

# Overview-Message Settings

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

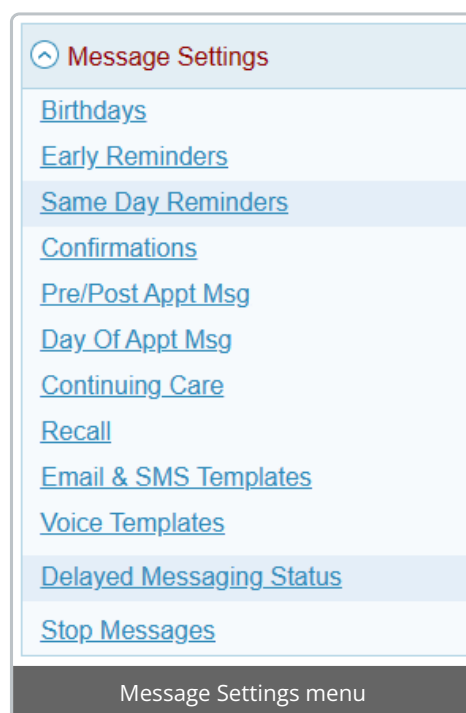
## Summary

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.

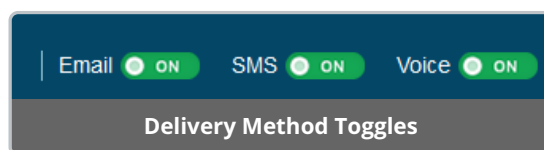
Access to the template files may be made by clicking [Email & SMS Templates](#) or [Voice Templates](#). New templates may be created or permanent edits made to existing templates from these locations.



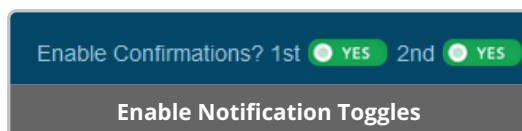
## Enable an Automated Notification

**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.

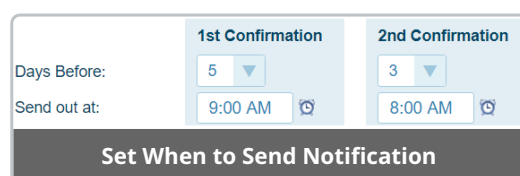
**1. Message delivery method:** Choose any combination of Email, SMS, or Voice (where available) by toggling the buttons to the **ON** (green) position.

A dark blue rectangular button labeled "Delivery Method Toggles" at the bottom. Above the label, there are three toggle switches: "Email" with a green circle and "ON" text, "SMS" with a green circle and "ON" text, and "Voice" with a green circle and "ON" text.

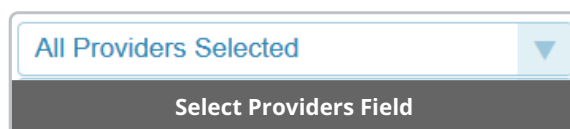
**2. Enable:** Turn on the notification by toggling the button ON (green).

A dark blue rectangular button labeled "Enable Notification Toggles" at the bottom. Above the label, there are two toggle switches: "Enable Confirmations? 1st" with a green circle and "YES" text, and "2nd" with a green circle and "YES" text.

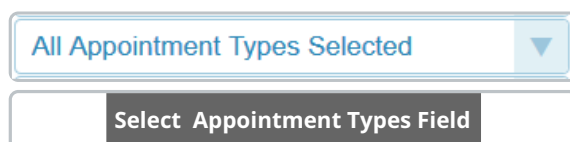
**3. When to send notification:** Each notification allows you to determine when the notification will be delivered.

A light blue rectangular button labeled "Set When to Send Notification" at the bottom. Above the label, there are two columns for "1st Confirmation" and "2nd Confirmation". Each column has a "Days Before:" dropdown (set to 5 and 3 respectively) and a "Send out at:" time selector (set to 9:00 AM and 8:00 AM respectively) with a clock icon.

**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](#).

A light blue rectangular button labeled "Select Providers Field" at the bottom. Above the label, there is a dropdown menu showing "All Providers Selected" with a downward arrow.

