

Appointment Confirmations

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Summary

Appointment Confirmations is the third quadrant down on the [Homepage](#). When a patient responds to an automated confirmation request, the response comes here.

| Method | Patient Name | Appt Date | Reply Text |
|--------|--------------|-----------------|------------------------|
| | Mickey M | 0/8/18 8:00 AM | Y |
| | Sarah Davis | 5/15/18 2:00 PM | sorry, I can't make it |
| | Joe Golliger | 5/15/18 9:00 AM | y |
| | Paige Davis | 5/15/18 9:00 AM | Y |

Appointment Confirmations - Homepage View

A patient who has clicked the *Confirm* button on an email or voice confirmation request is always shown as the letter *Y*.

With an *SMS confirmation*, patients are asked to reply *Y* to confirm, but may reply anything they want. Above, the patient replied by SMS "sorry, I can't make it".

The method the message was confirmed by is indicated by an icon. The *Homepage* view will only show the most recent 4 messages. The total number of confirmation replies currently in *Appointment Confirmations* will be seen in the upper right corner. You can preview the replies to the confirmation requests by scrolling in the window.

Open Message Viewing Pane

To open the *inbox viewing pane*, click anywhere on the *Appointment Confirmation Inbox*. The *Appointment Confirmation* popup window will appear.

Appointment Confirmations

| In PMS | Reply | Date | Provider | Reply Date |
|-------------------------------------|-------|-------------------|----------------|------------------|
| <input checked="" type="checkbox"/> | ✓ | 10/8/18 10:00 AM | Leonard Varna | 10/8/18 7:00 AM |
| <input type="checkbox"/> | ✓ | 10/13/18 10:00 AM | Leonard Varna | 10/8/18 7:00 AM |
| <input type="checkbox"/> | ✓ | 10/8/18 8:00 AM | David Arquette | 10/7/18 4:00 PM |
| <input type="checkbox"/> | | 5/15/18 2:00 PM | David Arquette | 5/13/18 10:00 AM |
| <input type="checkbox"/> | | 5/15/18 2:00 PM | David Arquette | 5/1/18 1:00 PM |
| <input type="checkbox"/> | | 5/15/18 9:00 AM | David Arquette | 5/1/18 2:00 PM |
| <input type="checkbox"/> | | 5/15/18 9:00 AM | Leonard Varna | 5/13/18 8:00 AM |
| <input type="checkbox"/> | | 4/12/18 9:00 AM | David Arquette | 4/10/18 4:00 PM |

Appointment Confirmations Viewing Pane

From this screen, you may view patient responses to confirmation requests along with their appointment information, access patient details, send confirmations to your PMS (where available), and reply to your patients by text or email.

- **Reply to patient:** Click the word **Reply**. A popup window will open to allow you to reply to your patient’s email or text message.
- **Review Patient Details:** Click on an underlined *patient's name*. The Patient Details window opens in a new tab. See [Patient Details](#) article for more details
- **Record patient response as a confirmation in your PMS:** Click the check box in the left hand column, then click the pencil icon at the top. This will remove the reply from the *Appointment Confirmations* inbox and record the reply as a confirmed appointment within your PMS.
- **Remove a non-confirmation reply from the inbox (ex.-sorry, I can’t make it):** Click the check box in the left hand column, then click the file icon at the top. This will remove the reply from the *Appointment Confirmations* inbox without saving as a confirmed appointment. Remember to action the cancellation within your PMS.

You can print or save messages to Excel by clicking the icons.

It’s always a good idea to keep your *Appointment Confirmations* inbox clean. Once a message has been seen and any necessary action taken, delete the message, helping others to know that any message remaining needs to be reviewed or acted upon.

Note: Messages are automatically archived and removed from the inbox after 30 days.

<End of Article>
