

Overview-Message Settings

Last Modified on 02/14/2023 3:48 pm EST

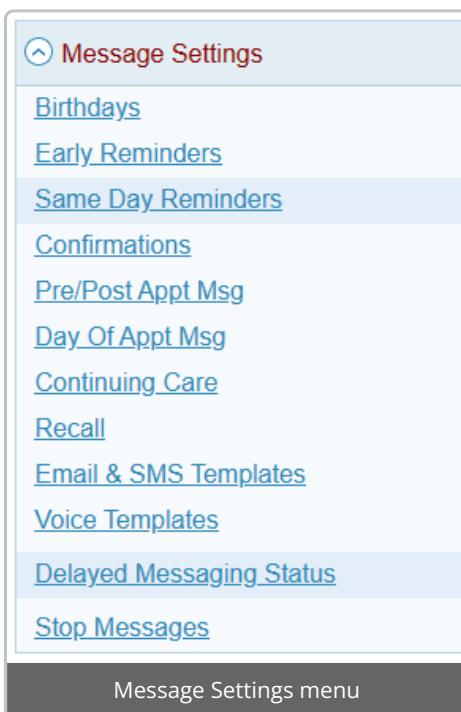
Summary

Clicking on [Message Settings tab](#) will show the drop down menu of possible automated messages and the template files used in Patient Communicator.

Note: All enabled notifications (with the exception of Birthdays) may be accessed and edited via the [Timeline](#) view by clicking the [Settings](#) tab.

Accessing specific notification types in *Message Settings* allow viewing notifications of that type (both enabled and disabled), editing of those notifications, and the creation of new notifications of that type. Template creation and editing is possible within each notification window.

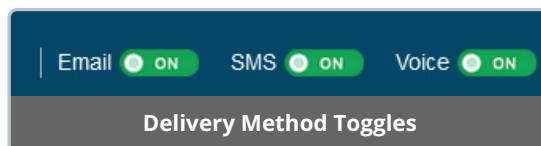
Access to the template files may be made by clicking [Email & SMS Templates](#) or [Voice Templates](#). New templates may be created or permanent edits made to existing templates from these locations.



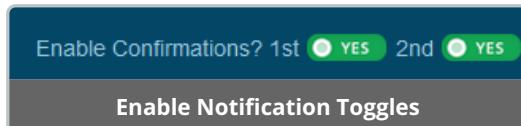
Enable an Automated Notification

Note: When creating and enabling an automated notification, all of the following steps must be completed: Not setting or incompletely setting any step below may prevent messages from being delivered to the patients. Remember to name and set the preferred delivery day and time if different than the default settings.

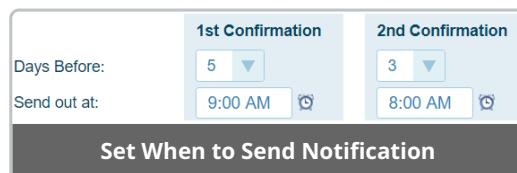
1. Message delivery method: Choose any combination of Email, SMS, or Voice (where available) by toggling the buttons to the **ON** (green) position.



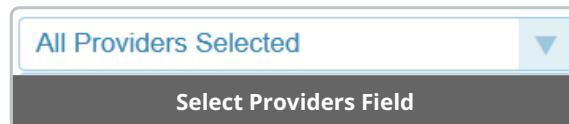
2. Enable: Turn on the notification by toggling the button ON (green).



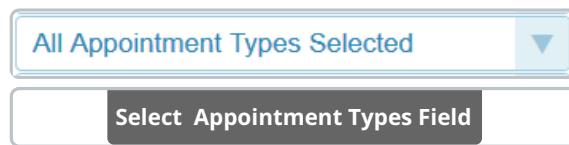
3. When to send notification: Each notification allows you to determine when the notification will be delivered.



4. Providers: The provider associated with a patient's appointment must be present. If a provider used for appointment scheduling is not present in the drop down menu, try refreshing providers, return and refresh the notification, and enable the desired provider. [Settings > General Settings > Refresh PMS Data](#).



5. Appointment Types: The appointment type associated with a patient's appointment must be present. If an appointment type used for an appointment is not present in the drop down menu, try refreshing appointment types, return and refresh the notification, and enable the the desired appointment type. [Settings > General Settings > Refresh PMS Data](#)



6. Voice Call Settings: Some notifications have the option to deliver a voice message to the home phone. To enable an automated voice call:

- **Call at:**-set the time of day to make the call
- **Days Before:**-set the number of days before the appointment to call
- **Speaker:**-English is always default. You may choose Spanish, Mexico for a voice message in Spanish if

Alice is chosen as Speaker. Choosing Spanish, Spain enables Conchita.

- **Call when:**-choose what contact information (or lack of) triggers a call
- **Option to call Office:**-will the patient be able to press a button to call the office telephone
- **Office Number:**-displays what phone number the patient will reach when Option to call Office is enabled

Voice Call Settings

Call at:	7:00 PM
Days Before:	2
Speaker:	Cathy
Language:	English, United States
Call when:	Always Call
Option to call Office:	Yes
Office Number:	555-555-5555

[Advanced Settings](#)

Voice Call Settings

- **Advanced Settings:** A practice may decide to send a voice call request on a day other than scheduled. In the example above, a confirmation request for a Monday appointment will be delivered on Saturday (2 days before the appointment date). In the example below, the voice confirmation calls scheduled for Saturday and Sunday (left column) have been changed to the Friday before (right column).

Voice Advanced Settings X

Override Default Days? YES

Sunday:	Friday
Monday:	Monday
Tuesday:	Tuesday
Wednesday:	Wednesday
Thursday:	Thursday
Friday:	Friday
Saturday:	Friday

CANCEL **SAVE & CLOSE**

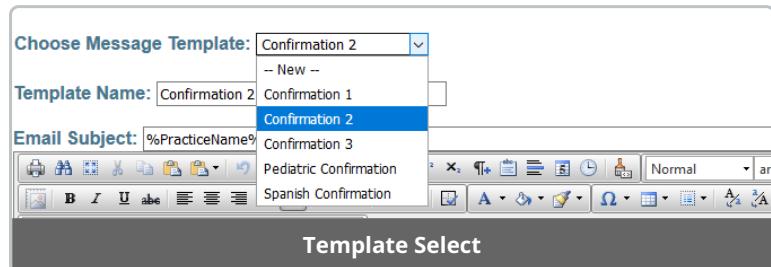
Change Day of Delivery

7. Templates: Each notification will preload with a default template when the message delivery method is turned on.

- To view the current enabled template, click the template tab in the notification for enabled delivery method. To change or edit the current template, click **Edit Template**.



- To change templates, choose a different template from the drop down menu in the Message Template screen. When done, click **SAVE & CLOSE**



After completing steps 1-7 above, the notification is enabled and will be automated on the next calendar day.

To edit or create new templates, see articles for [Email & SMS Templates](#) or [Voice Templates](#).

<End of Article>