

Atlas Chiropractic System

ONLINE BOOKING

Atlas Chiropractic Software's online booking feature is available to help clinics meet the demand of their patients for timely and efficient appointment scheduling options. There are a few easy steps to complete in order to setup the feature. This manual includes information for your office to complete these steps and understand how to use the feature plus a second manual that is available to your patients from their online booking webpage.

NOTE: Online Booking is available in Atlas Chiropractic Systems software version 2.5.0 and later. To use the feature, you must have updated to at least this version.

Before using the online booking feature users will need to designate a computer in the office to run the data sync utility (this utility is called Atlas Core – and is used to link your in-office database to the online booking system).



Setup > Initial Setup > Rooms

In Rooms, click Edit (bottom of the window) and check one box under the Core column for the PC you want to run Atlas Core. This generally should be your Front Desk PC (or a computer that is usually running Atlas during your working hours).

Number	Description	Provider	Current Status	Status	Pitstop	Assign	Import	VTC	Backup	Core	P	AFID	Type	Signout	Max	Touch	Subj	Sound
FD	Front Desk	No Provider	Not Available	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Record
R1	Room 1	Dr. Kevin Manso	Available	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Record
R2	Room 2	Dr. Kevin Manso	Available	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Record
SI	SI	No Provider	Not Available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Record

After selecting the computer, click SAVE and then Exit the Rooms window.

Restart Atlas on the PC selected and note the new Atlas Core window that launches automatically.

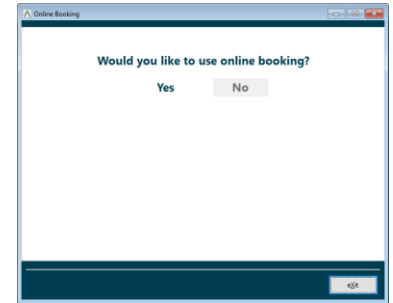
Atlas Core mainly functions as a log window – it will run in the background, minimized in your computer taskbar during operation. It will also close automatically when you close Atlas on the designated computer.

The next step is to enable and configure your online booking and schedule options. This will include selecting which Provider(s) patients can book with, which Appointment(s) patients can book and more. If you add or change these settings in Atlas in the future (add new Appointment Types or Providers for example) you may need to revisit this setup step.



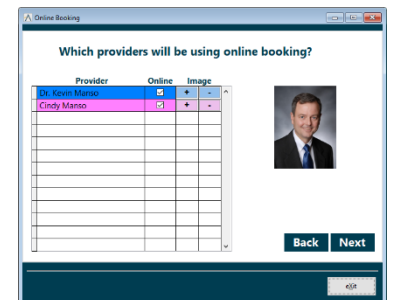
Setup > Initial Setup > Online Booking

The first time you open the online booking settings window, you will be prompted to start up the feature – select YES when you are ready to begin the setup.



Provider Setup: the first screen is for selecting which Provider(s) will be available for your patients to schedule appointments with online.

- Check the box 'Online' to enable online booking and schedule viewing
- Click the + sign to add an image for the provider (optional)
- Click the – sign to remove an image for the provider

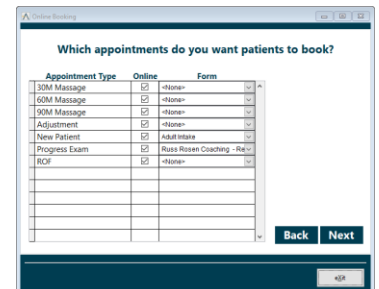


You may notice in our example we have 2 providers selected for online booking and have added their profile picture. The picture option can be helpful for clients who might not be sure of which provider they normally see and adds personalization to the experience.

Click NEXT when this step is done.

Appointment Type and Form Setup: in this window users can select which appointments will be available for patients to schedule online. Some offices may choose to limit only existing patients to schedule Adjustments for example while others may include all of their different appointments online.

