

## **T - Patient Self-Booking of Office Visits**

Here's how a patient is able to self-book online without going through the secretary. The patient, Billy Band, has logged into his doctor's Portal. You can see that his Gmail inbox is empty. Let's head back to the Portal. Billy wants to request an appointment, so he clicks on "New Request". He finds instructions for how to accurately describe his ailment. He selects his preferred office location. Billy has chosen the King St. office and is marking his appointment as "Urgent". Now Billy has the option of booking through the secretary (as one used to do by phone prior to ConsultSTAT) and which is the most common way to book using the Portal OR he can choose to self-book if the health care provider has enabled a self-booking block on the Portal. Whether or not to allow patient self-booking is totally up to the discretion of the health care provider.

Here's how to use Self-Booking. The check box "Contact Secretary" is checked by default. Billy checks "Self-Book". The "Self-Booking Dates" pop-up pane appears. You can see that there are no appointments available today or the day after tomorrow, but there are appointment times available tomorrow in the evening after 18:00 (between 6 p.m. and 7:20 p.m.). In this case, each appointment is 10 minutes long. (For self-booking blocks, all appointments are the identical length, which has been predetermined by the health care provider.

Billy chooses the 6 p.m appointment. When he clicks on it, it appears in green in the Appointment time & date box. Now, all Billy has left to do is to describe his ailment(s). He may also attach documents or photographs. In this case, none is necessary. The option to attach files can be seen right above the "Send Request" button. Let's send the request.

The status of the Request becomes Pre-Consult Approved (which is the exact status that would occur if Billy had gone through the secretary and she had scheduled the appointment). The Consultation Session area of the Manage Request screen shows Billy's confirmed appointment. If Billy would like to make any changes to his self-booked appointment, he can simply click the "Edit Button". (Note that this button is not available to him had he booked through the secretary. He would have to ask her to change the appointment).

For example, by clicking the "Edit" Button, he can change the appointment time to another available slot in the block, say 6:30 p.m. He simply selects the new appointment time and Saves. Billy has successfully booked himself an appointment at his doctor's office tomorrow at 6:30 p.m.

Let's take a look at Billy's Gmail inbox. He has received an automatic notification of his appointment. This is a useful additional reminder of appointment time and date.