Family Message Confirmation

Last Modified on 01/30/2020 12:56 pm EST

Summary

Family Message Confirmation messages are the vehicle by which the guarantor of multiple patients having appointments on the same day will confirm all the scheduled appointments at once. A *Family Message* confirmation request is only sent when multiple patients having appointments on the same day are unconfirmed. Go to Settings>Family Message Settings>Confirmations.

Patient Communicator reads the confirmation status in the practice management software (PMS) and, in most cases depending on the PMS, will send confirmation replies received by Patient Communicator to the PMS where the patient's status will be seen as confirmed.

Viewing *Schedule Breakdown* in Patient Communicator will always show the current confirmation status and, if the appointment is confirmed, how the appointment was confirmed.

A *Family Message Confirmation* request will only be sent to a guarantor of multiple patients with appointments on the same day whose status is

UNCONFIRMED. You can recognize them in the *Timeline Family Messaging* tab view by their purple color.

Family Message Confirmation Notification
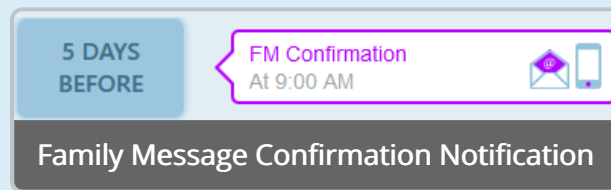
Enable a Family Message Confirmation notification

Note: When creating and enabling a *Family Message 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.

Family Message Notification Name

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).

Enable Confirmation 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 confirmed, 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 🕐

Send Email/SMS Time

4. 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

5. Advanced Settings: A practice may decide to send a voice call request on a day other than scheduled. In the example above, a voice 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

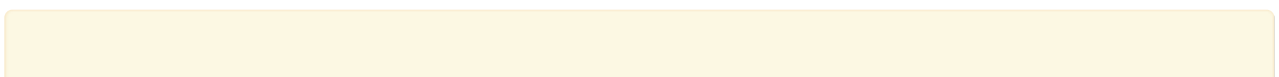|	
Sunday:	Friday ▼
Monday:	Monday ▼
Tuesday:	Tuesday ▼
Wednesday:	Wednesday ▼
Thursday:	Thursday ▼
Friday:	Friday ▼
Saturday:	Friday ▼

CANCEL SAVE & CLOSE

Voice Advanced Settings

6. Templates:

Note: Patient Communicator cautions against editing *Family Message Templates* due to extensive coding of the template for the Family Message ability.

Making changes may cause failure to properly message patients about upcoming appointments. Do not edit any Family Message SMS templates at all.

Each notification will preload with a default template when the message delivery method is turned on. *Email and Voice* templates will have 2 options. Templates names with 1 will include the names of all patients scheduled that day and the earliest appointment time only.

Template names with 2 will include every patient with an appointment that day list the appointment time for each individual patient.

Due to the space limitation of all outbound SMS messages to 160 characters, all *Family Messaging SMS* templates notify the receiver that there are multiple appointments starting at... and will provide the earliest appointment time.

- 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*.
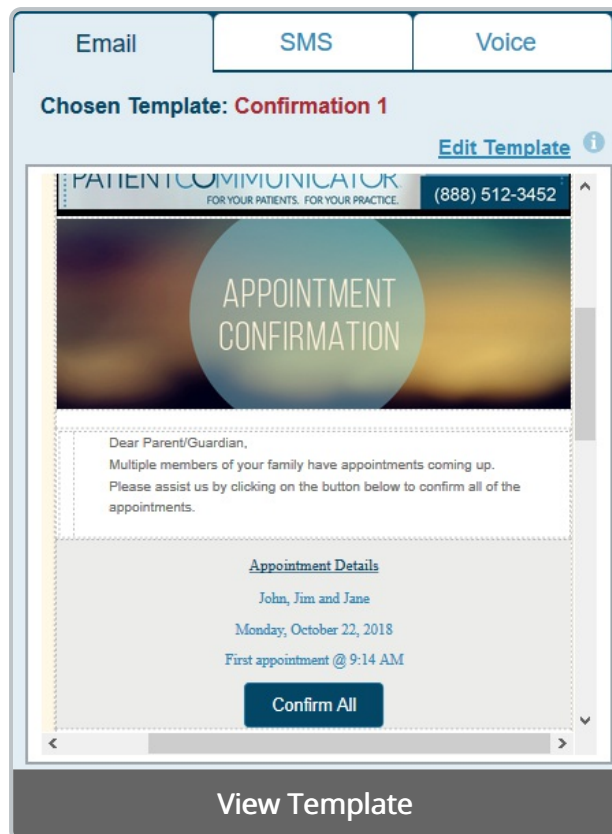
- To change templates, choose a different template from the drop down menu in the *Message Template* screen. When done, click **SAVE & CLOSE**
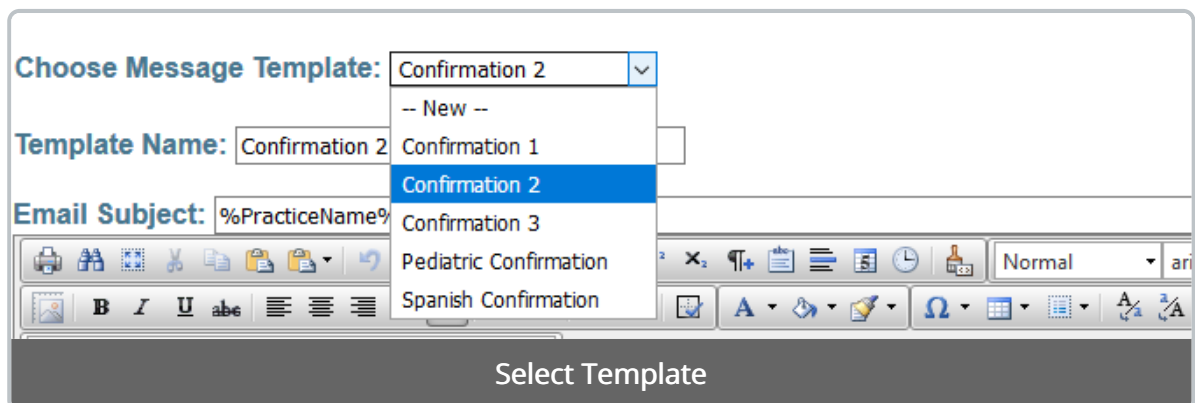
After completing steps 1-6 above the notification is enabled and will be automated on the next calendar day.

To edit or create new templates, see articles for Email & SMS Templates or Voice Templates.