

Search by Appointment

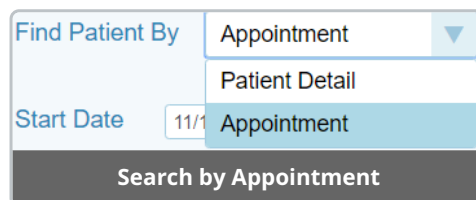
Last Modified on 11/07/2022 3:30 pm EST

Summary

To search for and message patients by appointment date(s), go to [Communication Center>Specific Patients > Appointment](#).

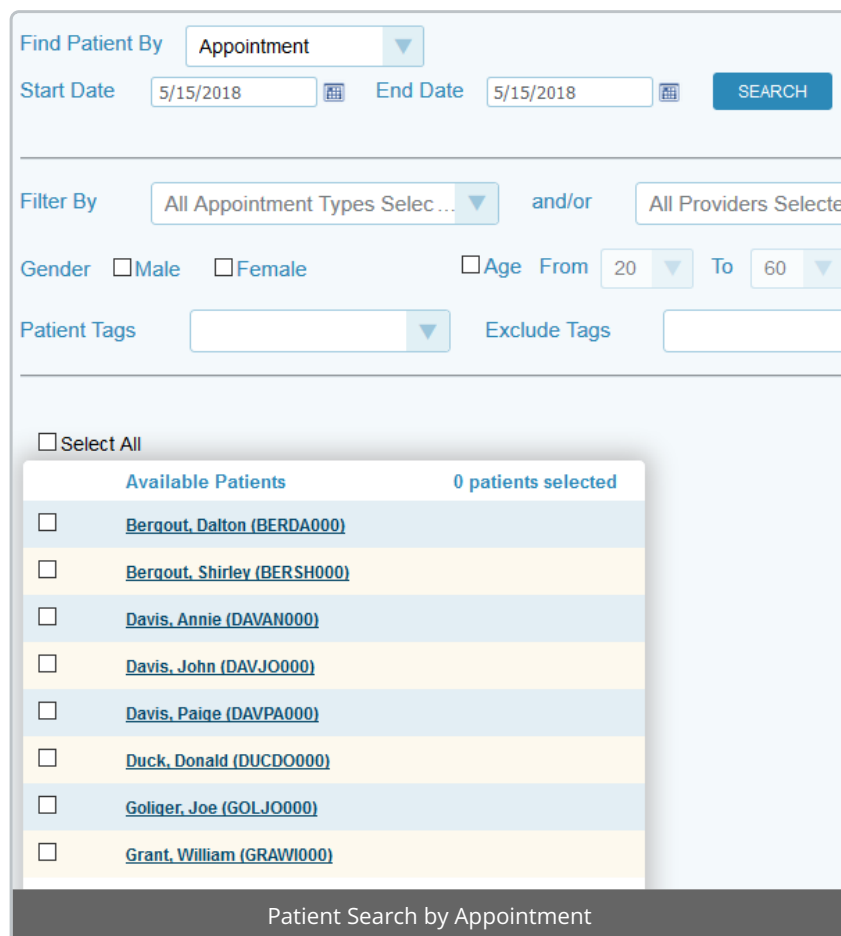
Searching for patients by appointment date(s)

- Search for patients by scheduled appointment by clicking on the word *Patient Detail* and selecting **Appointment**.



The screenshot shows a 'Find Patient By' dropdown menu. The menu is open, showing three options: 'Appointment', 'Patient Detail', and 'Appointment'. The first 'Appointment' option is selected. Below the dropdown is a 'Start Date' field with the value '11/1'. At the bottom of the form is a button labeled 'Search by Appointment'.

- Enter the appointment date or date range and click **SEARCH**
- Set any filters and click **FILTER**. Patients will appear in *Available Patients* column.



