



IMS™

Intelligent
Medical
Software

IMS InTouch Text Service User Guide

IMS Build 19

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Introduction

With IMS InTouch, you can communicate with patients through several IMS modules. You can securely send appointment and allergy shot reminders, notes, statements, and documents to patients via email or text.

This document aims to guide you through the features that are available in the Text service of IMS InTouch.

Text Service Setup

Once the Text service is installed on your IMS, it is necessary for an authorized user to do the important setup tasks discussed in the following sections.

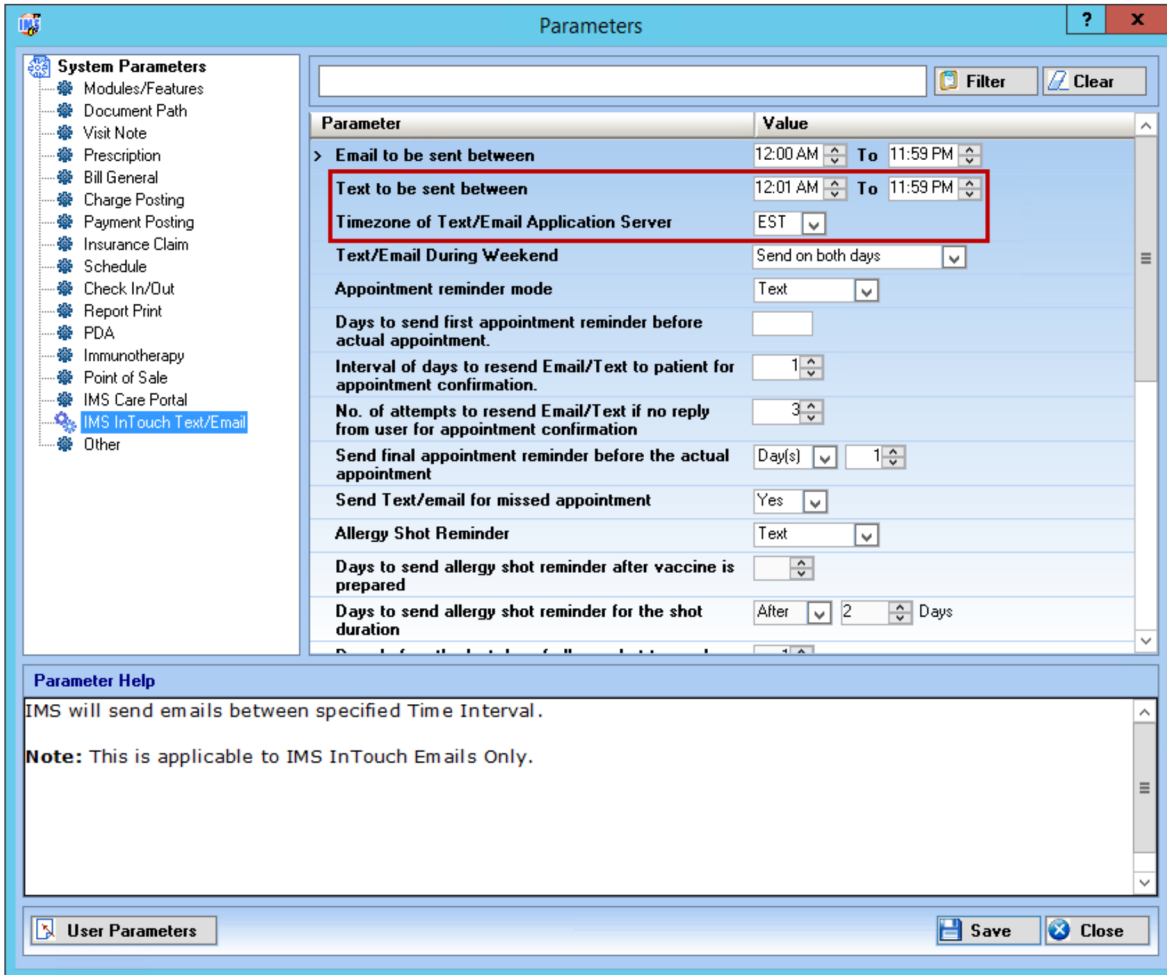
Set the parameters for the time interval of the Text service

Before you can use the Text service, set the time when the text messages are sent to a patient.

To adjust the Text settings, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **System Parameters**.
2. In the upper-left pane of the **Parameters** window, click **IMS InTouch Text/Email**.
3. In the upper-right pane, enter the applicable details in the **Value** column for the following parameters:
 - **Text to be sent between**. Specify the time interval when the text is sent to the patient.

- **Timezone of Text/Email Application Server.** Select the time zone used by the Text service.



Parameter	Value
> Email to be sent between	12:00 AM To 11:59 PM
Text to be sent between	12:01 AM To 11:59 PM
Timezone of Text/Email Application Server	EST
Text/Email During Weekend	Send on both days
Appointment reminder mode	Text
Days to send first appointment reminder before actual appointment.	
Interval of days to resend Email/Text to patient for appointment confirmation.	1
No. of attempts to resend Email/Text if no reply from user for appointment confirmation	3
Send final appointment reminder before the actual appointment	Day(s) 1
Send Text/email for missed appointment	Yes
Allergy Shot Reminder	Text
Days to send allergy shot reminder after vaccine is prepared	
Days to send allergy shot reminder for the shot duration	After 2 Days

Parameter Help
IMS will send emails between specified Time Interval.
Note: This is applicable to IMS InTouch Emails Only.

Figure 1 In the **Parameters** window, enter the applicable values for **Text to be sent between** and **Timezone of Text/Email Application Server** to adjust the time settings for the Text service.

4. Click **Save**, and then click **Close**.

Set the text sender's number

You can specify from which phone number the text messages are sent. You can also make these numbers active or inactive.

To set the sender's number, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Admin**.
2. In the left pane of the **Setup Center** window, double-click **Text/IVR Setup** to open the **Text/IVR Setup** window.

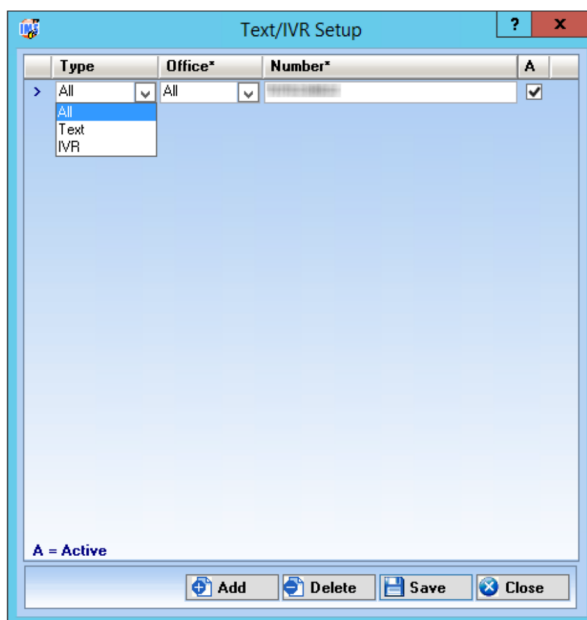


Figure 2 In the **Text/IVR Setup** window, enter the phone numbers that are used for the Text feature.

3. In the **Text/IVR Setup** window, enter the details under the following column headings:
 - **Type.** In the **Type** column, select the type of phone number.
 - **Office.** In the **Office** column, specify from which office the text is sent.
 - **Number.** In the **Number** column, enter the phone number.

- **A.** In the **A** column, select the check box to make the phone number active, or clear it to make the number inactive.

Note:

To add a new number, click **Add**. To delete a selected number, click **Delete**.

4. Click **Save**, and then click **Close**.

Set appointment reminder parameters

You can send appointment reminders via text to a scheduled patient. Likewise, a patient can use the Text service to confirm or cancel an appointment. If you want to send appointment reminders to a patient, set up the applicable parameters.

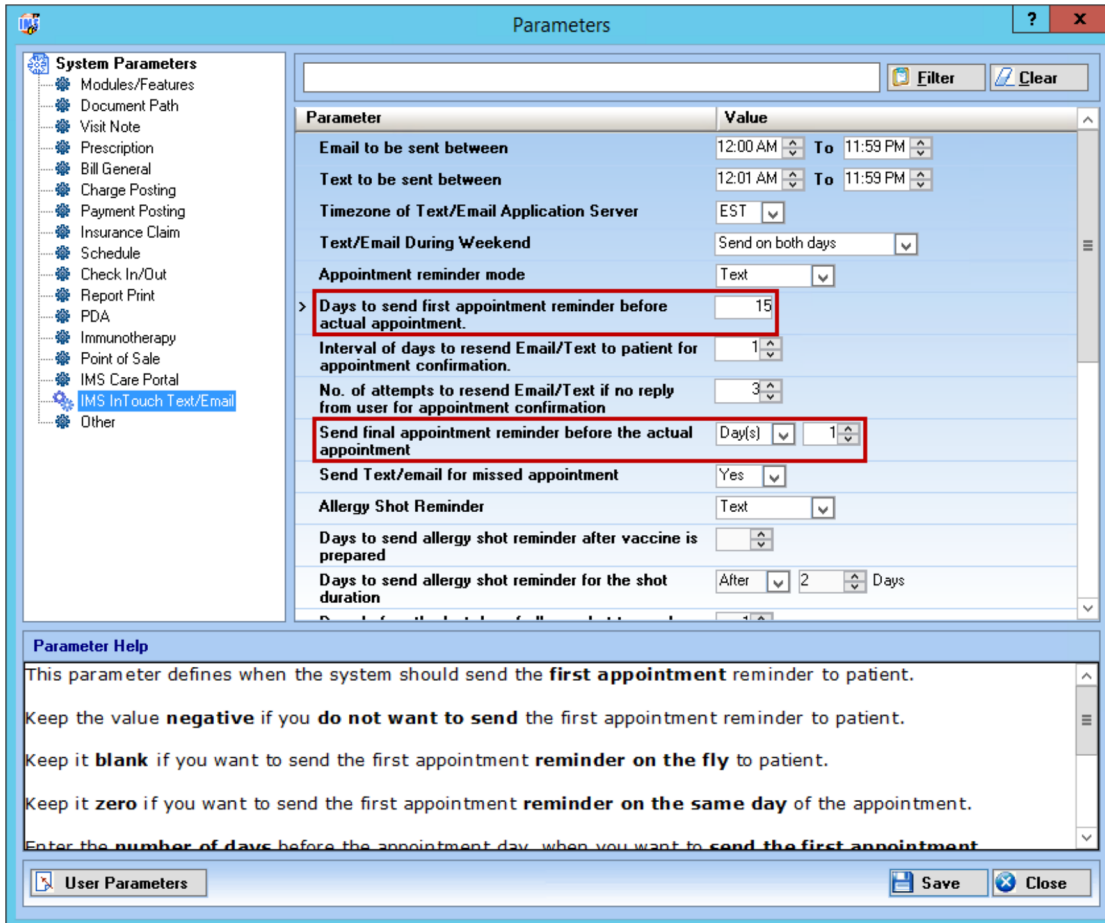
Customize appointment reminder settings. If you set the system to send appointment reminders to the patient—by email, text, or both—you can also set the number of confirmation attempts and the interval between them.

To customize appointment reminders, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **System Parameters**.
2. In the upper-left pane of the **Parameters** window, click **IMS InTouch Text/Email**.
3. In the upper-right pane, adjust the details in the **Value** boxes for the following parameters:
 - **Days to send first appointment reminder before actual appointment.** To automatically send an initial reminder to the patient in a specific number of days before the appointment, enter the number of days in the **Value** column for the **Days to send first appointment reminder before actual appointment** parameter.

To set up the parameter, do any of the following:

- Enter the number of days before the appointment day when you want to send the first appointment reminder to the patient.
 - Set the parameter to a negative value if you do not want to send the first appointment reminder to the patient.
 - Set the parameter to blank if you want to send the first appointment reminder as soon as you schedule the reminder to the patient.
 - Enter **0** if you want to send the first appointment reminder to the patient on the same day of the appointment.
- **Send final appointment reminder before the actual appointment.** To automatically send the final reminder days or hours before the appointment, select **Day(s)** or **Hour(s)** from the list in the **Value** column for the **Send final appointment reminder before the actual appointment** parameter, and then enter the number of days or hours in the box to the right of the list.



Parameter	Value
Email to be sent between	12:00 AM To 11:59 PM
Text to be sent between	12:01 AM To 11:59 PM
Timezone of Text/Email Application Server	EST
Text/Email During Weekend	Send on both days
Appointment reminder mode	Text
Days to send first appointment reminder before actual appointment.	15
Interval of days to resend Email/Text to patient for appointment confirmation.	1
No. of attempts to resend Email/Text if no reply from user for appointment confirmation	3
Send final appointment reminder before the actual appointment	Day(s) 1
Send Text/email for missed appointment	Yes
Allergy Shot Reminder	Text
Days to send allergy shot reminder after vaccine is prepared	
Days to send allergy shot reminder for the shot duration	After 2 Days

Parameter Help

This parameter defines when the system should send the **first appointment** reminder to patient.

Keep the value **negative** if you **do not want to send** the first appointment reminder to patient.

Keep it **blank** if you want to send the first appointment **reminder on the fly** to patient.

Keep it **zero** if you want to send the first appointment **reminder on the same day** of the appointment.

Enter the **number of days** before the appointment day, when you want to **send the first appointment**

User Parameters Save Close

Figure 3 In the **Parameters** window, adjust the appointment reminder parameters for the Text service in the upper-right pane of the **Parameters** window.

Note:

The patient receives the final appointment reminder even if the appointment remains unconfirmed.

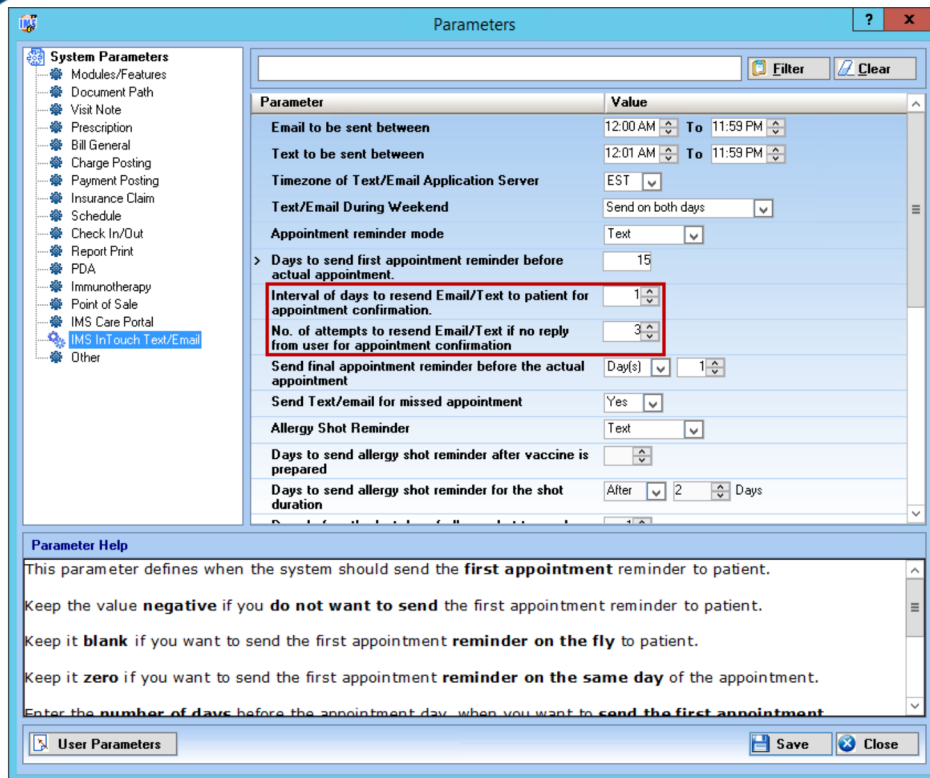


Figure 4 In the upper-right pane of the **Parameters** window, adjust the appointment confirmation parameters.

4. In the upper-right pane, adjust the following parameters:
 - **Interval of days to resend Email/Text to patient for appointment confirmation.** In the **Value** column for the **Interval of days to resend Email/Text to patient for appointment confirmation** parameter, enter the number of days that should pass before the system sends another confirmation text (if the patient does not respond to the first one).
 - **No. of attempts to resend Email/Text if no reply from user for appointment confirmation.** In the **Value** column for the **No. of attempts to resend Email/Text if no reply from user for appointment confirmation** parameter enter the number of times the system sends the confirmation text if the patient does not respond.

5. Click **Save**, and then click **Close**.

Send text reminders for missed appointments. You can choose whether or not you want to send a text for missed appointments.

To send text reminders for missed appointments, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **System Parameters**.
2. In the upper-left pane of the **Parameters** window, click **IMS InTouch Text/Email**.
3. From the **Value** list for the **Send Text/email for missed appointment** parameter, select **Yes**.

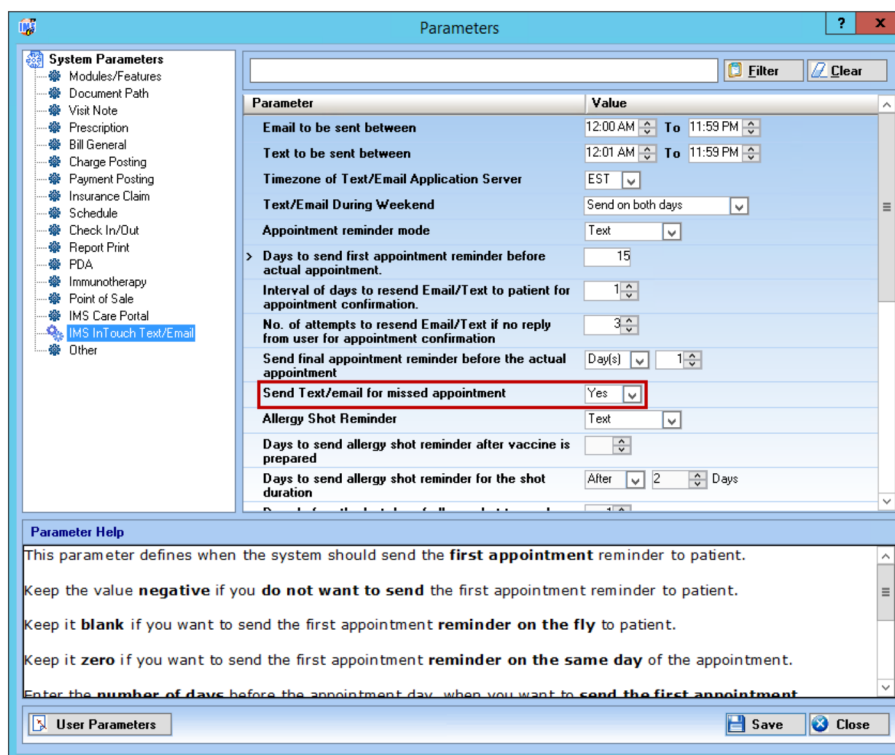


Figure 5 In the **Parameters** window, set the **Send Text/email for missed appointment** parameter to **Yes** to allow the system to send reminders for missed appointment.

