



IMSTM

Intelligent
Medical
Software

IMS InTouch Email Service User Guide

IMS Build 19

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Introduction

With IMS InTouch, your practice 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 email service of IMS InTouch.

With the email service, your selected files are sent to the patient's email address entered on the **Patient Master** screen. The following sections discuss how to set up and use the email service in five IMS modules.

Note:

To turn on and complete the setup for the email service, the **Enable Email Interface** and **Send Text/Email to patient for appointment confirmation** backend parameters needs to be activated. Contact an authorized Meditab representative to activate the parameters.

Credentials Setup

Once the email service is installed in your IMS, it is necessary that the administrative user sets up the email credentials that will be used to send the email messages to the patients.

To set up the credentials, follow these steps:

1. On the IMS menu bar, click **Setup**, and then click **User Parameters**.
2. In the upper-left pane of the **Parameters** window, click **Email**.
3. In the **Value** column of the upper-right pane, enter the applicable information.

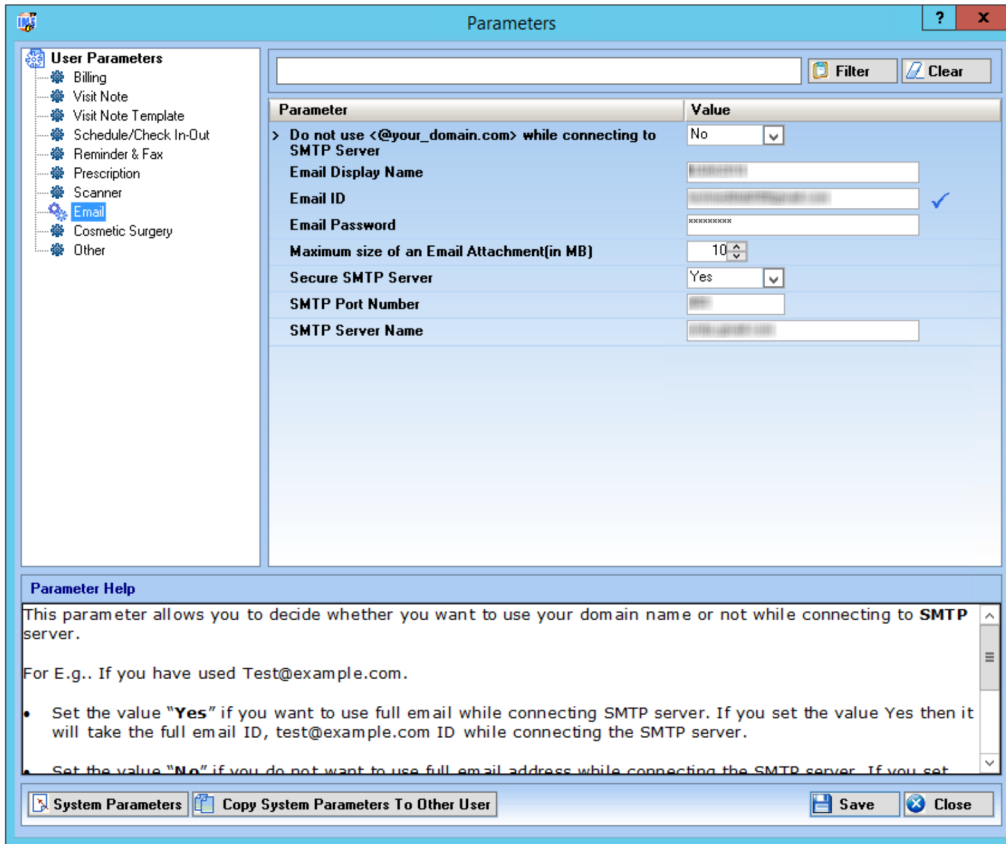


Figure 1 In the Parameters window, enter the applicable details in the Value column to set up your email parameters.

Note:

If you want to set a limit for the file size of the email attachments, enter the maximum size (in megabytes) in the Value column for the **Maximum size of an Email Attachment(in MB)** parameter.

Click the check symbol so that the system automatically verifies the validity of your email information.

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

Email Service Setup

The email service is available in the Appointment Reminder, Patient Documents, Patient Notes, Patient Statements, Patient Reminder, and Milestones modules. To access the email service functionalities through these modules, do the necessary setup tasks.

Set the parameters for the time interval of the email messages

You can set the time interval when the systems send the applicable email messages to the patient.

To adjust the time interval of the email messages, 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 **Value** column of the upper-right pane, enter the applicable details for the following parameters:
 - **Email to be sent in between**. Specify the time interval when the system sends email messages to the patient.
 - **Time Zone of the Text/Email Application Server**. Select the time zone used by the system when sending email messages.

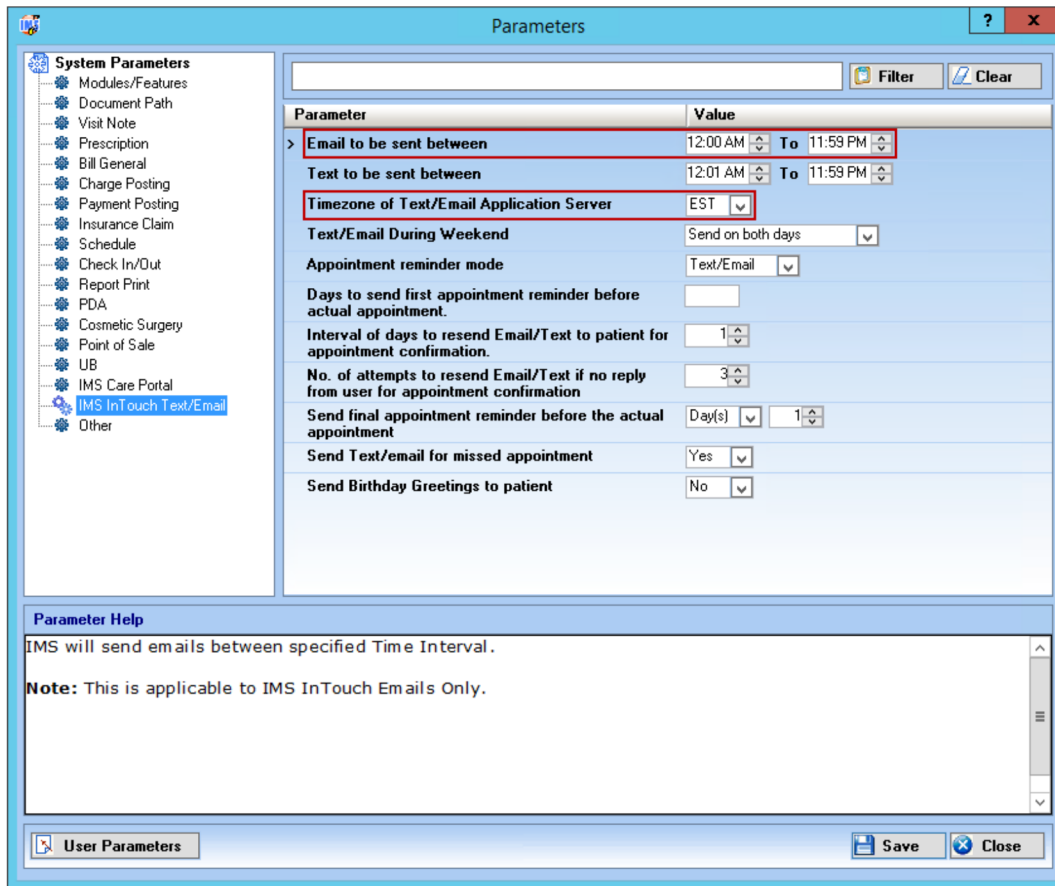


Figure 2 In the Parameters window, enter the applicable details in the Value column to set up your email parameters.

