

Search by Patient Detail

Last Modified on 11/07/2022 3:26 pm EST

Summary

To search for specific patients

Select **Specific Patients > Patient Detail**

- Search by Last Name, First Name, First Name Last Name, Email address, phone number or Patient ID and click **SEARCH**. The patient(s) will appear in the *Available Patients* column.

The screenshot shows a search interface with a header 'Find Patient By'. Below it, there is a dropdown menu currently set to 'Patient Detail'. To the right of the dropdown, the text 'Search by' is followed by a list of search criteria: 'Patient Detail', 'Email address, phone number or Patient ID', and 'Appointment'. Below this, there is a text input field containing 'Jefferson' and a blue 'SEARCH' button. At the bottom of the interface, there is a section titled 'Available Patients' which contains a single entry: 'Jefferson, Thomas (JEFTH000)' with a checkbox to its left. The entire interface is contained within a light blue box with a dark grey footer labeled 'Find Patient By'.

- Click the checkbox next to the patient's name, then **Add Checked** to move to the *Selected Patients* column.

The screenshot shows the 'Selected Patients' section of the interface. It features a list with one entry: 'Jefferson, Thomas (JEFTH000)' with a checkbox to its left. To the left of this list is a sidebar with four buttons: 'Add Checked >', '< Remove Checked', 'Add All >>', and '<< Remove All'. The entire interface is contained within a light blue box with a dark grey footer labeled 'Select and Add'.

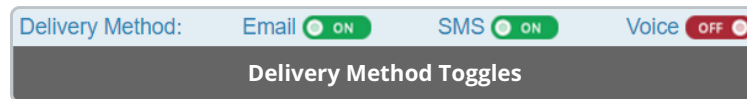
- Click **CONTINUE** to load templates and send messages

Note: Multiple random patients may be added to *Selected Patients* screen and sent the same message.

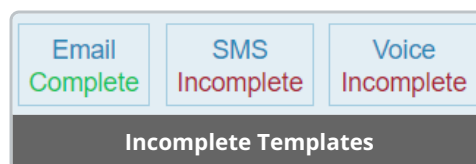
Load and send messages

After selecting the patients to message, you'll be able to select the method of messaging, set up the templates, and message your selected patients by following the steps below.

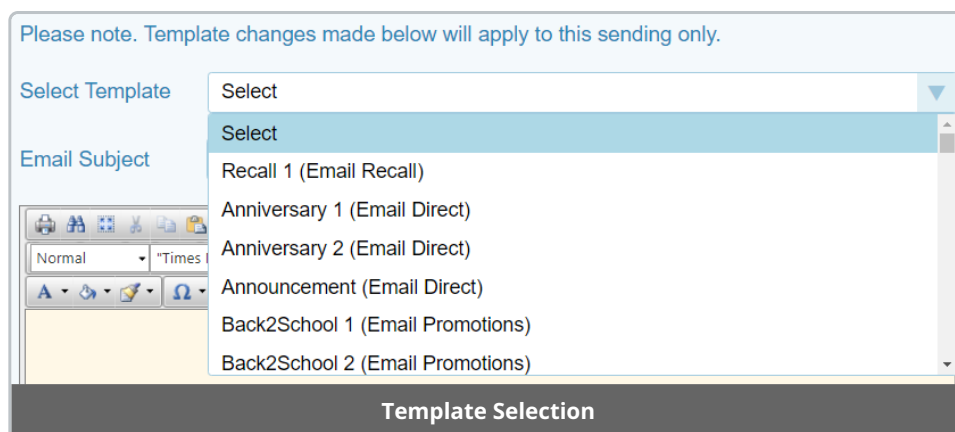
1. Select Delivery Method: Choose how to message your patient. Click on the toggle to messaging method.



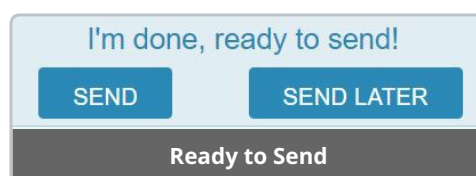
2. Incomplete notification: A template must be loaded for each selected delivery method in order to send to your selected patients. Once a template has been loaded, the notification changes to *Complete*.



3. Select Template: Clicking on any of the notifications in step 2 will allow you to load a preloaded template. All text fields within the template may be edited. Any changes apply to this sending only.



4. I'm done, ready to send!: Click SEND to message your patients now or click SEND LATER and select a time to message your patients.



Once sent, a screen will appear showing how many messages were sent and list any patient who didn't receive an enabled message.

1 email was sent out successfully						
Some messages did not go out. See details below.						
Invalid Data						
Patient ID	Last Name	First Name	Email	Cell	Delivery Method	Reason
JOHTA000	Johnson	Tara	patientsemail@her email.com	(555) 555-5555	Email	Missing Or Invalid Email
JOHTA000	Johnson	Tara	patientsemail@her email.com	(555) 555-5555	SMS	Missing Or Invalid Destination Number
STATA000	Stanford	Tad	hisemail@hisemail.com	(555) 555-5555	SMS	Missing Or Invalid Destination Number
Messaging Results Screen						

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