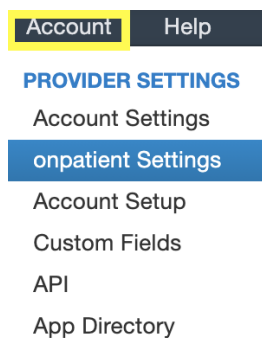# Automatically Sending OnPatient Invitations through Reminders and Appointment Confirmation
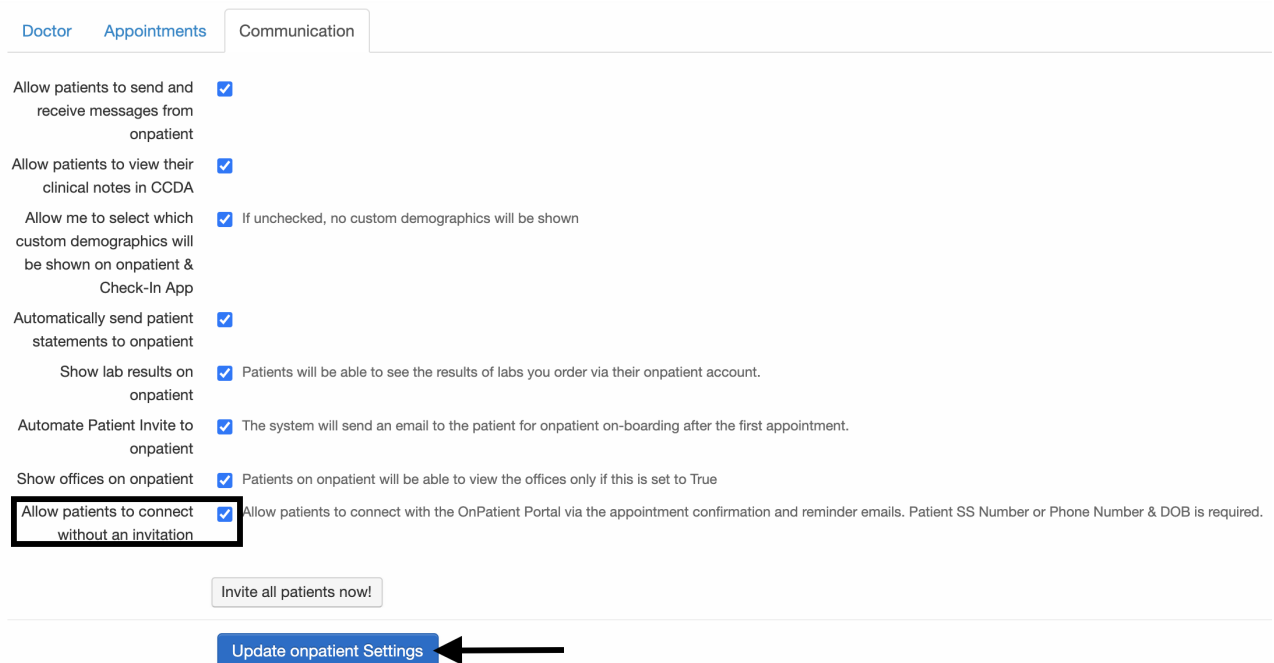
07/24/2024 12:34 pm EDT

You can automatically invite patients to connect with you through OnPatient prior to their appointment through a reminder email or the scheduling widget.

1. Go to **Account** > **OnPatient Settings**.

2. Navigate to the **Communication** tab. Check the **Allow patients to connect without an invitation** box and click **Update OnPatient Settings.**

Connecting with an Email Reminder

When a patient receives a reminder email, there is a link for appointment details and information.

Your appointment has been scheduled.

😊 ↩ ⤺ ⤻

R ⬭ **reminders@drchrono.com <reminders@drchrono.com>**   Tuesday, October 25, 2022 at 8:54 AM
To: sample@sample.com

This is a notice that you have scheduled an appointment with Dr. James Smith on Tuesday October 25 at 10:30AM.

You can view more details about this appointment at: https://drchrono.com/appointment_reminder/237df68b-3c4e-446c-8b8a-8154433a10ff

If you did not schedule this appointment or there is any problem with the appointment, please call (443) 555-5555.

This appointment scheduling is powered by: https://drchrono.com

Note: In order for the invitation to be accessed correctly, the patient's **cell phone number** must be entered in the chart.

The appointment details link will take the patient to a page with their appointment information, and a button to **Sign up for OnPatient**. The invitation link is valid for 7 days. You will need to re-invite / resend the invitation after the invitation expires.

Appointment with James Smith

October 05, 2020 at 1:00 p.m.

dr

Doctor	James Smtih
Office	225 Schilling Circle
	21212, MD Baltimore
When	October 05, 2020 at 1:00 p.m.
Website	http://www.drchrono.com
Contact	(443) 555-5555

[Confirm Appointment] [Cancel Appointment]

Your doctor uses **OnPatient** as your **Patient Portal**. Sign up to view your medical record, create appointments & message your doctor.

[Sign up for OnPatient]

This invitation expires on October 12, 2020

By clicking the **Sign up for OnPatient** button, they will be taken to the OnPatient Sign Up page to create an account with the email and Social Security Number or the email, date of birth, and **cell phone** number entered in their chart.

Connecting through the Scheduling Widget

When a patient schedules an appointment through the scheduling widget, they need to confirm their appointment through an email.

Please confirm your appointment with Dr. James Smith.

reminders@drchrono.com <reminders@drchrono.com>
To: sample@sample.com

Tuesday, October 25, 2022 at 9:06 AM

Dear Sample Patient,

This is a notification that you have requested an appointment with Dr. James Smith on Tuesday October 25 at 10:00AM.

Please click on this confirmation link to finalize your appointment:

CONFIRM

Please copy and paste the link into your browser if you are not able to directly click the link.
https://www.drchrono.com/for_patients/confirm_online_appointment_request/58085c25-c8e7-4c21-9f18-6041d512fd7f
If you don't confirm your appointment within the next hour your appointment request will be cancelled.
Please call (443) 555-5555 if you encounter any problems or if this appointment refers to an emergency.

Regards,
Family Practice

If you did not request this appointment please contact Dr. James Smith at (443) 555-5555

After confirming the appointment, the patient will be taken to a reminder website. They will be prompted to **Sign up for OnPatient**. The invitation is valid for 7 days. You will need to re-invite / resend the invitation after the invitation expires.

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October 05, 2020 at 1:00 p.m.

Doctor	James Smtih
Office	225 Schilling Circle
	21212, MD Baltimore
When	October 05, 2020 at 1:00 p.m.
Website	http://www.drchrono.com
Contact	(443) 555-5555

Your doctor uses **OnPatient** as your **Patient Portal**. Sign up to view your medical record, create appointments & message your doctor.

Sign up for OnPatient

This invitation expires on October 12, 2020

By clicking the **Sign up for OnPatient** button, they will be taken to the OnPatient Sign Up page to create an account with the email, date of birth, and phone number they entered into the widget.

onpatient

James Smith invites you to access your patient records

Sign up

First name

Last name

Email

Create Password

Already have an account? Login

Sign up

Note: In order for patients to be able to confirm their appointments through the widget, please ensure the **No confirmation emails** setting is unchecked under **Account** > **Offices** > **Online Schedule**.

Edit Office

Basic   Billing   **Online Schedule**

Show this office information online	☑
Allow online scheduling in this office	☑
Allow existing patients follow ups	☑
Allow existing patient new appointments	☑
Allow new patient appointments	☑
Allow patients to cancel appointments online	☑
No confirmation emails	☐