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

Set up the email service for the Appointment Reminder module

The Appointment Reminder module allows you to send email reminders to other IMS users and patients about scheduled appointments.

Activate the email service for the Appointment Reminder module.

Before you set up the Appointment Reminder module, adjust a system parameter to activate the email service.

To adjust this parameter, 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 **Appointment reminder mode** parameter, select **Email**.

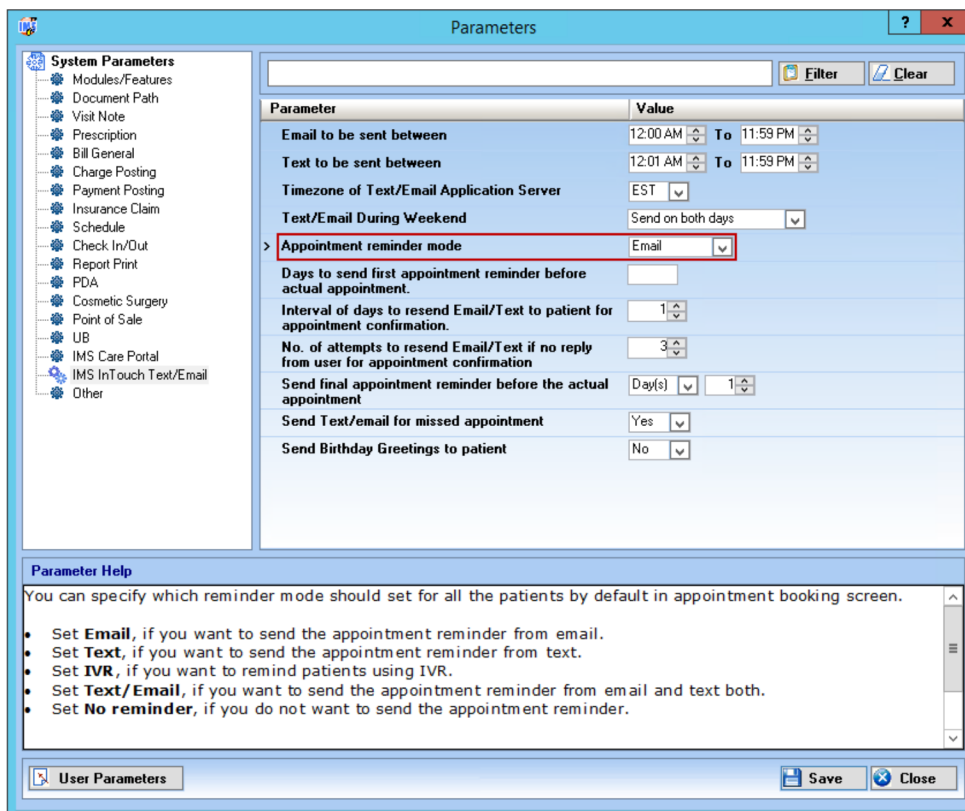


Figure 3 In the Parameters window, adjust the Appointment reminder mode parameter to turn on the email service.

Prepare the letter template. You can customize the contents of the email messages that you send to the patients. It is necessary to create the applicable templates, and then link it to the Appointment Reminder module.

The letter templates that you need for the Appointment Reminder module are the following:

- **Appointment Reminder for Email.** The **Appointment Reminder for Email** template is for email messages that are sent to the patients when the system automatically notifies them about their appointment in Scheduler. These letters include the link that patients can use to access the page where they can confirm or cancel their appointment.
- **Final Appointment Reminder for Email.** The **Final Appointment Reminder for Email** template is for the final email reminders that are sent to the patients. These email messages contain details about the patient's appointment.
- **Missed Appointment Reminder for Email.** The **Missed Appointment Reminder for Email** template is for email messages that are sent to the patients whose appointments are marked as missed.

If you want to edit the templates, you may do so in the **Letter Template** window.

To edit the templates, 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 template that you want to use from the **Select** list.
4. Edit the template in the center pane.

Note:

You can now use the **Subject** tag under **Sp. Columns** in the **Field List** pane to customize the subject line for the email messages. Any information included inside the **Subject** tag is shown in the subject line.

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 the email service for the Immunotherapy module](#).

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

Set up letter templates that have graphical content. To set up HTML templates for reminders that contain graphics, 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 **HTML Letter Template**.
3. In the **HTML Letter Template** window, do any of the following:
 - To create a new letter template, click **New** in the lower pane, and then create the content of the new letter in the center pane.
 - To edit an existing HTML letter template, select the applicable template from the **Select** list on the gold bar, and then make the necessary changes.
 - To open and edit an HTML letter template that is not created in IMS, click **Load HTML**, and then open the applicable file.

Note:

To copy the content of an existing template, click **Copy From Template** in the lower pane, click the applicable template in the **Select Letter Template** window, and then click **Ok**.

When the “Existing data will be overwritten with the content of the selected template. Are you sure you want to continue?” message appears, click **Yes**.

You can also access the source code of the selected template. To access the corresponding source code, click **Tools** on the menu bar of the **HTML Letter Template** window, and then click **Source code**. In the **Source code** window, you can copy and paste the source code of the applicable HTML template to open and edit the template in IMS. In the source code, the path to any image should be an absolute path.

For more information, contact the Implementation Team.

4. Apply the necessary tags under the categories in the right pane, and then click **Save**.
5. In the **Letter Template** window, enter the necessary information, and then click **Ok**.
6. In the **HTML Letter Template** window, click **Close**.

Link the letter template with the applicable reminder. When the letter template is available in the system, you can link every letter template with its corresponding reminder.

To link the letter template with the applicable reminder, follow these steps:

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

3. In the **Text/Email Templates** window, select **Email** from the **Type** list of the applicable option.
4. From the list in the **Category** column, select the applicable category for the template.
5. From the list in the **Template** column, select the template that you created or modified.

For more information about creating or modifying letter templates, see “Prepare the letter template” in [Set up the email service in the Appointment Reminder module](#).

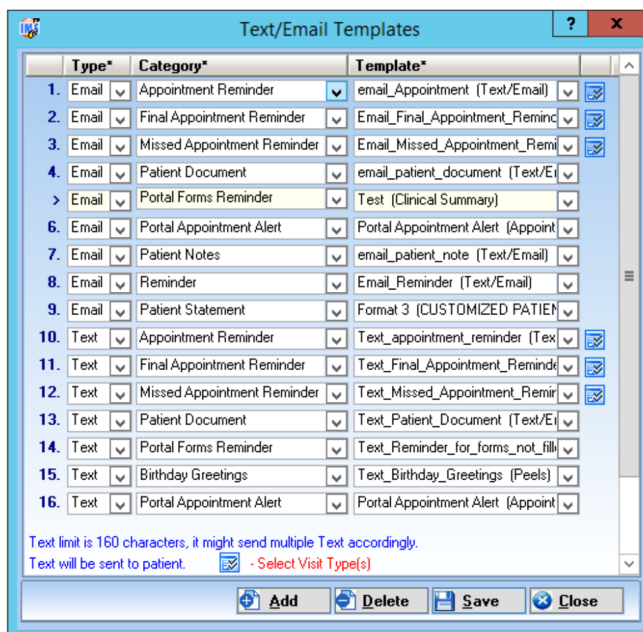


Figure 4 The Text/Email Templates window

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

Schedule the automatic reminders. The system automatically sends and resends reminders to patients through email. You can customize the schedule and frequency of these reminders that are sent to the patient. You can also specify the

number of attempts to contact the patient if the patient does not respond to the email reminder.

