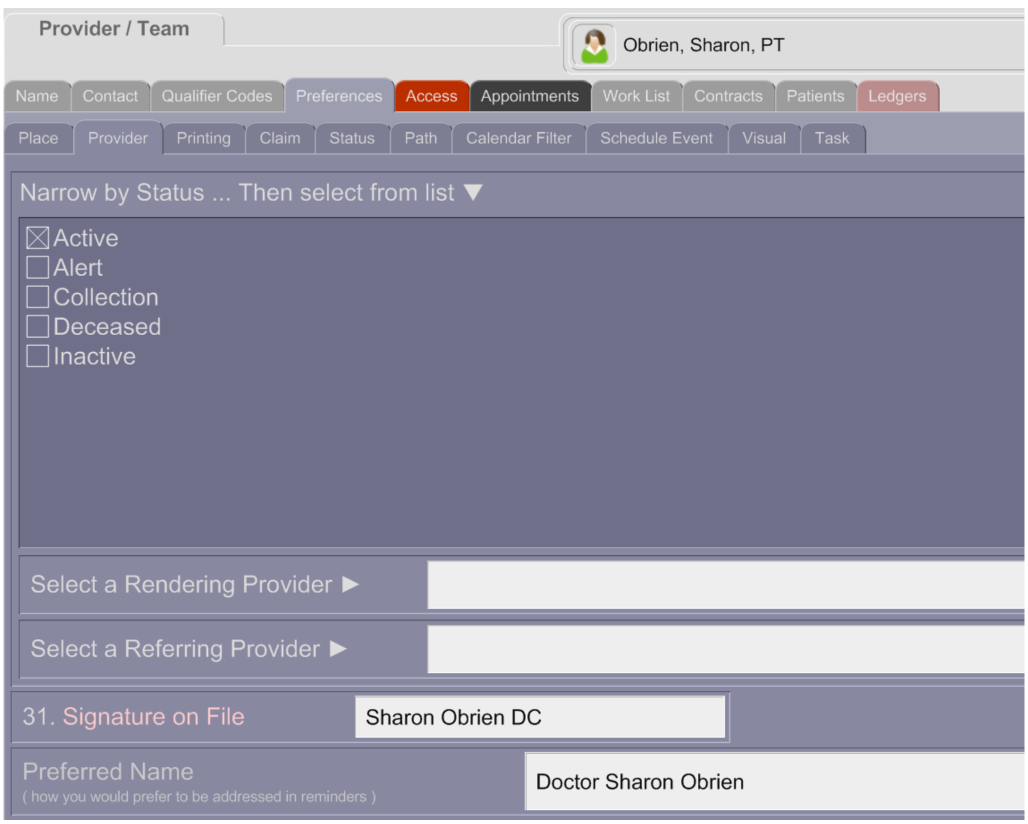
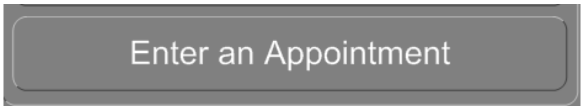
Call Reminders, Daily

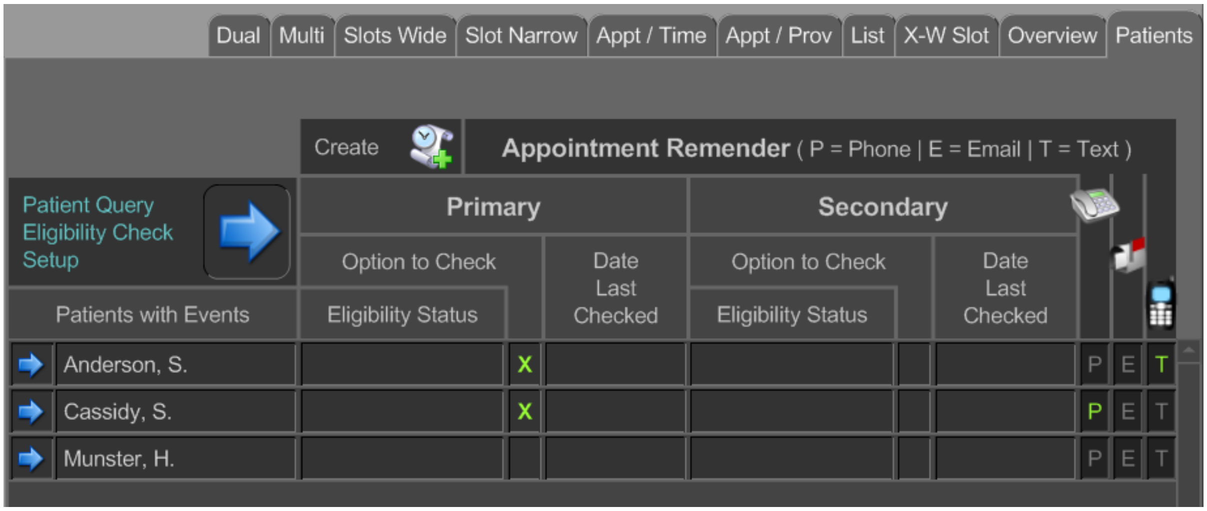
- Patient call reminders are generated to remind patients of their upcoming appointments. They can be printed, or you can create an electronic file which is sent to IMS Pro for automatic calling.
- In the **Provider/Team** menu for a rendering provider, go to the **Preferences** tab, **Provider** tab to fill in the "Preferred Name" field. This field is used to indicate how to pronounce the name of the provider as they would like it to be announced in reminders.



