

SCHEDULE APPOINTMENTS INSTRUCTIONS

To request a virtual appointment with Elisa Ordon at Everimagine Financial Planning use this link:

<https://go.oncehub.com/EverimagineFPAppointments>

After clicking on the virtual appointment link, you will see a menu to choose from showing the different event types varying in duration and function.

Step 1: Select/tap the appropriate event type based on your needs and the purpose of the meeting.

Steps for requesting an appointment are listed in the panel to the left of the event types.

Step 2: Click on a date in bold to see available time slots.

Step 4: After two time slots selected, you can redo/clear a slot by tapping the trashcan or

all your selections by clicking on **Clear all selections and ...**, or if correct click **Continue**

Step 3: To make a selection, click on a time slot

Click on the month to see if more times available.

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Step 5: Provide required* information -

your name, email, phone.

For Phone Call Only Event Type

Additional information required - To acknowledge no video conferencing, list the phone number we are to call.

Optional - mobile phone, note, e.g., time slot preference or meeting topic, then click **Done**.

Provide information

Event type: 15-Minute Phone Call Only (Change)

Time: You have selected 2 times (Change)
United States: Pacific time (GMT-7:00) [DST] (Change)

Your name*

Your email*

Your company

Your phone*

Phone Call Only - No Video Conferencing*

Your mobile phone: United States (+1) [dropdown] [dropdown]
Include area code

Note - List here preferred time slot or meeting topic. Thanks

Booking notifications will be sent to this email

To acknowledge no video conferencing list the phone number we are to call.

Change selection

Done

Note: You may change other appointment elements on the page.

Click on **Change selection** and these

Previous steps

Event type: 15-Minute Phone Call Only (Change)

Time: 2 times (Change)
Tue, Jul 21, 2020, 6:45 PM - 7:00 PM
Thu, Jul 23, 2020, 12:45 PM - 1:00 PM

United States: Pacific time (GMT-7:00) [DST] (Change)

Close

options to **Change Time Slots and Event Type** appear.

You may also change the Time Zone by clicking on **(Change)**

In-Person Appointment

To request an In-Person appointment, please use this link: <https://go.oncehub.com/ElisaOrdon>

Since there are no Event Type options for In-Person appointments, the process is the same as the virtual appointments starting with Step 2.

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After the booking request is made, you'll first receive an email showing your request has been submitted. It will look like this:

Your Booking request has been submitted

It will include the Event Type and 2 time slots you submitted, as well as the location of the meeting. If your appointment is a virtual meeting it will include the video conferencing information/link. →

Video Conferencing

When it's time, join the meeting from PC, Mac, Linux, IOS or Android:

<https://zoom.us>

It will also show your information including your phone number and any notes you added.

If you need to revise or cancel your request, click on this: →

United States; Pacific time (GMT-7:00) [DST]

[Cancel/Reschedule](#)

Next, you'll receive a follow up email confirming the appointment selected from the two time slots you submitted. The confirmation will look like this:

Your booking is confirmed

Dear

Your booking has been confirmed. Please see the meeting time and other information below.

Alternatively, you may receive an email requesting you to resubmit your book request.

The subject line will be: Action required: Please resubmit Booking request

To resubmit your book request, click on this button:

[Resubmit your booking request](#)

in the email.

Once your booking request is finalized, and you receive the confirmation email, you will be able to revise or cancel your appointment using the button in this email as well as the appointment reminder emails. The Cancel/Reschedule button looks like this: →

Time

Mon, Jul 1, 2019, 12:00 PM - 01:00 PM

United States; Pacific time (GMT-7:00) [DST]

[Cancel/Reschedule](#)

You can also add your appointment to a variety of popular calendars by clicking on the specific calendar listed the bottom of the confirmation email. calendar, the video conferencing link you can join the meeting by clicking on

[Add to Outlook Calendar](#)

[Add to Google Calendar](#)

[Add to Apple Calendar](#)

[Mobile and other calendars](#)

Once the event is added to your will also be posted in the event, and the link in the calendar.