

GETTING STARTED GUIDE: FOR CLIENTS

Online Booking

with 

Online Booking lets you request, cancel, or reschedule appointments with your clinician.

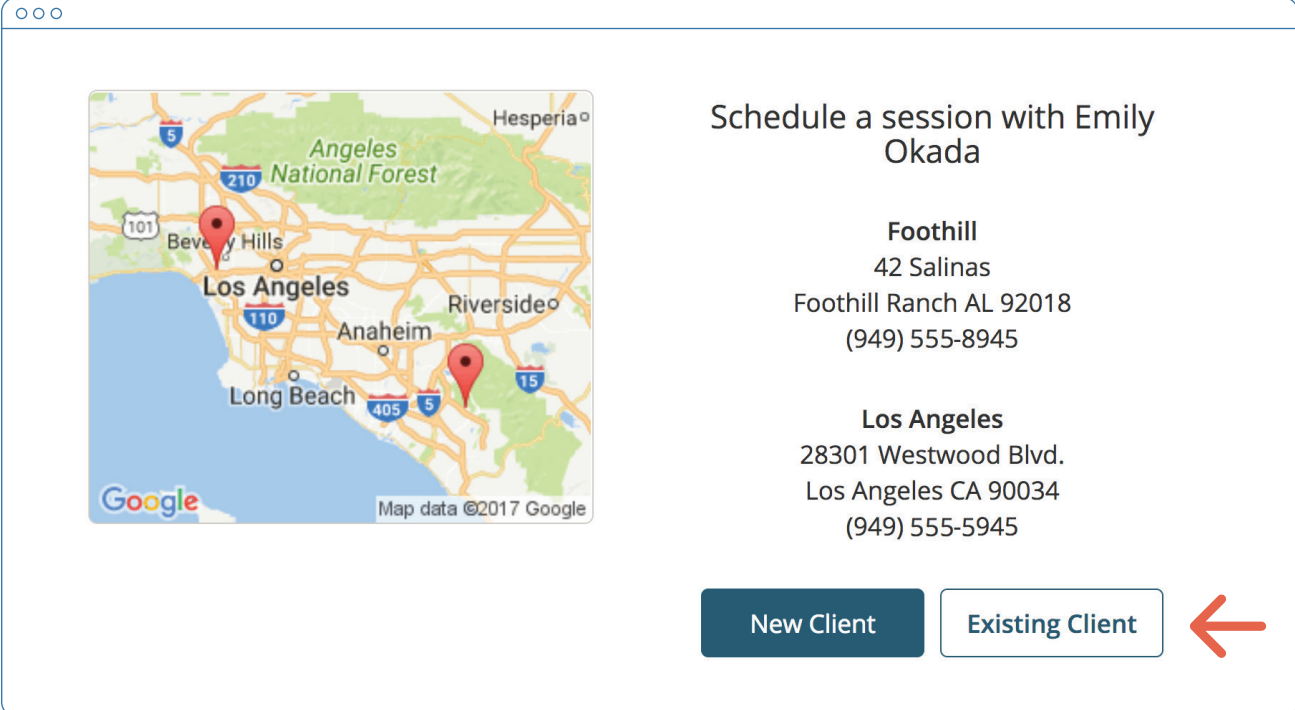
SECTIONS:

1. Request a session
2. Cancelling requests

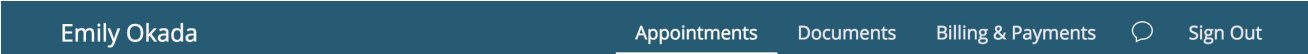
REQUEST A SESSION

The following steps will show you how to request appointments.

1. Go to your clinician's Client Portal and click Existing Client to log in. (The New Client button is only for clients who have never logged into the Client Portal before).