4. Click **Save**, and then click **Close**.

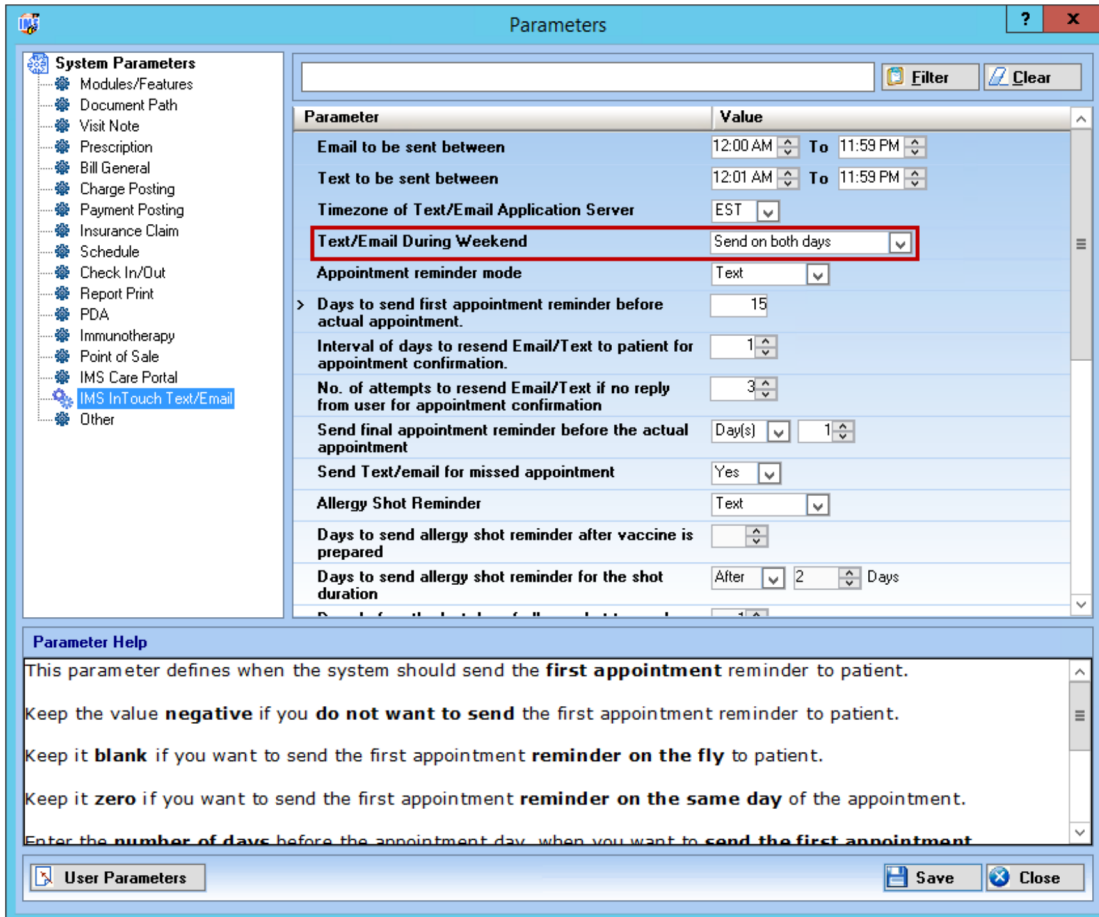
Set up text reminders for weekends. Based on the preferences of your clinic, you can set whether or not to send text reminders during weekends.

To set up text reminders for weekends, follow these steps:

1. In the upper-left pane of the **Parameters** window, click **IMS InTouch Text/Email**.
2. From the list in the **Value** column for the **Text/Email During Weekend** parameter, select any of the following:
 - **Send on both days.** Select **Send on both days** to send reminders on Saturdays and Sundays.
 - **Do not send on Saturday.** Select **Do not send on Saturday** so that the system sends the reminders on Sundays, but not on Saturdays.
 - **Do not send on Sunday.** Select **Do not send on Sunday** so that the system sends the reminders on Saturdays, but not on Sundays.
 - **Do not send on both days.** Select **Do not send on both days** if you do not want to send reminders during weekends.

Note:

If you select any of the last three options, the patient does not receive reminders even if he or she subscribes to text reminders for a certain module. For more information about reminder subscription, see [Set up the Text notification preference of a patient](#).



Parameters

System Parameters

- Modules/Features
- Document Path
- Visit Note
- Prescription
- Bill General
- Charge Posting
- Payment Posting
- Insurance Claim
- Schedule
- Check In/Out
- Report Print
- PDA
- Immunotherapy
- Point of Sale
- IMS Care Portal
- IMS InTouch Text/Email**
- Other

Parameter	Value
Email to be sent between	12:00 AM To 11:59 PM
Text to be sent between	12:01 AM To 11:59 PM
Timezone of Text/Email Application Server	EST
Text/Email During Weekend	Send on both days
Appointment reminder mode	Text
> Days to send first appointment reminder before actual appointment.	15
Interval of days to resend Email/Text to patient for appointment confirmation.	1
No. of attempts to resend Email/Text if no reply from user for appointment confirmation	3
Send final appointment reminder before the actual appointment	Day(s) 1
Send Text/email for missed appointment	Yes
Allergy Shot Reminder	Text
Days to send allergy shot reminder after vaccine is prepared	
Days to send allergy shot reminder for the shot duration	After 2 Days

Parameter Help

This parameter defines when the system should send the **first appointment** reminder to patient.

Keep the value **negative** if you **do not want to send** the first appointment reminder to patient.

Keep it **blank** if you want to send the first appointment **reminder on the fly** to patient.

Keep it **zero** if you want to send the first appointment **reminder on the same day** of the appointment.

Enter the **number of days** before the appointment day, when you want to **send the first appointment**

User Parameters Save Close

Figure 6 In the **Parameters** window, adjust the **Text/Email During Weekend** parameter to customize the reminders sent during weekends.

3. Click **Save**, and then click **Close**.

If you set that no reminder is sent on weekends, the text reminder for an appointment that is scheduled after the weekend may be sent before or after the weekend. This depends on the purpose of the text or from which module the text was sent. To know when the text is sent for each module, see Table 1 in [Appendix](#).

Customize the delay for the reminders of appointments that are scheduled on the fly

When the parameters are configured to immediately send the first appointment reminder when you schedule an appointment, you can set a time delay (in minutes) for the reminder. This is commonly referred to as reminders that are sent on the fly.

After the appointment is scheduled, the appointment reminder is sent based on the set delay.

To set the delay for appointment reminders that are scheduled on the fly, contact an authorized Meditab representative.

Turn on the birthday greetings

You can send automated text messages to patients on their birthdays.

To turn on this feature, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **System Parameters**.
2. When the **Parameters** window opens, type **birthday** in the filter box, and then click **Filter**.
3. From the list in the **Value** column for the **Send Birthday Greetings to patient** parameter, select **Yes**.
4. Click **Save**, and then click **Close**.

Turn on the patient check-in alerts

For cases wherein a patient checks in for a provider who is not available, you can send a text message to the provider to alert the provider about the check in, or about a change of provider for the patient.

To turn on patient check-in alerts, follow these steps:

1. On the IMS menu bar, click **Setup**, and then select **User Parameters**.
2. In the filter box of the **Parameters** window, type **alert**, and then click **Filter**.
3. In the **Value** box for the **Alert for patient checked in and provider is not available (Schedule/Check In-Out)** parameter, select **Yes**.

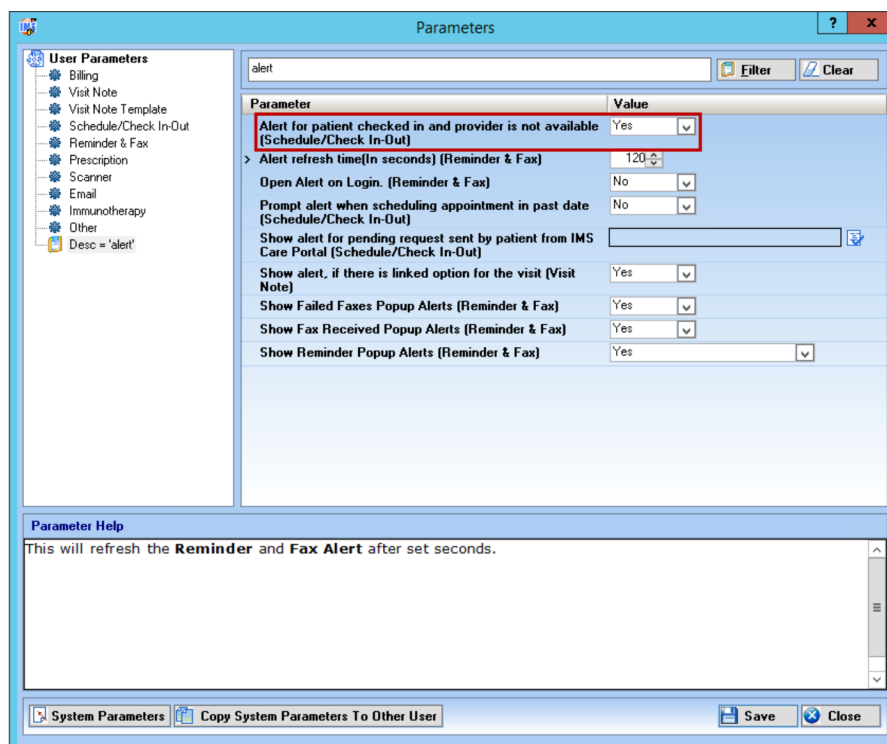


Figure 7 In the Parameters window, set the Alert for patient checked in and provider is not available (Schedule/Check In-Out) parameter to Yes.

4. Click **Save**, and then click **Close**.

Customize Text letter templates

Some Text Service features require letter templates to automatically fill out the information in the messages. To suit your clinic's preferences, you can create and customize the templates in the **Letter Template** window.

The following letter templates are needed for the different kinds of features available for the service:

- **Appointment Reminder.** The following templates are used for the appointment reminder messages:
 - **Appointment Reminder for Text.** The **Appointment Reminder for Text** template is for the text sent to the patients when the system automatically notifies them about their appointment. The text includes the link that patients can use to access the page where they can confirm or cancel their appointment.
 - **Final Appointment Reminder for Text.** The **Final Appointment Reminder for Text** is for the final appointment reminder texts sent to the patients. These texts contain details about the patient's appointment.
 - **Missed Appointment Reminder for Text.** The **Missed Appointment Reminder for Text** template is for the text messages sent to the patients whose appointments are marked as missed.
- **Patient Note.** To send notes to a patient via text message, create a Patient Note letter template for text.

- **Reminder.** To send reminders to a patient via text message, create a reminder letter template for text.
- **Allergy Shot Reminders.** To send reminders to patients who have to receive allergy shots, set up the applicable parameters. See [Set up allergy shot reminders](#).
- **Birthday Greetings.** To send birthday greetings to a patient via text message, create a Birthday Greetings letter template for text.
- **Patient Check In Alert.** The following templates are needed for patient check-in alerts sent to a provider:
 - **Patient Check In Alert for Text.** To send a check-in alert to a provider via text message, create a Patient Check In Alert letter template for text.
 - **Discard Notification for Text.** To send a notification to a provider about a change of provider for a patient, create a Discard Notification letter template for text.

To edit a message template, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Other**.
2. In the left pane of the **Setup Center** window, double-click **Letter Template**.
3. When the **Letter Template** window opens, select **Text/Email** from the **Type** list.

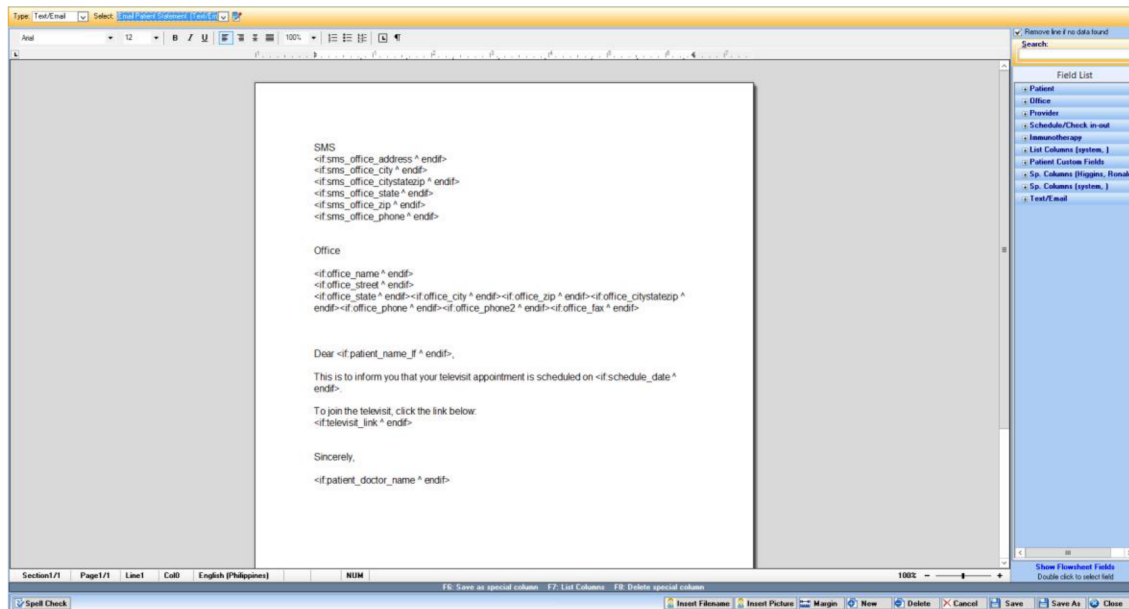


Figure 8 From the **Type** list in the **Text/Email Templates** window, select **Text/Email** to access the applicable templates.

4. From the **Select** list, select the message template that you want to edit.
5. Edit the template in the center pane.

Note:

You can select **Immunotherapy** in the right pane of the **Letter Template** window to customize allergy shot letter templates. **Immunotherapy** is only available if you turn on the Immunotherapy module in IMS. For more information about allergy shot reminders, see [Set up allergy shot reminders](#).

6. In the right pane of the **Letter Template** window, double-click the applicable tags to add new fields to the template.

Note:

You can now use the **If_Appt_Confirm** and **If_Appt_Notconfirm** tags under the **Sp. Columns** field list to customize the information included in the text that is sent to a patient when the appointment is confirmed and when it is not.

7. Click **Save**, and then click **Close**.

Link the letter template with the applicable reminder. You can link the text templates with their corresponding modules. To link the Text templates, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Admin**.
2. In the left pane of the **Setup Center** window, double-click **Text/Email Templates**.
3. In the **Text/Email Templates** window, click **Add**.

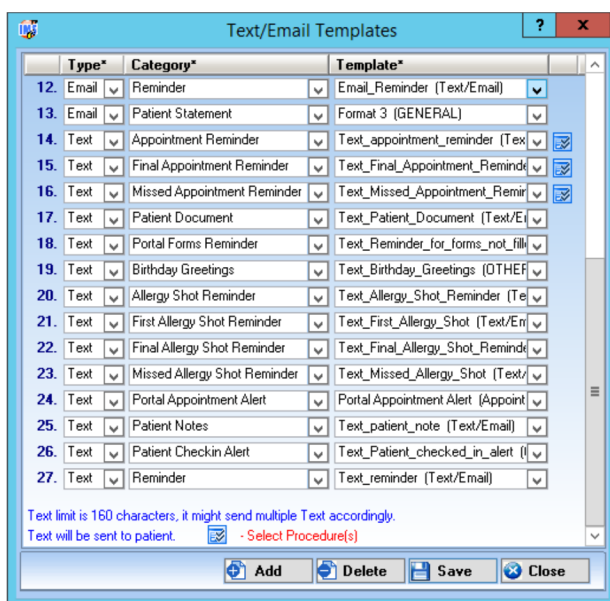


Figure 9 The **Text/Email Templates** window

4. Select the applicable options from the lists in the following columns:
 - **Type**. From the **Type** list, select **Text**.
 - **Category**. From the **Category** list, select the applicable Text category.
 - **Template**. From the **Template** list, select the template that you want to use.
5. Click **Save**, and then click **Close**.

Customize letter templates for specific procedures. To suit your clinic's preferences, you can create and customize a letter template for a specific procedure.

Customizing templates for procedures is generally the same as creating letter templates, but there is a specific tag that you can use to put the procedure details in the letter template. For more information about accessing the **Letter Template** window through **Setup Center**, see [Customize Text letter templates](#).

To customize a letter template for a specific procedure, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Other**.
2. In the left pane of the **Setup Center** window, double-click **Letter Template**.
3. On the gold bar of the **Letter Template** window, select **Text/Email** from the **Type** list, and then select the applicable letter template from the **Select** list.
4. In the center pane of the window, edit the template.
5. In the **Search** box in the right pane of the window, type **detail**, and then press Enter.

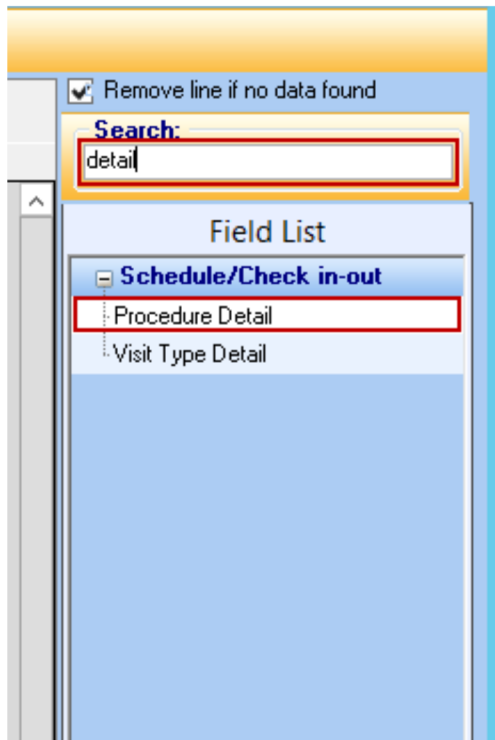


Figure 10 In the **Letter Template** window, search for **Procedure Detail** to include the applicable tags in the letter template.

6. In the **Field List** pane, double-click **Procedure Detail** to add the tag for the procedure details in the letter template.

