

Confirmations

Last Modified on 11/08/2022 2:34 pm EST

Summary

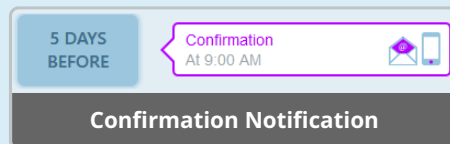
Responding to Confirmation messages is how your patients will confirm their appointments.

Patient Communicator reads your patient's confirmation status in the practice management software (PMS) and only sends a *Confirmation* request to patients whose status is *UNCONFIRMED*.

Patient confirmation replies received by Patient Communicator can be sent to the PMS where the patient status will be updated as confirmed.

Viewing [Schedule Breakdown](#) in Patient Communicator will always show the current *confirmation status* and, if the appointment is Confirmed, the confirmation method.

You can recognize Confirmation Notifications in the [Timeline](#) view by their purple color.



Enable a Confirmation Notification

Note: When creating and enabling a Confirmation 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. It is helpful to name the notification for easy identification in the *Timeline* view.

A screenshot of a form field for 'Notification Name'. It shows a text input with '1 of 10' and a dark grey button below it with the text 'Enter Confirmation Name'.

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

A screenshot of the 'Delivery Method Toggles' section. It shows three toggle switches: 'Email' (ON), 'SMS' (ON), and 'Voice' (ON). Below the toggles is a dark grey bar with the text 'Delivery Method Toggles' in white.

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

Enable Confirmations? 1st ☒ YES 2nd ☒ YES

Enable Toggles

3. Days Before/Send out at: Select how many days before the appointment date to send the Email and/or Sms confirmation and the time of day to send out. In the example below, the first request for confirmation will be sent 5 days before the date of appointment. If the patient is not yet confirmed 3 days prior to the appointment, another Email and/or SMS will be sent. If the first confirmation request was replied to by the patient as a confirmation, the second request will not be sent.

Email/SMS Time

	1st Confirmation	2nd Confirmation
Days Before:	5	3
Send out at:	9:00 AM	9:30 AM

Email/SMS Time

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](#).

All Providers Selected

Provider Selection Field

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](#).

All Appointment Types Selected

Appointment Type Selection Field

6. Voice Confirmations: A request to confirm an upcoming appointment can be made to the patient's 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.
- **Language:** English is always default. You may choose Spanish, Mexico for a voice message in Spanish if Alice is chosen as Speaker
- **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

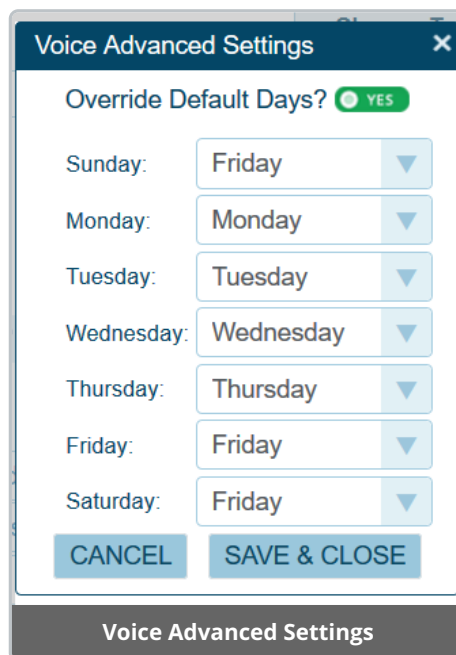
Option to call Office: Yes

Office Number: 555-555-5555

[Advanced Settings](#)

Voice Call Settings

7. Advanced Settings: A practice may decide to send a voice call request on a day other than scheduled. In the *Voice Call Settings* example above, a confirmation request for a Monday appointment will be delivered on Saturday (2 days before the appointment date). In the *Voice Advanced Settings* example below, the voice confirmation call 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

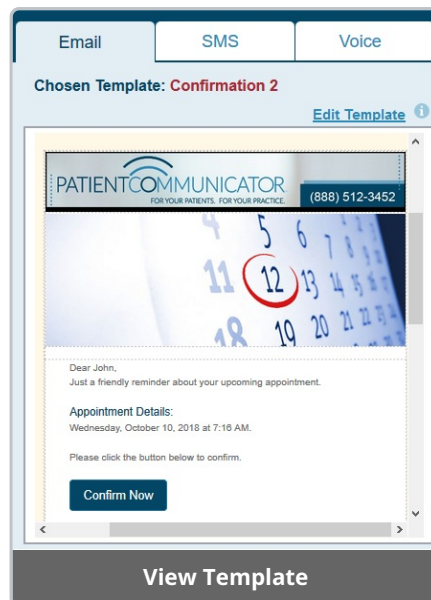
Saturday: Friday

CANCEL **SAVE & CLOSE**

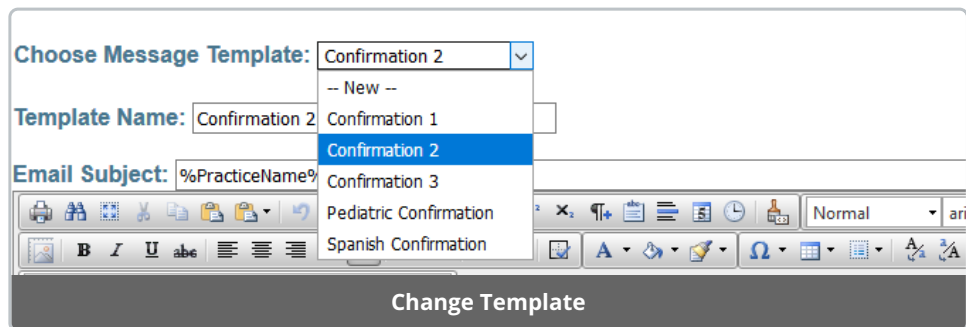
Voice Advanced Settings

8. 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 the 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 1-8 above, and 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>