The screenshot shows the 'Patient Search by Appointment' interface. At the top, there is a 'Find Patient By' dropdown menu set to 'Appointment'. Below this are 'Start Date' and 'End Date' fields, both set to '5/15/2018', with a 'SEARCH' button to the right. Below the date fields are filter options: 'Filter By' with a dropdown set to 'All Appointment Types Selected', 'and/or', and 'All Providers Selected'. There are also checkboxes for 'Gender' (Male, Female) and 'Age' (From 20 To 60). Below these are 'Patient Tags' and 'Exclude Tags' dropdown menus. At the bottom, there is a 'Select All' checkbox and a table of 'Available Patients' with 0 patients selected. The table lists the following patients:

	Available Patients	0 patients selected
<input type="checkbox"/>	Bergout, Dalton (BERDA000)	
<input type="checkbox"/>	Bergout, Shirley (BERSH000)	
<input type="checkbox"/>	Davis, Annie (DAVAN000)	
<input type="checkbox"/>	Davis, John (DAVJO000)	
<input type="checkbox"/>	Davis, Paige (DAVPA000)	
<input type="checkbox"/>	Duck, Donald (DUCDO000)	
<input type="checkbox"/>	Goliger, Joe (GOLJO000)	
<input type="checkbox"/>	Grant, William (GRAWI000)	

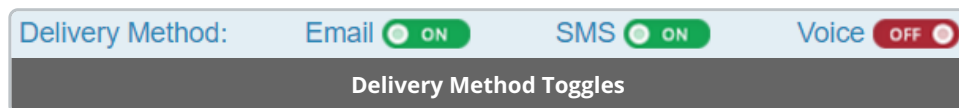
At the bottom of the interface is a button labeled 'Patient Search by Appointment'.

- Select All or choose desired recipients
- Click **CONTINUE** to load templates and send messages

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.

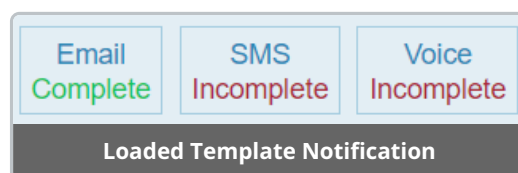
1. Select Delivery Method: Choose how to message your patient. Click on the toggle to select messaging method.



Delivery Method: Email ☒ ON SMS ☒ ON Voice ☐ OFF

Delivery Method Toggles

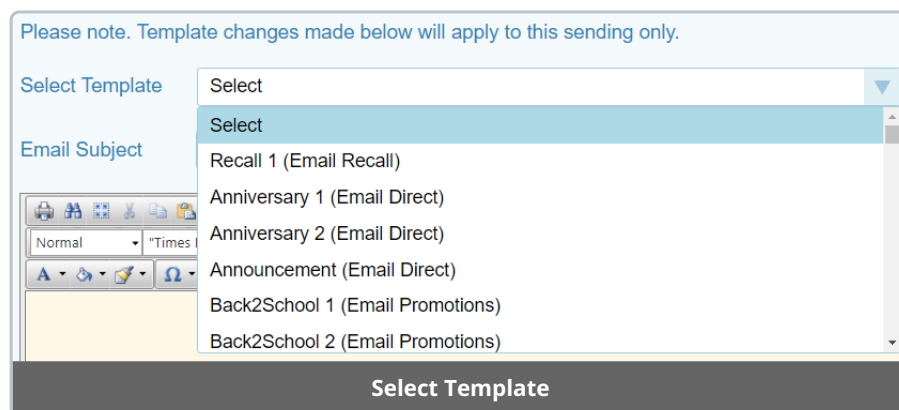
2. Incomplete notification: A template must be loaded for each selected delivery method in order to send to your selected patients. Once a template has been loaded, the notification changes to *Complete*.



Email Complete SMS Incomplete Voice Incomplete

Loaded Template Notification

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



Please note. Template changes made below will apply to this sending only.

Select Template

Email Subject

Select

Recall 1 (Email Recall)

Anniversary 1 (Email Direct)

Anniversary 2 (Email Direct)

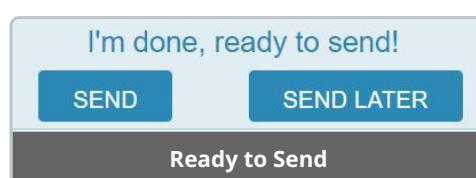
Announcement (Email Direct)

Back2School 1 (Email Promotions)

Back2School 2 (Email Promotions)

Select Template

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.



I'm done, ready to send!

SEND SEND LATER



Ready to Send

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

Message Results Screen

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