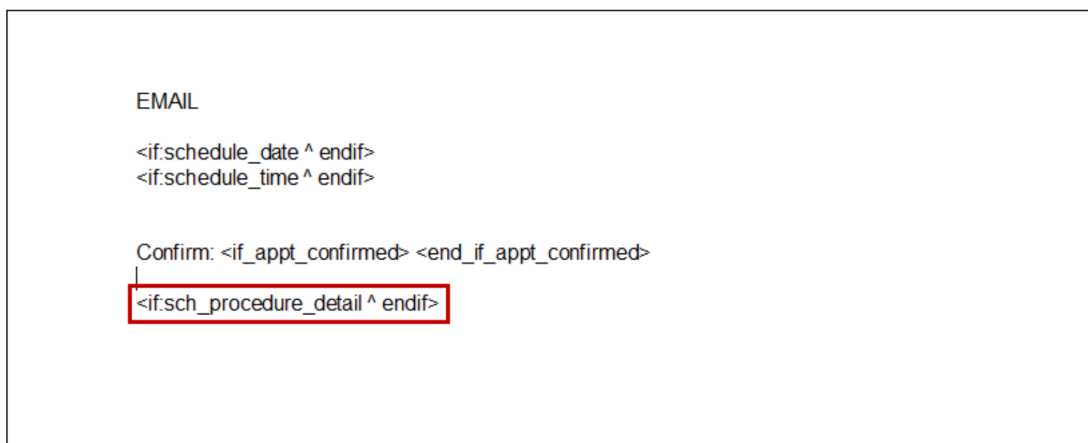



Figure 11 The **Procedure Detail** tag in the center pane of the **Letter Template** window

When the tag is added, its details replace the procedure details entered through the procedure setup in **Setup Center**.

7. Click **Save**, and then click **Close**.

To access the procedure details of a certain procedure, click **Setup** on the IMS menu bar > **Scheduler** > double-click **Procedure** > select the procedure > click the **Procedure Details** symbol .

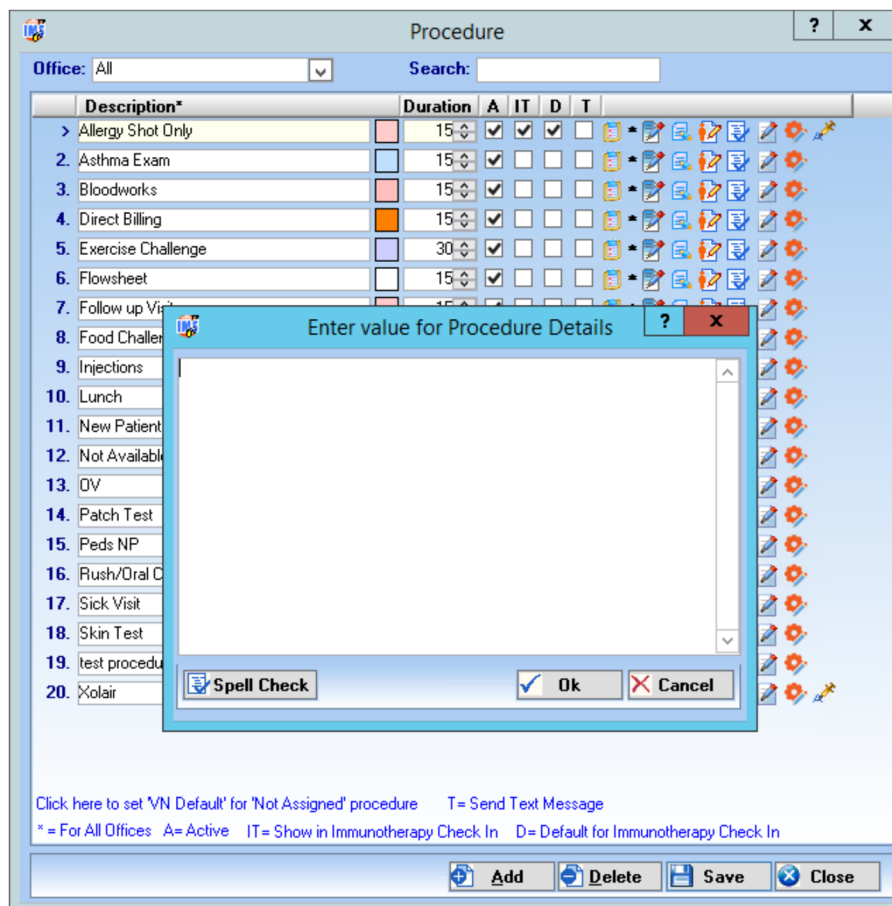




Figure 12 In the **Procedure** window, click the **Procedure Detail** symbol for the applicable procedure to view or edit the procedure details.

Set up the templates to remind about specific procedures. You can set up a reminder template for specific procedures. When you select a procedure for the scheduled patient, IMS sends a reminder message that informs the patient about the procedure.

To set up the templates for specific procedures, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Admin**.
2. In the left pane of the **Setup Center** window, double-click **Text/Email Templates**.
3. In the **Text/Email Templates** window, click the **Select Procedure(s)** symbol  for the applicable template.

Note:

The **Select Procedure(s)** symbol  is only available if **Appointment Reminder**, **Final Appointment Reminder**, or **Missed Appointment Reminder** is selected from the list in the **Category** column of the **Text/Email Templates** window.


4. In the **Procedure Selection** window, click the procedures that should use the reminder, and then click **Ok**.



Figure 13 The Procedure Selection window

Note:

Procedures that are already selected for other templates are not shown in the **Procedure Selection** window.

5. In the **Text/Email Templates** window, you can point to the Select Procedure(s) symbol  to view the list of procedures that are included in the corresponding reminder.
6. Click **Save**, and then click **Close**.

Note:

If you add and save a duplicate template, the “Duplicate rows with same Type, Category and Template are not allowed.” message appears.



Set up the templates to remind about specific visit types. You can also set up a reminder template for specific visit types. When you select a visit type

for the scheduled patient, the system sends a reminder to inform the patient about the visit type.

Note:

You can only access this feature if the **COS** back-end parameter is turned on. To turn on the parameter, contact an authorized Meditab representative.

To set up the templates to remind about specific visit types, follow the same steps mentioned in *Set up the templates to remind about specific procedures*.

Take note that the **Select Procedure(s)** symbol  is replaced by the **Select Visit Type(s)** symbol , which opens the **Select Visit Type(s)** window.

Set up allergy shot reminders

You can set IMS to send a reminder to patients who have to take allergy shots. To send allergy shot reminders, adjust the applicable parameters for the Immunotherapy module.

If there are multiple reminders for a patient on the same day, the system only sends one text to the patient instead of multiple texts.

Set up the parameters for allergy shot reminders. With the Text service, you can send reminders to patients who are undergoing immunotherapy treatment. You can send text reminders to notify the patient during the following stages:

- **Preparing the vaccine for the first shot.** When the first allergy shot is prepared, you can send a text message to notify the patient that his or her allergy shot is ready to be administered.

Note:

After giving the first shot, you can send a text message to notify the patient about the next shot duration.

- **Next Shot Duration.** You can send text messages to notify the patient about the next shot duration—an interval (in days) within which the patient can visit the clinic to receive the next shot.
- **Final Shot.** You can send a text message to remind the patient about the final allergy shot that he or she has to receive.
- **Missed Shot.** You can send a text message to remind the patient about the shots that he or she missed, if any.

To set up the parameters for allergy shot reminders, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **System Parameters**.
2. In the upper-left pane of the **Parameters** window, click **IMS InTouch Text/Email**.
3. In the right pane, adjust the following parameters:
 - **Allergy Shot Reminder.** From the list in the **Value** column for the **Allergy Shot Reminder** parameter, select any of the following:
 - **None.** Select **None** if you do not want IMS to send allergy shot reminders.

None also turns off all other parameters for allergy shot reminders.

Note:

The available options for the **Allergy Shot Reminder** parameter depend on which IMS InTouch service is purchased.

- **Text.** Select **Text** to send allergy shot reminders through text only.
- **Email.** Select **Email** to send allergy shot reminders through email only.
- **Both.** Select **Both** to send allergy shot reminders through email and text.
- **Days to send allergy shot reminder after vaccine is prepared.** In the **Value** box for the **Days to send allergy shot reminder after vaccine is prepared** parameter, enter any of the following numbers:
 - **0.** Enter **0** to send an allergy shot reminder to the patient on the day when the vaccine is prepared.
 - **Positive Number.** Enter a positive number to indicate the number of days—after preparing the vaccine—when the allergy shot reminder is sent.
 - **Negative Number.** Enter a negative number if you do not want IMS to send an allergy shot reminder for the first allergy shot.
- **Days to send allergy shot reminder for the shot duration.** In the **Value** column for the **Days to send allergy shot reminder for the shot duration** parameter, enter the applicable details in the following boxes:
 - **List to the left of the Days box.** From the list to the left of the **Days** box, select either of the following:
 - **Before.** Select **Before** if you want to send a reminder days before the start date of the next shot duration.
 - **After.** Select **After** if you want to send a reminder days after the start date of the next shot duration.
 - **Days.** In the **Days** box, indicate the number of days—either before or after the start date of the next shot duration—on which a reminder is sent.

The number of days, whether before or after the start date of the next shot duration, depend on the selected option from the list to the left of the **Days** box.

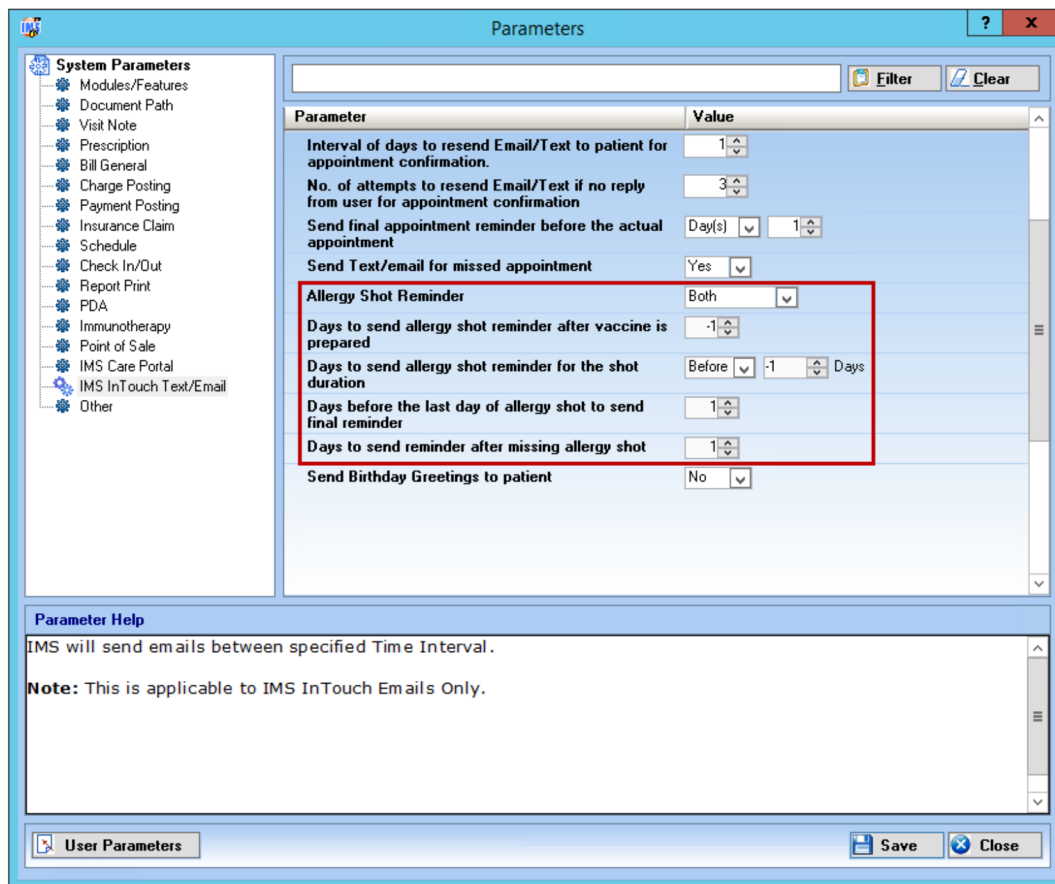
Note:

In the **Days** box, you can also enter **0** if you want IMS to send the reminder on the start date of the next shot duration.

If you do not want IMS to send a reminder for the next shot duration, enter a negative number in the **Days** box.

- **Days before the last day of allergy shot to send final reminder.** In the **Value** box for the **Days before the last day of allergy shot to send final reminder** parameter, enter any of the following numbers:
 - **0.** Enter **0** to send the final allergy shot reminder on the end date of the allergy shot duration.
 - **Positive Number.** Enter a positive number to send a reminder to the patient in a specific number of days before the end date of the allergy shot duration.
 - **Negative Number.** Enter a negative number if you do not want IMS to send a reminder for the final allergy shot.
- **Days to send reminder after missing allergy shot.** In the **Value** box for the **Days to send reminder after missing allergy shot** parameter, enter any of the following numbers:
 - **0.** Enter **0** to send a missed allergy shot reminder a day after the end date of the shot duration.
 - **Positive Number.** Enter a positive number to send a reminder to the patient in a specific number of days after the end date of the shot duration.

- **Negative Number.** Enter a negative number if you do not want IMS to send a reminder for missed allergy shots.



Parameter	Value
Interval of days to resend Email/Text to patient for appointment confirmation.	1
No. of attempts to resend Email/Text if no reply from user for appointment confirmation	3
Send final appointment reminder before the actual appointment	Day(s) 1
Send Text/email for missed appointment	Yes
Allergy Shot Reminder	Both
Days to send allergy shot reminder after vaccine is prepared	-1
Days to send allergy shot reminder for the shot duration	Before -1 Days
Days before the last day of allergy shot to send final reminder	1
Days to send reminder after missing allergy shot	1
Send Birthday Greetings to patient	No

Parameter Help
IMS will send emails between specified Time Interval.
Note: This is applicable to IMS InTouch Emails Only.

User Parameters [Save] [Close]

Figure 14 In the **Parameters** window, adjust the parameters for the allergy shot reminders.

4. Click **Save**, and then click **Close**.

Set up templates for allergy shot reminders. You can also set up the Text templates for allergy shot reminders.

To set up a letter template for an allergy shot reminder, follow the same steps mentioned in [Customize Text letter templates](#).

To link the allergy shot letter template with the applicable reminder, follow the same steps mentioned in “Link the letter template with the applicable reminder” under [Customize Text letter templates](#).

Reminders for allergy shots, first allergy shot, final allergy shot, and missed allergy shots are available in the **Category** column in the **Text/Email Templates** window.

Set up Text service for milestones

The Milestones module helps to market cosmetic clinics more efficiently. When a patient comes to inquire about a specific procedure, you can send marketing letters that are applicable to the patient through IMS InTouch. They are sent either as individual letters or in packages.

To set up the Text service for the Milestone module, follow these steps:

1. Create marketing letters that are specific to a procedure.
2. Create a treatment plan where you can group the letters into letter packages.
3. Group the letter packages into milestone groups that correspond to the specific step in the procedure.
4. In the **Treatment Plan** box, specify the treatment plan that you want to link with the related procedure.

Create letter templates. You can create letters that can be part of a procedure’s marketing package. These could be letters that answer basic inquiries about the procedure or letters that you send for appointments, cancellations, consultations, or information about what to do during the procedure.

You can create the letter templates in the **Letter Template** window. If the letters you need are saved in the system, you can also view or edit them. For more information about creating and editing letter templates, see [Customize Text letter templates](#).

Create a treatment plan. To organize your marketing efforts for a procedure, create a treatment plan. The treatment plan is composed of marketing letters that are grouped into letter packages.

To register a treatment plan, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Cosmetic Surgery**.
2. In the left pane of the **Setup Center** window, double-click **Milestones Treatment Plan**.
3. In the **Milestones Treatment Plan** window, enter the name of your treatment plan in the **Description** column.

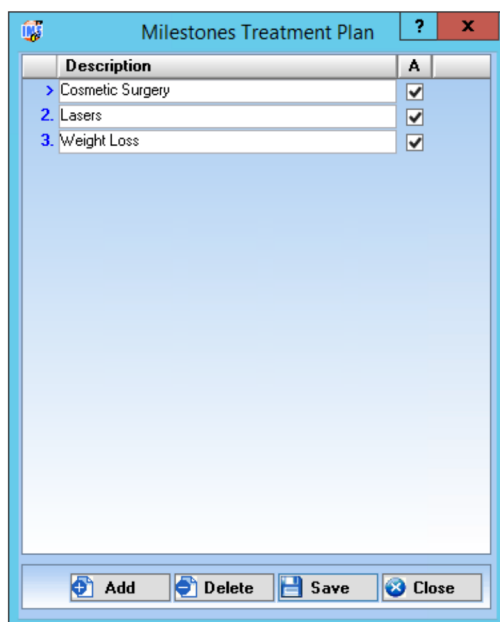


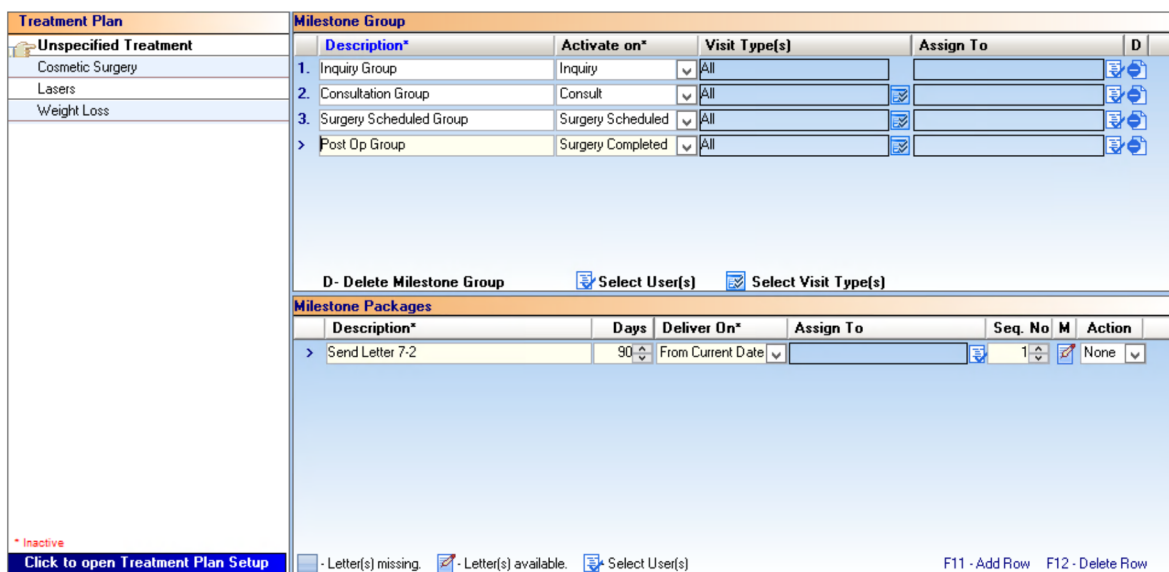
Figure 15 The Milestones Treatment Plan window

4. Click **Save**, and then click **Close**.

Customize the treatment plan. Once registered, you can set up the treatment plan to automatically send letters or letter packages at various steps in the procedure.

