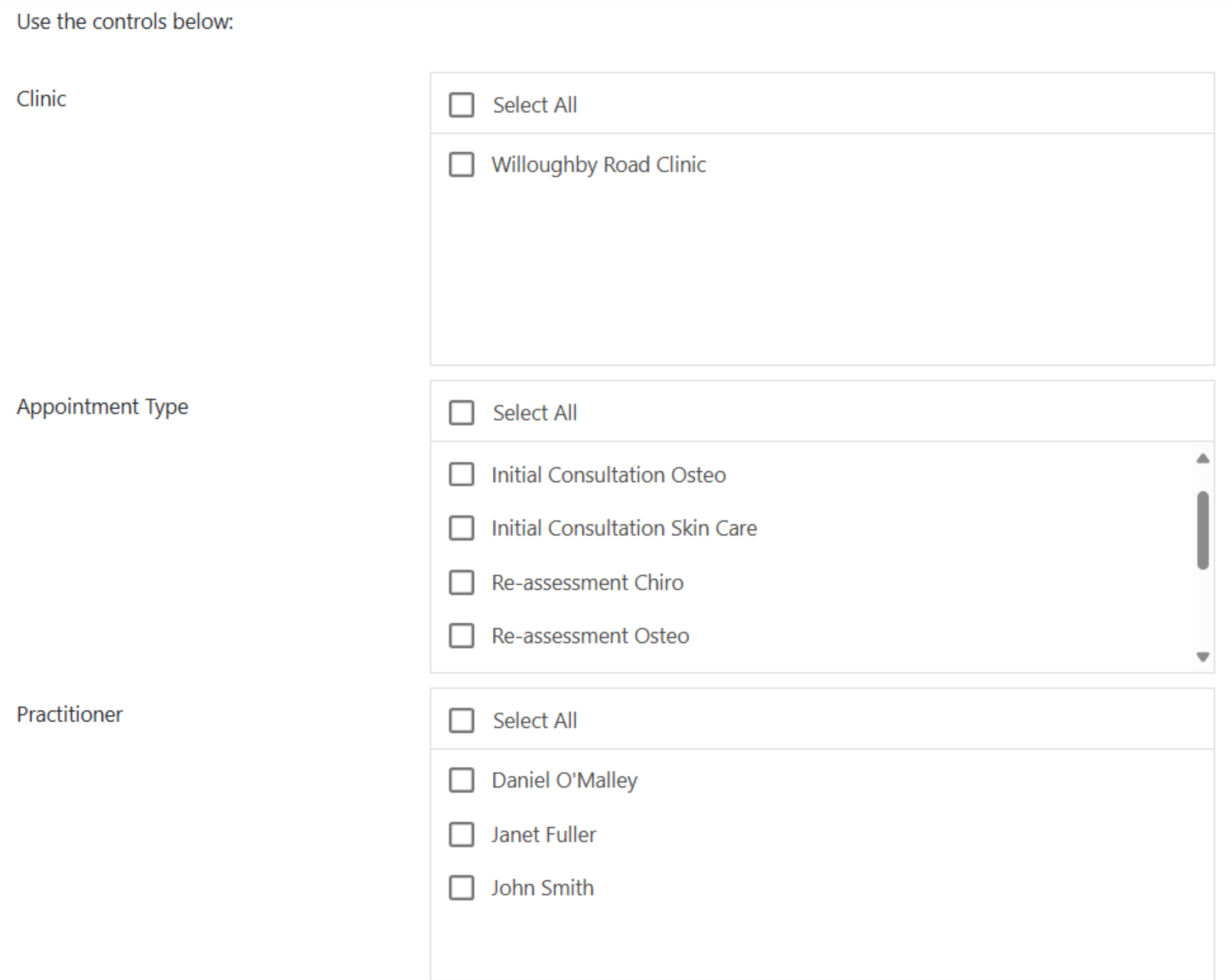
If you select "Allow Replies to ClinicOffice Web Edition" you cannot specify a sender name and instead your message will come through from a virtual number but patient's will be able to reply to your SMS messages.

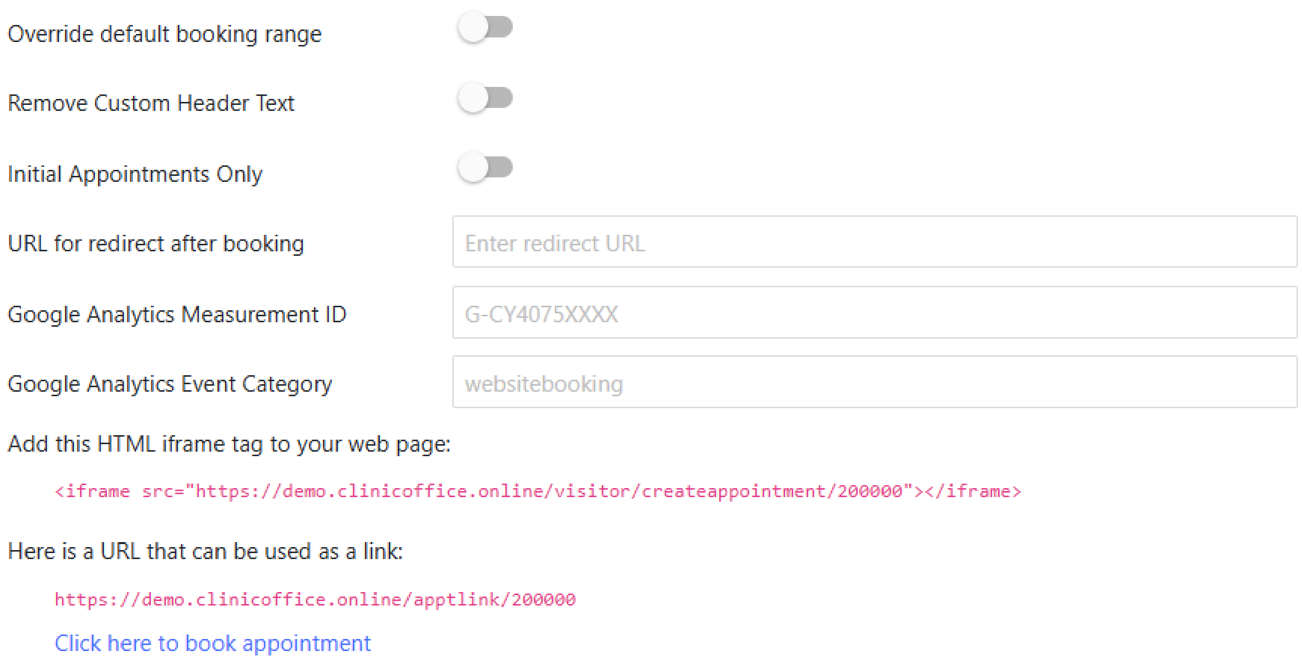
Booking Page iframe Builder

The Patient Booking system does support an iframe option that will make it appear that the booking page is an integrated part of your website. It also allows for the patient to be able to select for appointment availability before logging in.

You can enable the iframe by logging into the Web edition of ClinicOffice and going to the **Settings** > **Admin Settings** > **Bookings**. From there, switch on the setting '**Enable IFRAME widget on your websites**'. As can be seen in the below example, once enabled you will have the HTML for the iframe tag appear. You can copy this and use this on your website. Note that this is just a standard iframe and will support any HTML attributes such as definingb the height and wifdth etc.

By default the above link will show all appointment types, staff and clinics that have been marked as being bookable online. If you wish to refine this such as limiting the iframe for only a particular clinic then you can do this using the '**IFRAME Builder**' link. This link sits below the HTML iframe tage on the Bookings page of the Web edition's Admin Settings (as can be seen above). When you click on this the page below appears.