2. Navigate to the appointments tab. (This may already be selected by default after you log in).



ia Satir LLC

Appointments Documents Billing & Payments

Schedule a Session

With: Virginia Satir

3 At: Office 2

4 Service: Psychotherapy, 50 min (90837)

Oct 23 - Oct 29, 2017

5 Morning

MON 23	TUE 24	WED 25	THU 26	FRI 27	SAT 28	SUN 29
4 Available	4 Available	4 Available	0 Available	0 Available	0 Available	0 Available

Afternoon & Evening

MON 23	TUE 24	WED 25	THU 26	FRI 27	SAT 28	SUN 29
4 Available	0 Available	6 Available	8 Available	0 Available	0 Available	0 Available

3. Select your **clinician** (if there are multiples) and your preferred **office location** from the dropdown menus.
4. Select your **service**. What type of appointments do you see your clinician for?
5. Click one of the **available** boxes to see specific times. You'll see that these boxes are split into morning (up until 12 noon), and afternoon & evening (12pm onwards). Clicking the arrows on the top left and right will let you move from week to week.
6. Click on the **time** that you'd like to request.

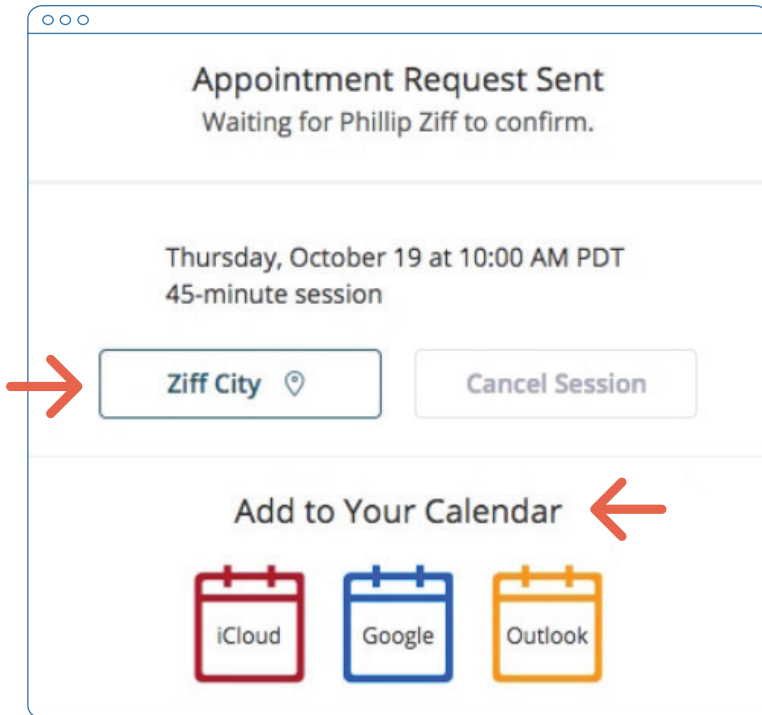
Appointments Documents Billing & Payments

Select a Start Time

Friday, October 20

6	12:00 PM
	01:00 PM
	02:00 PM

Note: To go back to the previous screen with all of the days, click the back button (top left).