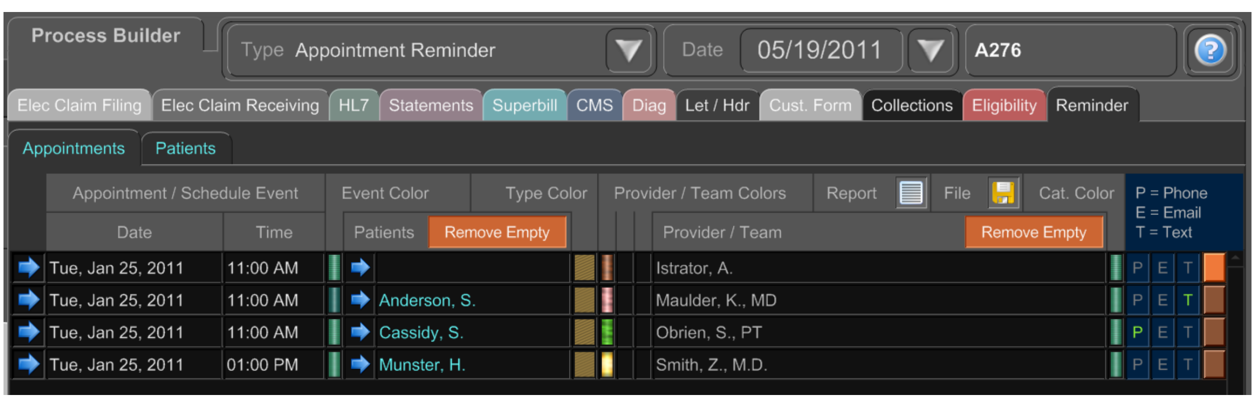
- From the **Scheduling** menu, click the "**Enter an Appointment"** button.



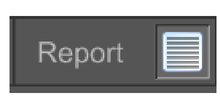
- On the **Day** view, click the **Patients** tab.



- Reminders can be selected by phone, email or text before the report is created.
- Click the icon labeled “Create” to generate a processing event.
- In the Process Builder, you can look at the information on the **Appointments** tab, or the **Patients** tab. You can remove empty records by clicking the light orange box to the right, which indicates an empty patient name on that record.



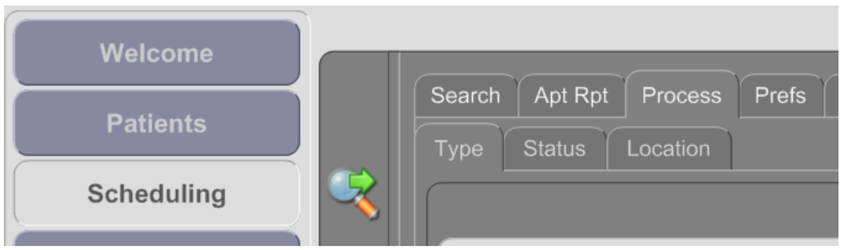
- You can generate a report by using the Report icon.



