Online Scheduling

User Guide

ZINGIT SOLUTIONS

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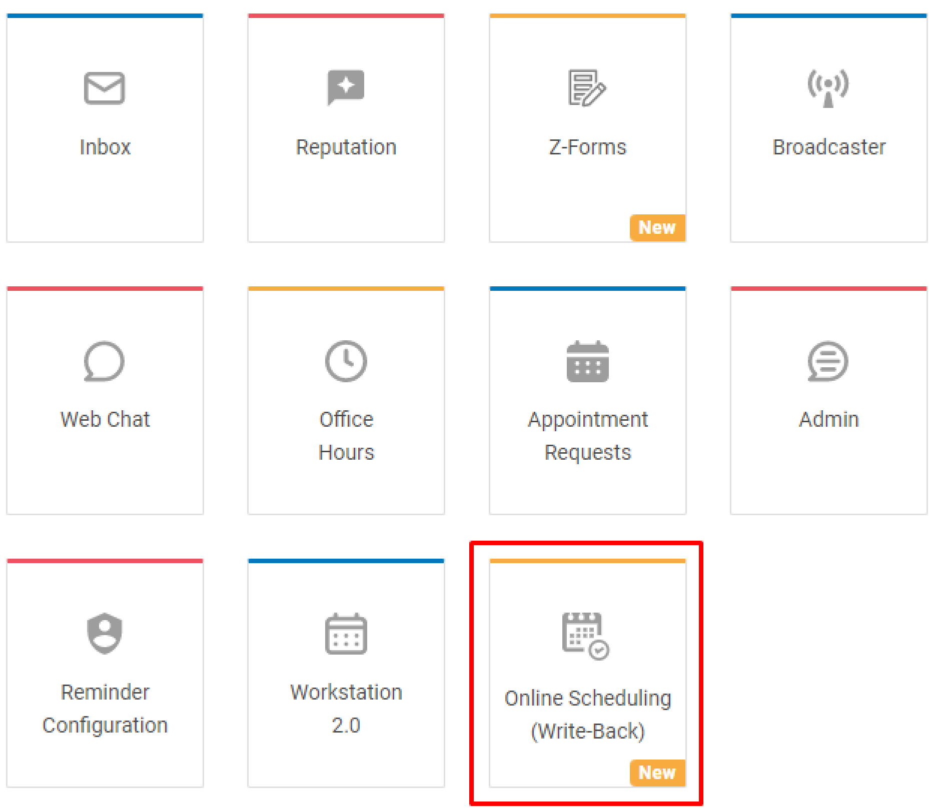
Getting Started

How It Works

The online scheduling widget allows potential new patients to request appointments at their desired date and time directly on your website. After your staff approves the request in Zingit, the new patient is sent a confirmation email, a new patient record is created in your EHR, and the appointment is automatically added to the calendar on your EHR as well. The calendar integration with your EHR allows Zingit to display available time slots on the widget in real-time. This feature also provides access to the Online Scheduling Dashboard in Zingit, where you'll be able to customize the widget and manage appointment requests. All the information you need to get started is available in this user guide!

Accessing The Online Scheduling Dashboard

To access the Online Scheduling Dashboard, you will first want to log into the Z-Suite by going to zingitapps.com and entering your credentials. Once in the Z-Suite, you will see a new tile at the bottom called Online Scheduling (Write-Back):