- Check the box 'Online' for appointment types you want available for patients to select and schedule online
- Select a Form to automatically send to patients when they book the selected appointment type



The Atlas online booking system can automatically email forms for the patient to complete based on their selected appointment type – this includes sending New Patient Paperwork, Re-exam forms and more!

The online forms feature is an add-on feature to online booking and requires a subscription to the Online Intake forms from Atlas. You can find out more about this feature and subscribe by clicking HELP in Atlas or visiting <http://atlaschirosys.com/orders>

Click NEXT when this step is done.

Clinic Details Setup: in this window users can configure their online details.

- Click the 'Get Image' button to find and upload your clinic logo that will be displayed on your patients booking page (optional)
- Set Username and Password to access the Provider side of the online booking feature

Please note – currently this login will be used by all providers to access their online schedule

- Select the time any online backup you might be using starts each night and how long the backup usually runs – this is an optional setup and you may need to consult with your local IT professional for details. Setting these options will ensure Atlas is closed before the backup runs to help avoid potential database corruption

Click UPLOAD when complete.

After clicking upload, Atlas will begin syncing your data to your online account. Depending on the size of your database this could take a few hours. You are able to use Atlas and your PC during the upload process.

When the upload has completed, you will see the 'Initial Upload Successful' message in the Atlas Core window.

Please do not proceed to the next steps until the upload has completed.

Notify Patients about your Online Booking Feature

There are two ways for you to alert your patients about your new online booking option. Clinics can send a mass email to their patient list or can send individual email notifications to specific patients. Please refer to our full User Manual for details about setting up email in Atlas if you haven't already set it up.

We have included an email template to notify your patients about the online booking option. You can use this template or create/edit your own. If you want to edit or create your own template (optional):



Setup > Templates > Email and Messaging

In the template window, click ADD at the bottom to create a new template.

- **Name:** enter a short description for the template (Email-Online Booking for example)
- **Type:** select Email from the drop down
- **Subject:** type in a subject line for the email
- **Body (box):** type in the body of the email. You will notice options for 'tokens' along the left side of the email edit screen. These tokens can be used to include personalized details for the recipient such as their name.

Use the 'Online Booking' token to include the link to your clinics online booking account in the email. Be sure to include this link so patients can easily navigate to your online booking portal.

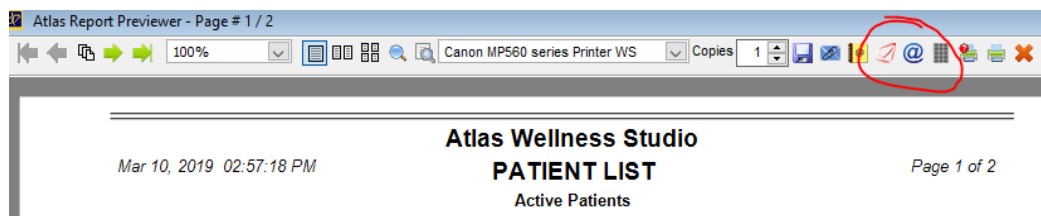
Click SAVE and Exit when done.



Reports > Patient Reports > Patient Lists

Use this to email a group of patients.

Select the criteria for your list (Active patients, who have Visited Since a date – for example) and click REPORT. On the Report Preview Toolbar locate the '@' symbol icon to send an email to all patients listed on the report.



Clicking this will open an email window where you can select the template created in the previous step and Atlas will send that template email to all of the patients on the report who have an email address on file. Please note: emailing a large patient list can take an extended amount of time but users can continue to work in Atlas while the emails are being sent.

Individual emails can be sent to specific patients from their profile. Open the patient profile and click the Email button. Select the template and click Send.

Patients will receive your email instructing them to create an online booking account. During the process they will receive an automated email to verify their account setup and then can begin booking appointments online. At this time Patients will only be able to view and book appointments.

Patients will not have the option to cancel or reschedule appointments online.

