



## Pre-Setup

Once you've received the **PMP Online Booking – Enrolment Approval email** you are ready to begin setting up your online appointment schedule in PMP and your online booking webpage. Please make sure your ePMP is running before you begin.

## PMP Setup

1. Open PMP
2. Click on **Setup** on the top menu
3. Click on **Doctors Hours** in the dropdown
4. Choose the doctor's name and click on **Edit this Doctor's hours**
5. In the new window, select **Online Appointments** from the dropdown at the bottom of the window (the color will change to a light blue)
6. Then, select the timeslot(s) that you want to allocate to Online Appointments (available for patients to view and book online) and click on **Set to the Doctor is in with** at the bottom (repeat until you have updated the weekly schedule). The selected times will turn light blue.
7. When you're finished selecting all your time slots click on **Accept** and proceed to the next section: **Online Booking Webpage Setup**
  - If **ePMP** is not running/enabled, it will need to be enabled now. Please see instructions on Page 3 to enable ePMP.

## Online Booking Webpage Setup

1. Go to <https://www.mobilefd.ca/manage>. This is the place where you can **customize** what your patients can see on the online booking webpage.
2. Login using the **User Account Number** and **Password** provided in your **PMP Online Booking – Enrolment Approval email**. If you cannot locate this email please contact us at [oca@chiropractic.on.ca](mailto:oca@chiropractic.on.ca).
3. Please add doctor's name and up to 3 **Headings** which will appear at the top of your Online Booking Webpage.
4. If you wish to provide additional information or instructions for your patients, please add to the **Additional Information or Instructions** box.
5. Please provide your **Contact Information**. This will be included in your patients' **Appointment Confirmation emails**.

- *An email notification of the online appointments will also be sent to the email you provide in this section.*
6. Depending upon clinic hours, procedure, etc. you may wish to set a cut-off time after which patients can no longer request an appointment for the following day online. If so, select **Yes** under the section “**Would you like to restrict tomorrow’s bookings?**”. When you select **Yes**, you will be able to select a cut-off time from the drop-down menu that appears below.
  7. You can select up to 3 **Appointment Types** from the dropdown list (pulling from your PMP), and give them different titles (if you want to make it simpler for patients to understand), change the units associated with each appointment type and the status from the dropdowns.
    - We recommend not changing the units associated with appointment types. Please be advised that if you change the units of an appointment online they will still appear in your PMP appointment book with the units equal to their PMP set up (not online set up).
  8. When complete, click **Submit**.
  9. Verify that your changes have been made by going to your **Online Booking Webpage**, provided in the **PMP Online Booking – Enrolment Approval email**. If you need to make any changes you can start again at step 1 of this process.

## Post-Setup

**Test** the online booking feature with a number of fake patients before going live and making it available to your patients.

**Reminder:** The online appointment schedule and the local PMP schedule will sync every 15 minutes, so it may take time for the changes to appear.

## Linking Online Appointments to Patient Files

1. When a patient registers for online booking for the first time the appointment will show up in PMP as “**Click to Setup**”.
2. When you click on this appointment you will get a list of all new online bookings that need to be linked to a PMP patient file.
3. When you click on an appointment in this list, PMP will suggest similar patient files that match with the patient’s demographic information provided .
4. If a patient file matches, click on **Link to this Patient** to associate the online account to that patient file for future appointments.

- Once an online account has been linked to a patient file, this account can be used for appointment booking with any of your clinic practitioners.
5. If there are no matches, click on **Create New Patient**.

## Enabling ePMP

1. In PMP, go to Setup > Computer Defaults.
2. In the bottom left corner, place a check mark in the box This machine, only sends email and/or updates MobilePMP.
3. Press Accept and then proceed through any security prompts that appear. After the prompts, ePMP should appear and then minimize itself into the taskbar.

## Support Information

If you have any questions, please contact OCA support:

**Tel:** 416-860-0070

**Toll-free:** 1-877-327-2273

**Email:** [oca@chiropractic.on.ca](mailto:oca@chiropractic.on.ca)

### **Support Business Hours**

8:30 to 5:30 EDT – Monday to Friday