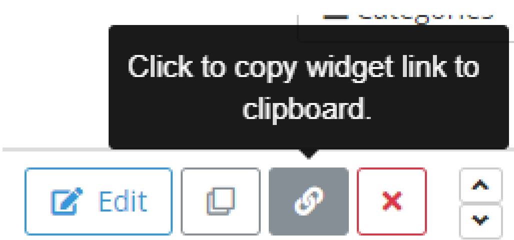


Setup Process

Widget Customization

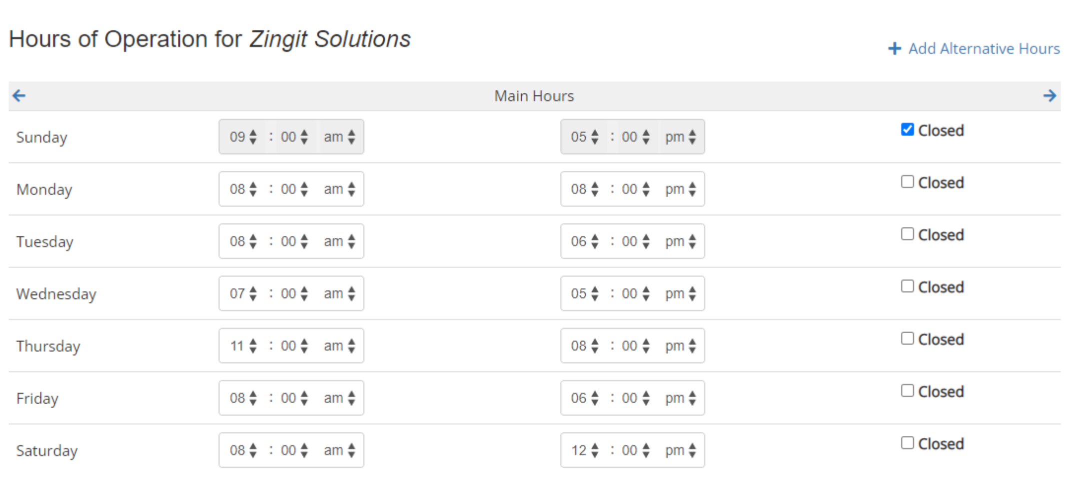
To begin customizing the online scheduling widget, you will want to select Widget Settings in the top right corner of the page.

Helpful tip: If you hover over a button, a pop-up description of the feature will appear for most items.



Location Hours

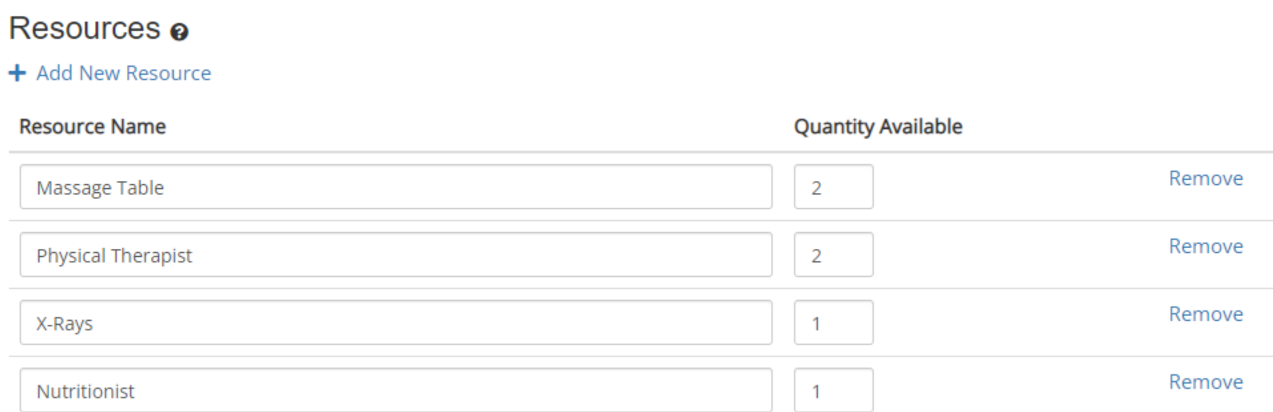
It is important to configure your office hours so that the online scheduling widget displays accurate availability options. There is the option to indicate that the office is closed for an entire day.



Important: If your office closes midday for lunch and blocking off those hours is required, please contact support@zingit.com for assistance. Please contact Zingit to block off future holiday closures as well.

Resources

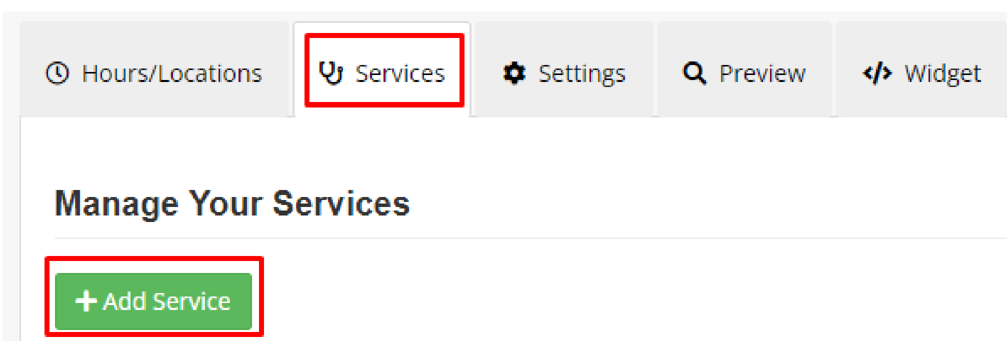
Resources allows you to control the availability of rooms or resources in your office. These resources are then tied to specific services you create, ensuring that these resources are not overbooked.