As can be seen from above, the top half of the page allows for you to specify the **Clinic**, **Appointment Type** and the **Practitioner**. The lower half of the page displays the HTML iframe tag and a URL link. You will note that as you tick or untick the relevant setting such as the appointment types or practitioners the tag and links change to reflect your changes.

Q) If I want all appointment types to be included in my iframe tag do I need to tick them all?
A) The short answer is no. If you leave a section unticked, such as the appointment types, then the Patient Booking system will translate the link as all appointment types being available. This principle will also apply to the clinic and practitioner sections.

Q) What does the 'Override default booking range' do?
A) When this is enabled it will allow you to specify a custom date range of appointment availability. The iframe will reference this range rather than the standard date range availability in the booking. You will note that it adds the text "bookingrange=x" to the tag/url. The 'x' is replaced by the number of days you specify in your date range.

Q) What does the 'Remove Custom Header Text' do?
A) When this is enabled it will add a clause to the tag/url which instructs the iframe to remove any custom user header text that would normally be present on the patient booking system.

Q) What does the 'Initial Appointment Only' do?
A) When this is enabled you will note that the value "initialappt=true" is added to the tag/url. This tells the system that this iframe or link should only offer appointment types that are marked as an initial appointment type. For more information on how to mark an appointment type as an initial appointment type see point two under the "Preparing the Patient Booking" section of this guide.

Soemthing to note is that when this is enabled, it will override any appointment types specified further up on the iframe builder. We recommend that you use this setting if you wish to create a link for new patients only. You could then have another button or page to support existing clients as well.

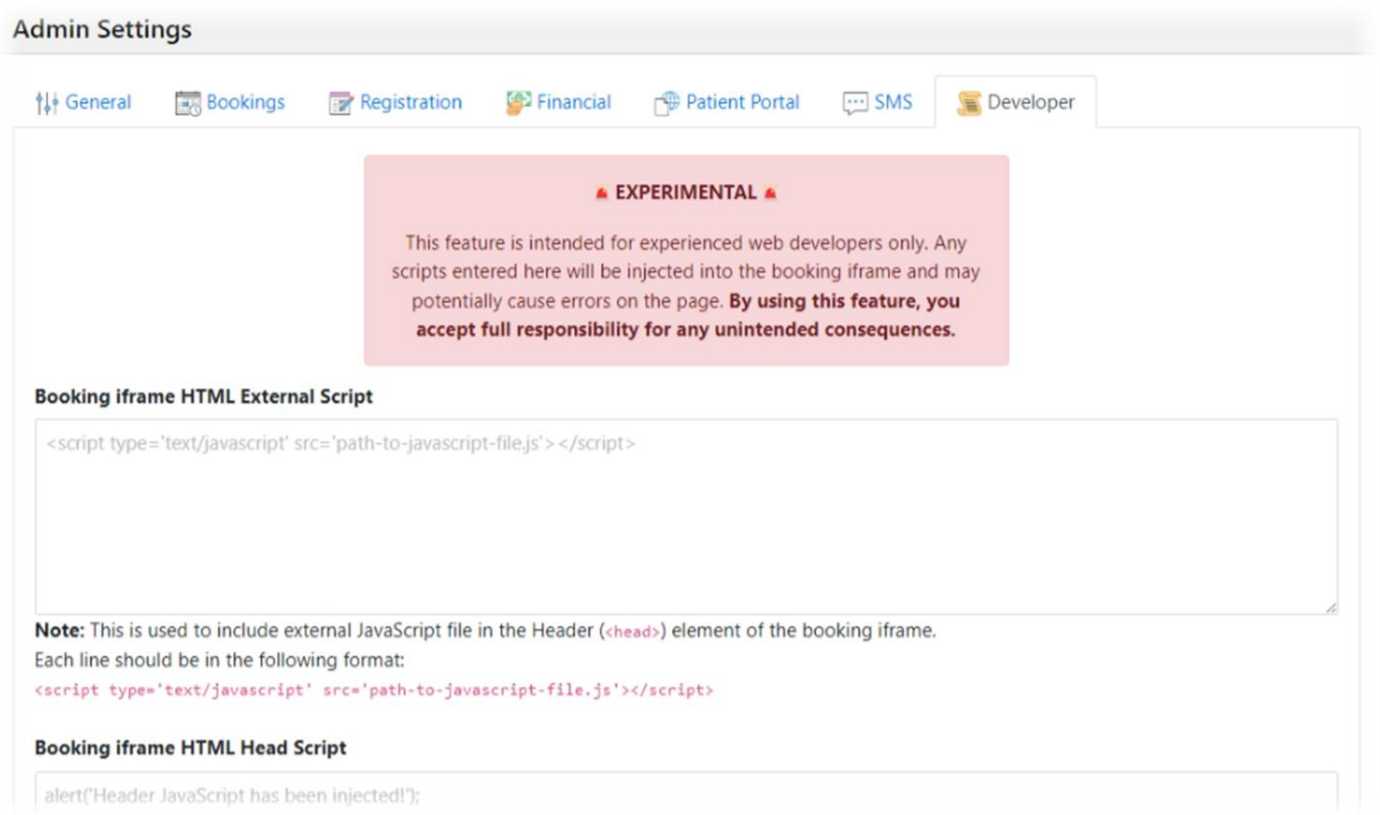
Q) What does the 'URL for redirect after booking' do?
A) This allows you to specify for the iframe or URL link to redirect the client to a different webpage after the patient has successfully booked their appointment. This can be used if you would prefer the person to end up on a particular landing page that you have designed.

Q) What do I do with the Google Analytics?
A) The Patient Booking system allows for you to track when an appointment has been booked using Google Analytics. Using Google Analytics you can generate an ID tag and put it into the 'Google Analytics Measurement ID' field. You can specify "**websitebooking**" (without quotes) in the "**Google Analytics Even Category**" field. Again, once you insert the values into this the 'src' will update to reflect this in both the iframe HTML code and the URL link.

Developer

The Developer section is designed for experienced web developers only. This will allow for further customisation to the Patient Booking system when it is in an iframe. HTML, CSS or Javascript can be used. This screen allows you to add external, head and body scripts.

This can be access by going to the **Settings** > **Admin Settings** > **Developer** within the Web edition.

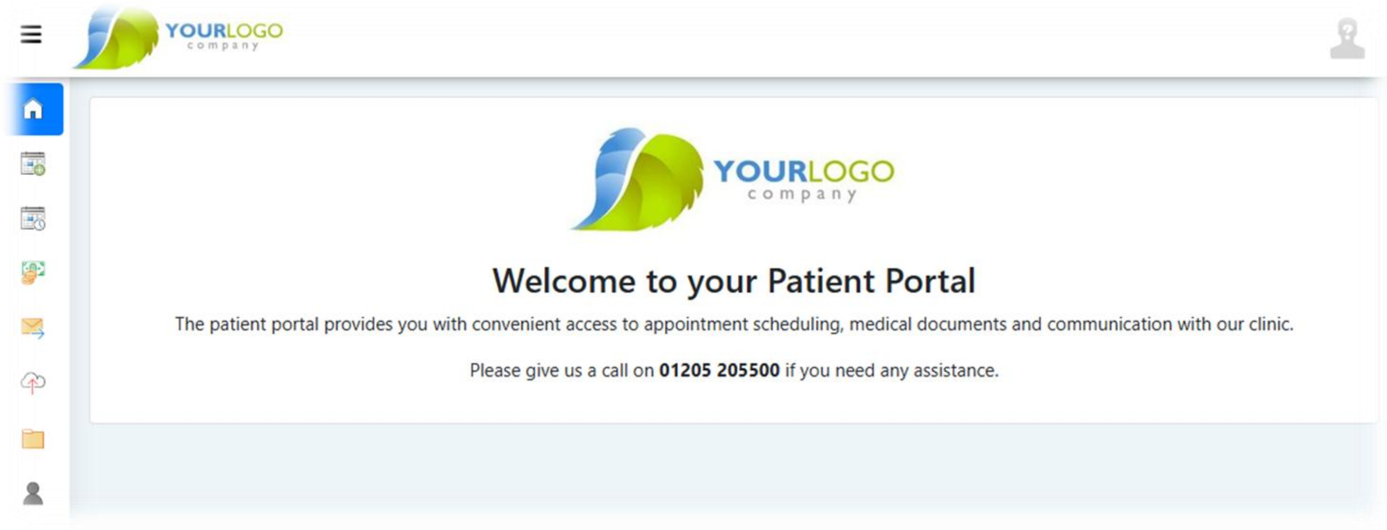


As any changes made in this screen could have potentially large ramifications we would advise to not use it if you are unsure what its purpose is.

