

Recall Wizard

Last Modified on 11/07/2022 3:29 pm EST


Summary


If you are using the recall feature in your PMS, you'll have the option to manually send patients reminders to schedule their recall appointments.

Patients will be sent the reminder only if they have no future recall appointment scheduled.

- Enter a date range to find patients who are (were) due for their recall appointments and still have no future recall appointment scheduled. Click **SEARCH**.
- Patients will appear in *Available Patients* column.

Find patients whose recall date falls in the time period below

Start Date 

End Date 

☐ Select All

| | Available Patients | 0 patients selected |
|--------------------------|---|---------------------|
| <input type="checkbox"/> | Bergout, Dalton (BERDA000) | |
| <input type="checkbox"/> | Biden, Joe (BIDJO000) | |
| <input type="checkbox"/> | Goliger, Joe (GOLJO000) | |
| <input type="checkbox"/> | Grant, William (GRAWI000) | |
| <input type="checkbox"/> | Richardson, Antoinette (RICAN000) | |
| <input type="checkbox"/> | Roberts, Melvin (ROBME000) | |

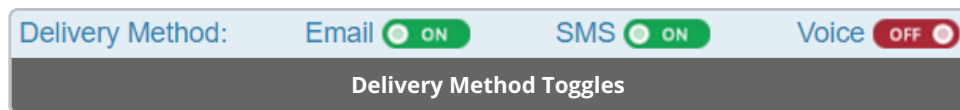
Select Patients to Message

- Click **Select All** or choose desired patients to message
- 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.

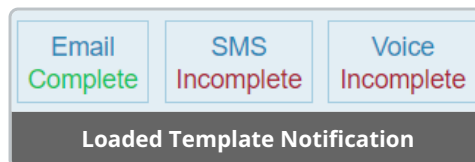
1. Select Delivery Method: Choose how to message your patient. Click on the toggle to select messaging method.



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

Delivery Method Toggles

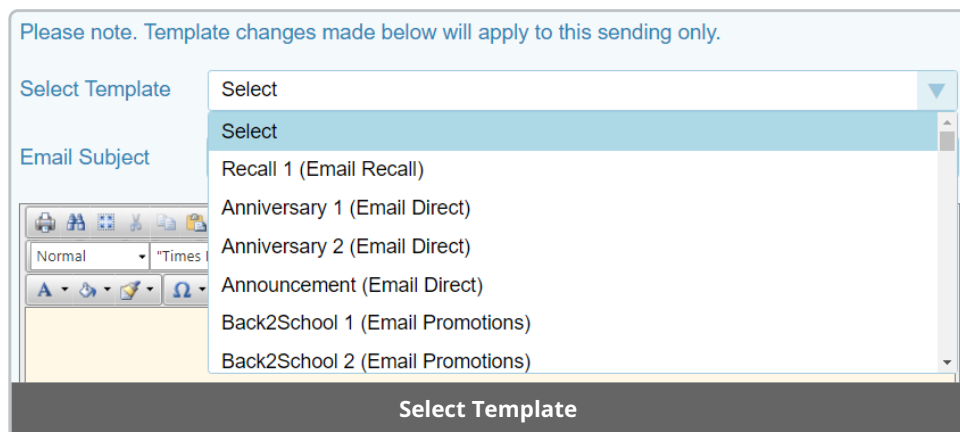
2. Incomplete notification: A template must be loaded for each selected delivery method in order to send to your selected patients. Once a template has been loaded, the notification changes to *Complete*.



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 a 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 Select

Email Subject Select

Recall 1 (Email Recall)

Anniversary 1 (Email Direct)

Anniversary 2 (Email Direct)

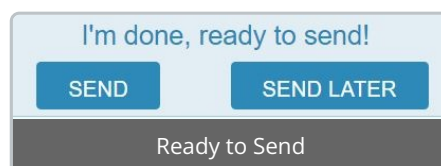
Announcement (Email Direct)

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

<End of Article>