To set the schedule and frequency of 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 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:

- o Enter the number of days before the appointment day when you want to send the first appointment reminder to the patient.
- o Set the parameter to a negative value if you do not want to send the first appointment reminder to the patient.
- o Set the parameter to blank if you want to send the first appointment reminder as soon as you schedule the reminder to the patient.
- o Enter **0** if you want to send the first appointment reminder to the patient on the same day of the appointment.
- **Interval of days to resend Email/Text to patient for appointment confirmation.** To automatically resend the initial reminder after an interval of days, enter the

number of days in the **Value** column for the **Interval of days to resend Email/Text to patient for appointment confirmation** parameter.

- **No. of attempts to resend Email/Text if no reply from user for appointment confirmation.** To set the number of times IMS resends the reminder when the patient does not respond, enter the number of times in the **Value** column for the **No. of attempts to resend email if no reply from user for appointment confirmation** parameter.
- **Send final appointment reminder before the actual appointment.** To automatically send the final reminder days or hours before the appointment, select either **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 either the number of days or hours in the box to the right of the list.

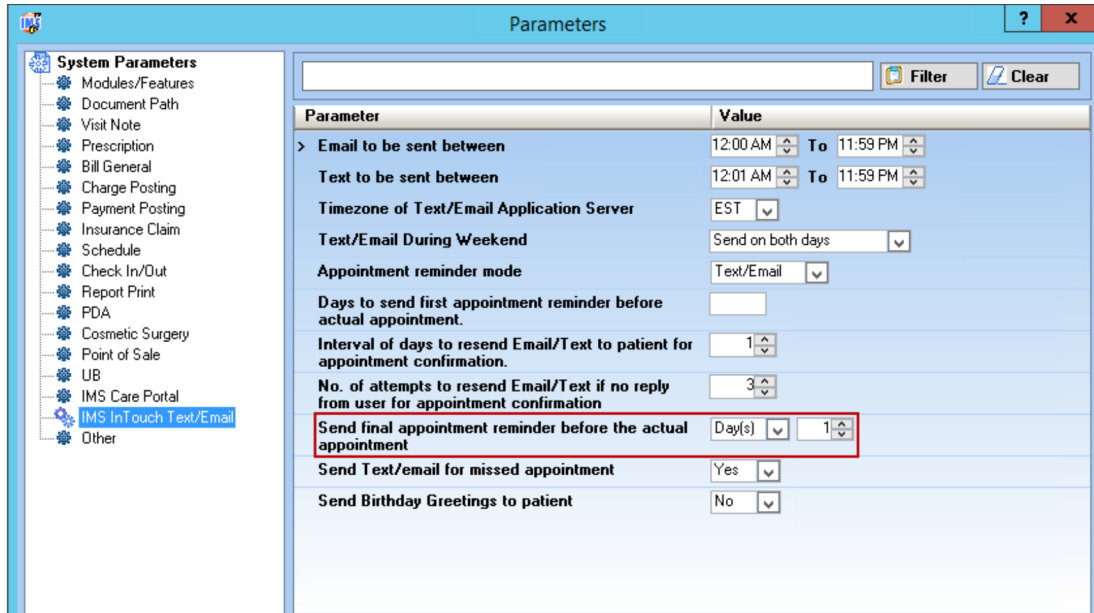


Figure 5 In the Parameters window, adjust the **Send final appointment reminder before the actual appointment** to set the time when IMS sends the final reminder.

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

Note:

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

Send email reminders for missed appointments. You can choose whether to send or not send email messages for missed appointments.

To turn on the email messages 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 InTouchText/Email**.
3. From the **Value** list for the **Send Text/email for missed appointment** parameter, select **Yes**.
4. Click **Save**, and then click **Close**.

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

To set up email reminders for weekends, 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 InTouchText/Email**.
3. From the **Value** list 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 email reminders for a certain module. For more information about reminder subscription, see [Set up the email notification preference of a patient.](#)

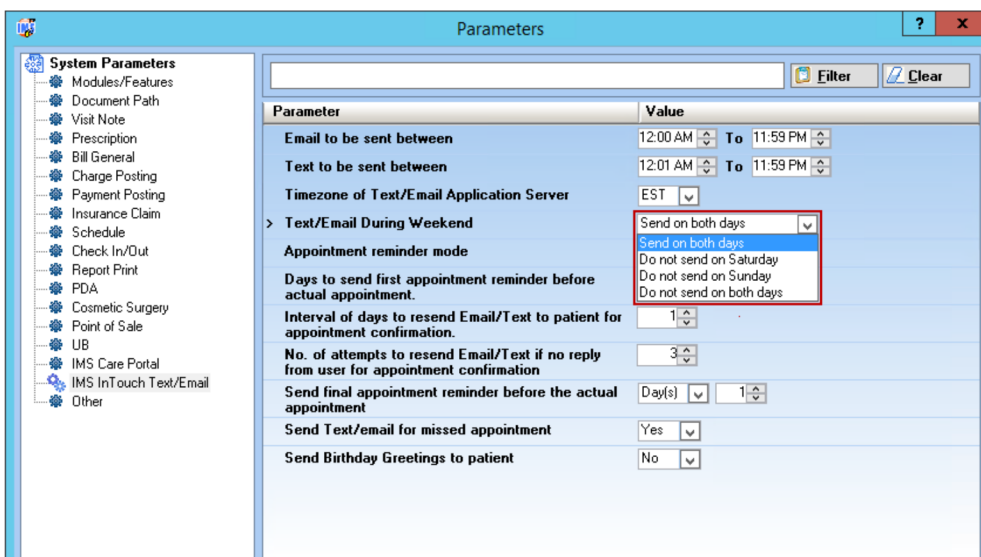


Figure 6 In the Parameters window, adjust the Text/Email During Weekend parameters to customize the reminders that are sent during weekends.

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

If you set that no reminder is sent on weekends, the email 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 email or from which module the email message was sent. To know when the email messages are 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.

Customize letter templates for specific procedures. To suit your clinic's preferences, you can also 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 setting up letter templates, see "Prepare the letter template" under [Set up the email service for the Appointment Reminder module](#).

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. Edit the template in the center pane.
5. In the right pane, type **detail** in the **Search** box, and then press Enter.

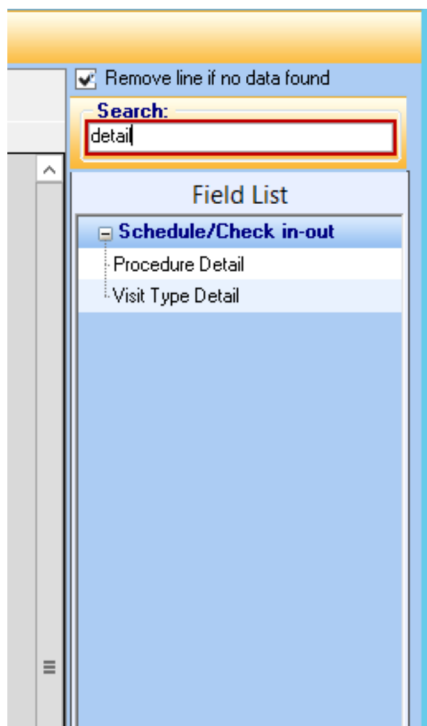


Figure 7 In the right pane of the **Letter Template** window, type **detail** in the **Search** box, and then click **Procedure Details** to apply the applicable tags to the letter template.