CAUTION: PioneerSoftware Ltd are not responsible for any code additions that you as the end user put into this screen. This means that if any functionality of the Patient Booking system is broken because of custom code, this will have to be undone by the user that inserted the bespoke code. PioneerSoftware Ltd will not advise on how to code a bespoke script for this screen.

Patient Portal Home

There is the option to set the Patient Booking up so that the first page a patient sees when they login is the "Patient Portal Home". An example of what this looks like is below.



This screen can basically act as a welcome screen to the patient. As shown in the example above you can set this up so that the company logo appears along with the contact information for the clinic. You can also specify how they can use other parts of the patient booking system, i.e. where to book new appointments, view existing appointments or how to upload documents.

How to Set Patient Portal Home As the First Default Page

To set this screen up as the first page that the patient sees when they login, please follow the steps below.

- Login to the ClinicOffice Web edition as your staff member self
- Click on the **Settings** button from the left hand panel
- Go to the **Admin Settings** and click the **Bookings** tab
- Under the **Other Settings** locate the setting "**Patient's default home page**" and change this to "**Patient Portal Home**"

How to Edit the Patient Portal Home Contents

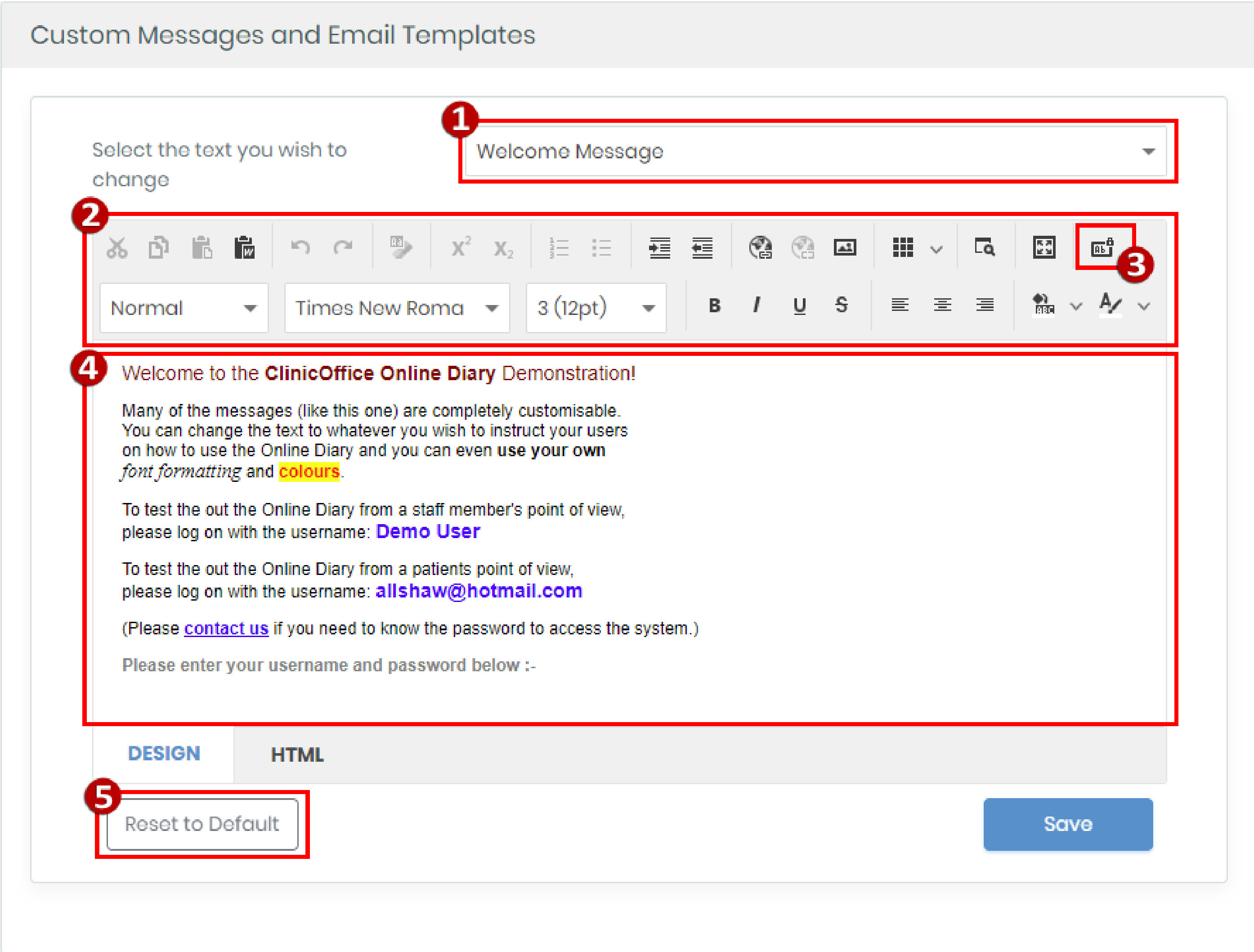
You can alter the contents of this message by following the steps below.

- Login to the ClinicOffice Web edition as your staff member self
- Click on the **Settings** button from the left-hand panel
- Go to the **Custom Messages**
- For the "**Select the text you wish to change**" select "**Patient Portal Home**"

For more information on how to use the "Custom Messages" screen, please see the section below "Custom Messages".

Custom Messages

Go to: **Staff Diary** > **Settings** > **Custom Messages**



Custom Messages and Email Templates. Here you can customise emails and messages that are sent from the Patient Booking. 'Msg' / 'Message' screens are aspects of the webpages (such as the Welcome screen or the Booking success page) that are customisable with full font formatting. The Emails sent from the Patient Booking system to Patients are also customisable. There are already defaults in place, so you don't need to set each one up initially if you don't want to.

[1] Allows you to select different messages or email templates to edit. If you select an email template then an additional drop down field will appear that will contain the "**Email Subject**" as well.

[2] There are many HTML text controls in this editor, including sizing options, fonts, colours, alignment etc.

[3] **Insert Placeholder** gives you a range of merge fields that automatically pulls in data from your database.

[4] Your custom message goes here. This is what your patient booking users will either see on the diary interface or will be emailed with.