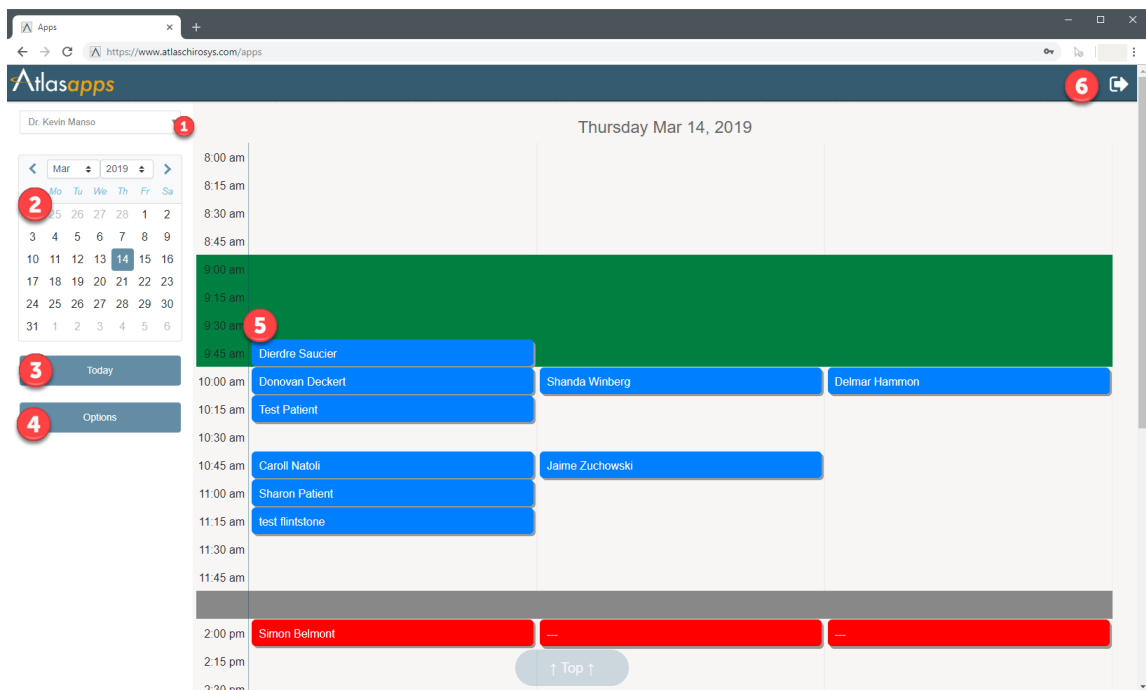
There will be a help video and documentation to help answer questions your patients may have.

Providers Online Schedule Portal

Providers will be able to view their schedules online from nearly anywhere and any device.

To start go to <http://atlaschirosys.com/apps>

- Click on the 'Online Booking' link
- Login using the credentials created during the Online Booking setup process earlier in this tutorial



1. **Provider selection:** click the drop down menu to view / select provider schedule
2. **Calendar:** use the calendar to navigate days – click the left/right arrows at the top or select the Month and/or Year menu
3. **Today:** navigate immediately back to today’s current date
4. **Options:** configuration screen for provider’s online schedule. See the ‘Options’ section later in this manual
5. **Schedule:** providers schedule area which will reflect appointment type colors, hours, color bands, etc as setup in Atlas.
6. **Logout:** click to logout of the online booking portal

Booking Options

- **Schedule Delay:** number of hours before a time that patients can book
- **Email for new appointments:** sends an email notification to the provider whenever an appointment is booked online
- **Sign up Link:** URL to the webpage where patients can book online for the clinic – can be sent to your web developer to include on your website or can be pasted into another email program to send in emails to patients
- **Website Button:** code that can be used to include a button link on your website for patients to book online

Booking options

Dr Kevin

Schedule Delay: ?

Email for new appointments: ?