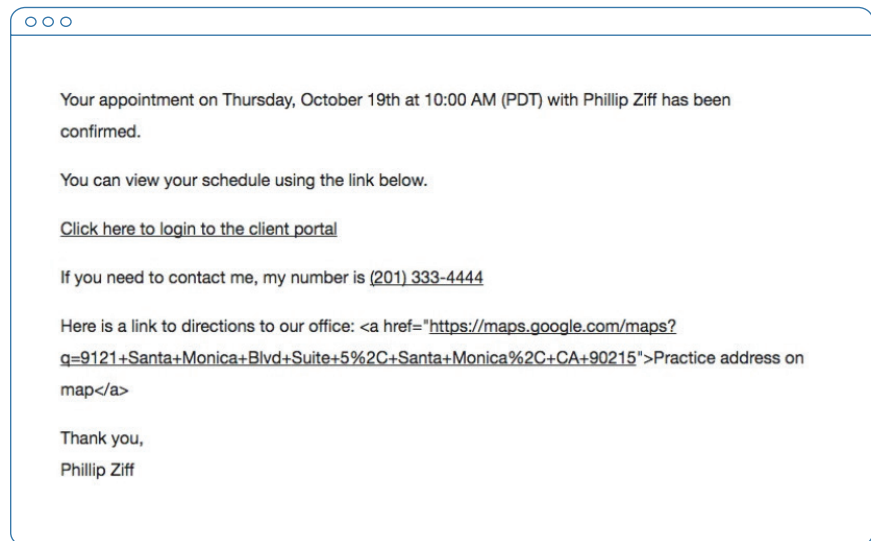


7. Your appointment request is now confirmed.

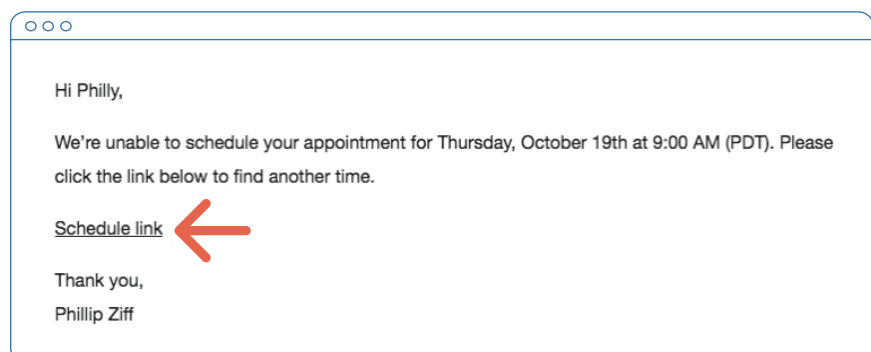
Note: This doesn't mean that the request has been accepted by your clinician yet.

You can click to view a map of the office location, or add the session to your calendar.

8. When your appointment request is accepted, you'll receive an email confirming the session:



9. If they cannot see you at that time, you'll receive an email with a link to reschedule. Click the link to go back to your client portal and request a new session.



VIEWING AND CANCELLING REQUESTS

You'll see a list of your upcoming requests and confirmed or denied appointments on the appointments page of your client portal, below the calendar.

The screenshot shows a client portal interface for 'Afternoon & Evening' appointments. At the top, a calendar displays availability for the week of October 17th to 23rd. The 'THU 19' date is highlighted with a '3 Available' status, while other days show '0 Available'. Below the calendar, the time zone is set to 'Pacific Time (US & Canada) UTC-07:00 (change)'. Under the 'Upcoming Sessions' section, two sessions are listed for Thursday, Oct 19. The first session is at 09:00 AM PDT, a 45-minute session with a 'Pending' status. Below this session are two buttons: 'Ziff City' with a location pin icon and 'Cancel Session'. A red arrow points to the 'Cancel Session' button. The second session is at 10:00 AM PDT, also a 45-minute session with a 'Pending' status.

Click **Cancel Session** to cancel your appointment request.

Note: You'll only be able to cancel this way according to your clinician's cancellation policy. If you attempt to cancel too close to a session, or if they don't offer online cancellation, you'll receive a message to call their office to cancel.

Once your session is cancelled, you'll see this reflected on your appointments page in the Client Portal. Use this page to check the status of your requests, cancel sessions, or schedule new ones!

This screenshot shows the 'Upcoming Sessions' page after a cancellation. The first session, 'Thursday, Oct 19 at 10:00 AM PDT 45-minute session', now has a 'Cancelled' status in a red box. Below it is a 'Ziff City' button with a location pin icon. The second session, 'Thursday, Oct 19 at 01:15 PM PDT 45-minute session', has a 'Confirmed' status in a green box. Below this session are two buttons: 'Ziff City' with a location pin icon and 'Cancel Session'.