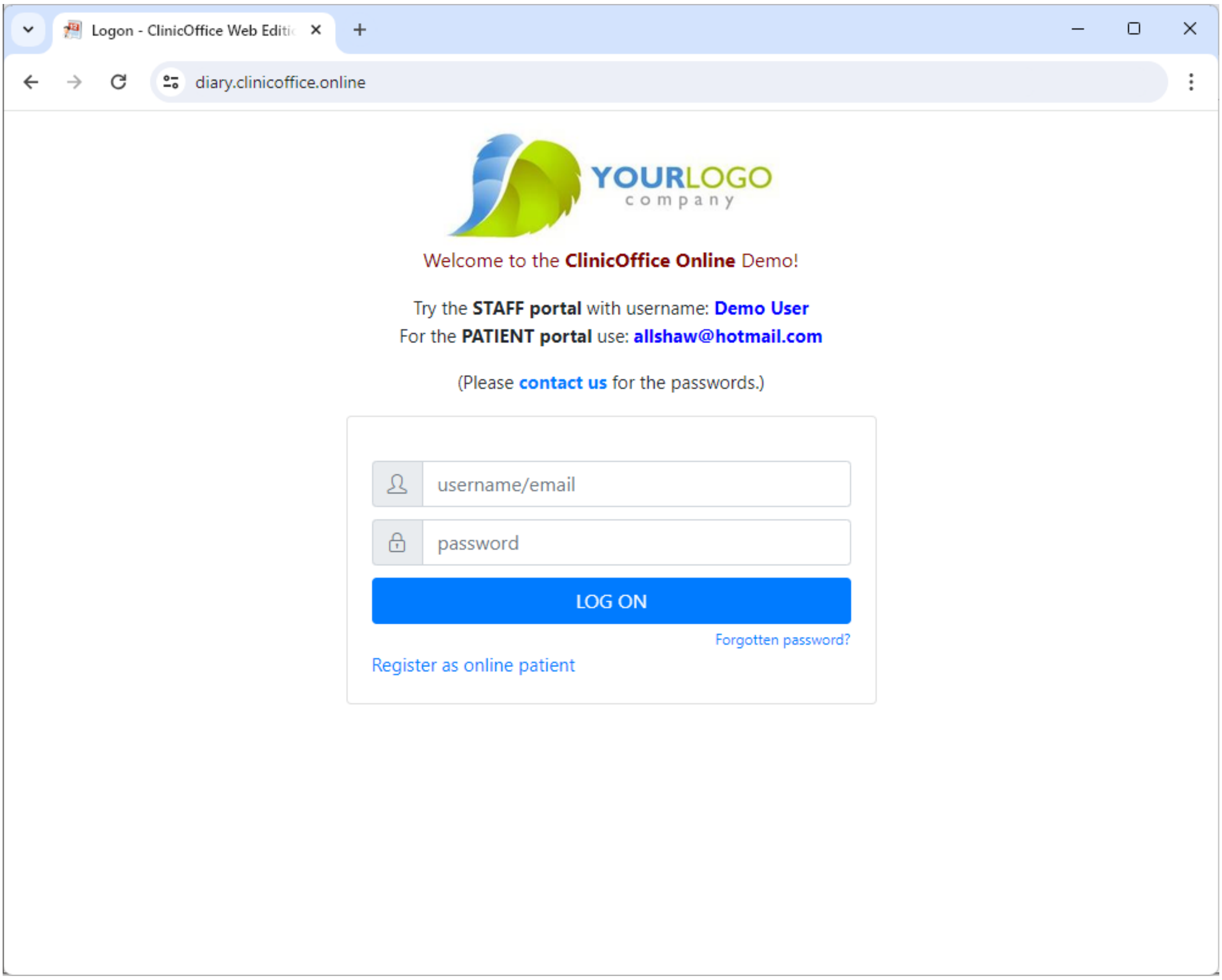
[5] Reset to Default reverts the template to the original default message. This cannot be undone.

SECTION 2

Logging On to the Patient Booking

The Patient Booking requires for the patient to have an email and a password in order to complete booking an appointment. The reason is so that the system can identify who the appointment, invoice and payment belongs to. This also saves the hassle of the patient re-entering the contact details everytime they need to book an appointment.

- They will need to enter their username and password into the two boxes as pictured below
- Click '**LOG ON**' to Logon to the Patient Booking



The logo is customisable so you can personalise the diary for your clinic. You can also customise the welcome message. Additionally, the options for 'Existing Patients' and 'New Patients' to register can be toggled on and off in the admin settings section. Please see **Section 1** for more information on how to setup the patient booking.

NOTE: The above is not applicable if you are using an iframe or booking URL. With either of these options the patient will first select their appointment and will only need to login to confirm this at the end of the booking process.

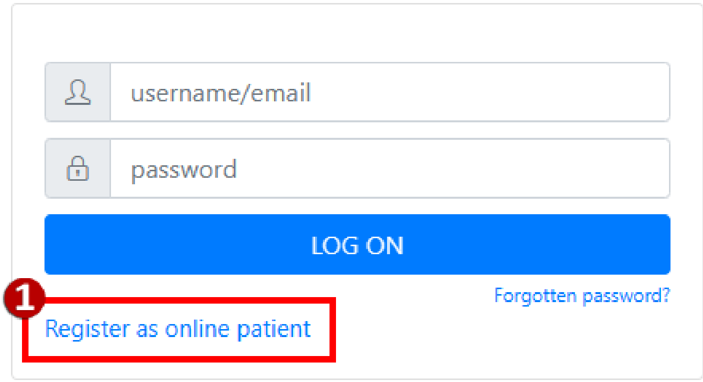
Register as Online Patient

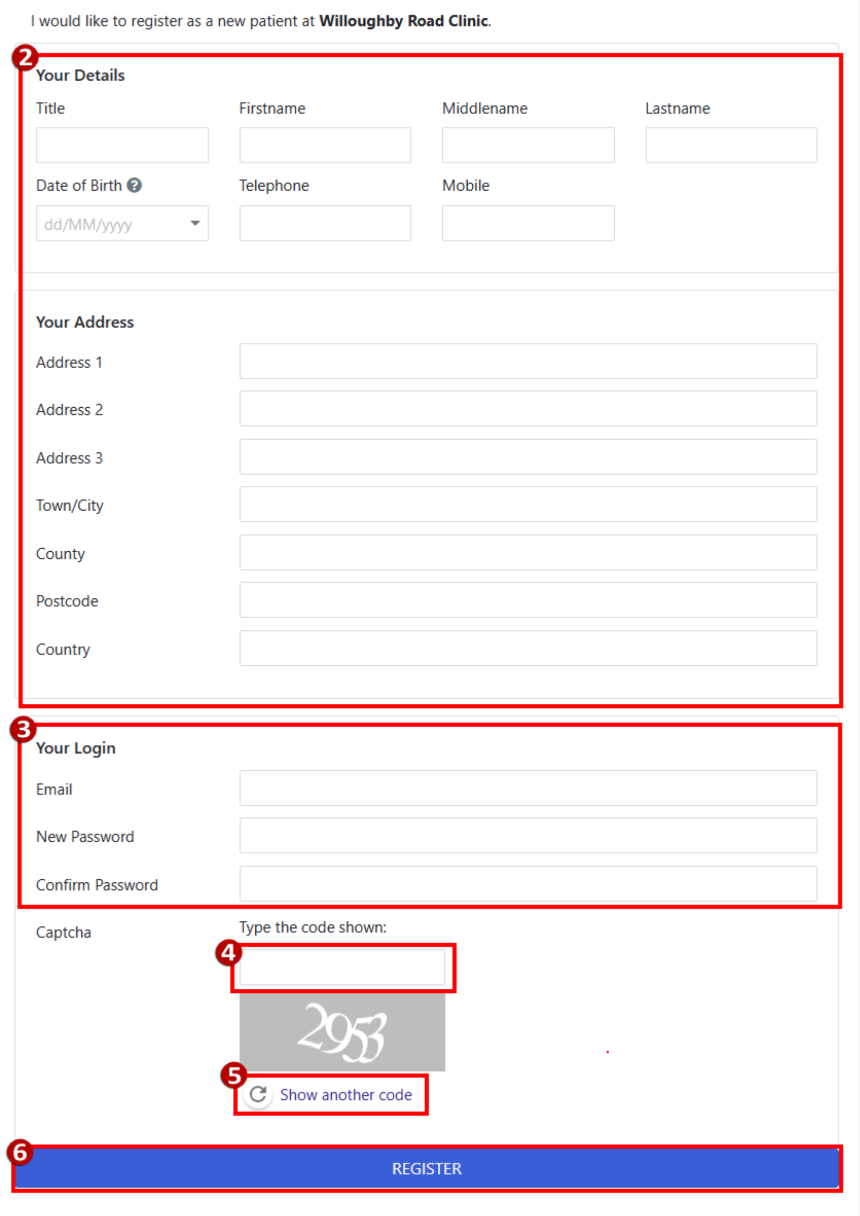
Patients who wish to book online **must register** with you. If the patient is someone who has never been to the clinic before or they have been to the clinic but never used the Online Patient Booking system, then they will go through these steps.