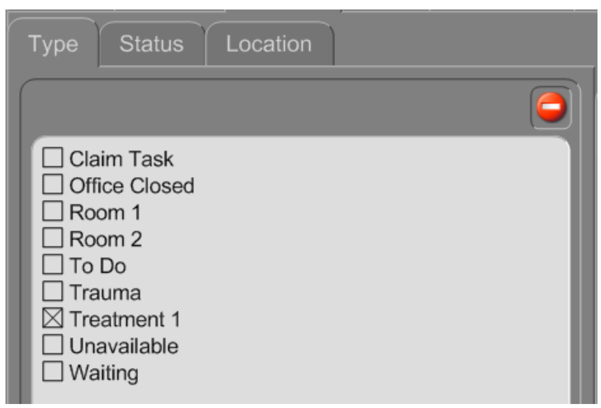
- Click the gold disc to create a file to send electronically to IMS Pro. 

Call Reminders, by Date Range, Type Status and Location

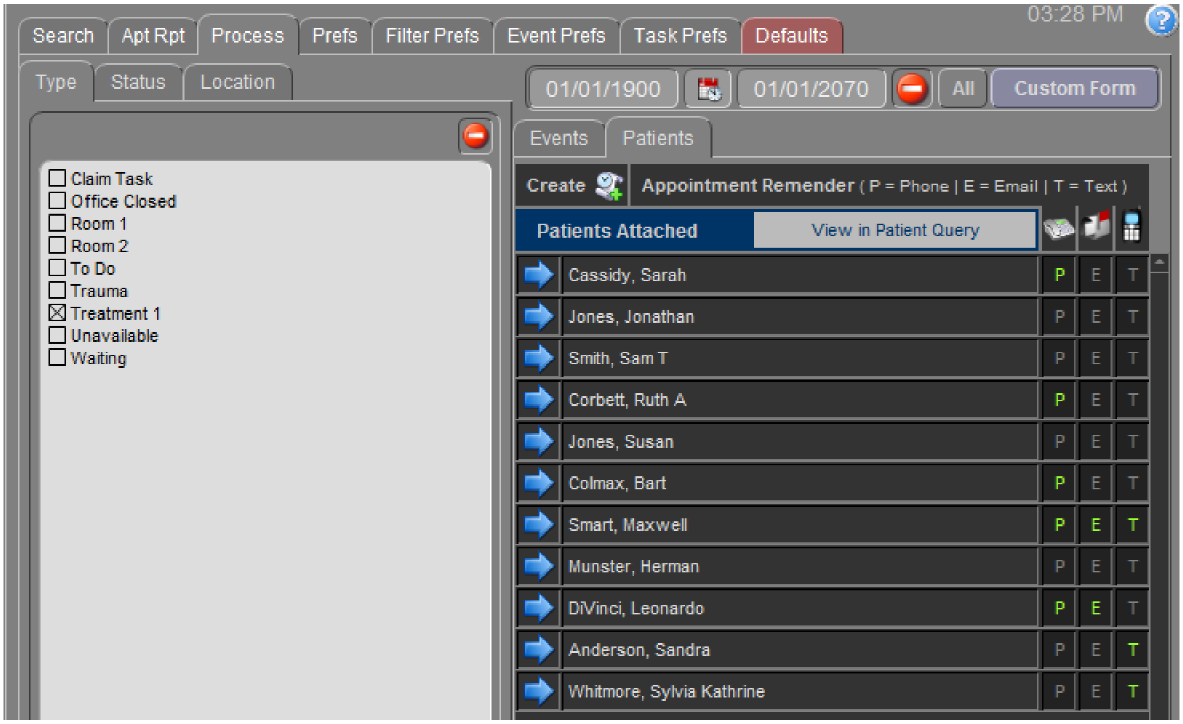
- Go to the **Scheduling** menu and select the **Process** tab.