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

```
Dear <if:patient_fname ^ endif>,  
  
This is to notify that your patient statement has been uploaded to your portal account.  
Please login to your account to view it.  
  
<if:sch_procedure_detail ^ endif>|  
  
Thank you,  
<if:sms_office_name ^ endif>
```

Figure 8 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 > click **Scheduler** > double-click **Procedure** > click the **Procedure Detail** symbol  for the applicable procedure.

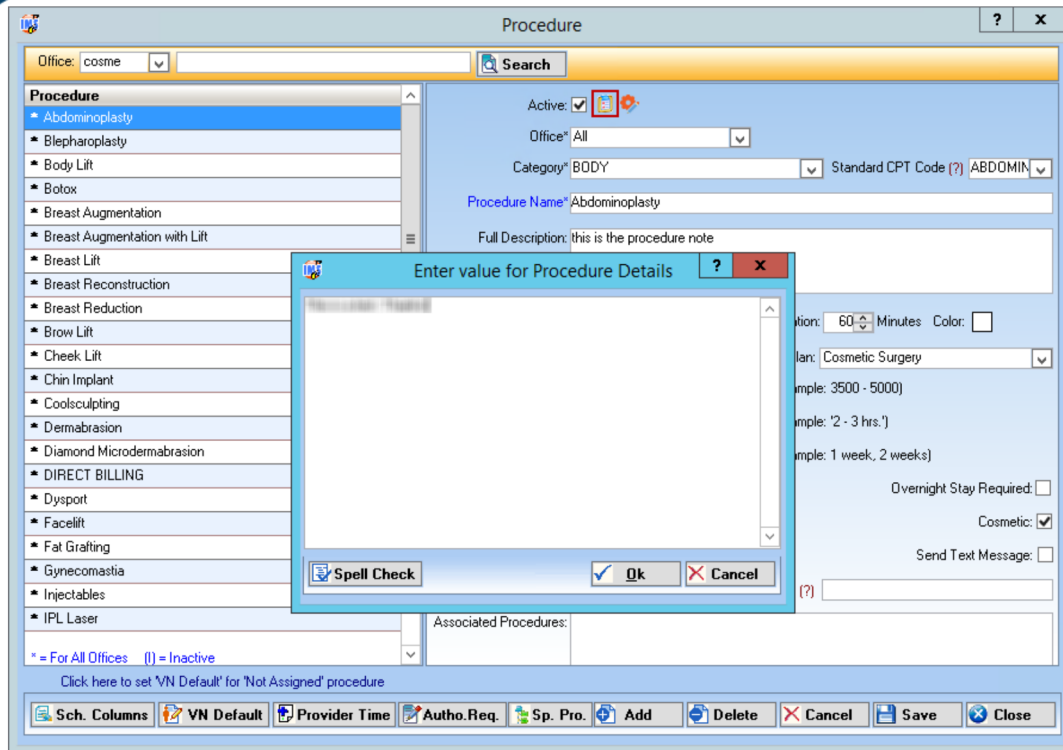




Figure 9 In the Procedure window, click the Procedure Detail symbol for the applicable procedure to view or edit the procedure details.

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, the system 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 Visit Type(s)** symbol  for the applicable template.

Note:

The **Select Visit Type(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.

- In the **Visit Type Selection** window, click the procedures for which you like to use the reminder, and then click **Ok**.

Note:

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

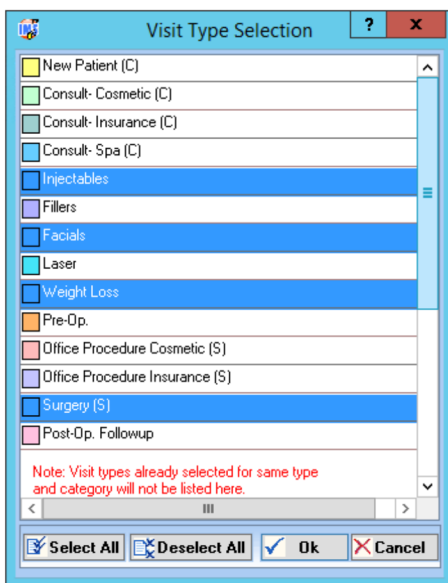



Figure 10 The Visit Type Selection window

In the **Text/Email Templates** window, you can point to the **Select Visit Type(s)** symbol  to view the list of procedures that are included in the corresponding reminder.

- 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 message that informs 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 support@meditab.com.

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*.

Set up the email service for the Patient Documents module

With Patient Documents module, you can view, create, and upload patient documents to IMS CarePortal. Through the email service, you can notify a patient that a document is uploaded.

If you want to edit the templates, you may do so in the **Letter Template** window. For more information about letter templates, see “Prepare the letter template” and “Link the letter template with the applicable reminder” in [Set up the email service for the Appointment Reminder module](#).

If you want to change where, in your local disk, the system saves the email attachments, adjust the **Email Files Path** system parameter.

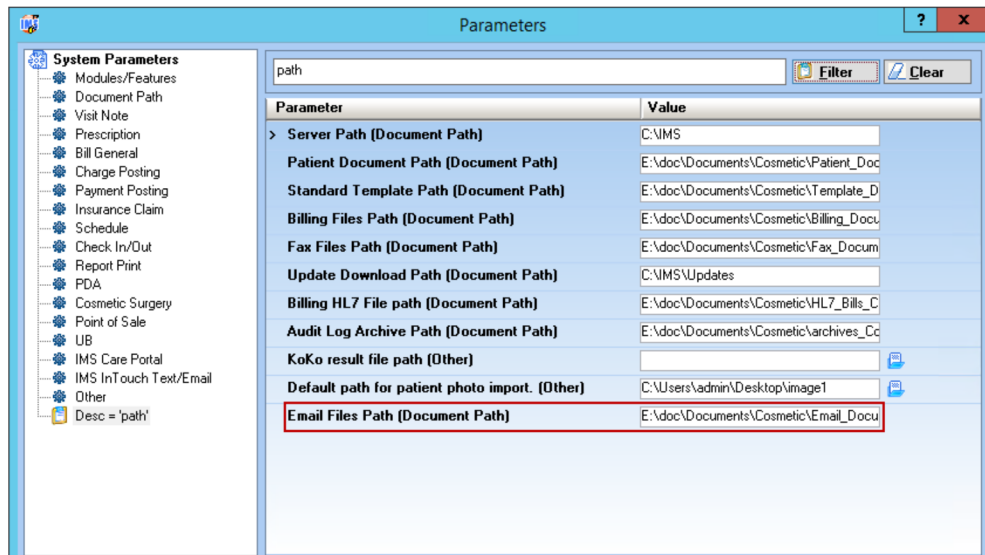


Figure 11 In the **Parameters** window, enter the file path to set where the system saves the email attachments.

Set up the email service for the Patient Notes module

With the Patient Notes module, you can create notes for the patient and enter any additional information in the patient’s record. The email service allows you to send these notes to the patient or notify the patient about the notes sent through IMS CarePortal.

If you want to edit the templates, you may do so in the **Letter Template** window. For more information about letter templates, see “Prepare the letter template” and “Link the letter template with the applicable reminder” in [Set up the email service for the Appointment Reminder module](#).

Set up the email service for the Patient Statements module

With the Patient Statements module, you can view and send billing statements to the patients. You can also send the patient statements through email.