[1] Click: **'Register as online patient'** see image RIGHT

This will load the New Patient Registration screen.

See image BELOW





[2] The Patient will fill out this form with their details. What details are required of them can be customised via the Admin Settings with the ClinicOffice Web edition.

[3] The patient will need to enter their email and password. Like other online services an email must be unique for each person.

[2] The Anti-Bot Question requires the patient to type in the characters they see in the box at the bottom.

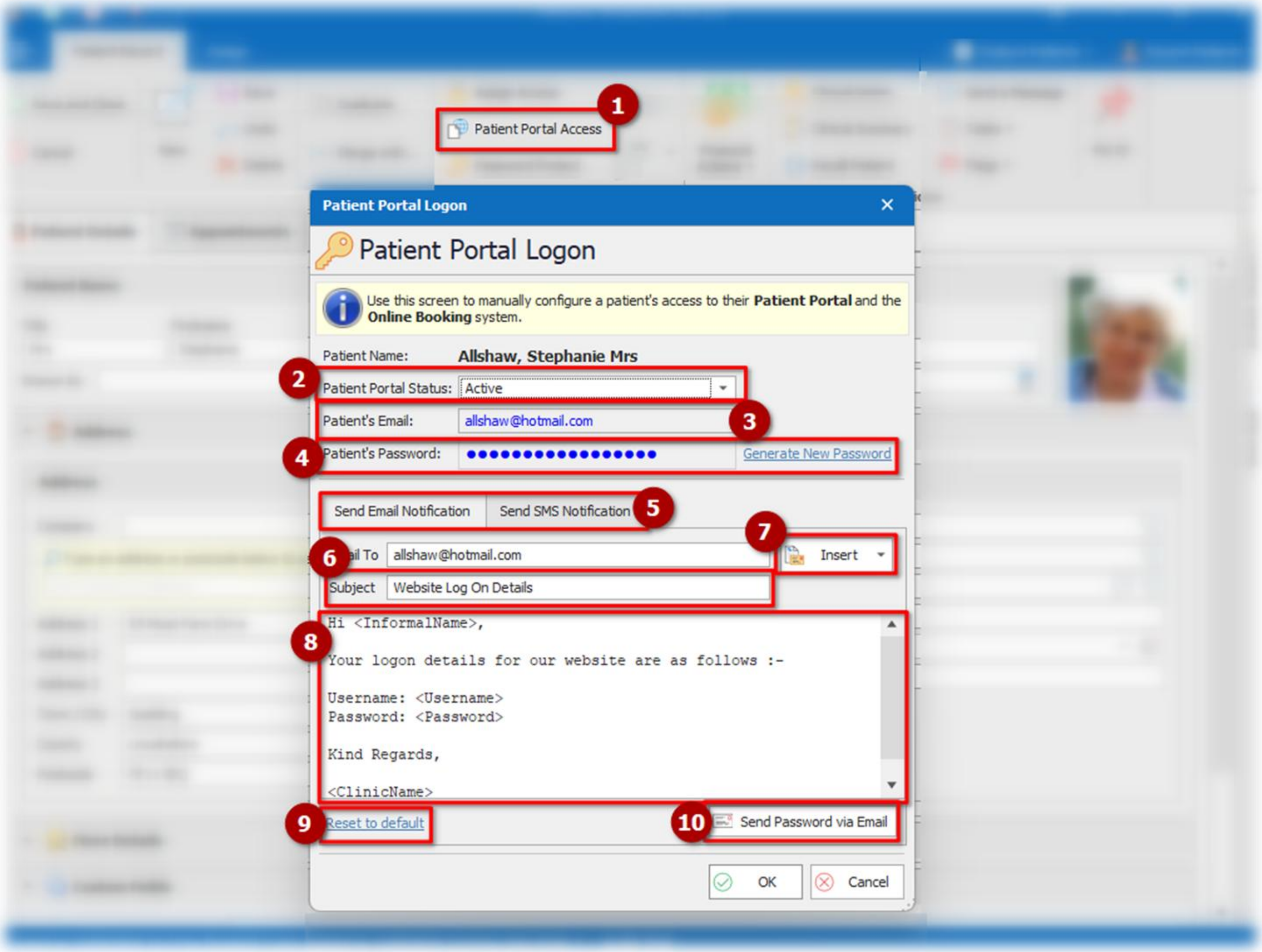
[3] Click **'Show another Code'** to generate a new image – useful if the patient is struggling to read the characters.

[4] Click **Register** to submit these details, after which the patient will receive an email confirming their login details.

> If you are unable to see the 'New Patient registration' link as pictured to the left, you will need to enable the setting to allow patients to self-register. Please see Section 1 of this guide for more information.

Creating and Approving Patients Login Details

You can view and edit Patients' login details after they have self-registered. You can also allow Online Access for Patients manually from the main ClinicOffice v5/6 program. This is useful if you do not want Patients to self-register or they are struggling to register themselves.



(See image ABOVE)

[1] Open the Patient Record and click **Patient Portal Access**

[2] Set the **Patient Portal Access** to **Active**

[3] So long as the patient record already has an email entered the **Patient's Email** field will be auto filled in. The email will act as the patient's username.

[4] You can edit the password from the **Patient's Password** or click '**Generate New Password'** to create a randomly generated password.

[5] You can send the login details to the patient either by email or SMS. Select either one with the two tabs.

[6] Edit the **Subject**

[7] Click on the drop-down **Insert** button to insert merge fields into the message body. Merge Fields are displayed in these brackets **<>**. When the email is sent the patient's information will be merged into these.

[8] The Message body is editable – so if you wish to personalize the message that is sent – you can!