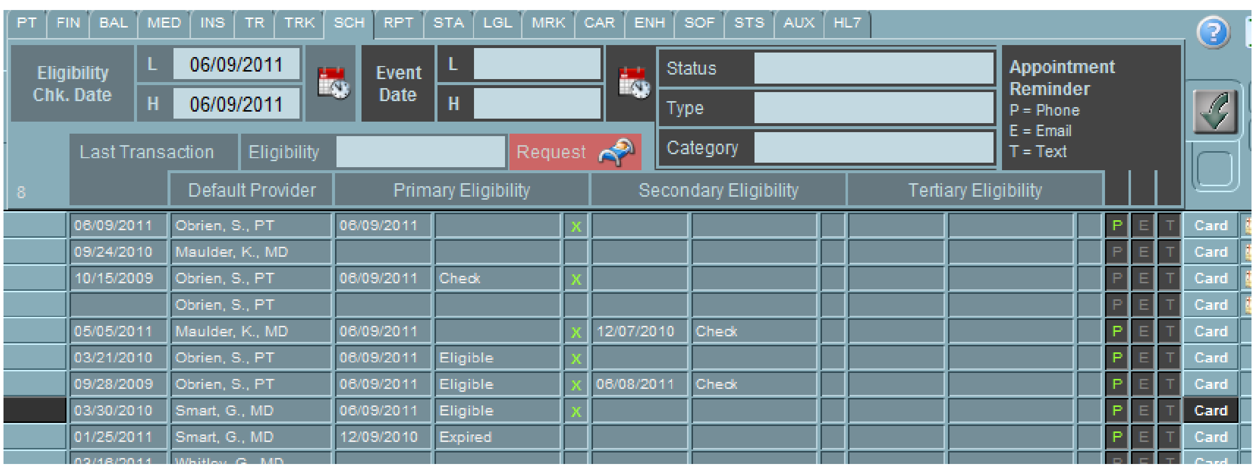
- Choose the “Type”, “Status” and “Location” to filter the appointment reminders.



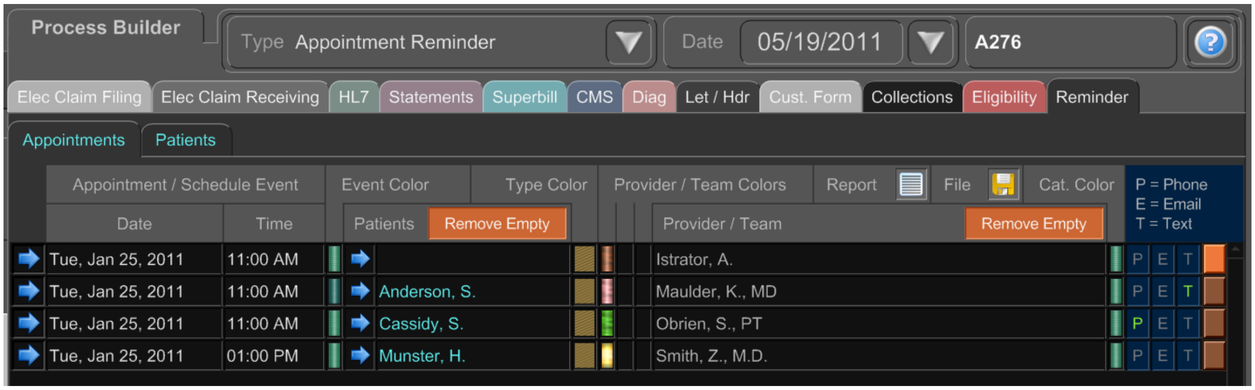
- Select a Date Range. Click on the date selector to select a date range, for example, Monday through Friday for a full week’s appointments.
- The letters “P”, “E” and “T” when highlighted in a light green indicate the method with which the patients prefer to be contacted. You can select phone, email or text for each patient by clicking “P”, “E”, or “T” next to each name.



- You can also view and edit the preferred contact method on the Patient query screen, **SCH** tab.



- Click the icon labeled “Create” on the **Patients** tab to generate a processing event, which will bring up a list of claim processing events that have appointment reminders associated with them.
- In the **Process Builder**, you can look at the information on the **Appointments** tab, or the **Patients** tab.



- You can remove empty records by clicking the light orange box to the right, which indicates an empty patient name on that record. Even though this event is within that date range, there is no point in sending out an appointment reminder for an appointment with no patient. You can quickly remove this event from the list by clicking the orange button, or if you have several events with empty Patient names, you can click the "**Remove Empty"** button at the top of the "Patients" column to remove all of the items which do not have patients linked.

- From this list you can generate a report which you can use as a call list for your staff to make appointment calls to the patients by using the Report icon.

- You can also build an electronic file. Click the gold disc  to create a file to send electronically to IMS Pro, or any service which is handling your call reminder process.

- All of these appointment reminders become claim processing events that are tied to the patient. So when you go into a patient's **Processing** tab on the **Patient** menu, you will see the appointment reminder in the patient's list of processing events. Thus, you will know they have been reminded.

- The “Default Statement Path” must be set in the Provider / Team preferences for a logged in user in order for the electronic file to be created.