Adding Services

Services is where you will create the new patient appointment service on the widget for your future patients.

To add the new patient service, select Services at the top of the settings and then click on Add Service.



Service Name – The name of the service that will display on the scheduling widget.

Mapped Service – A drop-down menu that displays the appointment types pulled from your EHR. Tying the new patient service to the specific new patient appointment type within your EHR will allow for the appointment requests to be written correctly to your calendar.

Service Description – A short description of the new patient service that will display on the scheduling widget. This can be filled out to provide a detailed explanation of what new patients can expect on their first visit.

Session Duration & Price – Allows you to display the duration for the service in minutes and the pricing if standardized. You do have the option to hide either or both.

Form – If your office is using our Z-Forms, an existing new patient intake form will display in the drop-down menu and can be assigned to the new patient service! That means that after a new patient appointment is confirmed, the patient will be emailed the new patient intake form. If you are not using our Z-Forms yet, contact support@zingit.com for more information!

Resources – Resources created in the Hours/Locations tab can be assigned to a service.

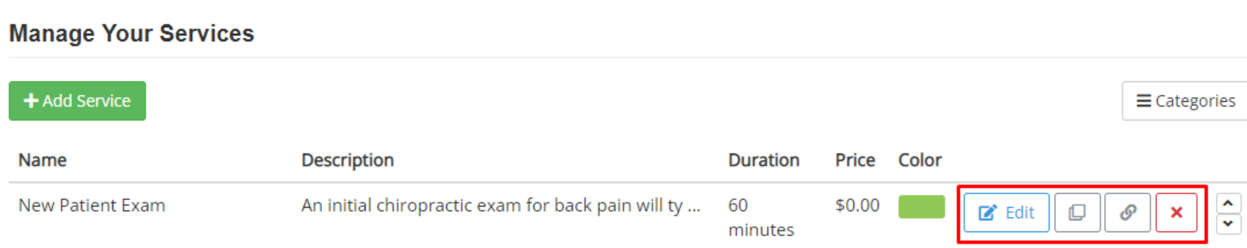
Overrides – These are settings that can be modified for the specific service in question. The settings used here will be unique to the service and not apply to any others if multiple new patient services are created.

Advanced – Like the Overrides, these settings are unique to the service in question. The color-coding option is for internal use. You can hide a service from the patient-facing scheduling widget here if you want to make it unavailable temporarily. Another feature is the ability to select a start and end date for a service, which is useful if a unique new patient service is being offered for a limited time.

Managing Services

After a service is created, all services will display under the Manage Your Services section. You will be able to do things such as:

- Edit the settings/configuration of the specific service
- Duplicate the service to use as a template for similar new patient services
- Copy the direct URL link for the service to send to potential new patients
- Delete the service entirely
- Change the order of the services displayed on the scheduling widget.



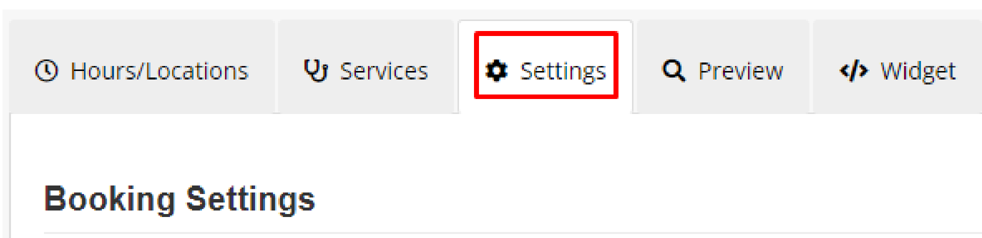
Booking Settings

Located under the Settings tab, this section allows you to edit the settings used for booking services.

