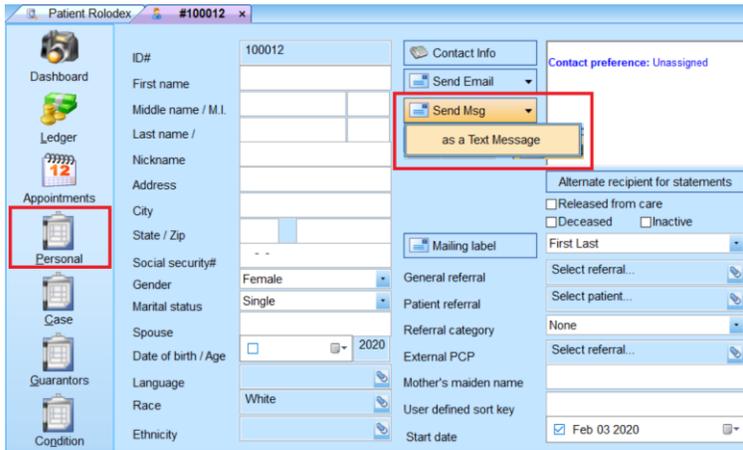


# How can I send generic text messages to a patient outside the appointment scheduler?

From any patient's **Personal** tab, simply use the **Send Msg** button:

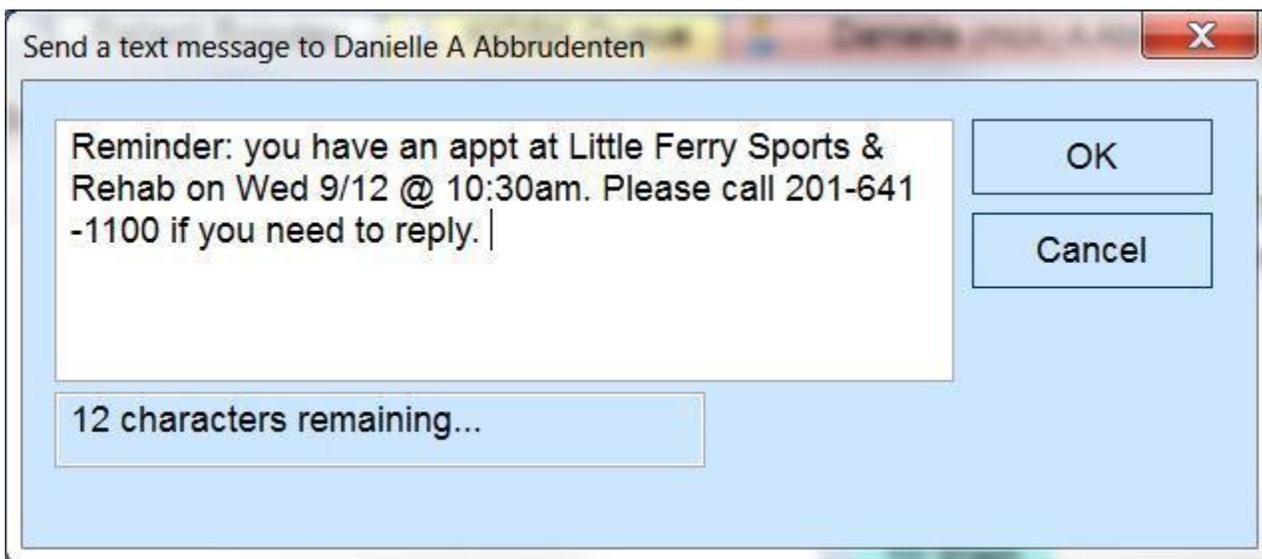


To send text messages to groups of patients, you can use **Advanced Method #2** discussed below.

# How can I send text messages to patients to remind them of an upcoming appointment?

## Individual Appointments

- Right-click the patient's appointment within the scheduler.
- If the options is available, a check mark will appear next to Send text message
- Select the option to view a mini-editor with default text.
- Use as-is or change the text.
- Press **OK** to send.



# Multiple Appointments / Multiple Patients

## Basic method: From the scheduler tab...

1. Within the **Appointments** tab, select the **Print / Export** tab.
2. Select your date and/or time range.
3. Scheduled appointments is checked by default.
4. Select Send basic text messages to patients who can receive them in the **Other options** check list.
5. Press **Print/Process** to all patients who fit the selected criteria.