No

Sign Up Link:

Website Button:

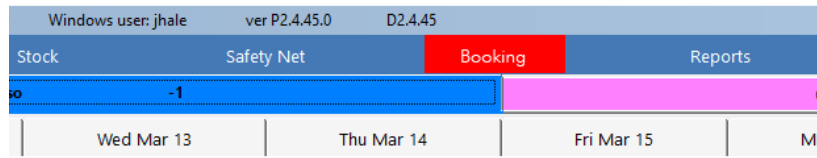
Save Changes

Close

Booking Conflicts and Stats

When patients initially sign up and create their online booking account, you will need to verify / sync their account to your database. This helps ensure accuracy in appointment management.

Booking conflicts will also need to be handled. Conflicts are appointments potentially overbooked or booked in times that conflict with other appointments. This can happen if the program is not syncing properly or if patients book while offices are changing hours, etc. This should not be a common occurrence, but can easily be handled if it happens.

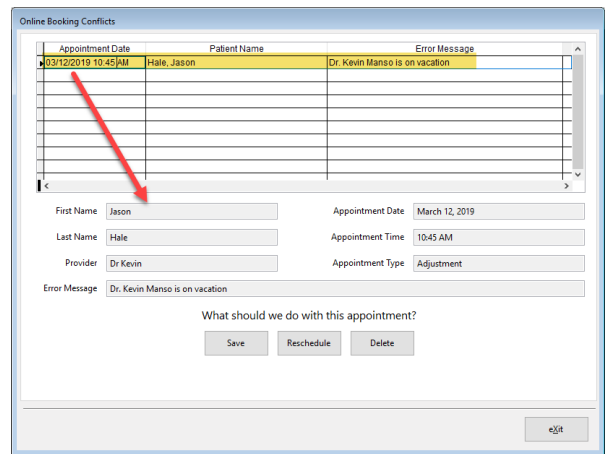


When the booking button (top of Atlas) is highlighted Red, it indicates a potential conflict or issue that needs attention.

1. **Confirming New Accounts:** one reason booking conflicts needs attention is to confirm new online accounts with your system. This helps ensure accuracy for your online booking system. If you open the booking conflicts window (simply click BOOKING) it will open the window for your review. Click in a patient name in the grid, use FIND PATIENT to open your patient search window and find the patient associated with the account and Merge to complete. If the account is not a current patient you can click NEW PATIENT to add them to your system. Once completed you should not have to verify or add this patient account again.

Click the APPTS button to view a list of appointments the patient has created.
Click the SKIP button to leave the confirm list and see Scheduling Conflicts.

2. **Schedule Conflicts:** if you open booking conflicts you may also be presented with a grid showing conflicts on the schedule. In the example used in this manual, the patient scheduled an appointment online while the office was also setting up Vacations / Holidays for the clinic. These changes were not synced before the patient booked their appointment. The booking conflict system identified this potential issue and is prompting the user to correct the issue.



- Click on the name in the grid
- Decide if you need to save the appointment 'as-is' or Reschedule or Delete the appointment to clear the booking conflict

It is important to take care of any booking conflicts immediately to ensure an accurate and efficient online booking experience for patients

Our Support Team is available:
 Monday - Thursday 8:00am to 7:30pm Eastern Standard Time
 Friday 8:00am to 4:30pm Eastern Standard Time
 Phone: 1-866-762-8527 option 2
 Email: support@atlaschirosys.com

Online chat, with a Live Technician, is also available during our regular business hours at our Atlas Support site. The Atlas Support Team is knowledgeable in a variety of computer related topics, however our focus is supporting the Atlas software. It is recommended to consult with a local IT professional in regards to your computers and network. Atlas personnel are available to assist your IT team to ensure the best possible experience with your software configuration and usage.

On occasion, your Atlas Support Representative is able to directly assist with general computer support (networking, antivirus, configuration) but Atlas recommends that issues outside of the scope of Atlas Support be directed to the appropriate Support professional.