Important: In this section, you will need to configure your local time zone. This will ensure that the time displayed on the scheduling widget will align with your calendar.

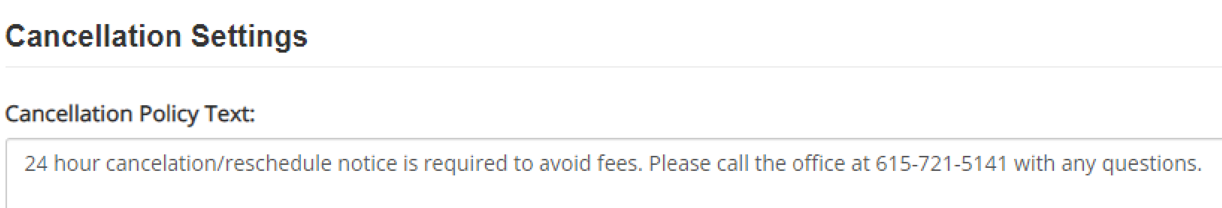
You will also want to decide if your office will allow your new patients to request same-day appointments. If same day bookings are permitted, there is also a setting to decide how much notice is required to book.

An additional setting to highlight is the optional "fake it until you make it" setting. This allows the calendar to appear moderately or super busy when patients go to request an appointment. Seeing a limited number of options could create a sense of urgency for the patient to book their new patient appointment as soon as possible.



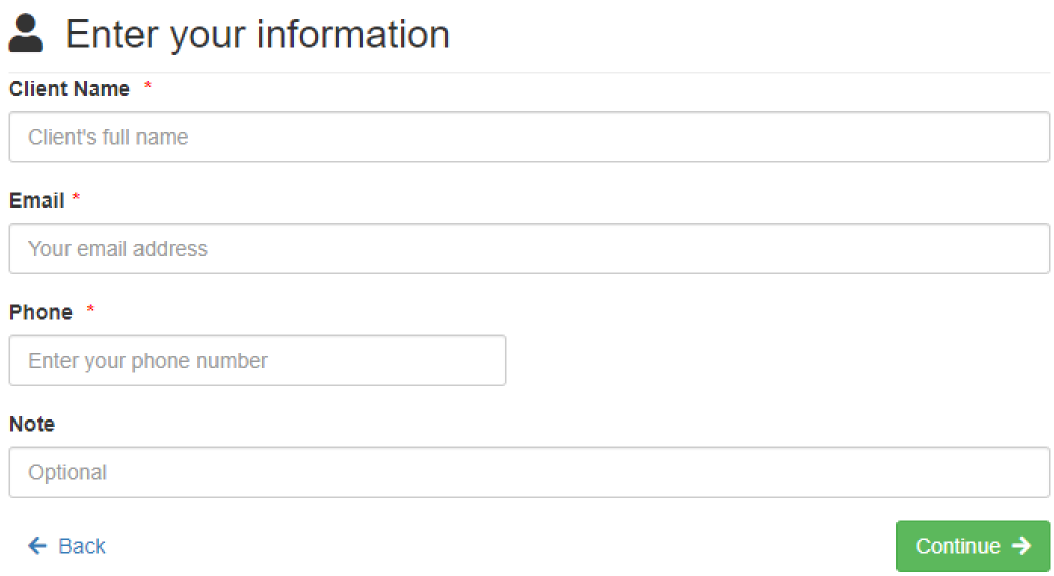
Cancellation Settings

Located under the Settings tab, this section is where you will add your office's cancellation policy. This policy will be provided to new patients in their confirmation email after the staff has approved the appointment request.