To set up a treatment plan, follow these steps:

1. In the left pane of the **Setup Center** window, double-click **Milestones Template** to open the **Milestones Template** screen.
2. In the **Treatment Plan** pane of **Milestones Template**, click the applicable treatment plan.

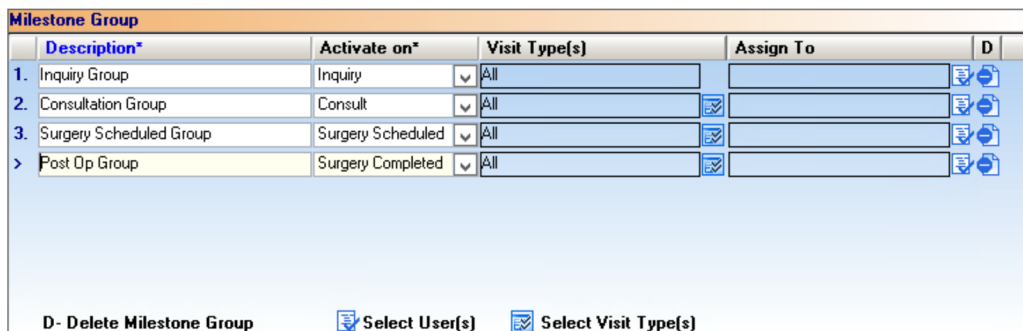


The screenshot shows the 'Milestones Template' screen. On the left is the 'Treatment Plan' pane with a list of plans: 'Unspecified Treatment', 'Cosmetic Surgery', 'Lasers', and 'Weight Loss'. The 'Unspecified Treatment' plan is selected. On the right is the 'Milestone Group' pane, which contains a table with columns: 'Description*', 'Activate on*', 'Visit Type(s)', 'Assign To', and 'D'. The table lists four milestone groups: '1. Inquiry Group' (Activate on: Inquiry, Visit Type(s): All), '2. Consultation Group' (Activate on: Consult, Visit Type(s): All), '3. Surgery Scheduled Group' (Activate on: Surgery Scheduled, Visit Type(s): All), and '> Post Op Group' (Activate on: Surgery Completed, Visit Type(s): All). Below the table are buttons for 'D - Delete Milestone Group', 'Select User(s)', and 'Select Visit Type(s)'. At the bottom of the 'Milestone Group' pane is a 'Milestone Packages' section with a table containing one row: '> Send Letter 7-2' (Days: 90, Deliver On*: From Current Date, Assign To: [empty], Seq. No: 1, M: [empty], Action: None). At the bottom of the screen are status indicators: '* Inactive', 'Click to open Treatment Plan Setup', and a row of icons for '- Letter(s) missing', '- Letter(s) available', and 'Select User(s)'. On the far right are keyboard shortcuts: 'F11 - Add Row' and 'F12 - Delete Row'.

Figure 16 On the **Milestones Template** screen, click the applicable treatment plan in the **Template Plan** pane to open its set of milestones in the **Milestone Group** pane.

3. In the **Milestone Group** pane, enter the necessary information in the following columns:
 - **Description.** In the **Description** box, type the name of your milestone group.

- **Activate on.** From the **Activate on** list, select the point in the process on which the package letters are activated and sent.



Description*	Activate on*	Visit Type(s)	Assign To	D
1. Inquiry Group	Inquiry	All		
2. Consultation Group	Consult	All		
3. Surgery Scheduled Group	Surgery Scheduled	All		
> Post Op Group	Surgery Completed	All		

D- Delete Milestone Group Select User(s) Select Visit Type(s)

Figure 17 In the **Milestone Group** pane, enter the necessary information to create the milestone groups.

4. In the **Milestones Packages** pane, enter or modify the necessary details in the following boxes:

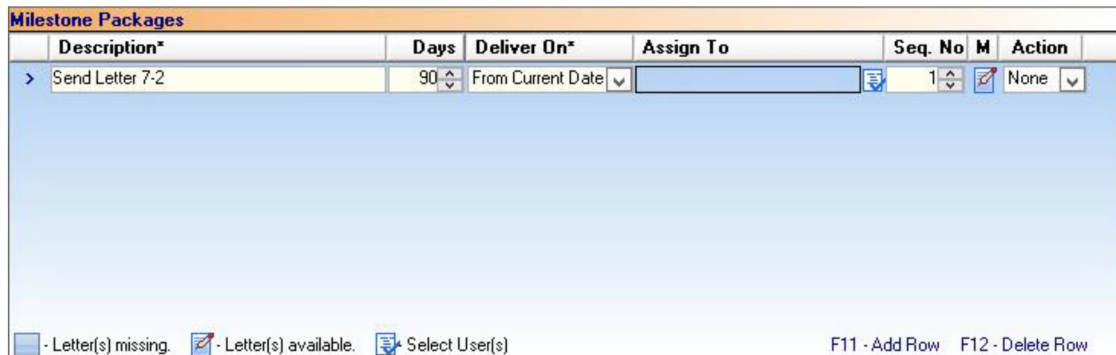
- **Description.** In the **Description** box, enter the name of the letter package.
- **Days and Deliver On.** In the **Days** and **Deliver On** boxes, specify how many days before or after a certain step or date you want to send the letter package.

For example, you may enter **3** in **Days**, and then select **From Current Date** from the **Deliver On** list to send the letters three days after today.

Note:

If you enter **0** in **Days**, and then select **From Current Date** from the **Deliver on** list, the letter package is sent today.

- **Action.** From the list in the **Action** column, select **Text** to send the letter package through text.



Description*	Days	Deliver On*	Assign To	Seq. No	M	Action
> Send Letter 7-2	90	From Current Date		1		None

☐ - Letter(s) missing.
 ☒ - Letter(s) available.

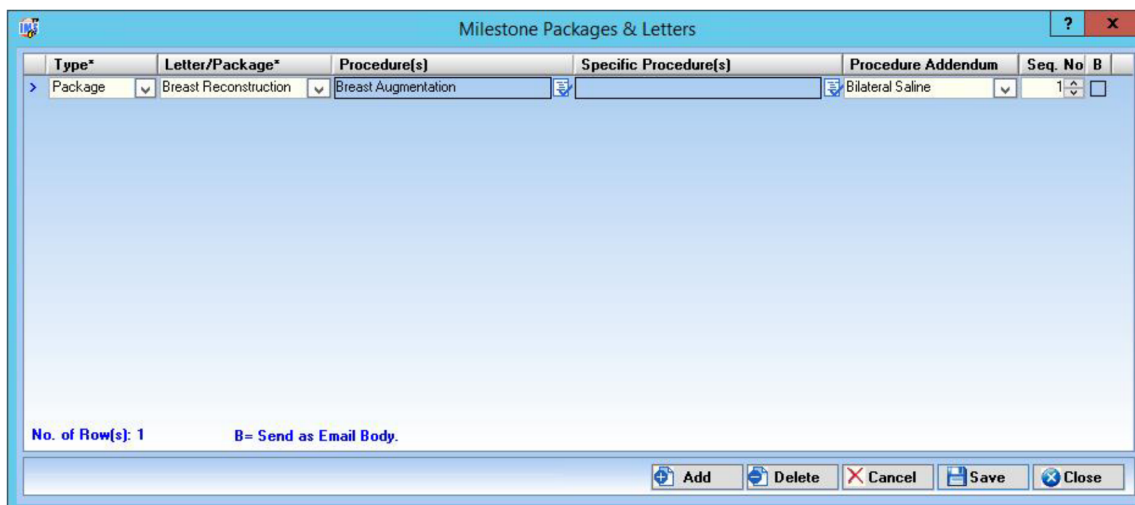
F11 - Add Row F12 - Delete Row

Figure 18 In the **Milestone Packages** pane, enter the necessary details to create the letter packages that you want to send for the selected milestone group.

5. In the **Milestone Packages** pane, click the **Letter(s) missing** symbol ☐.

If package already has a letter attached to it, the **Letter(s) missing** symbol ☐ is replaced by the **Letter(s) available** symbol ☒.


6. When the **Milestone Packages & Letters** window opens, enter **Letter** or **Package** in the **Type** column, and then enter the letter template that you want to use in the **Letter/Package** column.



Type*	Letter/Package*	Procedure(s)	Specific Procedure(s)	Procedure Addendum	Seq. No	B
> Package	Breast Reconstruction	Breast Augmentation		Bilateral Saline	1	<input type="checkbox"/>

No. of Row(s): 1 B= Send as Email Body.

Figure 19 In the **Milestone Packages & Letters** window, attach the letters that you want to send.

7. Click **Save**, and then click **Close**.
8. On the **Milestones Template** screen, click the **Save** symbol  on the action toolbar.

Link the treatment plan with a procedure. To link the treatment plan with a procedure, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Scheduler**.
2. In the left pane of the **Setup Center** window, double-click **Procedure**.
3. In the left pane of the **Procedure** window, click the procedure that you want to link with a treatment plan.

Note:

You can also click **Add** in the lower pane to create a new procedure.

4. From the **Treatment Plan** list, select the treatment plan that you want to link with the procedure.

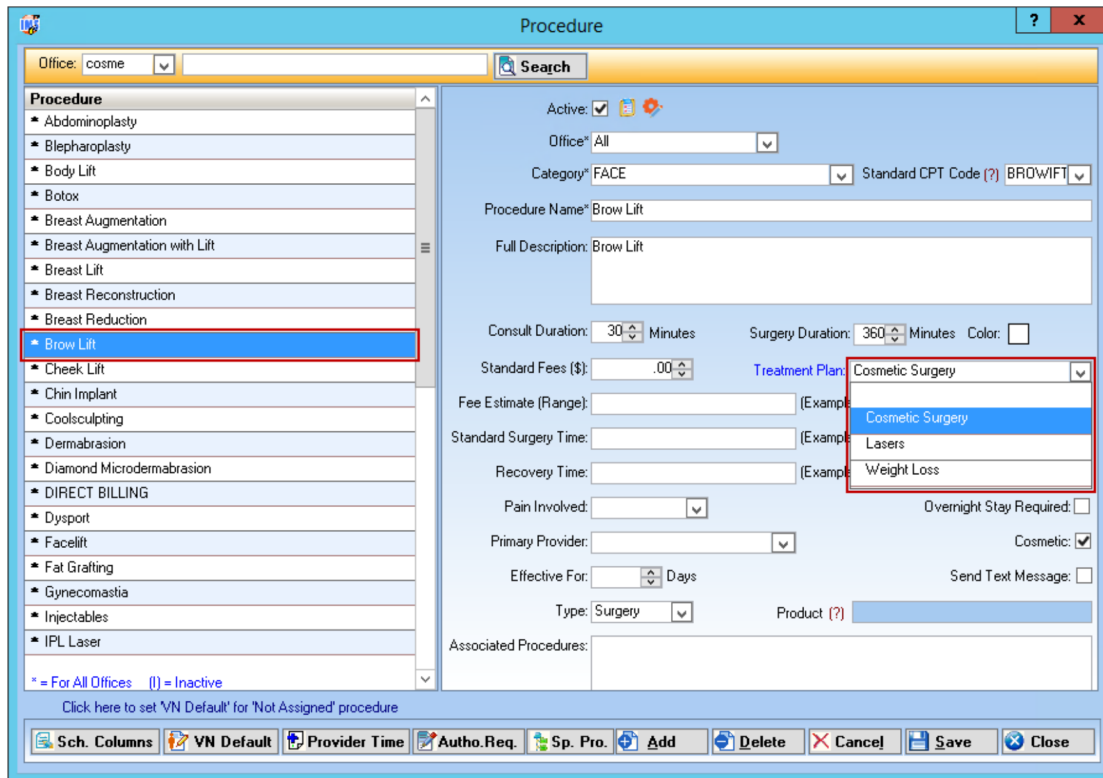


Figure 20 In the left pane of the **Procedure** window, select a procedure, and then select its treatment plan from the **Treatment Plan** list to link the procedure with the treatment plan.

5. Click **Save**, and then click **Close**.

Set up the Reminder module to automatically select the Text check box according to the selected task

When you add a task reminder in the Reminder module, you can set the reminder to send a text notification to the patient about the task. For more information about Text notifications in task reminders, see [Set a task reminder to send a text notification to the patient](#).

You can set IMS to automatically select the **Text** check box in the **Reminder Task** window—allowing notification of the reminder task via text—when you select a task and a patient for the task reminder.

To set IMS to automatically select the **Text** check box, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Reminder**.
2. In the left pane of the **Reminder** screen, click **Setup**.

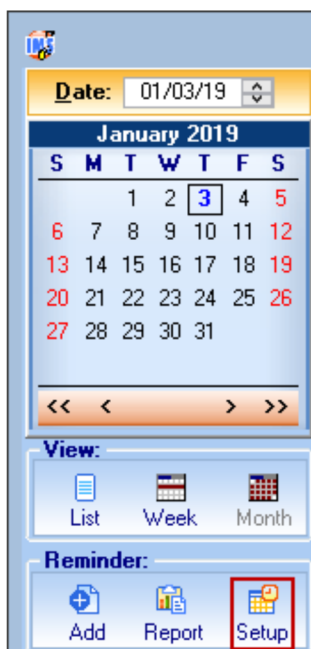
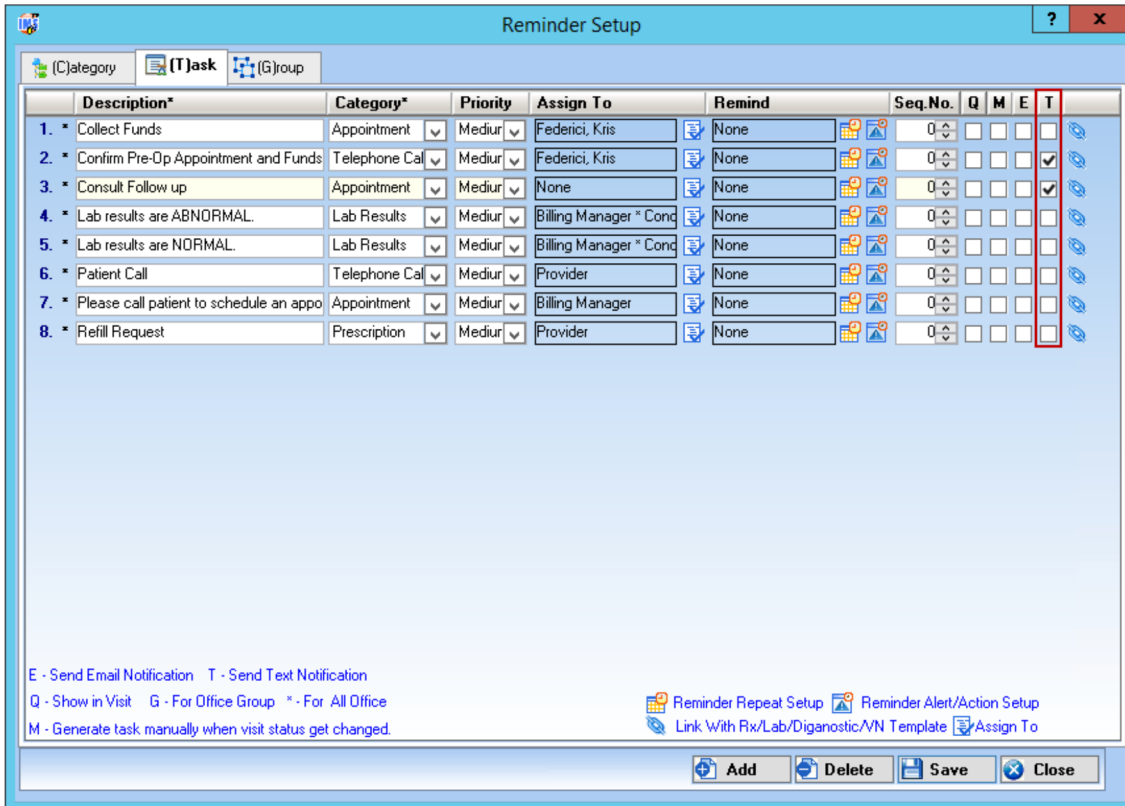


Figure 21 In the left pane of the **Reminders** screen, click **Setup** to access the setup options for task reminders.

3. In the **Reminder Setup** window, click the **(T)ask** tab.
4. In the **T** column, select the check box of the reminder that should automatically send text notifications.



	Description*	Category*	Priority	Assign To	Remind	Seq.No.	Q	M	E	T
1.	Collect Funds	Appointment	Medium	Federici, Kris	None	0				
2.	Confirm Pre-Op Appointment and Funds	Telephone Call	Medium	Federici, Kris	None	0				<input checked="" type="checkbox"/>
3.	Consult Follow up	Appointment	Medium	None	None	0				<input checked="" type="checkbox"/>
4.	Lab results are ABNORMAL.	Lab Results	Medium	Billing Manager * Cond	None	0				<input type="checkbox"/>
5.	Lab results are NORMAL.	Lab Results	Medium	Billing Manager * Cond	None	0				<input type="checkbox"/>
6.	Patient Call	Telephone Call	Medium	Provider	None	0				<input type="checkbox"/>
7.	Please call patient to schedule an appo	Appointment	Medium	Billing Manager	None	0				<input type="checkbox"/>
8.	Refill Request	Prescription	Medium	Provider	None	0				<input type="checkbox"/>

E - Send Email Notification T - Send Text Notification
Q - Show in Visit G - For Office Group * - For All Office
M - Generate task manually when visit status get changed.

Reminder Repeat Setup Reminder Alert/Action Setup
Link With Rx/Lab/Diagnostic/VN Template Assign To

Add Delete Save Close

Figure 22 In the **Reminder Setup** window, select the applicable check boxes to allow the corresponding reminder to automatically sent text notifications.

5. Click **Save**, and then click **Close**.



Note:

When you create a task reminder, the **Text** check box in the **Notify Patient** section of the **Reminder Task** window is automatically selected when you select a patient in the **For Whom** section.

Set up the Text notification preference of a patient

According to the preferences of the patient, you can set up which module reminders are sent to the patient. You can select which modules would send text messages to the patient.

To set up the notification preference of the patient, follow these steps:

1. On the IMS toolbar, click the **Patient** symbol .
2. On the action toolbar of the **Patient Master** screen, click the **Search** symbol .
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the right pane of the **Patient Master** screen, click **Other Options**, and then select **Text/Email Notification Preference**.

