

Patient Tags

Last Modified on 04/24/2023 1:41 pm EDT

Summary

Patient tags allow you to create groups of patients to include in or exclude from message notifications.

Example Tag: *Spanish* messaging to patients (Patient Communicator is preloaded with Spanish messages for [confirmations](#), [reminders](#), and [recall notifications](#)).

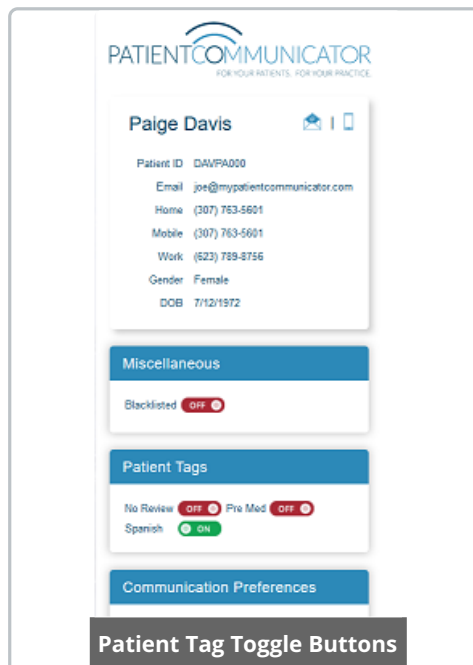
Create Patient Tag

To create a patient tag, go to [Settings > Advanced Settings > Patient Tags](#). Enter the desired patient tag name to be created in the Tag Name field and **SAVE**.

Enable a Patient Tag

Once a patient tag has been created as above, it is ready to be assigned to any patient.

Any patient tag created will be available to specific patients in the [Patient Details](#) screen. Simply toggle the button from the **Off** (red) position to **ON** (green) to tag that patient.



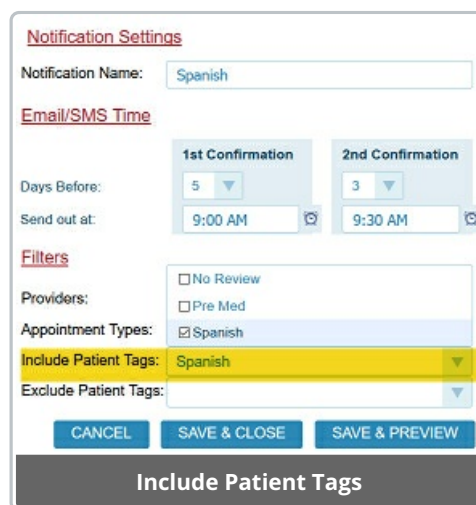
The screenshot displays the 'PATIENTCOMMUNICATOR' interface for a patient named Paige Davis. The patient's information, including ID, email, and phone numbers, is shown at the top. Below this, there are three sections: 'Miscellaneous' with a 'Blacklisted' toggle (OFF), 'Patient Tags' with 'No Review' (OFF), 'Pre Med' (OFF), and 'Spanish' (ON) toggles, and 'Communication Preferences'. A dark grey box at the bottom of the screenshot is labeled 'Patient Tag Toggle Buttons'.

Use a Patient Tag in Notifications

When a patient tag has been created, notifications will show two options regarding patient tags.

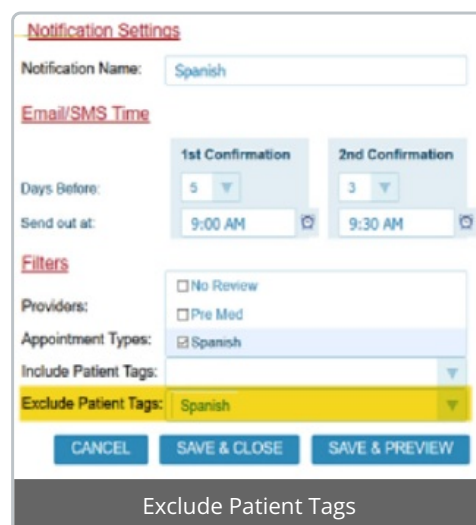
Include Patient Tags: Selecting a patient tag here will limit the sending of the notification to those

patients assigned with that specific tag. All other patients will be excluded from receiving the enabled notifications



The image shows a 'Notification Settings' dialog box. At the top, 'Notification Name' is set to 'Spanish'. Under 'Email/SMS Time', '1st Confirmation' is set to 5 days before at 9:00 AM, and '2nd Confirmation' is set to 3 days before at 9:30 AM. In the 'Filters' section, 'Providers' has 'No Review' and 'Pre Med' selected, and 'Appointment Types' has 'Spanish' selected. Under 'Include Patient Tags', 'Spanish' is selected and highlighted in yellow. The 'Exclude Patient Tags' field is empty. At the bottom, there are three buttons: 'CANCEL', 'SAVE & CLOSE', and 'SAVE & PREVIEW'. A dark grey bar at the very bottom contains the text 'Include Patient Tags'.

Exclude Patient Tags: Selecting a patient tag here will limit the sending of the notification to those patients without with that specific tag. All other patients will be included and will receive the enabled notification.



This image shows the same 'Notification Settings' dialog box as above, but with a different configuration. In the 'Filters' section, 'Appointment Types' still has 'Spanish' selected. However, under 'Exclude Patient Tags', 'Spanish' is now selected and highlighted in yellow. The 'Include Patient Tags' field is empty. The buttons at the bottom remain the same. A dark grey bar at the very bottom contains the text 'Exclude Patient Tags'.

Notice in our example that the *Spanish* tag was used to include tagged patients for confirmation messaging in Spanish and exclude tagged patients from the English confirmation message. This is necessary to ensure the patient receives only one notification.

<End of Article>