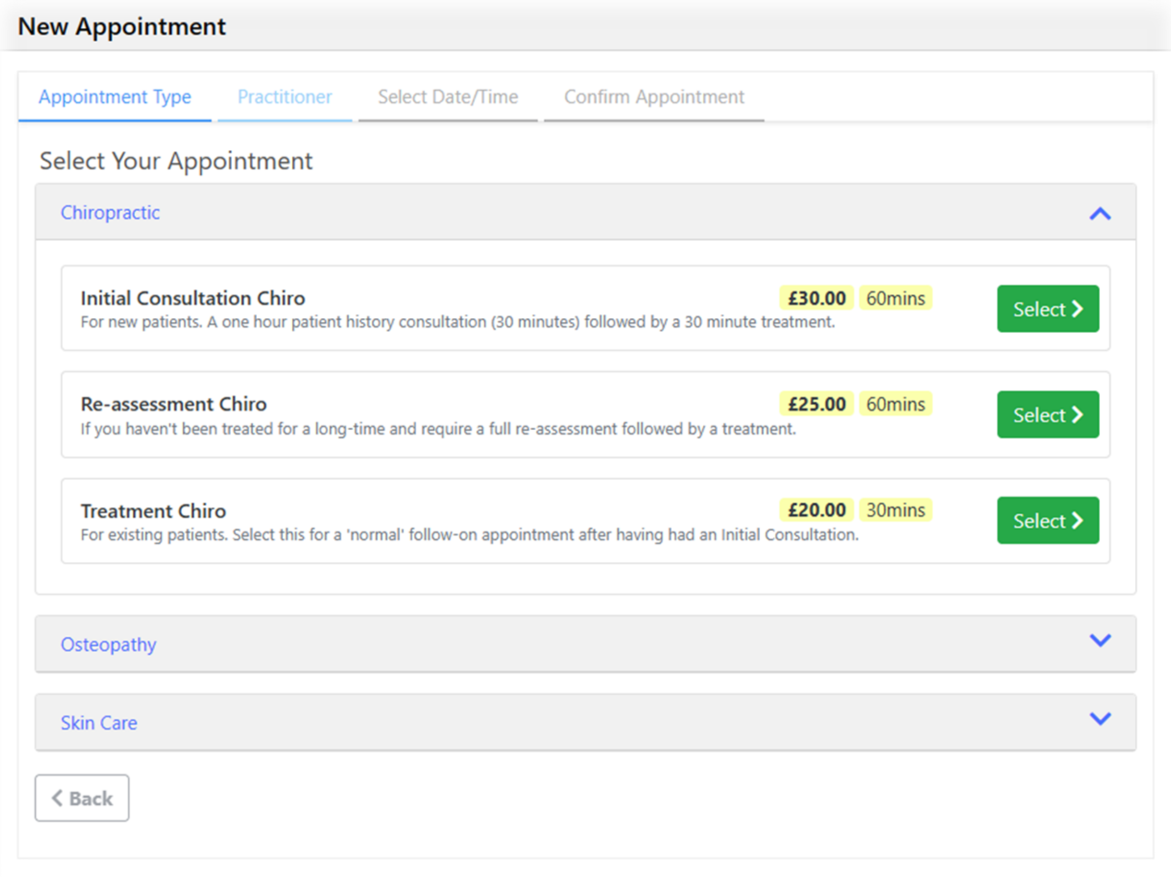
[9] Click: **Reset to Default** if you wish to revert to the standard template, should you make any changes and wish to revert to the default again. You will lose any changes you've made to the message body and the subject line.

[10] Click **Send Password via Email** (or via SMS) to send the message to the patient so they can log in.

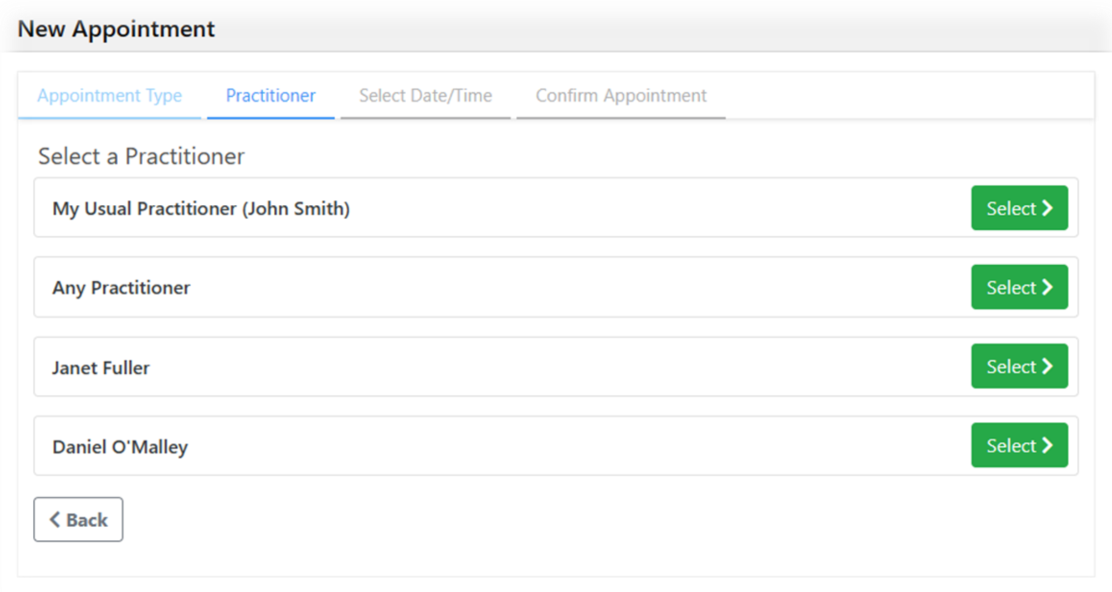
Patient Booking New Appointment

(1) Login as a patient or visit the iframe or booking URL you have set up.

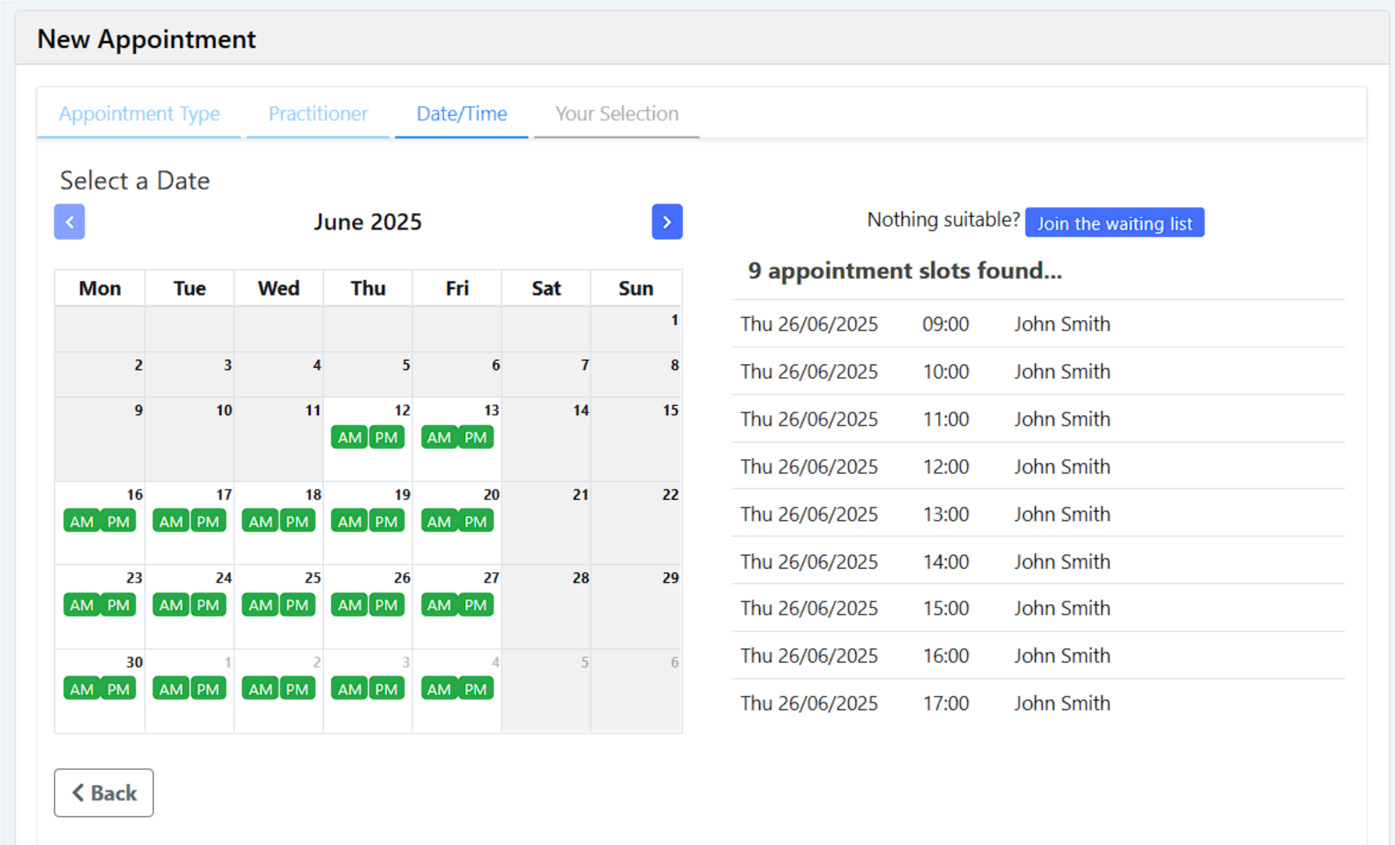
(2) Use the 'New Appointment' screen (shown below) to locate and select the **Appointment Type** Additional settings for this box are mentioned in Section 1 of the User Guide – i.e. defining which appointment types are available online.

