

Birthdays

Last Modified on 02/26/2020 10:15 am EST

Summary

Patient Communicator will search every day to find which of your active patients are celebrating their birthday on that day and send an email and/or sms greeting to the patient.

This is a great tool to build on the patient relationships your practice has worked hard to create. Many patients appreciate and respond to the greetings and even reply that they need to schedule an appointment.

The default time to send the greeting is noon, when patients are often with friends, family, and coworkers at lunch and may then share their positive feelings about the practice with others.

Note: Birthday notifications do not appear in the timeline as they are not generated by a scheduled appointment.

To enable or edit a Birthday Notification

Only one *Birthday Notification* may be enabled. To create and enable a notification follow the steps below:

1. Go to [Settings > Message Settings > Birthdays > Add new Notification](#).
2. When a new notification is created, the notification is set to *Enabled* (YES) by default.
3. Editing may be done from this screen or click **SAVE & CLOSE** to keep all settings.

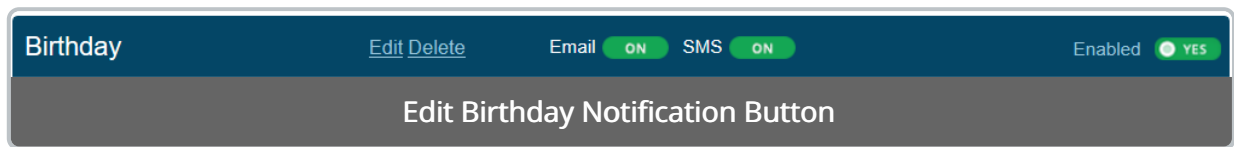
Birthday Notification