The screenshot shows the 'Appointments' software interface with the 'Print / Export' tab selected. The interface includes the following elements:

- Current system date & time:** September 8, 2018 7:48pm
- Report date range:** Sep 08 2018 (start) to Sep 08 2018 (end)
- Time range:** 01:00 PM (start) to 07:30 PM (end)
- Provider:** Dr. Karen Walters, (0-0)
- Include the following as separate lists in report...:**
  - Scheduled appointments
  - Missed appointments for TODAY through current time
  - Missed appointments
  - New patient appointments
  - Cancelled appointments
  - Rescheduled appointments
- Other options:**
  - Print fee routing slips
  - Send basic text message to scheduled patients who can receive them
  - Export scheduled appointments in date range
  - Notify regarding expired authorizations
  - Print comments on a separate line
- Print / Process** button

## Advanced method #1: Appointment Recall feature...

Set specific advance timing features separately for each appointment as it's created for a customized reminder date.

1. This feature should be partially automated within the configuration for a standard recall date.
2. Set the **Recall** date for each appointment as it's created.
3. Routinely (e.g. daily/weekly), access the **Appointment Recall** report from the **Reports** menu.
4. Change the **Report objective** to Send form letters (via portal / email / text).
5. Check Send as text message to patient's cell phone within the **Email/text options** list.
6. Enter a subject (e.g. "Your Appointment") as the **Email/text subject**.
7. Under **Selected template**, select Use Portal / Email / Text only (in priority order).
8. Press the **Browse** button to select a previously created form letter (text merge) file template.
9. Select a provider.
10. Add any related filters.
11. Select **Create/Process** to begin the process.

The screenshot shows a software interface with a navigation pane on the left and a main configuration area on the right. The navigation pane includes categories like Aged Accounts Receivable, Alerts, Appointment Recall, Appointment Reminder List, Audit, Birthday List, CMS, Daysheet, Deposit Slip, EHR, Fee Slips, Form Letters/Text Merge, Inventory, List Bills By Date, Mailing Labels, Managed Care, Narratives, and Patient List. The main area is titled 'Appointment Recalls' and contains several sections:

- Report objective:** A dropdown menu set to 'Send form letters (via portal / email / text)'.
- Recall date range:** Two date pickers both set to 'Sep 08 2018'.
- Restrict to a specific provider:** A text box containing 'Dr. Karen Walters, (0-0)' with a link icon.
- Email/Text options:** A list of checkboxes: 'Send to patient's home email address' (unchecked), 'Send to patient's work email address' (unchecked), and 'Send as text message to patient's cell phone' (checked).
- Email/Text Subject:** A text box containing 'Your Appointment'.
- Selected template:** A text box containing 'D:\MPN\Templates\Appt Reminder.rtf'.
- Use Portal / Email / Text only (in priority order):** A dropdown menu.
- Buttons:** 'Create Report', 'Filters', and 'Browse'.

## Advanced method #2: Form Letters:

1. Access the **Form Letters/Text Merge** report from the **Reports** menu.
2. Press the **Browse** button to select a previously created form letter (text merge) file template.
3. Check Send as text message to patient's cell phone within the **Portal/Email/text options** check list.
4. Enter a subject (e.g. "Your Appointment") as the **Email/Text subject**.
5. Change the dropdown list to: Use Portal / Email / Text only (in priority order).
6. Add any related filters.
7. Select **Create Report** to begin the process.

The screenshot shows a software interface with a navigation pane on the left and a main configuration area on the right. The navigation pane lists various reports, with 'Form Letters/Text Merge' selected. The main area is titled 'Form Letters/Text Merge' and contains the following fields and controls:

- Select a template:** A text box containing 'D:\MPN\Templates\Appt Reminder.rtf' and a 'Browse' button below it.
- Template type:** A checkbox labeled 'Is this a referral "thank-you" template?' which is currently unchecked.
- Portal/Email/Text options:** A group box containing three checkboxes: 'Send to patient's home email address' (unchecked), 'Send to patient's work email address' (unchecked), and 'Send as text message to patient's cell phone' (checked).
- Email/Text Subject:** A text box containing 'Your Appointment'.
- Attachment:** An empty text box with a paperclip icon to its right.
- Use Portal / Email / Text only (in priority order):** A dropdown menu with a downward arrow.
- Filters:** A button to the right of the dropdown menu.
- Create Report:** A large button at the bottom of the configuration area.