If you want to edit the templates, you may do so in the **Letter Template** window. For more information about letter templates, see “Prepare the letter template” and “Link the letter template with the applicable reminder” in [Set up the email service for the Appointment Reminder module](#).

Set up the email service for the Immunotherapy module

To use the email service in the Immunotherapy module, adjust the applicable parameters.

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

Set up the parameters for allergy shot reminders. With the email service, you can send reminders to patients who are undergoing immunotherapy treatment. You can send 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 an email 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 an email message to notify the patient about the next shot duration.

- **Next Shot Duration.** You can send email 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 an email message to remind the patient about the final allergy shot that he or she has to receive.
- **Missed Shot.** You can send an email message to remind the patient about the shots that he or she missed, if any.

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

1. On the IMS menu bar, click **Setup**, and then click **System Parameters**.
2. In the 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 **Value** list 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 disables all other parameters for allergy shot reminders.
 - **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.

Note:

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

- **Days to send allergy shot reminder after vaccine is prepared.** In the **Value** column 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 allergy shot is prepared.
 - **Positive Number.** Enter a positive number to indicate the number of days—after preparing the allergy shot—when the allergy shot reminder is sent.
 - **Negative Number.** Enter a negative number if you do not want IMS to send a 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** column 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** column for the **Days to send reminder after missing allergy shot**, 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.

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

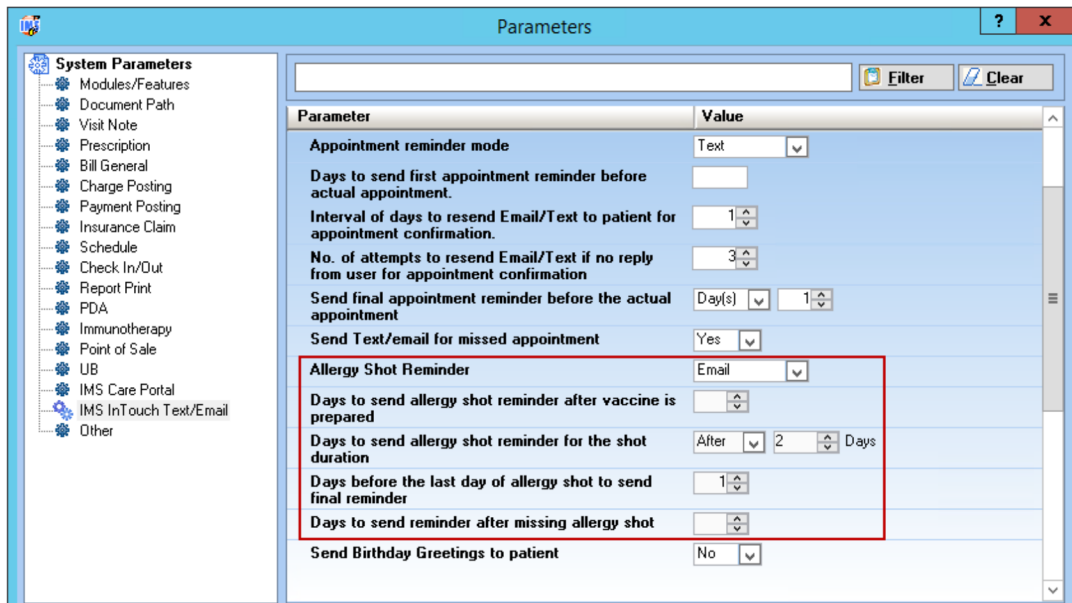


Figure 12 In the Parameters window, adjust the parameters for the allergy shot reminders to customize the reminders.

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

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

To set up a letter template for an allergy shot reminder, follow the same steps mentioned in “Prepare the letter template” under the [Setup the email service for the Appointment Reminder module](#) section.

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 [Set up the email service for the Appointment Reminders module](#).

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

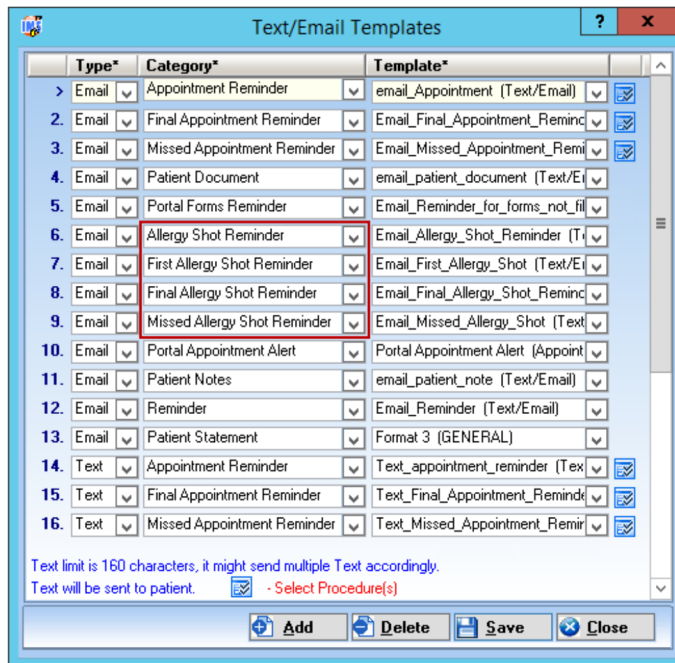


Figure 13 From the lists in the **Category** column of the **Text/Email Templates** window, you can select reminders for allergy shots.

Set up the email service for the Milestones module

The Milestones module is used to market cosmetic clinics more efficiently. When a patient comes to inquire about a specific procedure, you can send marketing letters—through the email service—that are applicable to the patient. They are sent either as individual letters or as grouped letter packages.

To set up the email 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 will be part of a procedure's marketing package. These can 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 editing letter templates, see "Prepare the letter template" in [Set up the email service for the Appointment Reminder module](#).

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, click **Add**, and then enter the name of your treatment plan in the **Description** column.

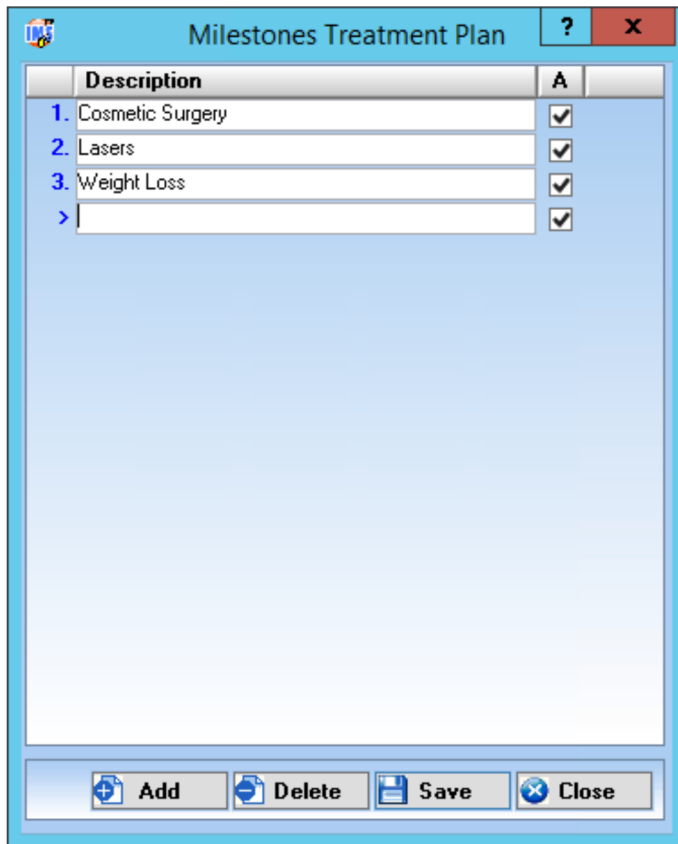


Figure 14 The Milestones Treatment Plan window

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

Customize the treatment plan. Once the treatment plan is registered, you can set it so that the system automatically sends letters or letter packages at various steps in the procedure.

