Processing Appointment Requests Using the eWeb*Extra* Patient Info Inbox

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This document is a short guide that explains how to process appointment requests in the Patient Info Inbox. For more detailed instructions on setting up and using the eWeb*Extra* OfficeMate Integration and the Patient Info Inbox, see the *eWeb*Extra *OfficeMate Integration User's Guide*.

NOTE	To keep the Patient Info Inbox window visible on top of all other open windows, click **Options** and select **Always On Top**.

All appointment requests that patients submit online are sent to the Patient Info Inbox. Before accepting an appointment request, search to confirm that the patient exists in your OfficeMate database and create the patient, if necessary.
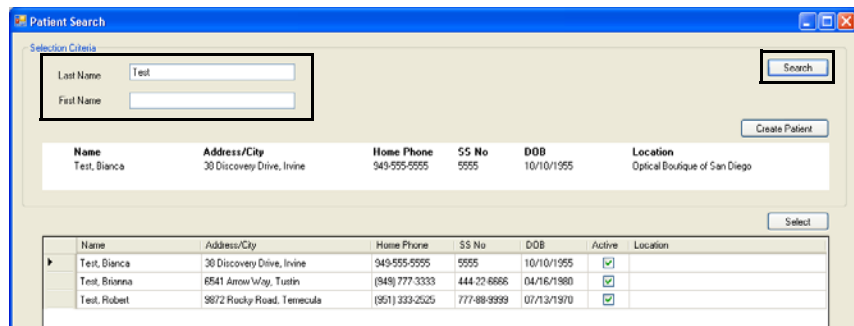
Finding the Patient in the OfficeMate Database

1. In the Patient Info Inbox, click the **Appointment Requests** tab.

2. Locate the appointment you want to process and click **Find Patient**.

   The Patient Search window opens. If there are no existing patient records in OfficeMate with the same name, a dialog box opens, prompting you to perform another search or create a new patient. Click **OK** to close the dialog box.
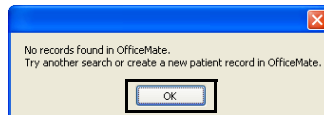
3. Search for a patient by typing variations or shortened versions of the patient name in the **Last Name** and **First Name** fields and clicking **Search**.

   All patients that meet the search criteria appear in the list.

4. Perform one of the following:

   – Select the patient in the search results list and click **Select**, or double-click the patient name.

   – If you cannot find a patient match, click **Create Patient** to create a new patient record.

Processing the Appointment Request

Once you have selected or created the patient record, you can process the appointment request.

1. Double-click the request you want to process.

   The Appointment Request for Patient window opens.

2. Accept or decline the request by selecting the appropriate radio button.

3. Choose whether to send the patient an e-mail by selecting the appropriate radio button. You can edit the default e-mail text or send it as-is.

4. To print the appointment request details, click **Print**.

5. Click **Process Appointment Request** to process the request and remove it from the Patient Info Inbox. You cannot retrieve a request after processing it.

Accept or decline the appointment request

Send or do not send an e-mail to patient

Edit e-mail text, if necessary

Process the appointment request
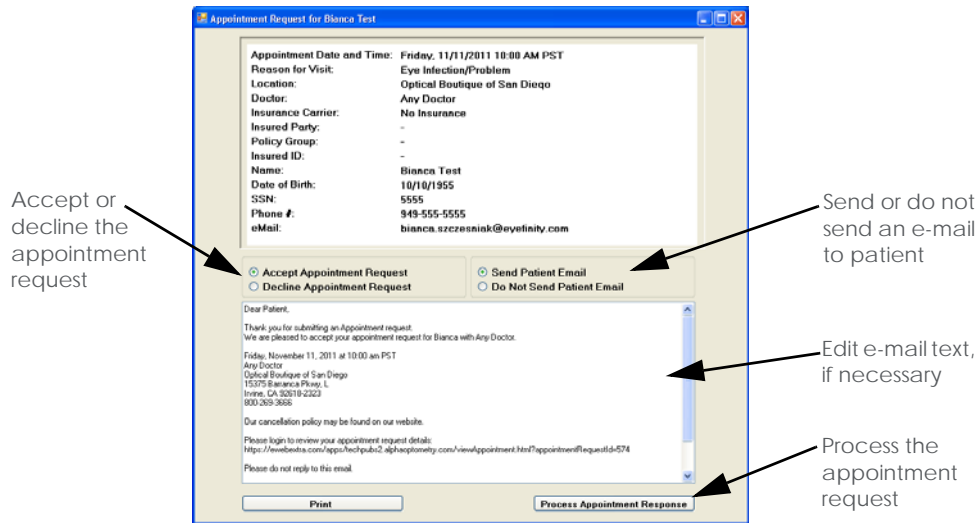
6. If you accepted the request, a dialog box appears asking you to confirm that you want to add the appointment to your OfficeMate Scheduler. Click **Yes**.

   The appointment is automatically recorded in your OfficeMate Scheduler.