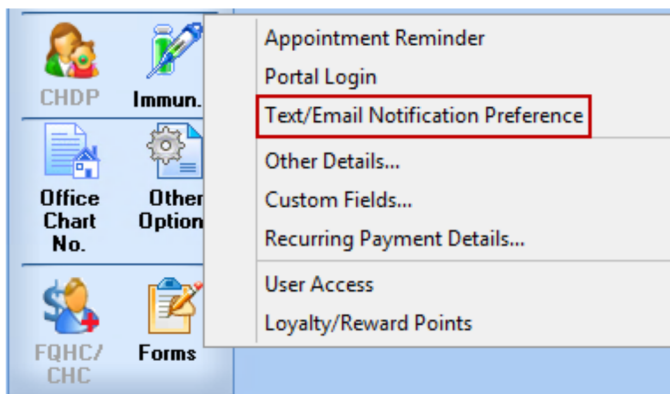


Figure 23 To open the **Text/Email Notification Preference** window, click **Other Options** in the right pane of the **Patient Master** screen, and then select **Text/Email Notification Preference**.

5. In the **Text** column of the **Text/Email Notification** window, select the check boxes of the modules that send text reminders to the patient.

If you don't want the module to send a text reminder to the patient, clear its corresponding check box.

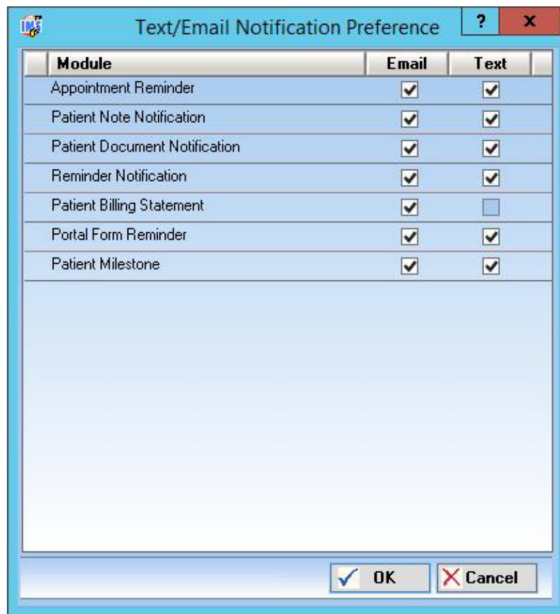


Figure 24 In the **Text/Email Notification Preference** window, select or clear the applicable check boxes to set the modules that can or cannot send reminders.

Note:

By default, all check boxes are selected for all patients in the **Text/Email Notification Preference** window.

- Click **OK**.

Add the unsubscribe link in the letter template. You can allow the patient to unsubscribe from the text reminders through a link in the reminder. To use this feature, add the applicable link in the letter template.

To add the unsubscribe link in the letter template, follow these steps:

- On the IMS menu bar, click **Setup**, and then click **Other**.
- In the left pane of the **Setup Center** window, double-click **Letter Template** to open the **Letter Template** window.
- On the gold bar of the **Letter Template** window, select **Text/Email** from the **Type** list.

- In the right pane, enter **unsub** in the **Search** box, and then press Enter.

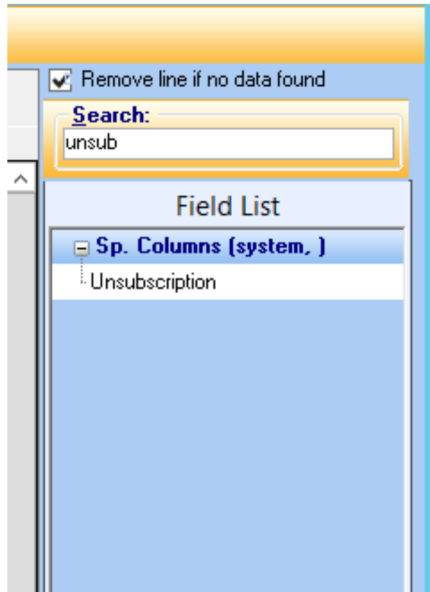


Figure 25 In the **Letter Template** window, search for **Unsubscription** in the right pane to access the applicable link for the letter template.

- Click an area in the letter template where you want the link to appear, and then click **Unsubscription** in the right pane.

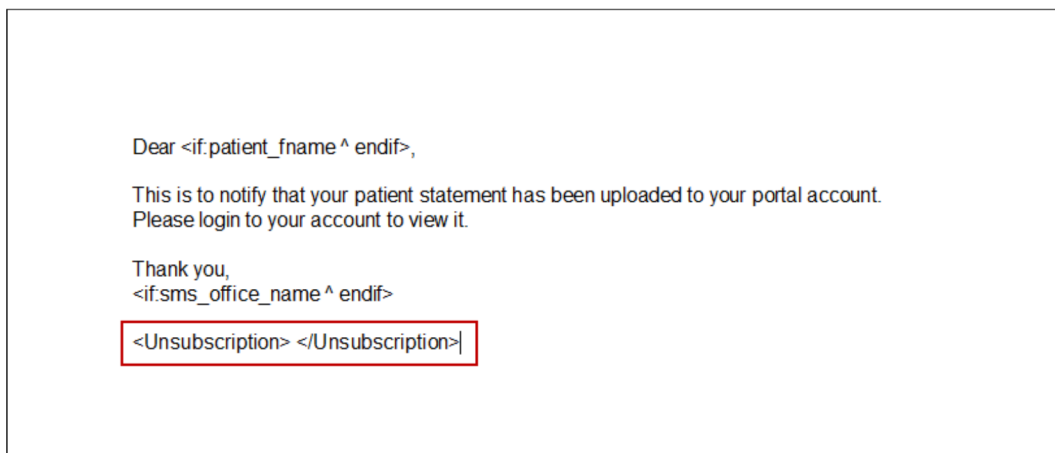


Figure 26 In the **Letter Template** window, click an area in the letter template, and then click **Unsubscription** in the right pane to add the **<Unsubscription> </Unsubscription>** link to the letter template.

- In the letter template, type the text—which the patient needs to click to unsubscribe—in between **<Unsubscription>** and **</Unsubscription>**.

<Unsubscription> Click here to unsubscribe. </Unsubscription>

Figure 27 Enter the text for the link in between <Unsubscription> and </Unsubscription>.

Note:

To unsubscribe from the reminders, the patient can click the link that is included in the reminder. For more information about the tasks that the patient needs to do when he or she unsubscribes, see [Unsubscribe from Text reminders](#).

Call at our office if you have any concerns

[Click here to unsubscribe](#)

Figure 28 The link that appears in the reminder received by the patient

Text Service End User Tasks

When the Text service is available, you can send a text message to patients and providers for different purposes.

Send an appointment reminder to a patient

You can send appointment reminder messages to patients through the Scheduler module.

To send an appointment reminder, follow these steps:

1. On the IMS menu bar, click **Activities**, and then select **Scheduler**.

2. On the **Schedule for (Provider)** screen, double-click the preferred slot to open the **Schedule Entry** window.
3. In the **Schedule Entry** window, enter the appointment details.

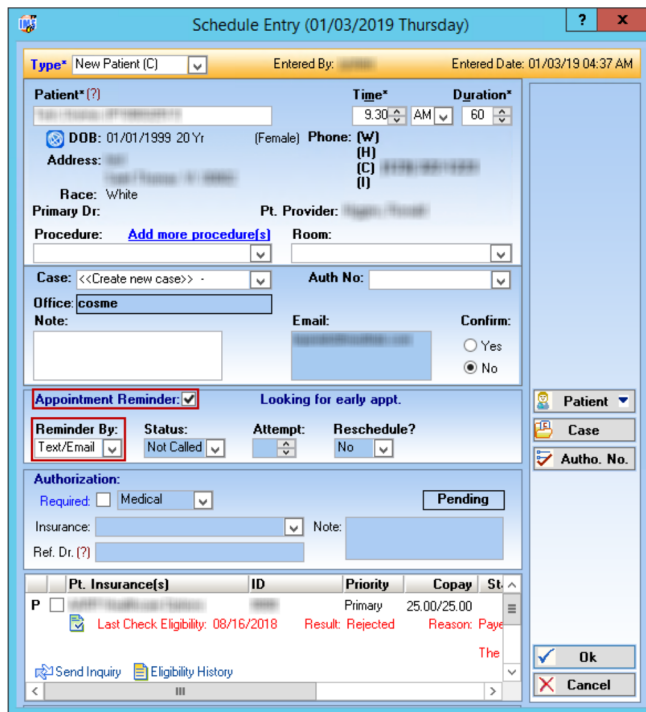


Figure 29 In the Scheduler Entry window, select the **Appointment Reminder** check box and enter **Text** or **Text/Email** in **Reminder By** so the system automatically sends an appointment reminder to the patient via text.

4. Select the **Appointment Reminder** check box to set the system to send automatic reminders to the patient.
5. From the **Reminder By** list, select either **Text** or **Text/Email**.
6. Click **Ok**.

The system can now send appointment reminders to the patient. The appointment reminders—including the final appointment reminder—are sent with the information and in a manner based on your setup settings.

Note:

If you select a visit type that does not have an appointment reminder template, **No appointment reminder template found for the selected visit type** appears in the **Schedule Entry** window.

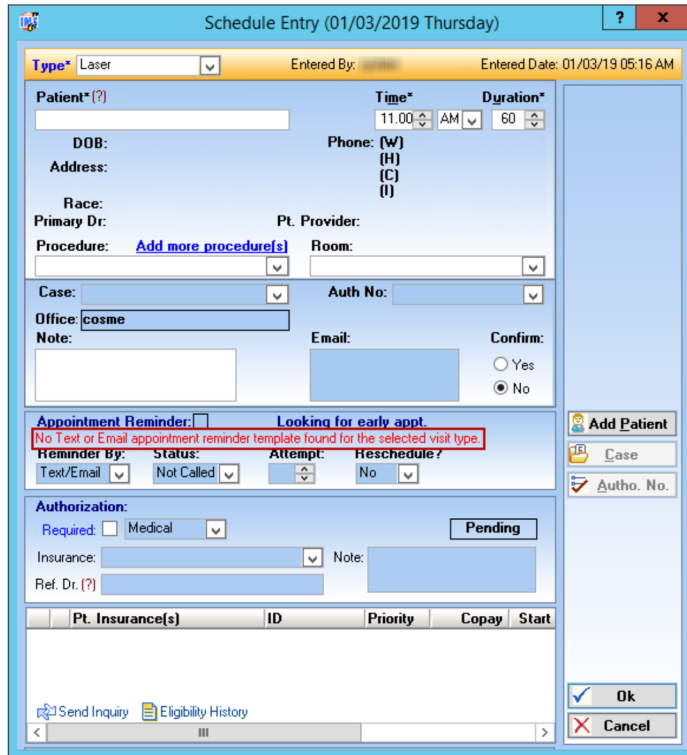


Figure 30 The Schedule Entry window shows a notification if you select a visit type that has no letter template.

Send updated appointment details. If you update the patient's appointment details, you can choose to send appointment reminder messages with the updated details.

To send updated appointment details, follow these steps:

1. On the **Scheduler** screen, double-click your preferred time slot to open the **Schedule Entry** window.
2. In the **Schedule Entry** window, update the patient's appointment details, and then click **Ok**.

- When the “Do you want to send Text/Email for an updated appointment to patient? If Yes, then appointment status will become unconfirmed” message appears, click **Yes**.

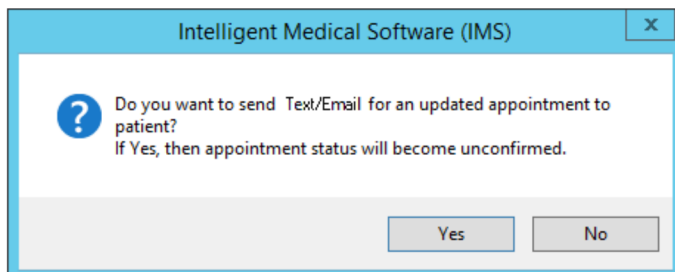


Figure 31 To send a text with the updated appointment details, click **Yes** when the confirmation message appears.

Note:

If you choose to send a notification for updated appointment details, the system refreshes the resend counts for the appointment reminder messages. For more information about resend counts, see the **Interval of days to resend Email/Text to patient for appointment confirmation** and **No. of attempts to resend Email/Text if no reply from user for appointment confirmation** parameters in [Set appointment reminder parameters](#).

Send a missed appointment reminder to a patient. If the patient fails to show up for the appointment, you can mark their appointment as missed so that a missed appointment reminder is sent to the patient via text. You can access this functionality either in the Scheduler or Check In/Out module.

Note:

You can send a missed appointment reminder text to the patient if the patient was initially sent with the appointment reminder text for the schedule entry.

Mark appointment as missed in Scheduler. To mark the appointment as missed in Scheduler, follow these steps:

- On the **Scheduler** screen, right-click the patient’s name, and then click **Missed**.

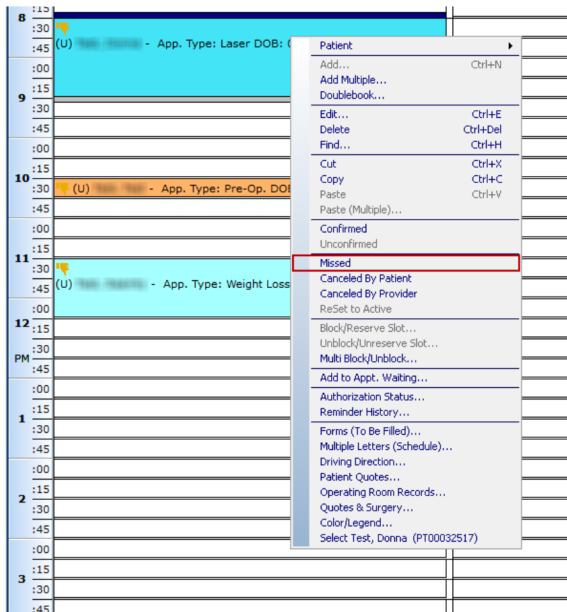


Figure 32 On the Scheduler screen, right-click the patient's name, and then click **Missed** to mark the appointment as missed.

2. In the **Missed Appointment** window, you can enter additional details and select the subsequent action to take, and then click **Ok**.

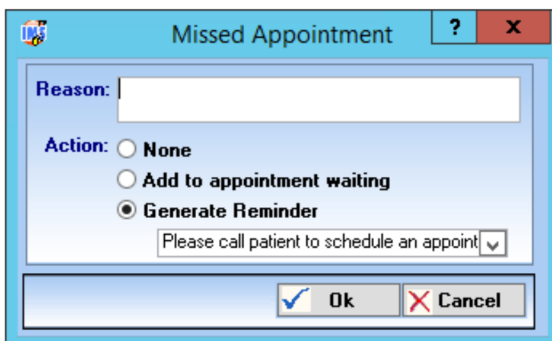


Figure 33 In the **Missed Appointment** window, you can enter additional details and select the applicable action.

Mark appointment as missed in Check In/Out. You can choose from the following options when marking the appointment as missed on the **Check In/Out** screen:

- **By Patient.** To mark a patient as missed in the **Appointments** pane, right-click the patient's name, and then select **Missed**. You can also click the **Option** symbol, and then select **Missed**.
- **By Batch.** Click the **Option** symbol, and then select **Mark All No Show as Missed**.

All patients that are listed in the **Appointments** pane who did not show up in the clinic on that day will be sent with the missed appointment reminder text.

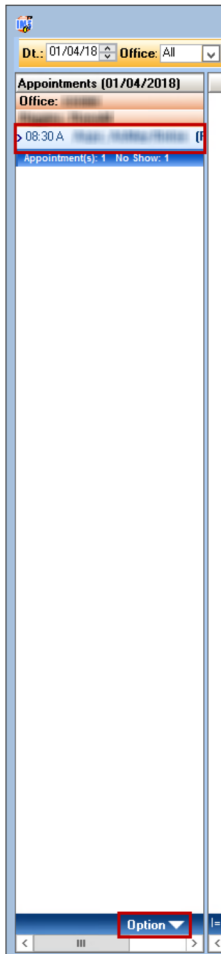


Figure 34 On the **Check In/Out** screen, you can choose to send the missed appointment reminder by patient or by batch.

Send patient notes

With IMS InTouch, you can send patient notes to the applicable patients via text.

To send patient notes, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then select **Note**.

2. In the **Patient Note** window, enter required details in the right pane, and then type the note in the **Note** box.

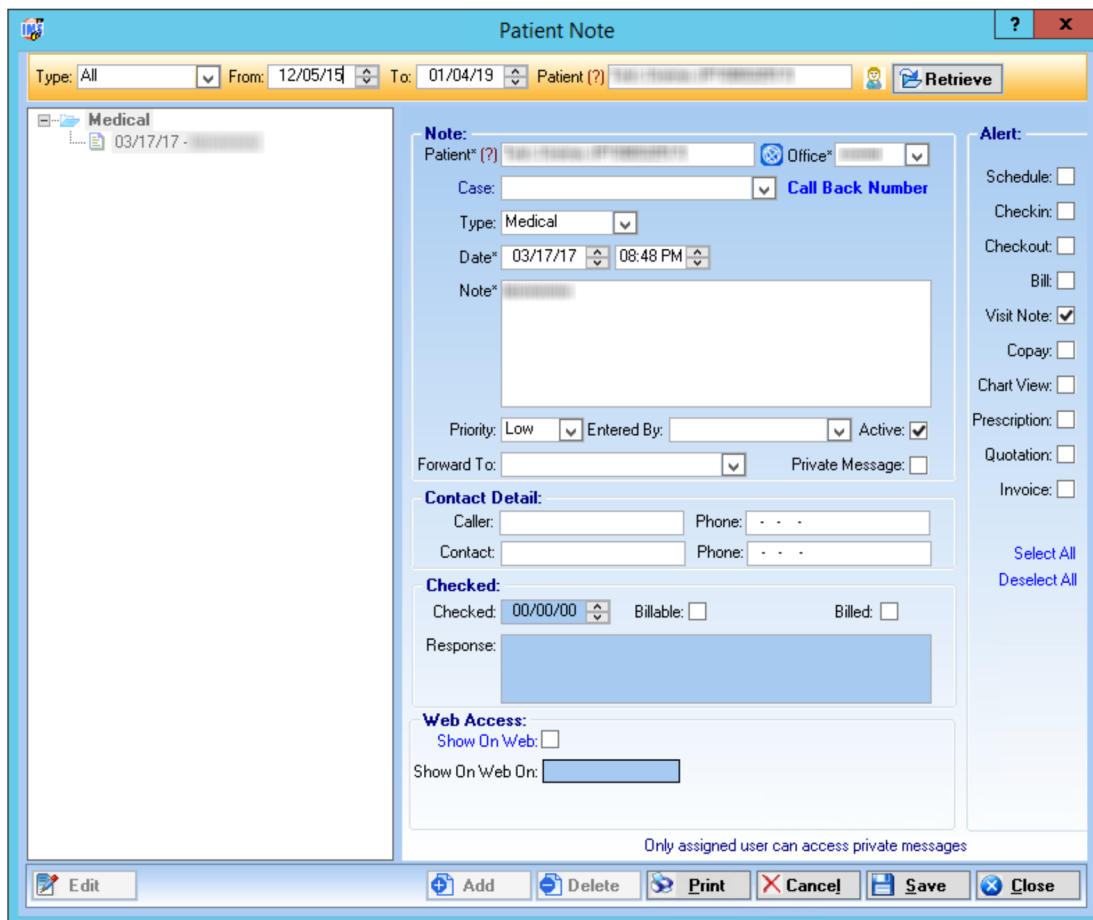


Figure 35 In the **Patient Note** window, enter the information that you want to include in the text.