To set up 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 Template**.

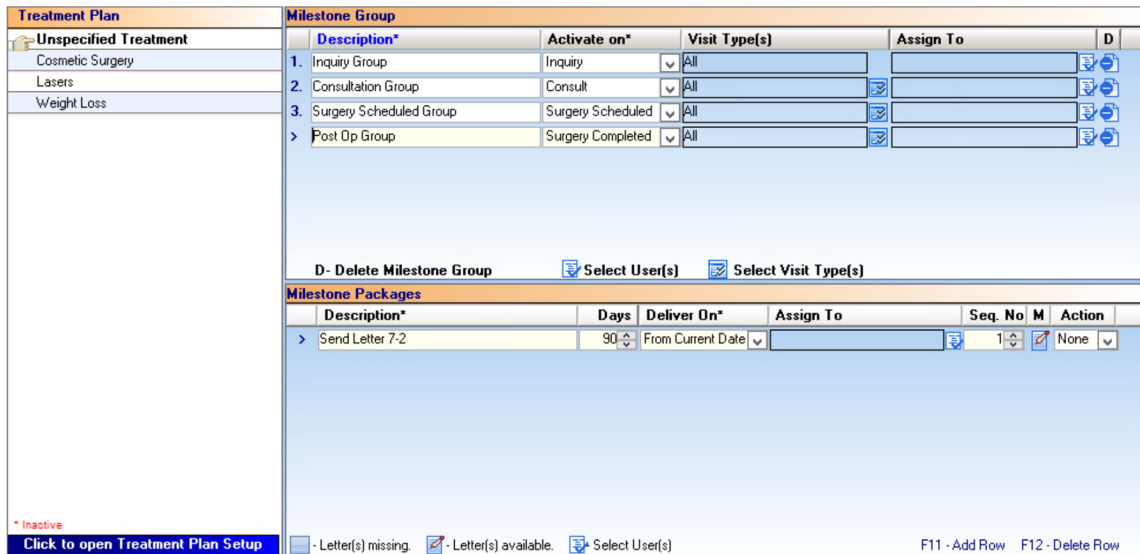


Figure 15 The Milestones Template screen

3. On the **Milestones Template** screen, select the applicable treatment plan in the **Treatment Plan** pane.
4. 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 to the patient.

Milestone Group					
	Description*	Activate on*	Visit Type(s)	Assign To	D
1.	Inquiry	Inquiry	All		
2.	Consultation	Consult	New Patient (C), Consult- Cosmet	<input checked="" type="checkbox"/>	
3.	Surgery Scheduled	Surgery Scheduled	Office Procedure Cosmetic (S), S	<input checked="" type="checkbox"/>	
>	Surgery Completed	Surgery Completed	Office Procedure Cosmetic (S), S	<input checked="" type="checkbox"/>	

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

Figure 16 In the **Milestone Group** pane, enter the necessary information to create the milestone groups.

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

- **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 **Action** list, select **Email** to send the letter package through email when the milestone is activated for the patient.

Milestone Packages							
Description*	Days	Deliver On*	Assign To	Seq. No	M	Action	
> Phone Call - 24 hrs after surgery	7	After Surgery		1		None	
2. Email - Post Op Follow up	10	After Surgery		2		None	
3. After Surgery Survey	30	After Surgery		3		Email	
4. Email - 6 months after surgery	180	After Surgery		4		Email	

- Letter(s) missing.
 - Letter(s) available.
 Select User(s)
 F11 - Add Row F12 - Delete Row

Figure 17 In the **Milestone Packages** pane, enter the necessary details to create the letter packages that you want to send for the selected milestone group.

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


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

7. In the **Milestone Packages & Letters** window, select **Package**, **Letter** or **No Document** from the **Type** list, and then select the letter template that you want to use from the list in the **Letter/Package** column.

Milestone Packages & Letters						
Type*	Letter/Package*	Procedure(s)	Specific Procedure(s)	Procedure Addendum	Seq. No	B
> Letter	Letter - Post Appointment	All			1	<input type="checkbox"/>

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

Figure 18 The **Milestone Packages & Letters** window

8. You can also do either of the following:
 - Select the **B** check box to send the contents of the letter template as part of the email body.
 - Leave the **B** check box cleared if you want to send the letter as an attachment.
9. Click **Save**, and then click **Close**.
10. On the actions toolbar of the **Milestones Template** screen, click the **Save** symbol .

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 in the right pane, select the treatment plan that you want to link with the procedure.

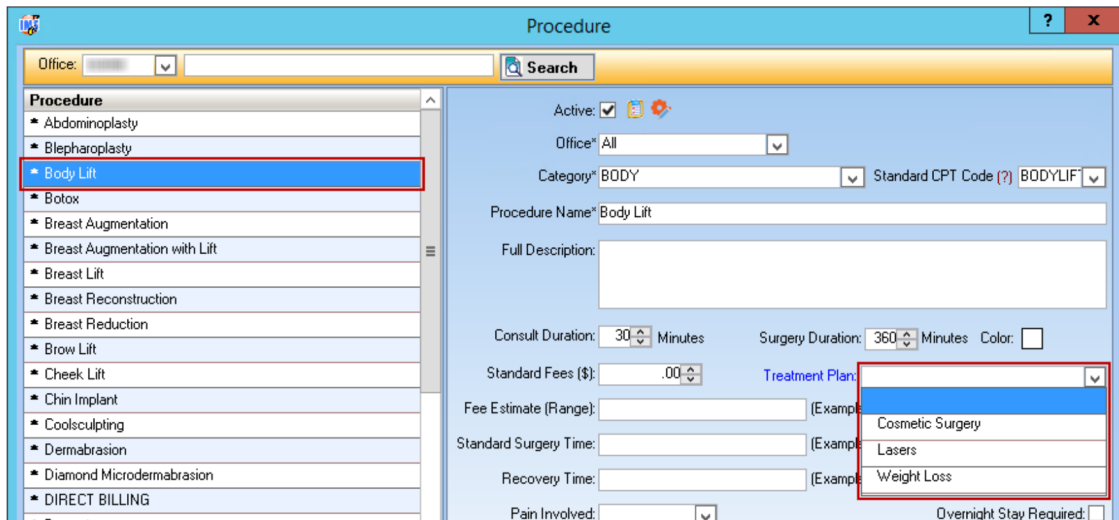




Figure 19 To link a procedure with a treatment plan, select a procedure in the left pane of the **Procedure** window, and then select its treatment plan from the **Treatment Plan** list.

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

Set up the email notification preference of a patient

You can select which modules can send email notifications to the patient basing on his or her preference.

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, click **Other Options**, and then select **Text/Email Notification Preference**.

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

If the module should not send an email reminder to the patient, clear its corresponding check box.