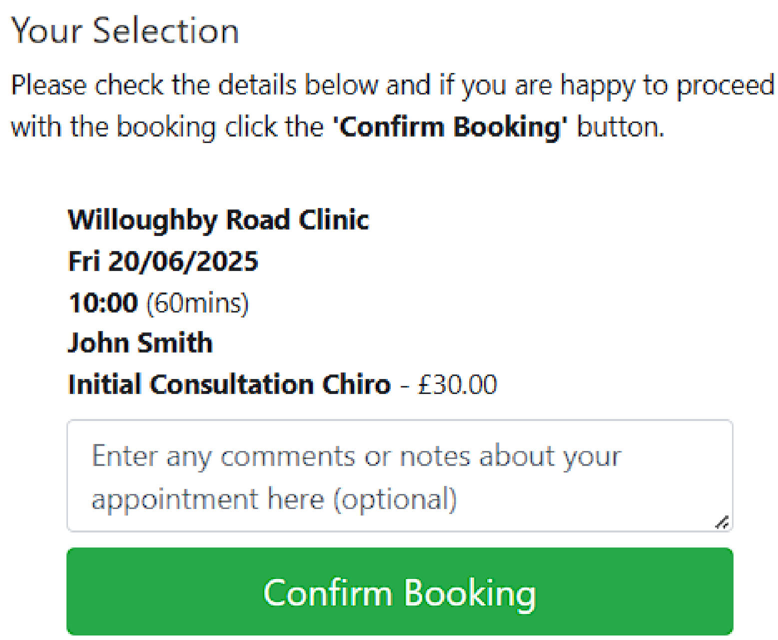


(3) Select a Practitioner. Either choose **'Any Practitioner'** or specify a practitioner. You can choose which Practitioners are available for the Patient Booking on the Admin Settings Page. For more information on this please see Section 1 of the User Guide.



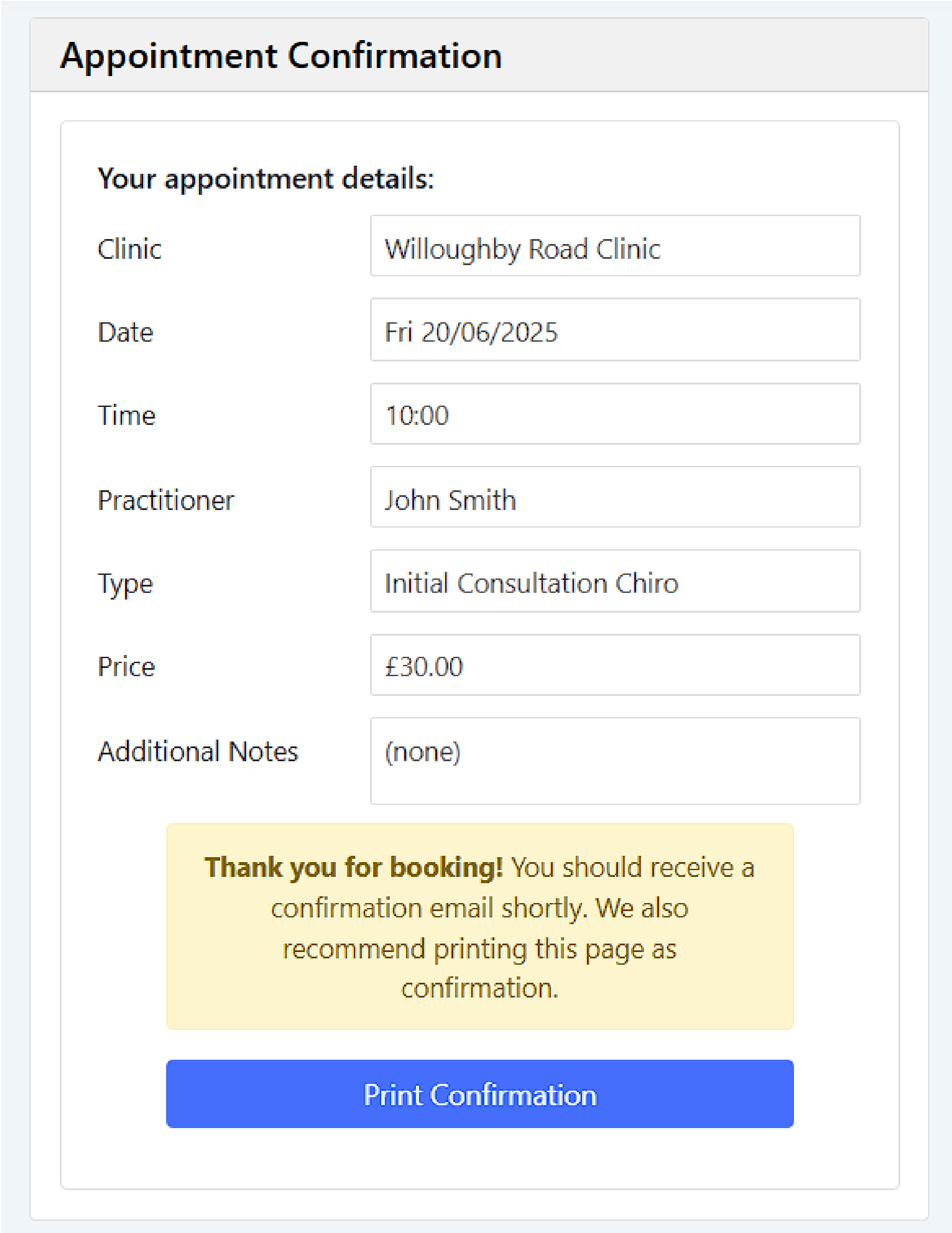
(4) Once you have made your selection, the system will offer a list of available dates. Please choose either the morning (AM) or afternoon (PM) for a date and then select the time from the right-hand side.





(5) One last step before confirming the appointment is the option to add notes to the appointment. This is useful if the patient wants to convey additional information that they would give over the phone. Any notes made here are inserted into the Notes field on the appointment record. Once you are happy, click **'Confirm Booking'**.

(6) The last screen on the Patient Booking is a confirmation window which is printable and displays an overview of the appointment the patient has booked. The patient will also receive an email confirmation and by default the clinic will also be copied into that email.



Patient Appointment Screen

The **'My Appointments'** screen displays a list of both past and future appointments, along with the charges and amounts outstanding. You can access this from the left hand tab and it represented by a small alarm clock symbol.