**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](#)

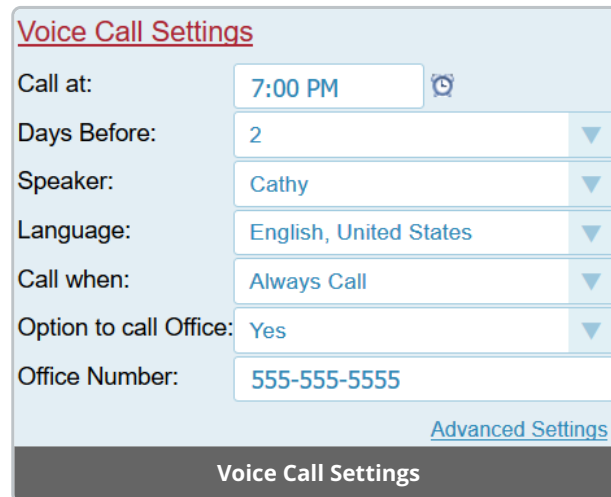
A light blue rectangular button labeled "Select Appointment Types Field" at the bottom. Above the label, there is a dropdown menu showing "All Appointment Types Selected" with a downward arrow.

**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

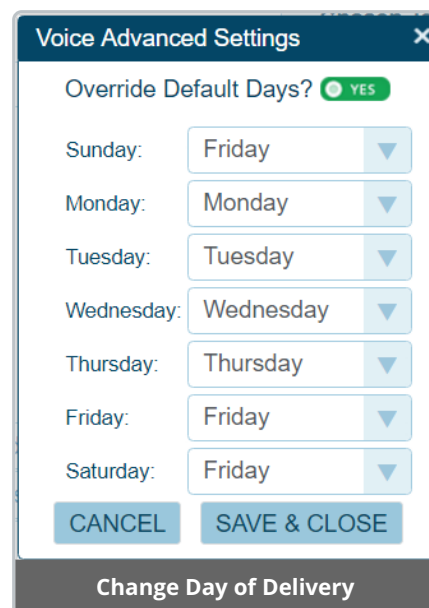
Option to call Office: Yes

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**

Override Default Days? ☒ YES

Sunday: Friday

Monday: Monday

Tuesday: Tuesday

Wednesday: Wednesday

Thursday: Thursday

Friday: Friday

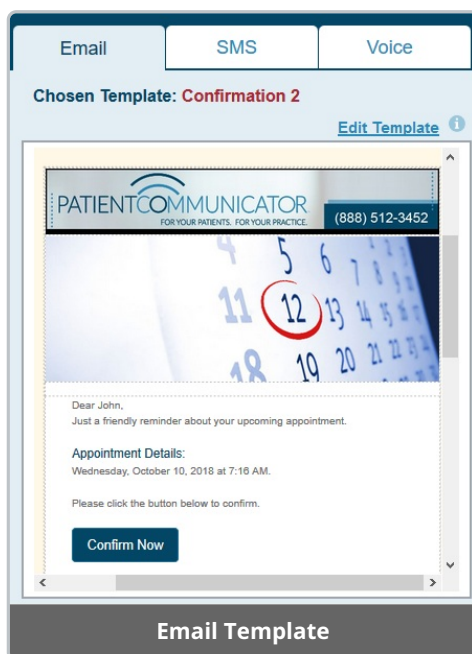
Saturday: Friday

**CANCEL** **SAVE & CLOSE**

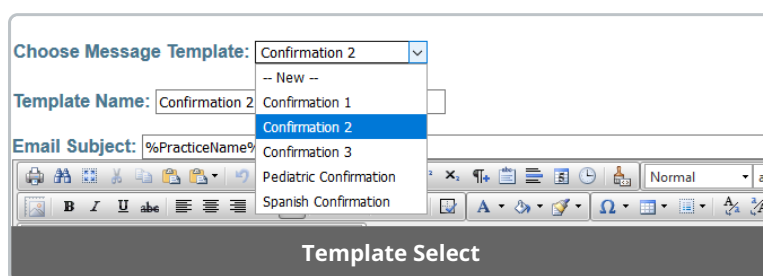
**Change Day of Delivery**

**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>