3. In the **Web Access** pane, select the **Show On Web** check box, and then select the **Text** check box.

Note:

If you select the **Show On Web** check box, the note appears in the patient's IMS CarePortal account.


4. Click **Save**.

Note:

The details in **Template**, **Status**, and **Note** are imported from the **Patient Master** screen. If the patient's cell phone number is not available on Patient Master, the "Patient cell phone number is not entered" message appears in the **Text** window.


Upload documents

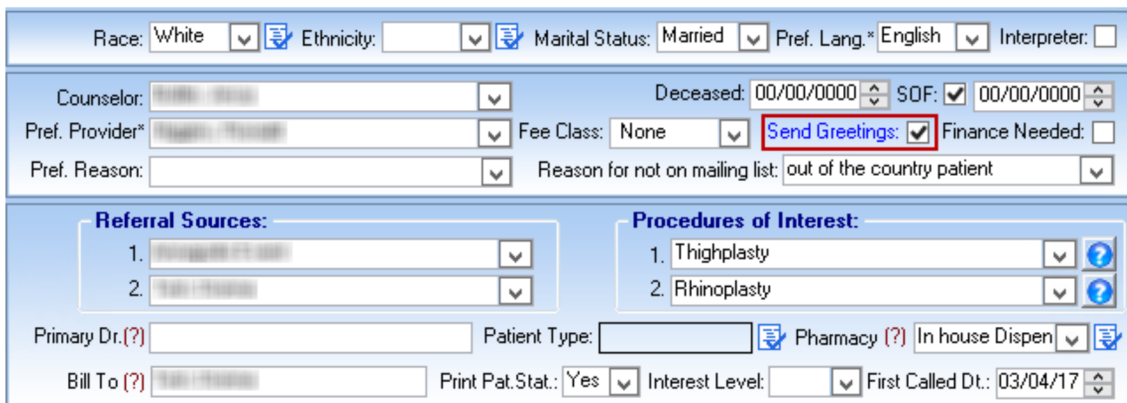
To upload documents and send notifications to a patient, follow these steps:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Document**.
2. On the gold bar of the **Patient Document(s)** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the lower pane of the **Patient Document(s)** window, click **Add**.
5. In the **Patient Documents** window, enter the necessary details.
6. From the first **Document** list, select whether the document is **Received** or **Sent**, and then select the file type of the document from the second **Document** list.
7. In the **Web Access** pane select the **Show on Web** check box, and then select the **Text** check box.
8. Click **Save**, and then click **Close**.

Send a birthday greeting to a patient

To send automated text messages to patients on their birthdays, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **Patient**.
2. On the action toolbar of the **Patient Master** screen, click the **Search** symbol .
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. On the **Patient Master** screen, select the **Send Greetings** check box.



The screenshot shows the Patient Master screen with various fields for patient information. The 'Send Greetings' checkbox is checked and highlighted with a red box. Other visible fields include Race (White), Ethnicity, Marital Status (Married), Pref. Lang. (English), Interpreter, Counselor, Deceased date, SDF, Fee Class (None), Finance Needed, Pref. Provider, Pref. Reason, Reason for not on mailing list, Referral Sources, Procedures of Interest, Primary Dr., Patient Type, Pharmacy, In house Dispens, Bill To, Print Pat. Stat., Interest Level, and First Called Dt.

Figure 36 On the **Patient Master** screen, select the **Send Greetings** check box to send automated text messages to patients on their birthdays.

5. Click the **Save** symbol .

Send a patient check-in alert to a provider

There are times when a provider is not available or not logged on to IMS when the patient checks in. You can set up an automated notification for the provider.

To turn on this feature, follow these steps:

1. On the IMS menu bar, click **Setup**, and then select **Scheduler**.
2. In the **Setup Center** window, double-click **Procedure**.
3. On the gold bar of the **Procedure** window, set the necessary filter criteria, and then click **Search**.
4. In the left pane, select a procedure, and then select the **Send Text Message** check box.

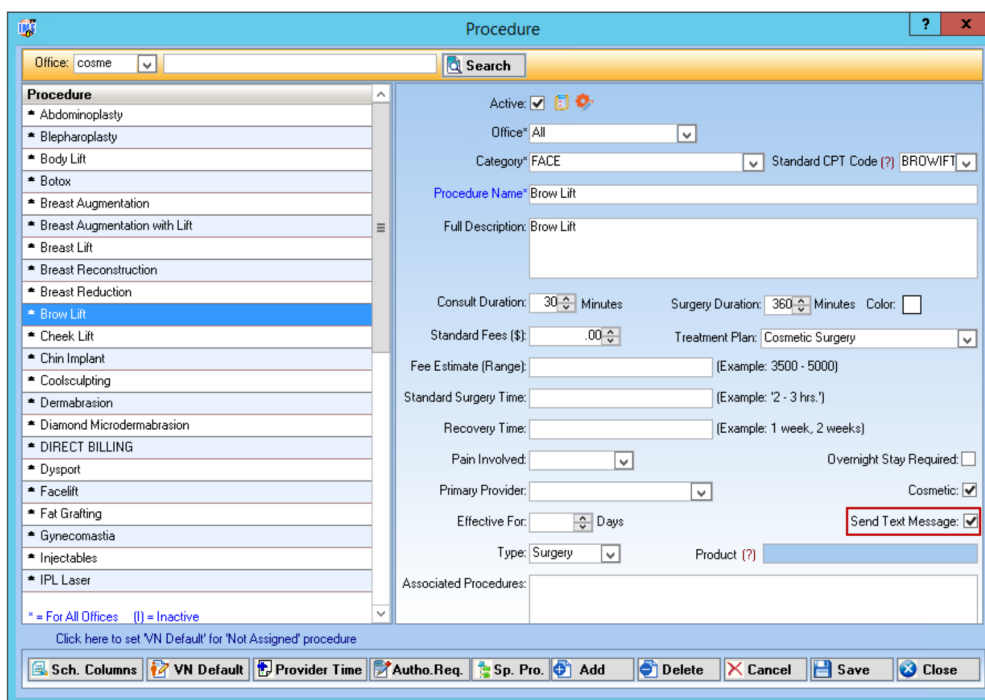



Figure 37 In the **Procedure** window, select the **Send Text Message** check box to set up an automated notification.

5. When the “Do you want to set Send Text message to all procedures?” message appears, click either **Yes** or **No**.
6. Click **Save**, and then click **Close**.

Send a discard notification. After sending a patient check-in alert to the unavailable provider, you can assign the patient to another provider, and then send a discard notification to the unavailable provider.

To send a discard notification, follow these steps:

1. On the IMS toolbar, click the **Check In/Out** symbol .
2. In the center pane of the **Check In/Out** screen, right-click the selected check-in entry, and then select **Edit**.
3. When the **Check In** window opens, select the new provider from the **Provider** list, and then click **Ok**.

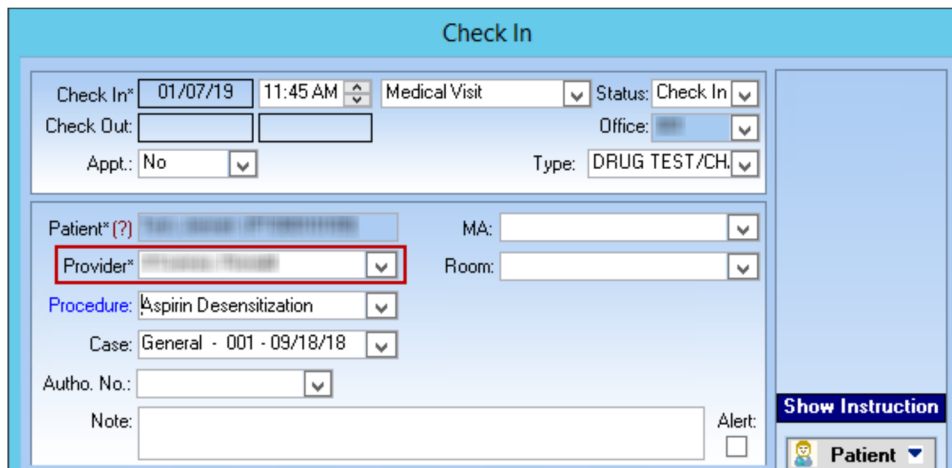


Figure 38 In the **Check In** window, select a new provider from the **Provider** list.

4. When the **Instruction** window opens, click **Continue**.

Note:

You can only send a discard notification if a patient check-in alert has been sent to the unavailable provider.

Send text messages to multiple patients

With the Text service, you can now send a text message to multiple patients that fit a certain criterion. This feature is available on the **Patient Special Search** and **Chart Audit** screens.

Send text messages to multiple patients through the Patient Special Search screen. To send text messages to multiple patients through Patient Special Search, follow these steps:

1. On the IMS menu bar, click **Utilities**, and then click **Patient Special Search**.
2. In the left pane of the **Patient Special Search** window, enter the necessary filter criteria to retrieve the applicable records, and then click **Search**.

Note:

The **Email Exists**, **Cell# Exists**, and **Care Portal Users** check boxes are new filter criteria that retrieve records with email addresses, mobile phone numbers, and IMS CarePortal accounts.

3. In the right pane, select the applicable check boxes beside the **Name** column.

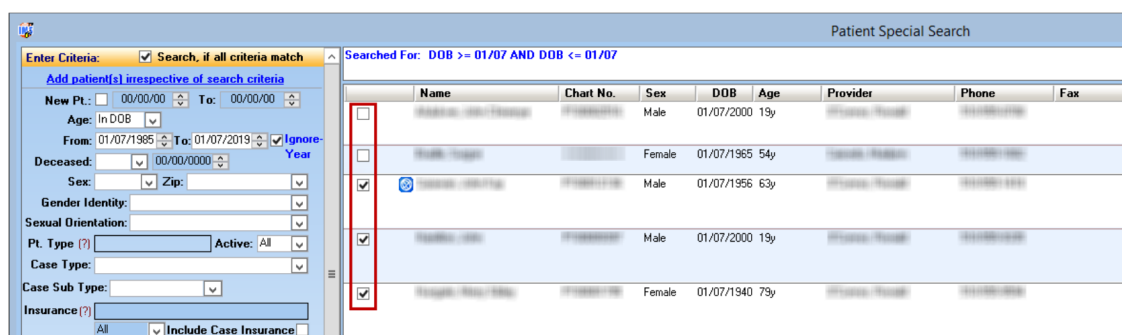


Figure 39 In the **Patient Special Search** window, select the applicable check boxes beside the **Name** column to select the recipients of the text messages.

4. In the lower pane, click **Print/Fax/Email/Text**, and then click **Text**.
5. In the **Send Text** window, select the applicable letter type from the **Letter Type** list, and then select the applicable letter template from the **Template** list.

Note:

The available letter templates in **Template** list depend on the selected letter type.

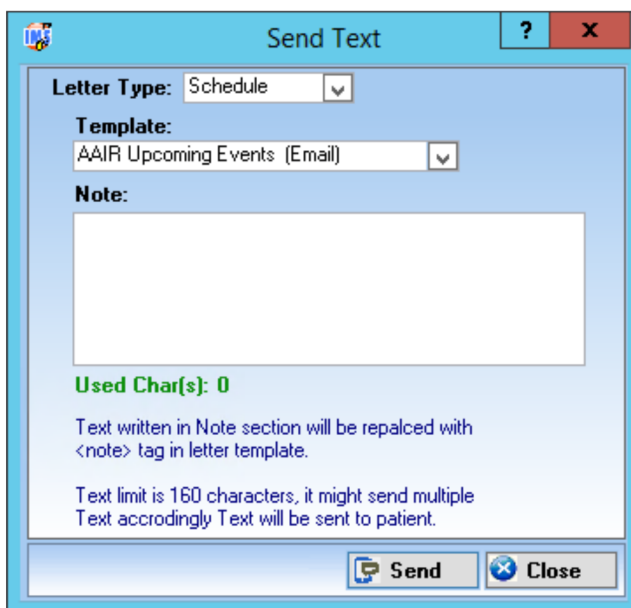


Figure 40 The Send Text window

Note:

If you do not want to use a template, select **Free Text** from the **Template** list. In the **Free Text** box, enter the content of the text that you want to send to the patients, and then proceed to step 9.

6. In the **Note** box, enter a note for the patient, and then click **Send**.
7. When the “Text have been generated successfully.” message appears, click **OK**.

Send text messages to multiple patients through the Chart Audit screen. Apart from the **Visit** filter criterion, the **Chart Audit** screen has similar

features with the **Patient Special Search** screen. To send text messages to multiple patients through the **Chart Audit** screen, you can follow the same steps mentioned in [Send text messages to multiple patients through the Patient Special Search screen](#).

Send a reminder text to multiple patients through the Health Maintenance screen

Through the **Health Maintenance** screen, you can set a reminder to automatically send a text notification to multiple patients regarding the reminder.

To set a text notification in a reminder, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Health Maintenance**.
2. In the upper-left pane of the **Health Maintenance** screen, click **Setup**.
3. In the lower pane of the **Health Maintenance Setup** window, do any of the following:
 - If you want to set a text notification in a new reminder, click **Add**.
 - If you want to set a text notification in an existing reminder, select a reminder in the left pane, and then click **Edit**.
 - In the upper pane of the **(C)riteria** tab, review or enter the applicable filter criteria.
4. Click the **(A)ction** tab, and then select the **Text** check box in the **Notify Patient** section.

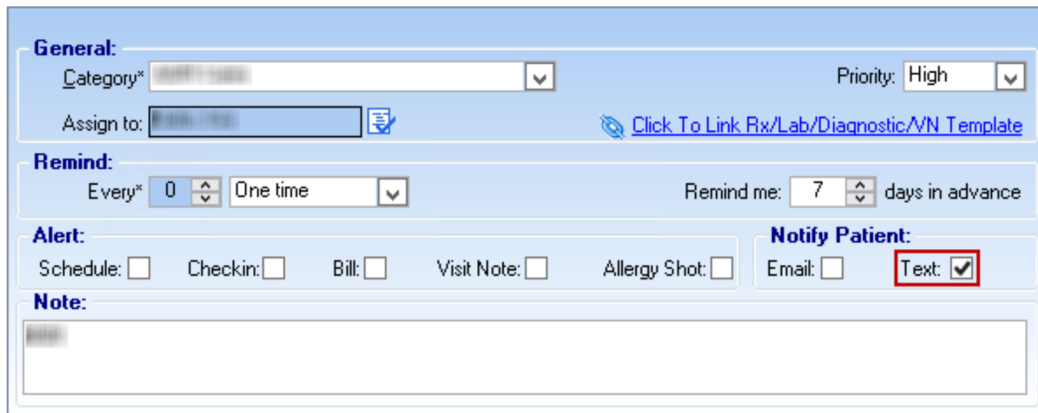


Figure 41 In the (A)ction tab of the Health Maintenance Setup window, select the Text check box.

5. Click **Save**, and then click **Close**.

Note:

When the reminder is generated, text notifications are sent to the selected patients.

The Send Fax/Email/Text Window

The **Send Fax/Email/Text** window is a combination of the **Send Fax**, **Send Email**, and **Send Text** windows. Through the **Send Fax/Email/Text** window, you can send messages via the patients' preferred mode of communication. The patient's preferred mode of communication is recorded in the Patient Master.

To open the **Send Fax/Email/Text** window, click **Print/Fax/Email/Text**, and then click **Fax/Email/Text as preferred communication** on the **Patient Special Search** or the **Chart Audit** screen.

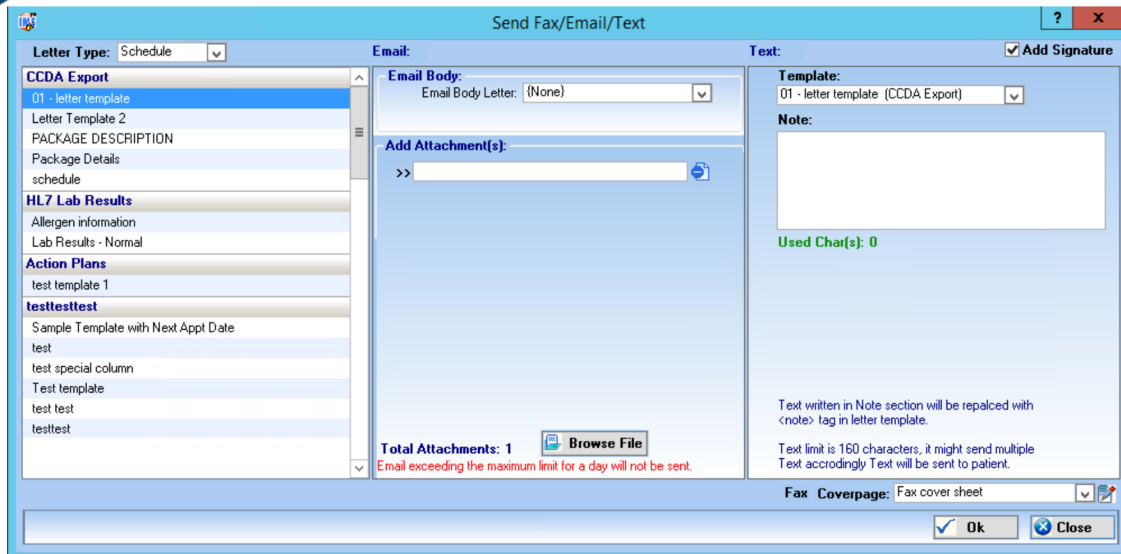


Figure 42 The Send Fax/Email/Text window

The **Send Fax/Email/Text** window has the following sections:

- **Left Pane.** In the left pane of the **Send Fax/Email/Text** window, click the letter template that you want to attach to the email message. For more information about the Email service, see *IMS InTouch Email Service User Guide*.
- **Email Pane.** You can send email messages to multiple patients through the **Email** pane of the **Send Fax/Email/Text** window. For more information about the Email service, see *IMS InTouch Email Service User Guide*.
- **Text Pane.** The **Text** pane of the **Send Fax/Email/Text** window has the same function as the **Send Text** window mentioned in [Send text messages to multiple patients through the Patient Special Search screen](#).
- **Fax Section.** In the fax section—below the **Text** pane—you can set the fax that you want to send to the patients.