My Appointments

Date	Appointment With	App Type	App Status	Charge	Owing	Actions	
Future Appointments							
18/02/2019 09:00	John Smith	Treatment	Pending			Cancel	•••
14/02/2019 11:00	Janet Fuller	Reassessment	Pending				•••
Previous Appointments							
11/02/2019 10:30	John Smith	X-Ray	Completed	£50.00	£0.00		•••
11/02/2019 09:00	John Smith	Initial Consultation	Completed	£30.00	£0.00		•••

From this screen you can also cancel an appointment by clicking the ' **Cancel'** link on the appointment you wish to cancel. See image BELOW

	App Status	Charge	Owing	Actions
	Pending			Cancel
t	Pending			

My Finances

The **'My Finances'** allows for the patient see what they have been invoiced (in green) and what they have paid (in yellow). This grid not only provides the amount but as seen above it displays the running balance and the clinic this is at.

Finances

Date/Time	Description	Amount	Balance	
05/06/2025 12:00	Payment received [Cheque]	£80.00	£0.00	•••
04/06/2025 16:30	Invoice #WRC-118 Initial Consultation Chiro (PAID)	-£30.00	-£80.00	•••
04/06/2025 08:30	Invoice #WRC-103 X-Ray (PAID)	-£50.00	-£50.00	•••

You can disable or enable this screen for the patient by logging into the Web edition as your staff self and go to **Settings** > **Admin Settings** > **Patient Portal** > "**Allow patients to view Finances**".

Sending a Message to the Clinic

The "**Send Message**" section when enabled allows for the patient to send an email directly from the Patient Booking system. The patient can get to this from the left hand panel that also houses the "New Appointments", "My Appointments" and other options.

The **Send Message** screen is composed of the following parts:

[1] The "**Message**" area allows the patient to type out the main body of the message here.

[1] If the patient wants a copy of the message they send to the clinic, then they must tick the "**Send me a copy to my primary email**".

[3] The patient can click the "**Send to Clinic**" button to send the message/email to the clinic.

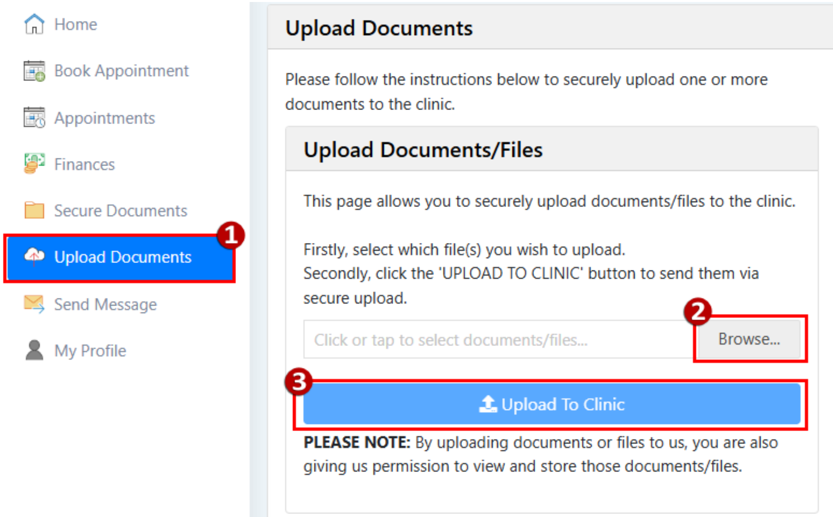
The email address that this message is sent to is the one defined under the Web Edition's Settings. To view what this is currently set to login to the Web edition of ClinicOffice as your staff self, go to **Settings** > **Admin Settings** > **General** > **Clinic Email Address.** You can change it from here if you wish and click the **Save** button.

How to Enable/Disable the Send Message Feature

You can disable or enable this feature for the patient by logging into the Web edition as your staff self and go to **Settings** > **Admin Settings** > **Patient Portal** > "**Enable Send Message feature**".

Patient Upload Documents and Files

The **'Upload Document'** screen allows for the patient to upload any medical notes, letters or general information to their record so that you as the clinic can view them. This option only appears for the patient once you have enabled this setting by logging into the ClinicOffice Web as a Staff Member, go to **Settings** > **Admin Settings** > **Patient Portal** and switch on '**Enable Upload Documents feature**'.



When the patient logs into Web edition of ClinicOffice, they will be able to upload a document by:-

[1] Clicking the **Upload Files** button

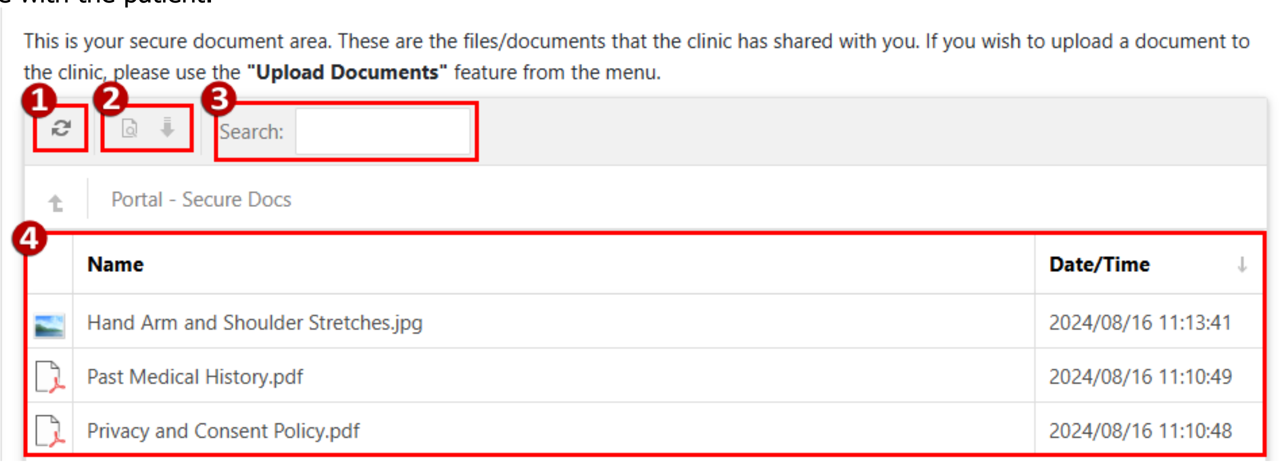
[2] Click the **Browse** button

[3] Click to **Upload to Clinic**

The patient's file will then be visible to users of ClinicOffice under the patient's Documents tab.

Secure Documents

The **'Secure Documents'** screen is where a patient can view files that they have uploaded or files that you wish to share with the patient.



To enable this feature for the patient log into the Web edition as your staff self and go to **Settings** > **Admin Settings** > **Patient Portal** and switch on '**Enable Secure Documents Feature**. The patient can then access this screen when logging into the Patient Booking system and clicking the "**Secure Documents**" button from the left hand side panel. This screen is made up of the following parts:

[1] Clicking the **Refresh** button refreshes the documents displayed on the grid

[2] Once the patient selects a document from the grid they can click on either the **Preview** button to preview the document or the **Download** button to download the document.

[3] Allows the patient to search for the document from the **Filter By** field.

[4] This is where the documents available are on display. A patient can double-click to preview the document but note that not all internet browsers support this so they may need to use the **Preview** button mentioned in option 2.

If you wish to view these documents from your Staff side you can open the patient's record, go to the **Documents** section and open the "**Portal – Secure Docs**" folder. You can add additional documents to this folder for the patient to view them from their "Secure Docuuments" section.

SUPPORT INFORMATION

Call Our Helpdesk 01205 205500

Email us support@pioneersoftware.co.uk

USEFUL LINKS

ClinicOffice Online Service Overview

Web User Guide

Patient Booking Demonstation – Try it for yourself!