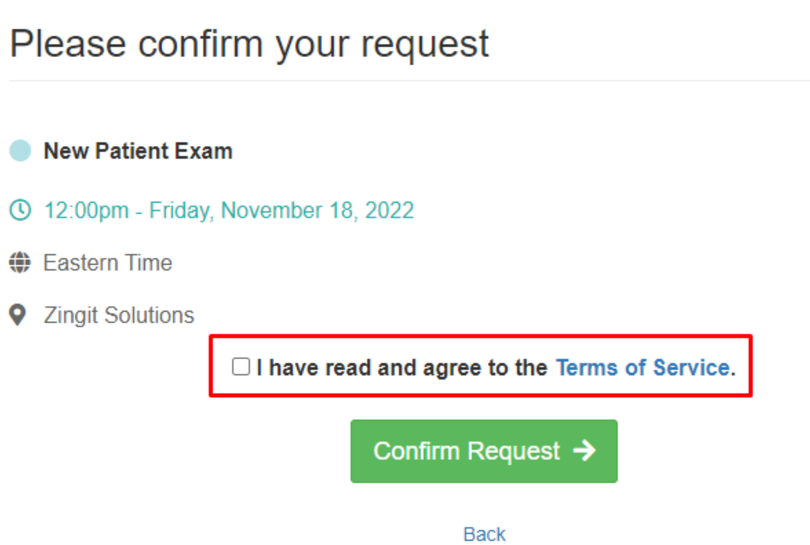


Other Widget Settings

Custom Fields – This setting allows you to create custom fields during the appointment request process on the scheduling widget. This is where the patient enters their information such as their name and email.



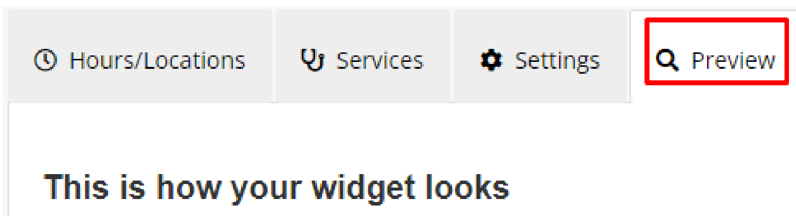
Custom Terms of Service – Before the patient confirms their appointment request, you have the option to add custom terms of service for them to read and accept.



Activation & Management

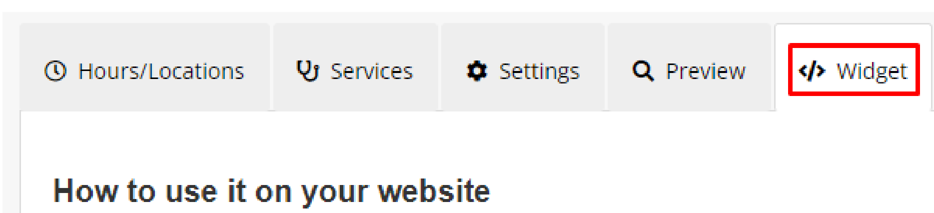
Previewing The Widget

The scheduling widget can be previewed under the Preview tab at any point during the customization process. The widget will display exactly as it would on your website, even allowing you to go through the appointment request process as if you were a new patient. This helps ensure that the scheduling widget is customized to your needs.



Adding Widget to Website

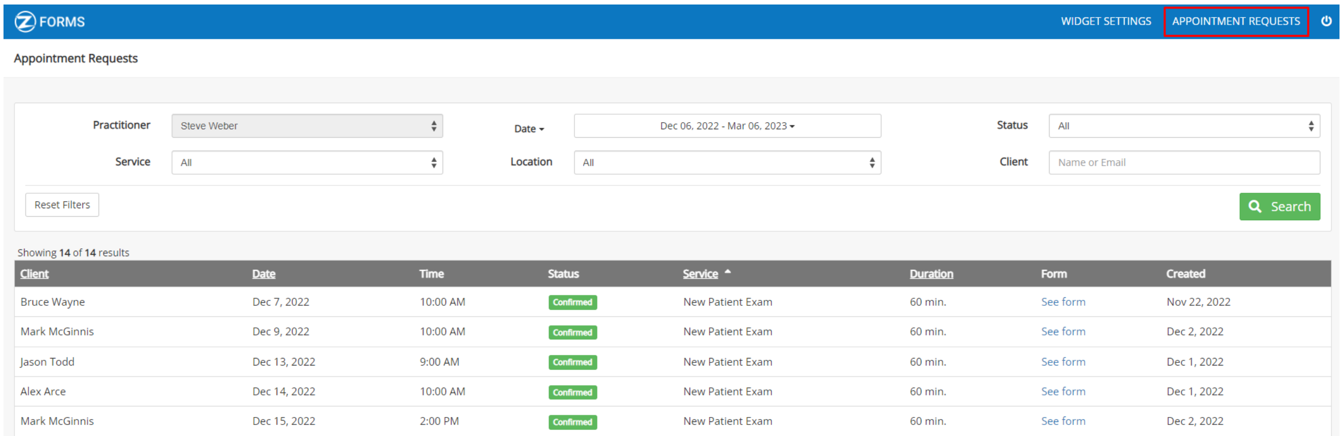
Once the scheduling widget is fully customized, you are now able to add the widget to your website. The two different codes available and how to apply either option to your website can be found under the Widget tab. We would recommend copying the HTML codes, as well as the instructions provided, and sending those to your web designer to apply to your website. A direct link to the scheduling widget can also be found in this section, which can be added to a template in the Zingit Inbox.