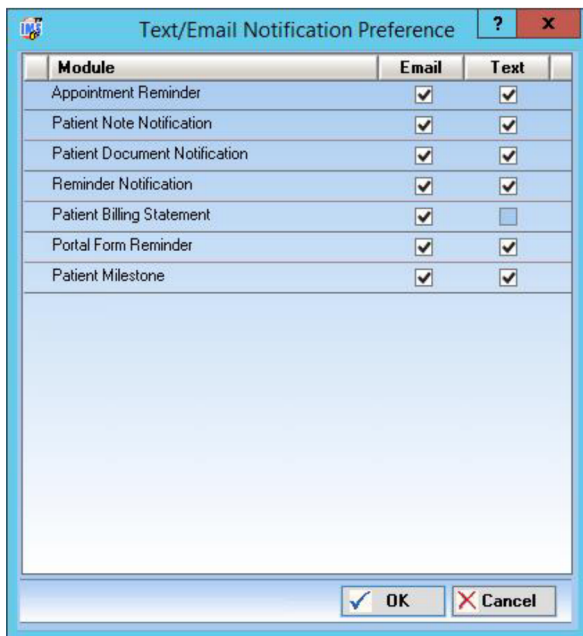


Figure 20 In the **Text/Email Notification Preference** window, either select or clear the applicable check boxes to set the modules that can or cannot send email reminders.

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. Patients can now unsubscribe from the email reminders through a link in the email. To turn on this feature, add the applicable link in the letter template. For more information about setting up letter templates see “Prepare the letter template” in [Set up the email service for the Appointment Reminder module](#).

To add the unsubscribe link in the letter 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. On the gold bar of the **Letter Template** window, select **Text/Email** from the **Type** list.
4. In the right pane, type **unsub** in the **Search** box, and then press Enter.

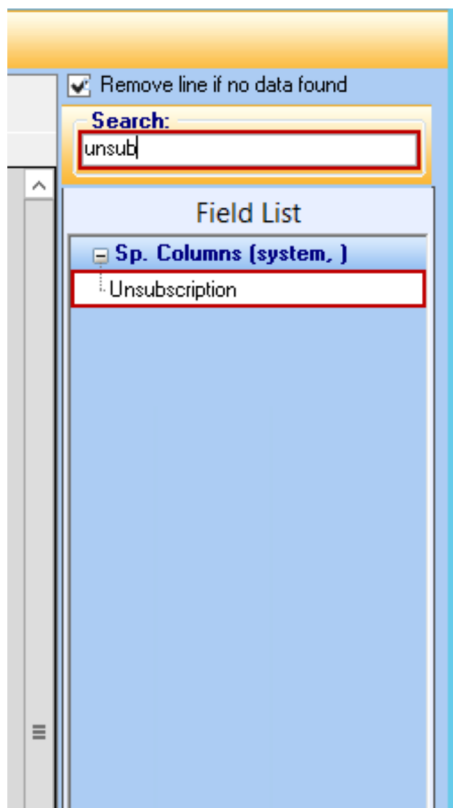


Figure 21 In the **Letter Template** window, search for **Unsubscription** in the right pane to access the applicable link for the letter template.

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

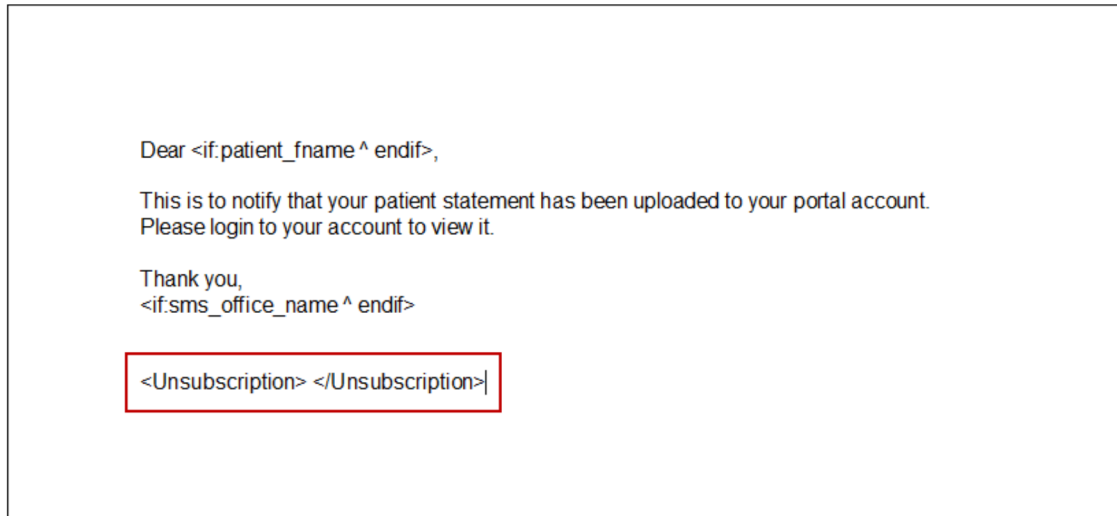


Figure 22 In the **Letter Template** window, click an area in the letter template, and then double-click **Unsubscription** in the right pane to add the **<Unsubscription> </Unsubscription>** link to the letter template.

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



Figure 23 Enter the text for the link in between **<Unsubscription>** and **</Unsubscription>**.

Note:

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

Set up the Reminder module to automatically select the Email check box depending on the selected task

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

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

To set IMS to automatically select the **Email** 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** window, click **Setup**.

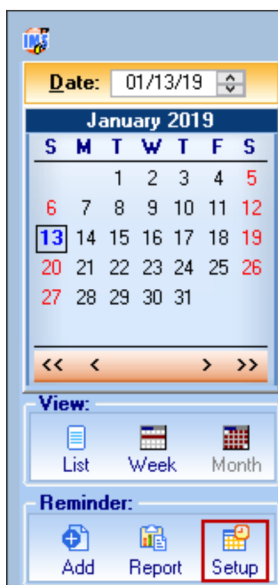


Figure 24 To access the setup for task reminders, click **Setup** in the left pane of the **Reminders** screen.

3. In the **Reminder Setup** window, click the **(T)ask** tab.

4. Select the **E** check box for the applicable reminder.

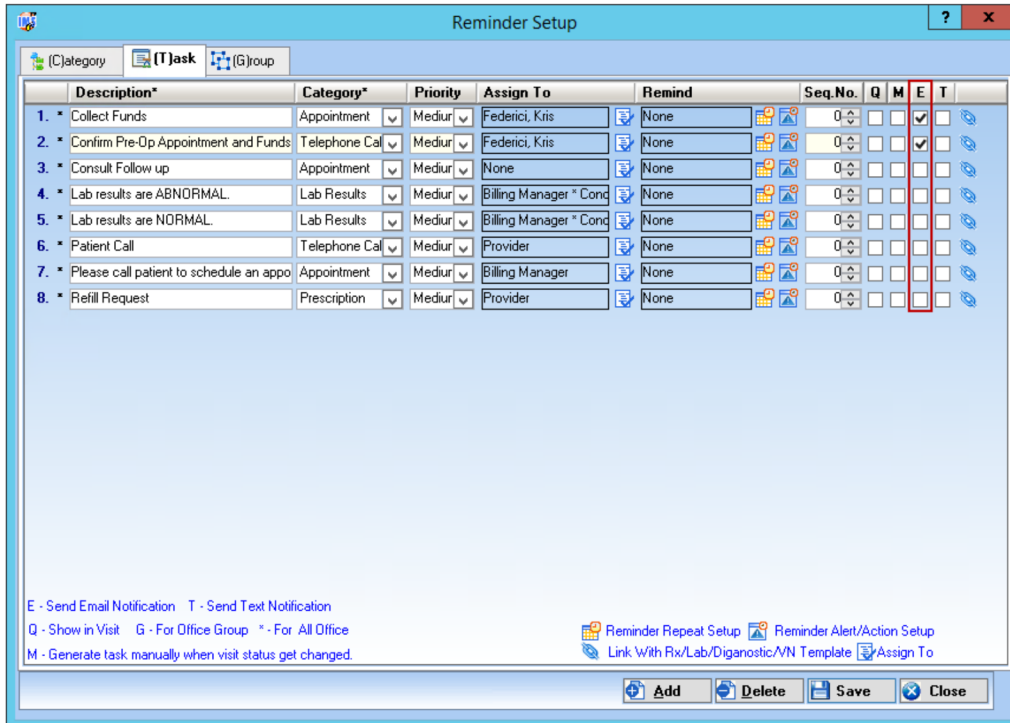


Figure 25 In the **Reminder Setup** window, select the applicable check boxes so that the corresponding reminder automatically sends email notifications.

