

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](#).

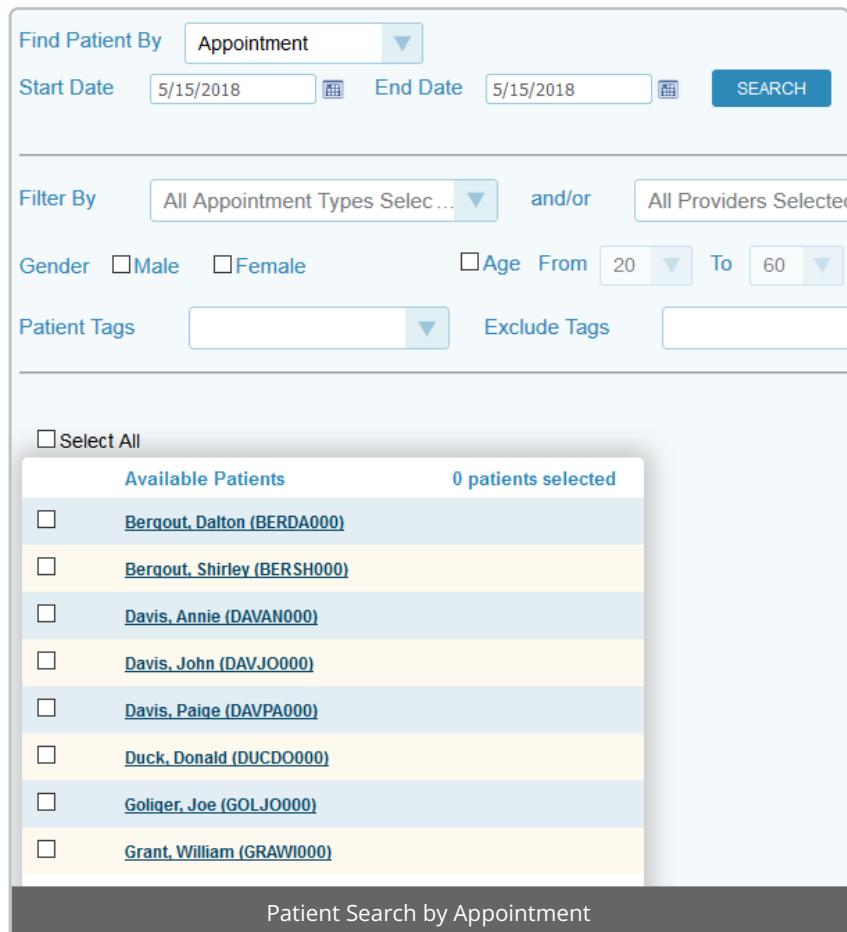
Searching for patients by appointment date(s)

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



Find Patient By **Appointment**
Start Date **11/1** Appointment
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.



Find Patient By **Appointment**
Start Date **5/15/2018** End Date **5/15/2018** **SEARCH**

Filter By **All Appointment Types Selected** and/or **All Providers Selected**

Gender Male Female Age From **20** To **60**

Patient Tags Exclude Tags

Select All

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)	

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.

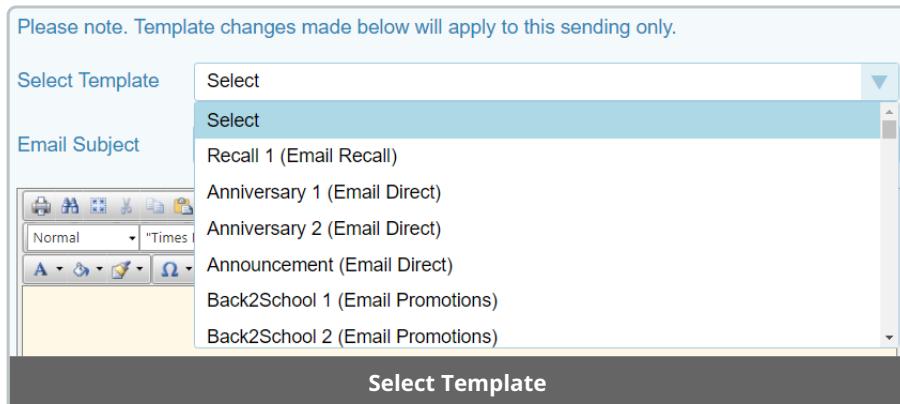
- 1. Select Delivery Method:** Choose how to message your patient. Click on the toggle to select messaging method.



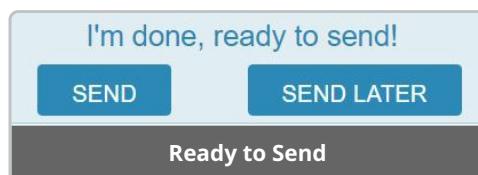
- 2. Incomplete notification:** A template must be loaded for each selected delivery method in order to send to your selected patients. Once a template has been loaded, the notification changes to *Complete*.



- 3. Select Template:** Clicking on any of the notifications in step 2 will allow you to load any 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

Message Results Screen

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