When you send a fax, an email, and a text message through the **Send Fax/Email/Text** window, IMS only sends the message that is created and sent through the preferred mode of communication of the patient.

For example, if the preferred mode of communication of the patient is text, IMS only sends the details that you entered in the **Text** pane, including the letter template selected in the left pane, if any.

Set a task reminder to send a text notification to the patient

You can also set a task reminder in the Reminder module to send a text notification regarding the task.

To set a task reminder to send a text message, follow these steps:

1. On the IMS menu bar, click **Activities**, and then click **Reminder**.
2. In the left pane of the **Reminder** screen, click **Add**.
3. On the gold bar of the **Reminder Task** window, enter the applicable filter details, and then click **Retrieve**.

If you want to set a new reminder, click **Add**, and then enter the required details in the right pane.

Note:

Make sure to enter the patient in the **Patient** box in the **For Whom** pane. When you enter the patient, the system checks if the patient has a mobile phone number. If no patient is selected, you cannot proceed to step 4.

4. In the **Reminder Task** window, enter the applicable information, and then select the **Text** check box in the **For Whom** section.

 Text ☒. 'Repeating:' section includes Type* (Not Repeating), Start Date* (01/07/19), End Date* (00/00/00), Due Time* (12:00 AM), and Remind me: 7 days in advance. On the right, an 'Alert:' section has checkboxes for Schedule, Checkin, Bill, Visit Note, Chart View, and Allergy Shot. At the bottom, there is an 'Option' dropdown and buttons for Add, Edit, Delete, Cancel, Save, and Close." data-bbox="148 208 782 486"/>

Figure 43 In the **Reminder Task** window, select the **Text** check box to let the reminder to send a text notification.

5. Click **Save**, and then click **Close**.

Note:


When the reminder is edited, its text notification is sent to the patient again.

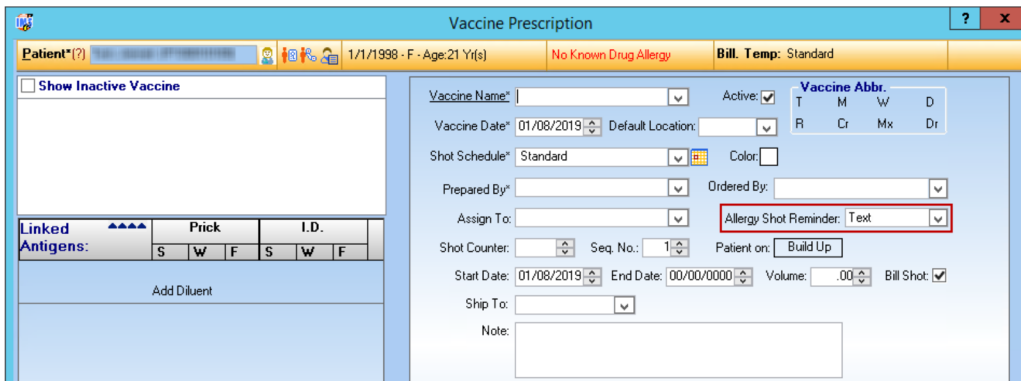
If you set the reminder to be a repeating reminder, the text notification is sent to the patient every time the reminder repeats.

Send the first allergy shot reminder

When an allergy shot is already prepared for the patient, you can send a reminder to the patient through the Text service.

To send the first allergy shot reminder, follow these steps:

1. On the IMS menu bar, click **Activities**, point to **Immunotherapy**, and then click **Immunotherapy**.
2. On the gold bar of the **Immunotherapy** window, click the red question mark  beside **Patient**.
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the right pane of the **Immunotherapy** window, click **Vaccine**.
5. In the **Vaccine Prescription** window, click **Add**, and then enter the necessary details in the upper-right pane.
6. From the **Allergy Shot Reminder** list, select **Text**.



The screenshot shows the 'Vaccine Prescription' window. The 'Allergy Shot Reminder' dropdown menu is highlighted with a red box, showing the 'Text' option selected. The window includes fields for Vaccine Name, Vaccine Date, Shot Schedule, Prepared By, Assign To, Shot Counter, Seq. No., Patient on, Start Date, End Date, Volume, Bill Shot, Ship To, and Note. The 'Allergy Shot Reminder' dropdown is currently set to 'Text'.

Figure 44 From the **Allergy Shot Reminder** list, select **Text** to send allergy shot reminder through the Text service.



Note:

The default option selected from **Allergy Shot Reminder** list depends on the **Allergy Shot Reminder** parameter. For more information about the **Allergy Shot Reminder** parameter, see “Set up the allergy shot reminder parameters” under [Set up allergy shot reminders](#).

When you send an allergy shot reminder, you can select any option from the **Allergy Shot Reminder** list regardless of the option that is set as default. If the **Allergy Shot Reminder** parameter is set to **None**, the **Allergy Shot Reminder** list in the **Vaccine Prescription** window is not available.

7. Click **Save**, and then click **Close**.

The allergy shot reminder is sent when the vaccine is successfully diluted.

Note:

If the patient’s preferred language is not English, the “Patient’s preferred language is not English. Patient may not understand the current language of allergy shot reminder template. Do you still want to send allergy shot reminder to the patient?” message appears. Click **Yes**.



Send a reminder for the next allergy shot

After the first shot is given to the patient, a reminder is sent to the patient for the next shot duration. Every time the patient receives a shot, a reminder is sent to the patient for the next shot duration depending on the option selected from the **Allergy Shot Reminder** list in the **Vaccine Prescription** window.

Activate the Inquiry milestone group

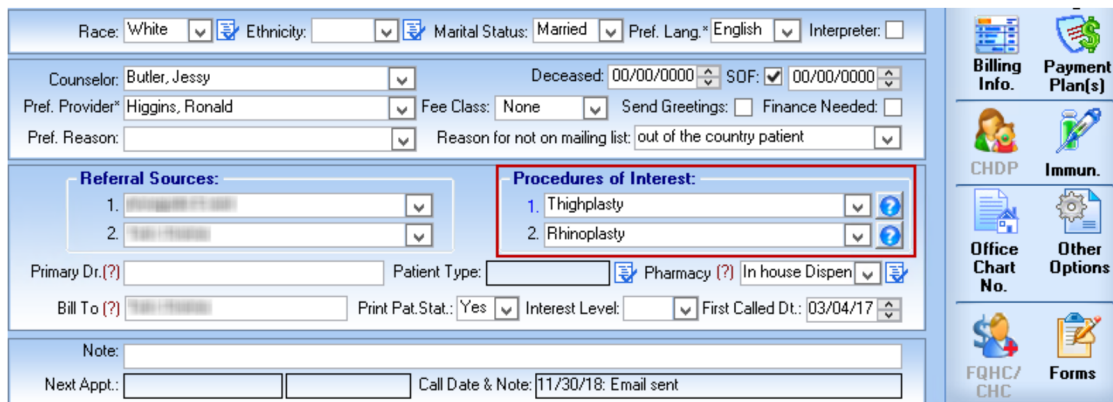
It is necessary to activate a milestone group so that the system sends the letters that you set for that group. There are different ways to activate milestone groups and send the applicable text to patients.

To activate the Inquiry milestone group, follow these steps:

1. On the IMS menu bar, click the **Patient** symbol .
2. On the action toolbar of the **Patient Master** screen, click the **Search** symbol .
3. In the **Search Patient** window, search for and select a patient, and then click **Ok**.
4. In the **Procedures of Interest** section, select the applicable procedures.


Note:

Procedures of Interest activates the Inquiry milestone group. The milestone packages in Inquiry are sent to the patient when you save your changes.

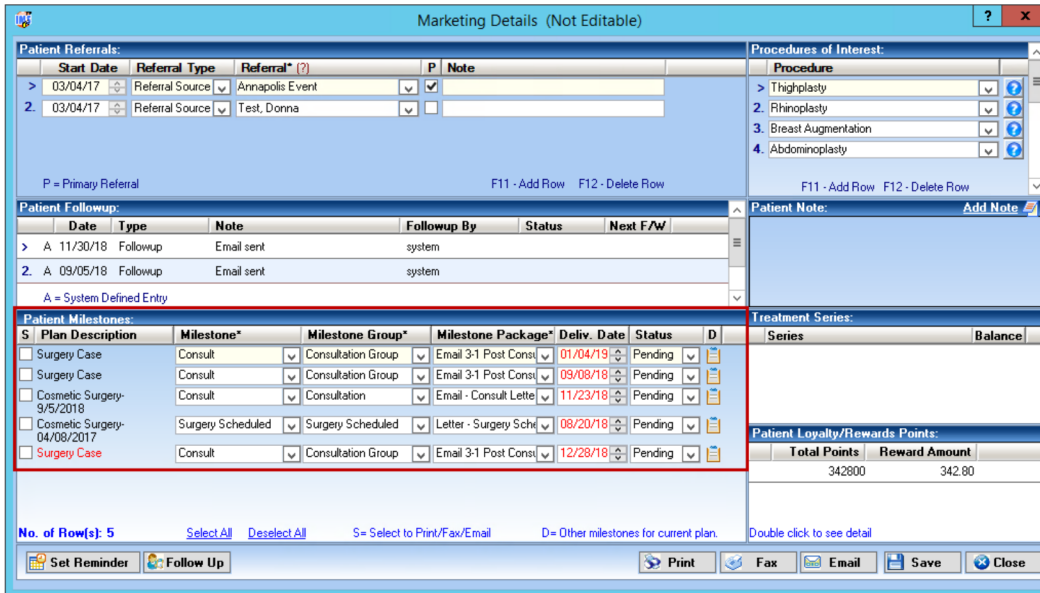


The screenshot shows the Patient Master screen with various fields for patient information. The 'Procedures of Interest' section is highlighted with a red box, showing a list of procedures: 1. Thighplasty and 2. Rhinoplasty. Other sections visible include 'Referral Sources', 'Billing Info.', 'Payment Plan(s)', 'CHDP', 'Immun.', 'Office Chart No.', 'Other Options', 'FQHC/CHC', and 'Forms'.

Figure 45 In the **Procedures of Interest** section, select the applicable procedures for the patient to activate the Inquiry milestone.

5. On the action toolbar, click the **Save** symbol .

6. In the right pane of the **Patient Master** screen, click **Marketing**.
7. In the **Marketing Details** window, review the attached packages in the **Patient Milestones** pane.



Marketing Details (Not Editable)

Patient Referrals:

Start Date	Referral Type	Referral* (?)	P	Note
03/04/17	Referral Source	Annapolis Event	<input checked="" type="checkbox"/>	
03/04/17	Referral Source	Test, Donna	<input type="checkbox"/>	

P = Primary Referral F11 - Add Row F12 - Delete Row

Patient Followup:

Date	Type	Note	Followup By	Status	Next F/W
11/30/18	Followup	Email sent	system		
09/05/18	Followup	Email sent	system		

A = System Defined Entry

Patient Milestones:

S	Plan Description	Milestone*	Milestone Group*	Milestone Package*	Deliv. Date	Status	D
<input type="checkbox"/>	Surgery Case	Consult	Consultation Group	Email 3-1 Post Cons	01/04/19	Pending	<input type="checkbox"/>
<input type="checkbox"/>	Surgery Case	Consult	Consultation Group	Email 3-1 Post Cons	09/08/18	Pending	<input type="checkbox"/>
<input type="checkbox"/>	Cosmetic Surgery-9/5/2018	Consult	Consultation	Email - Consult Lette	11/23/18	Pending	<input type="checkbox"/>
<input type="checkbox"/>	Cosmetic Surgery-04/08/2017	Surgery Scheduled	Surgery Scheduled	Letter - Surgery Sch	08/20/18	Pending	<input type="checkbox"/>
<input type="checkbox"/>	Surgery Case	Consult	Consultation Group	Email 3-1 Post Cons	12/28/18	Pending	<input type="checkbox"/>

No. of Row(s): 5 Select All Deselect All S= Select to Print/Fax/Email D= Other milestones for current plan. Double click to see detail

Set Reminder Follow Up Print Fax Email Save Close

Procedures of Interest:

Procedure
Thighplasty
Rhinoplasty
Breast Augmentation
Abdominoplasty

F11 - Add Row F12 - Delete Row

Patient Note: Add Note

Treatment Series:

Series	Balance

Patient Loyalty/Rewards Points:

Total Points	Reward Amount
342800	342.80

Figure 46 In the **Patient Milestones** pane of the **Marketing Details** window, view the details of the letter package that the system sent for the **Inquiry** milestone group.


8. Click **Close**.

To track the status of the messages that are generated, in queue, or sent, open the **Text/Email Tracking** window. For more information about tracking text messages, see [Text Tracking](#).

Activate other milestone groups

Except for **Inquiry**, you can activate all milestone groups in the **Schedule Entry** window.

To activate the other milestone groups, follow these steps:

1. On the IMS menu bar, click the **Scheduler** symbol .
2. On the **Schedule for Provider** screen, double-click an available slot to open the **Scheduler Entry** window.
3. In the **Schedule Entry** window, enter the applicable information.
4. From the **Type** list, select the applicable milestone group, and then select the applicable procedure from the **Procedure** list.

Note:

The selected procedure must have a milestone package linked with it.

When you save the information, the system automatically sends the letter packages under that milestone group.

5. From the **Reminder By** list, select **Text**, and then click **Ok**.

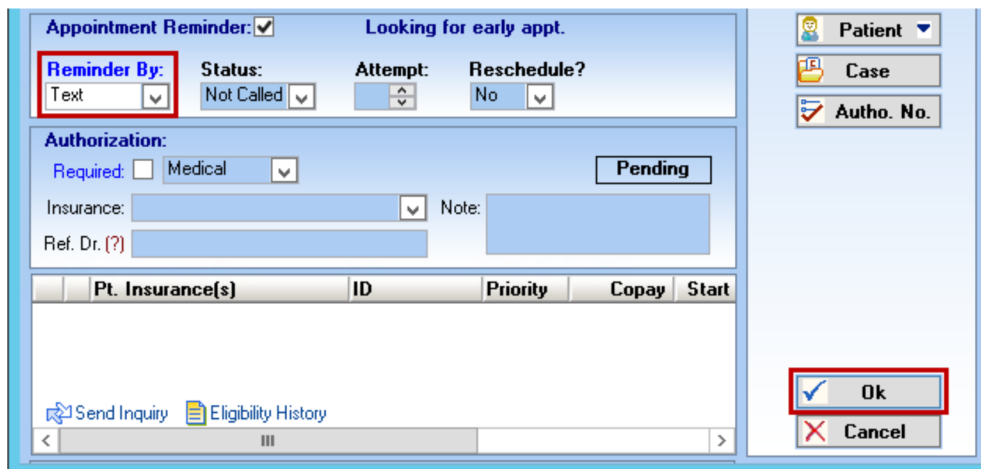


Figure 47 In the **Schedule Entry** window, select **Text** from the **Reminder By** list, and then click **Ok** to save the patient appointment and activate the milestone group.

6. When the **Marketing Details** window opens, review the activated letter packages in the **Patient Milestones** pane, and then click **Close**.

Unsubscribe from Text reminders

Patients can now unsubscribe from Text reminders by module. They can also select which of the IMS modules—which have the Text service functionality—should send them Text reminders.

To unsubscribe from Text reminders, the patient follows these steps:

1. Open the reminder.
2. In the body of the reminder, click the applicable link to open the **Unsubscribe** webpage in another tab.

[Click here to unsubscribe](#)

Figure 48 To select the modules that you want to unsubscribe from, click the applicable link.

Note:

For more information about adding the unsubscribe link to the reminder, see “Add the unsubscribe link in the letter template” in [Set up the Text notification preference of a patient](#).

3. On the **Unsubscribe** webpage, select the check box for the IMS module that you want to unsubscribe from, and then click **Unsubscribe Selected**.

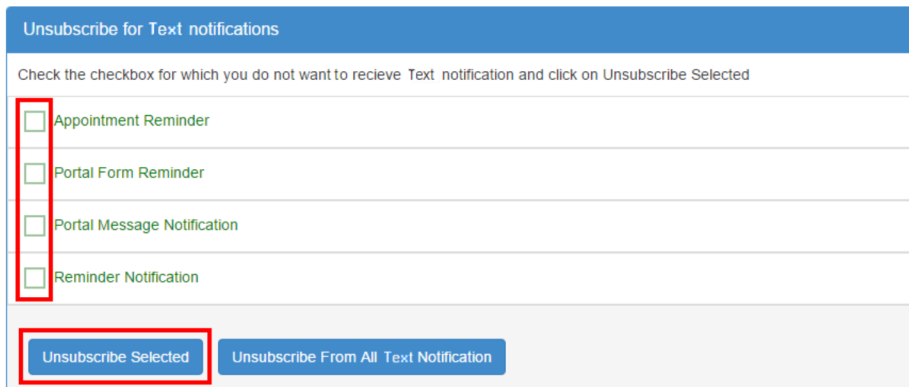
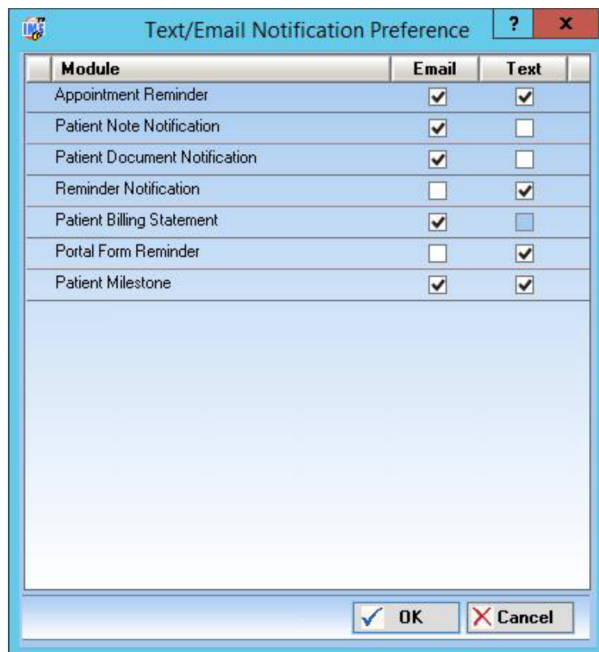


Figure 49 On the **Unsubscribe** webpage, select the applicable module, and then click **Unsubscribe Selected** to unsubscribe from the reminders sent through the selected modules.