The scheduling widget will go live as soon as it is on your website and potential new patients will be able to start requesting appointments!

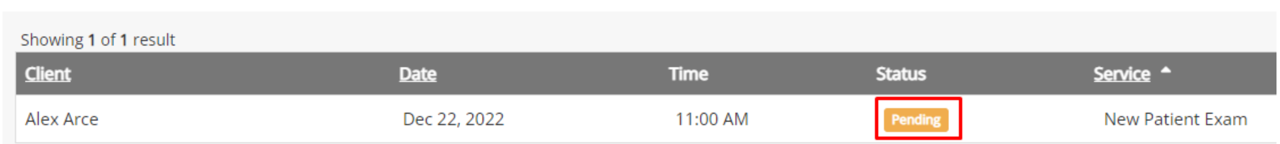
Managing Appointment Requests

When a new patient requests an appointment using the scheduling widget, your office will be sent a notification email, and the request will appear in the Appointment Requests Dashboard under Appointment Requests.

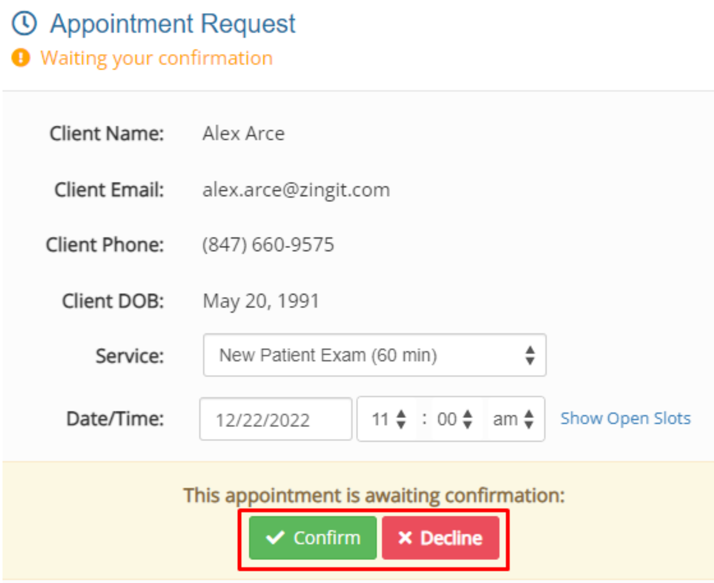


Approving Requests

Before an appointment is written back to your EHR calendar, the request must be approved by the staff. This is helpful for last minute changes not yet reflected on the EHR calendar, such as an unexpected closure, and to prevent fake requests from being added to your calendar. When a request is made, the status of the appointment will display as pending.



To approve or decline the request, click on the request, and select either option. You will be given the option to send a message to the patient in an email for either selection.



After the request is confirmed, the new patient will be sent a confirmation email with the appointment details, a new patient record will be created in your EHR, and the appointment will be added to your calendar. If your office is using new patient intake forms with Z-Forms, the new patient intake form will also be emailed to the new patient.

Important: If a request from an existing patient arrives to the Appointment Requests Dashboard, approving the request may result in a duplicate record in your EHR for that existing patient. You will instead want to manually create an appointment on your EHR's calendar with the patient's existing record. The patient can be notified by the staff through the Zingit Inbox and the request can then be deleted.

Appointment Request Records

All previous requests submitted through the scheduling widget will be available to review for your records. Requests can be filtered by service, date range, confirmation status, or you can search by name/email.

Questions & Support

If your office has any questions regarding the online scheduling widget not covered in this guide or any feedback, please contact us at support@zingit.com.