+ Add new Notification

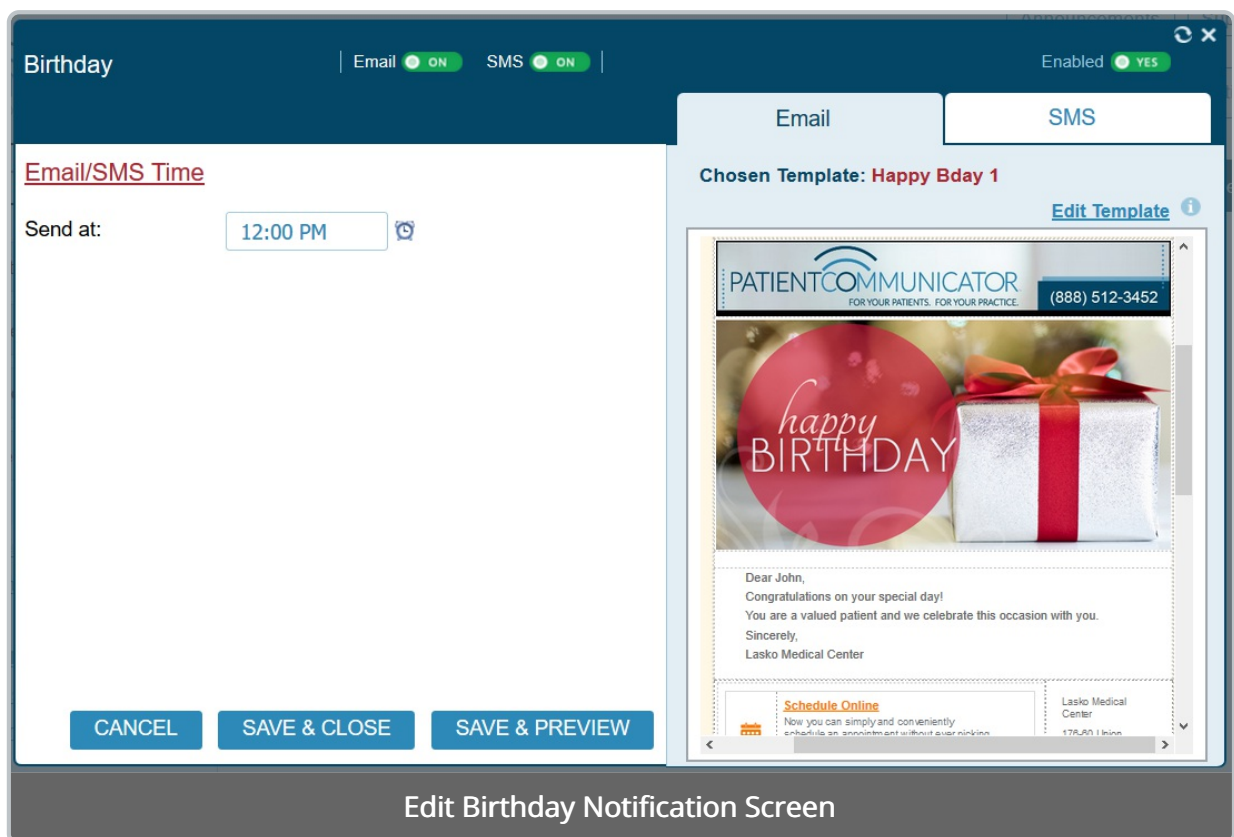
Create Birthday Notification

If a Birthday Notification has already been created, click **Edit** in the notification

viewing pane to edit settings in the edit notification screen.

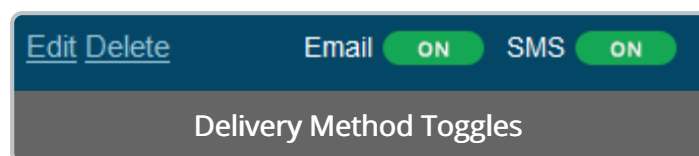


From the *edit notification* screen, you may change the *time of delivery*, *method of delivery*, *email* and *sms templates* sent to the patients, and enable or disable the notification. A preview of patients to receive the notification can also be made.

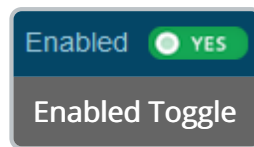


Edit a Birthday Notification

1. Message delivery method: You may choose either Email, SMS, or both by toggling the buttons to the ON (green) position.

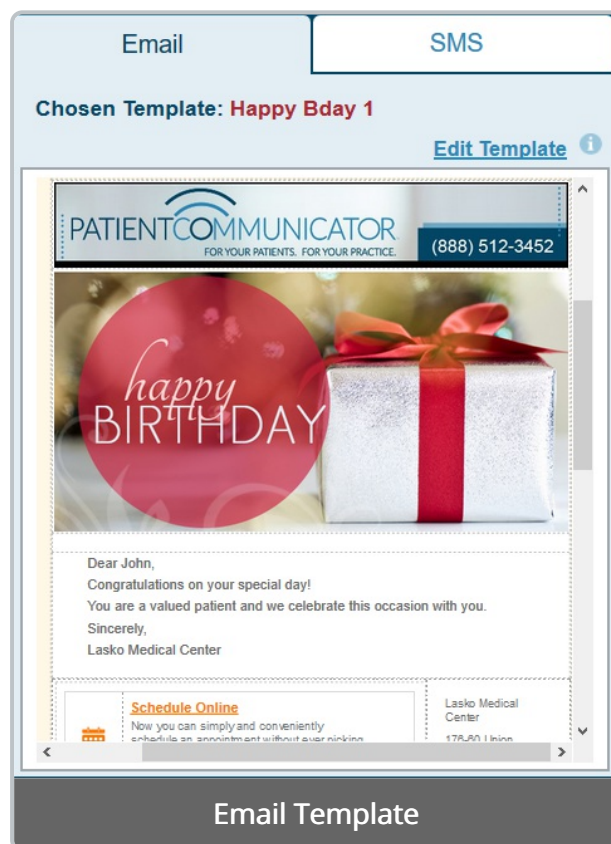


2. **Enable** the notification by clicking Enabled to **ON** (green)



3. Templates: The Birthday notifications are preloaded 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**

Choose Message Template:

Happy Bday 1

-- New --

Happy Bday 1

Happy Bday 2

Happy Bday 3

Happy Bday Pediatric 1

Happy Bday Pediatric 2

Happy Bday Spanish

Happy Bday Video

Template Name:

Happy Bday 1

Email Subject:

%PracticeName

Insert Template Keyword

Change Template