When the patient unsubscribes through the **Unsubscribe** webpage, the module that the patient unsubscribed from is cleared in the patient's notification preferences. For more information about notification preferences, see [Set up the Text notification preference of the patient](#).



Module	Email	Text
Appointment Reminder	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Note Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient Document Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reminder Notification	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Billing Statement	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Portal Form Reminder	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Milestone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 50 When the patient unsubscribes from a module's notifications, the check box for the corresponding module is cleared in the **Text/Email Notification Preference** window.

If the patient is scheduled, **Patient has unsubscribed for Appointment Reminder notification** appears in the **Schedule Entry** window.

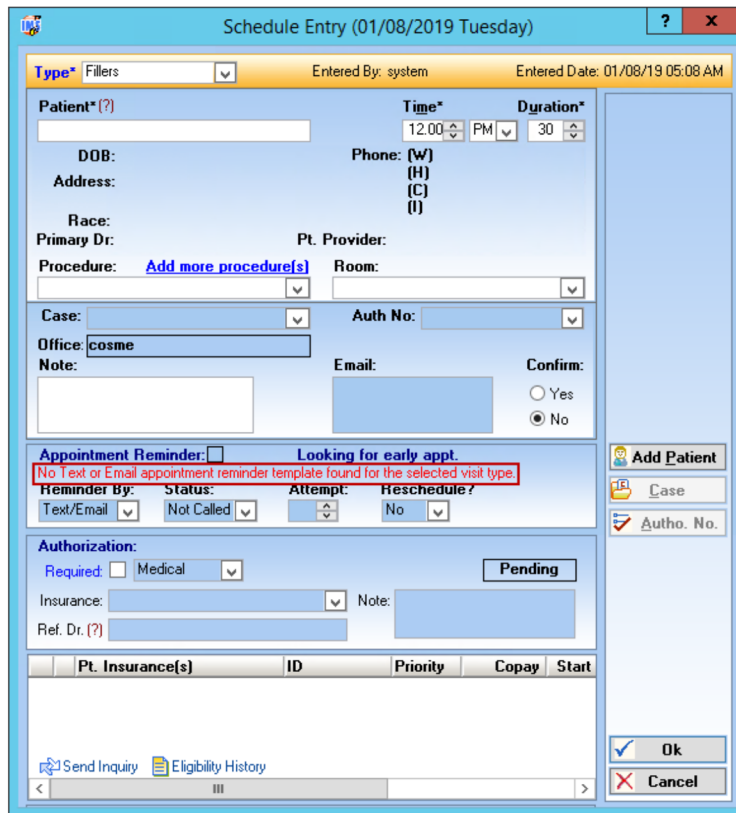


Figure 51 If you schedule a patient that has unsubscribed from Text reminders, **Patient has unsubscribed for Appointment Reminder** notification appears in the **Schedule Entry** window.

Note:


The patient can also unsubscribe from reminders through IMS CarePortal and IMS Patient App.

Text Tracking

With IMS InTouch, you can track and monitor the activity of text messages. All messages are now sent using the IMS InTouch utility, so the system is now able to record and track every text message that is sent from IMS.

In IMS Build 19, you can also check the status and view important details of all texts that were created and sent through the **Chart View** window.




To track the text and email messages, do either of the following:





- Click **Utilities > Text/Email Tracking**.
- Click the **Chart View** symbol  > **Text/Email** tab.

Track text messages


With IMS, you can track the status of the messages that are generated, in queue, or sent.

To track text messages, follow these steps:

1. On the gold bar of the **Text/Email Tracking** window, select **Text** from the **Text/Email** list, and then enter the applicable filter criteria in the following boxes:
 - **Office**. Click the red question mark  beside **Office** to search for the office from where the text message was created.
 - **Entity Type**. Click the **Entity Selection** symbol  beside the **Entity Type** box to open the **Entity Selection** window where you can select the type of recipient.
 - **Entity**. Click the question mark  beside **Entity** to search for and select the specific recipient based on the selected type in **Entity Type**.
 - **Date Type**. From the **Date Type** list, select the applicable status so that the system retrieves the records that are sent, generated, or due within the date range entered in the **From Date** and **To Date** boxes.

- **From Date and To Date.** In the **From Date** and **To Date** boxes, enter a date range within which the messages were sent, generated, or due.
 - **Text/Email.** From the **Text/Email** select **Text**.
 - **Status.** Click the **Status Selection** symbol  beside the **Status** box to open the **Status Selection** window where you can select the statuses of the messages that the system retrieves.
 - **Sent By.** Click the question mark  beside **Sent By** to search for and select the user who sent the message.
 - **Sent For.** Enter the applicable details in the following boxes:
 - **Primary.** Click the **Primary Sent for Selection** symbol  beside the **Primary** box to open the **Primary Sent for Selection** window where you can select the primary purposes of the messages.
 - **Secondary.** Click the **Sent For Selection** symbol  beside the **Secondary** box to open the **Sent For Selection** window where you can select the secondary purposes of the messages.
2. Click **Retrieve**.
 3. When the search results appear in the center pane, view the applicable information in the following columns:
 - **Status.** In the **Status** column, view the status of the text message.
 - **Entity Type.** In the **Entity Type** column, view the entity to which you sent the text message. The entity could be a patient, pharmacy, etc.
 - **Entity Name.** In the **Entity Name** column, view the actual name of the person or facility to whom you sent the text message.

- **Gen. Date.** In the **Gen. Date** column, view the date when the text message is created.
- **Due Date.** In the **Due Date** column, view the date when a generated text message is supposed to be sent.
- **Sent Date.** In the **Sent Date** column, view the date when the text message is sent.
- **Type.** In the **Type** column, view whether the message is sent through text or email.

The **Text Content** symbol  appears in the **Type** column if the corresponding entry is a text message. Point to the **Text Content** symbol to view the message.

- **Sent By.** In the **Sent By** column, you can view the user who sent the text message.
 - **Sent For.** In the **Sent For** column, you can view the reason why the text message is sent.
 - **Email Id/Phone No.** In the **Email Id/Phone No.** column, view the phone number of the recipient of the text message.
 - **Office.** In the **Office** column, view the office from where the text message is sent.
 - **Detail.** In the **Detail** column, view the other details about the text message.
4. In the lower pane of the **Text/Email Tracking** window, do any of the following:
- **Select All.** Click **Select All** to select all entries in the center pane.
 - **Deselect All.** Click **Deselect All** to clear all entries in the center pane.

- **Export Text Usage Report.** Click **Export Text Usage Report** to open the **Export Text Usage Report** window.
- **Cancel Text/Email.** Click **Cancel Text/Email** to cancel the text message being sent.
- **Print list.** Click **Print list** to print the list that appears in the center pane.
- **Resend.** Click **Resend** to resend a selected text message to a patient.

Note:

If you want to make the **Resend** or the **Cancel Text/Email** button unavailable for a certain user, revoke the **Utilities > Text/Email > Resend** or **Utilities > Text/Email > Cancel Text/Email** security rights of the user.

5. Click **Close**.

Note:

Text messages that are not sent on or before their due date because of the **Text/Email During Weekend** parameter are marked as **Failed**. For more information about setting up reminders for weekends, see “Set up text reminders for weekends” under [Customize Text letter templates](#).

Save filter criteria for Text Tracking. You can save your selected filter criteria on the gold bar of the **Text/Email Tracking** window, and then use this set of criteria to automatically fill out the gold bar with your preferred filter details.

To save your preferred filter criteria, follow these steps:

1. On the gold bar of the **Text/Email Tracking** window, enter the filter criteria that you want to save.
2. Right-click the gold bar, and then click **Save Criteria**.

3. In the **User Defined Criteria** window, enter the necessary details in the following boxes:

- **Seq. No.** Select a number in the **Seq. No.** box to set the sequence of the saved criteria.
- **All Users.** Select the **All Users** check box if you want the saved criteria to be available to all users.
- **Default.** Select the **Default** check box to make the saved criteria the default criteria when you open the **Text/Email Tracking** window.
- **Description.** Type the name of the saved criteria in the **Description** box.
- **From Date** and **To Date.** Enter your preferred date range in the **From Date** and **To Date** boxes.

Note:

Depending on the selected date range, a box appears to the right of the **From Date** or the **To Date** list. In the box, enter a number to complete the selected date range. For example, if you select **Today Plus No. of Days** from the **To Date** list, you also need to enter the number of days in the box to the right of the **To Date** list.

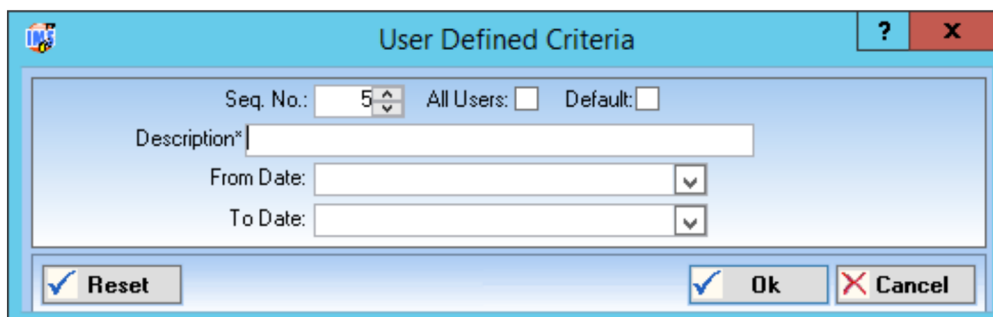


Figure 52 The User Defined Criteria window

4. Click **Ok**.



Note:

If you are making changes to an existing criterion, the “This will override previously selected default criteria, do you want to continue?” message appears. Click **Yes** to update the existing criteria.

Generate a report for appointment updates

You can also track the appointment confirmations and status updates using the Reports feature.

To generate the report about Text, follow these steps:

1. On the IMS menu bar, click **Reports**, and then click **All**.
2. In the left pane **Report Center (All)** window, click the expand symbol  beside **Scheduler**, and then click the expand symbol  beside **General**.
3. Double-click **By All Options** to open the **Scheduler By All Options Report Parameters** window.

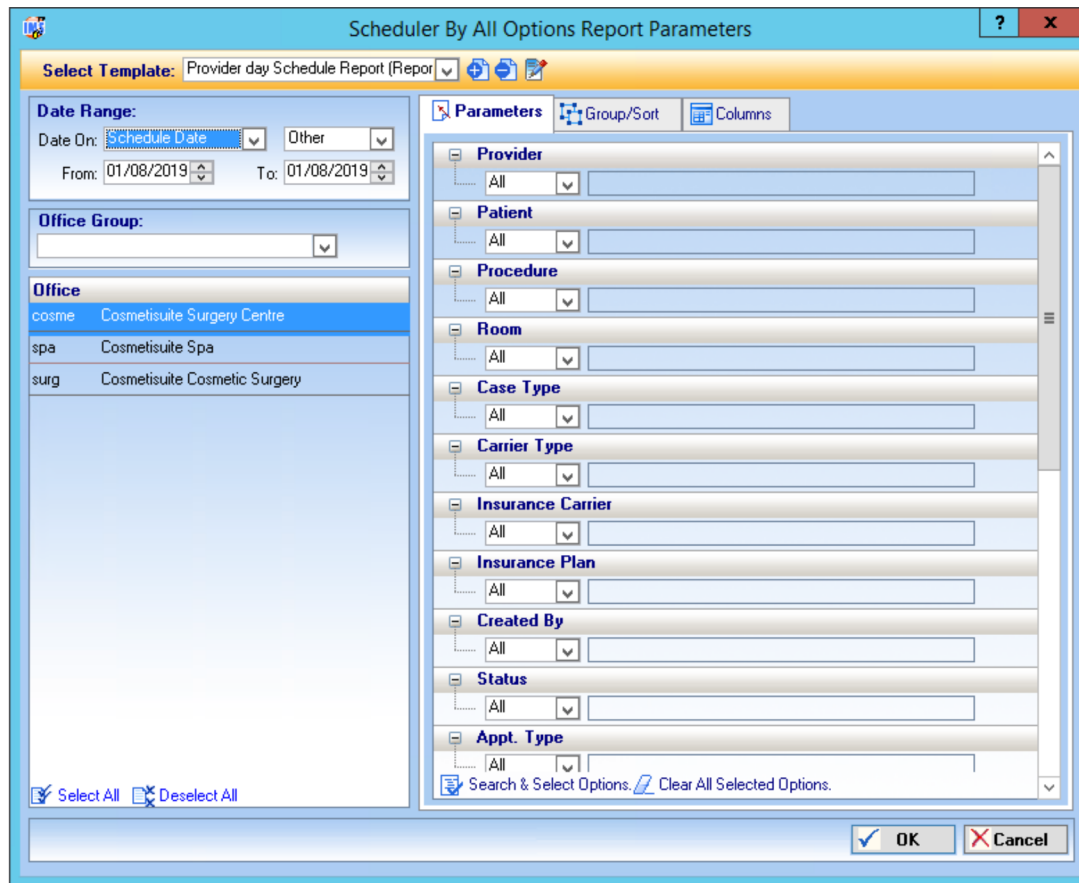
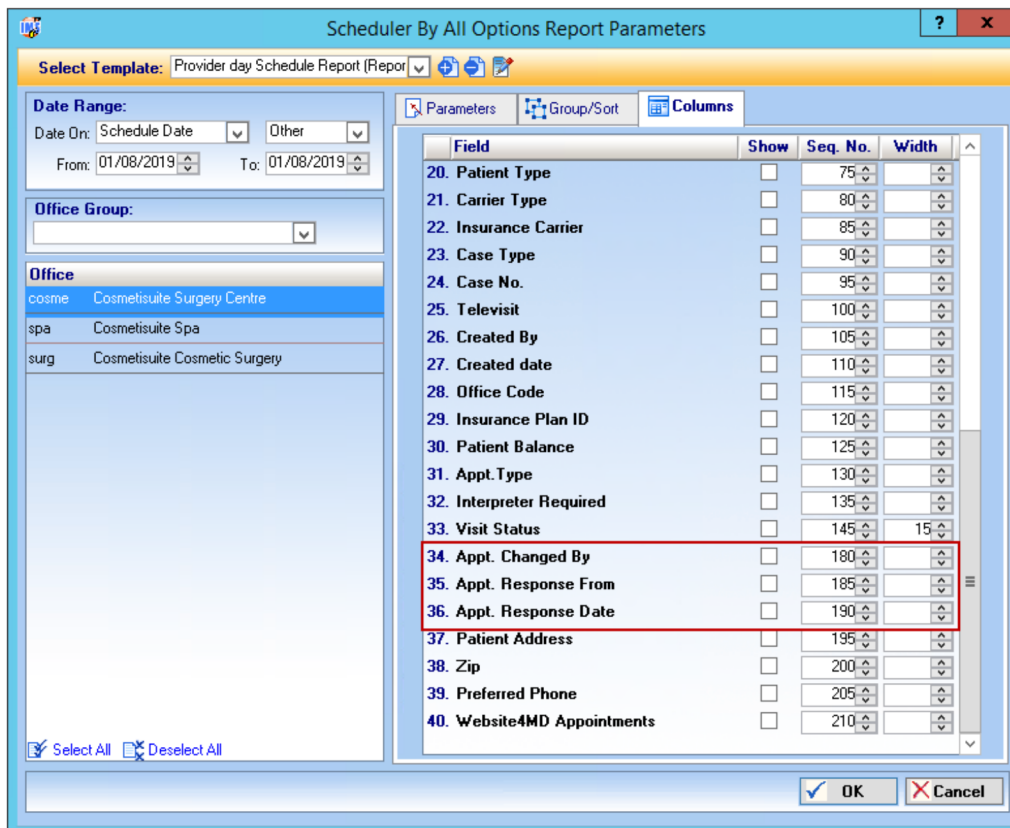


Figure 53 The Scheduler By All Options Report Parameters window

4. In the **Scheduler By All Options Report Parameters** window, filter the results shown in the **Parameters** tab, and then click the **Group/Sort** tab.
5. In the **Group/Sort** tab, perform the necessary options, and then click the **Columns** tab.
5. In the **Columns** tab, do the following:
 - 5.1. Select the **Show** check box for **Appt. Changed By** to show the column in the report.

- 5.2. Select the **Show** check box for **Appt. Response From** to show the column in the report.
- 5.3. Select the **Show** check box for **Appt. Response Date** to show a column which shows you when the appointment response has been added.



Scheduler By All Options Report Parameters

Select Template: Provider day Schedule Report (Report)

Date Range: Date On: Schedule Date Other From: 01/08/2019 To: 01/08/2019

Office Group:

Office

Field	Show	Seq. No.	Width
20. Patient Type	<input type="checkbox"/>	75	
21. Carrier Type	<input type="checkbox"/>	80	
22. Insurance Carrier	<input type="checkbox"/>	85	
23. Case Type	<input type="checkbox"/>	90	
24. Case No.	<input type="checkbox"/>	95	
25. Televisit	<input type="checkbox"/>	100	
26. Created By	<input type="checkbox"/>	105	
27. Created date	<input type="checkbox"/>	110	
28. Office Code	<input type="checkbox"/>	115	
29. Insurance Plan ID	<input type="checkbox"/>	120	
30. Patient Balance	<input type="checkbox"/>	125	
31. Appt. Type	<input type="checkbox"/>	130	
32. Interpreter Required	<input type="checkbox"/>	135	
33. Visit Status	<input type="checkbox"/>	145	15
34. Appt. Changed By	<input type="checkbox"/>	180	
35. Appt. Response From	<input type="checkbox"/>	185	
36. Appt. Response Date	<input type="checkbox"/>	190	
37. Patient Address	<input type="checkbox"/>	195	
38. Zip	<input type="checkbox"/>	200	
39. Preferred Phone	<input type="checkbox"/>	205	
40. Website4MD Appointments	<input type="checkbox"/>	210	

Select All Deselect All

OK Cancel

Figure 54 In the Scheduler By All Options Report Parameters window, click the **Columns** tab, and then perform the necessary options to set the columns you want to show in the report.

6. Click **OK**.

Appendix

Table 1.

Types of Reminders and Their Schedule of Sending if the System Does Not Send Reminders on Weekends

Type	Schedule
Appointment Reminder	Before the weekend
Follow up Appointment Reminder	Before the weekend
Final Appointment Reminder	Before the weekend
Missed Appointment Reminder	After the weekend
First Allergy Shot Reminder	Before the weekend
Allergy Shot Reminder (Subsequent)	Before the weekend
Final Allergy Shot Reminder	Before the weekend
Missed Allergy Shot Reminder	After the weekend
Patient Note Notification	After the weekend
Patient Document Notification	After the weekend
Patient Reminder	Before the weekend

Care Portal Form Reminder	After the weekend
Patient Milestone	After the weekend
Broadcast	After the weekend
Patient Statement	After the weekend
