

# Refresh PMS Data

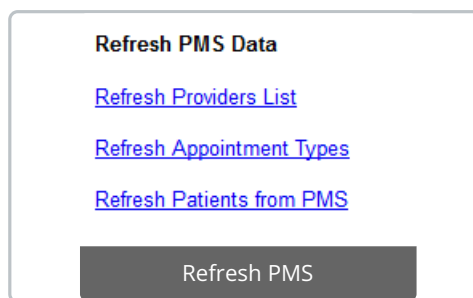
Last Modified on 11/08/2022 10:00 am EST

## Summary

All providers, appointment types, and patient information used by Patient Communicator were uploaded from your practice management system into the system at the initial on-boarding. Your system automatically sees all patients, providers, and appointment types within the Schedule and Unconfirmed Breakdowns. To ensure those patients get their scheduled notifications, we update the Providers and Appointment Types daily and enable them for messaging within any notification that sends messages to All Providers or All Patients. Where notifications have specific providers or appointment types selected (filtered), a manual refresh of the system will need to be done along with manually updating the notifications with any new provider or appointment type to be added to trigger the notification(s) to be sent.

## Refresh PMS Data

You will need to update any new providers and appointment types to Patient Communicator by clicking the **Refresh** hyperlinks on this screen.



It is possible to *Refresh Patients* anytime to see the most current patient contact information within Patient Communicator. Notifications are always sent using the patient contact information found in your PMS, even if different than what is seen for the patient in your system.

## Enable New Providers and Appointment Types

You must then enable each new provider and/or appointment type in the notifications where providers or appointment types appear:

1. Access the notification edit screen from the *Timeline*.
2. Add the new item to either the **Providers** or **Appointment Types** field in every notification the fields are present.
3. Click **SAVE & CLOSE**

Confirmation

Email ON SMS ON Voice ON | Enable Confirmations? 1st YES 2nd YES

EmailSMSVoice

Notification Settings

Notification Name: Confirmation

Email/SMS Time

1st Confirmation

Days Before: 5

Send out at: 9:00 AM

2nd Confirmation

Days Before: 3

Send out at: 8:00 AM

Filters

Providers: All Providers Selected

Appointment Types: All Appointment Types Selected

Include Patient Tags:

Exclude Patient Tags: Spanish

CANCELSAVE & CLOSESAVE & PREVIEW

Chosen Template: Confirmation 2

Edit Template

Notification Type

Provider

Appointment Type

PATIENTCOMMUNICATOR  
FOR YOUR PATIENTS. FOR YOUR PRACTICE. (888)

11 12 13 14

Notification Edit Screen

Changes in patient contact information are automatically updated every morning. Patient Communicator will always defer to the patient contact information found in your practice management system when messaging your patient.

<End of Article>