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

Note:


When you create a task reminder, the **Email** check box in the **Web Access** pane of the **Reminder Task** window is automatically selected after you select a patient in the **For Whom** section.

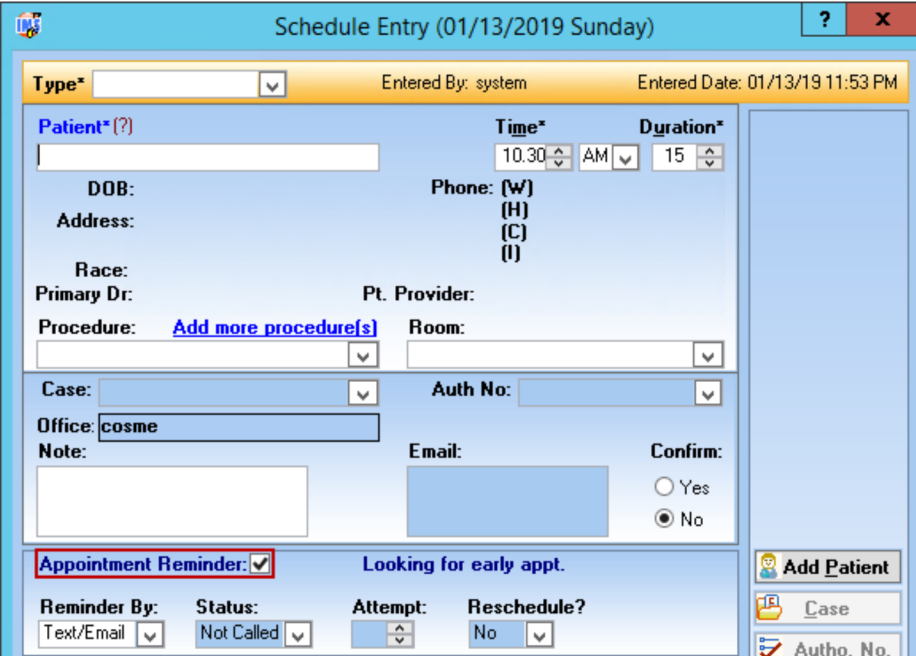
Email Service End User Tasks

When the necessary setup tasks are done, you can now use email service through the applicable IMS modules.

Set the system to send an appointment reminder through the Scheduler

You can send an email to patients to remind them of their scheduled appointments. To set the system to send appointment reminders via email, follow these steps:

1. On the IMS toolbar, click the **Scheduler** symbol .
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 necessary appointment details, and then select the **Appointment Reminder** check box.



The screenshot shows the 'Schedule Entry (01/13/2019 Sunday)' window. At the top, it displays 'Type*' (dropdown), 'Entered By: system', and 'Entered Date: 01/13/19 11:53 PM'. The main form includes fields for 'Patient* (?)', 'DOB:', 'Address:', 'Race:', 'Primary Dr:', 'Pt. Provider:', 'Procedure:', 'Room:', 'Time*' (10.30 AM), 'Duration*' (15), 'Case:', 'Auth No:', 'Office: cosme', 'Note:', 'Email:', and 'Confirm:' (radio buttons for Yes and No, with 'No' selected). At the bottom, the 'Appointment Reminder:' checkbox is checked and highlighted with a red box. Other fields include 'Looking for early appt.', 'Reminder By:' (Text/Email), 'Status:' (Not Called), 'Attempt:' (dropdown), 'Reschedule?' (No), 'Add Patient', 'Case', and 'Autho. No.' buttons.

Figure 26 In the **Schedule Entry** window, enter the necessary details, and then select the **Appointment Reminder** check box to let the system send automatic reminders to the patient.

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.

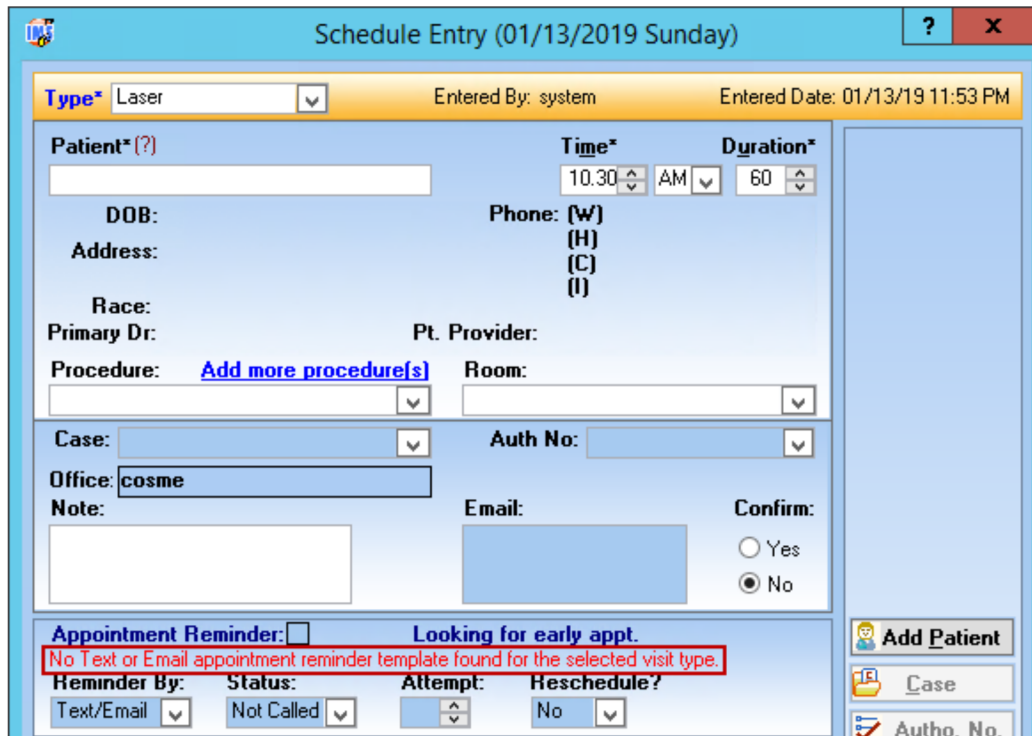


Figure 27 The Schedule Entry window shows a notification if you select the visit type that has no letter template.

- From the **Reminder By** list, select **Email**, and then click **Ok**.

Monitor the appointment status in Scheduler

On the **Schedule for (Provider)** screen, you can monitor the status of the appointment reminder.

A symbol that indicates the status appears to the left of the patient’s name. The legend for the symbols appears in the lower section of the screen.

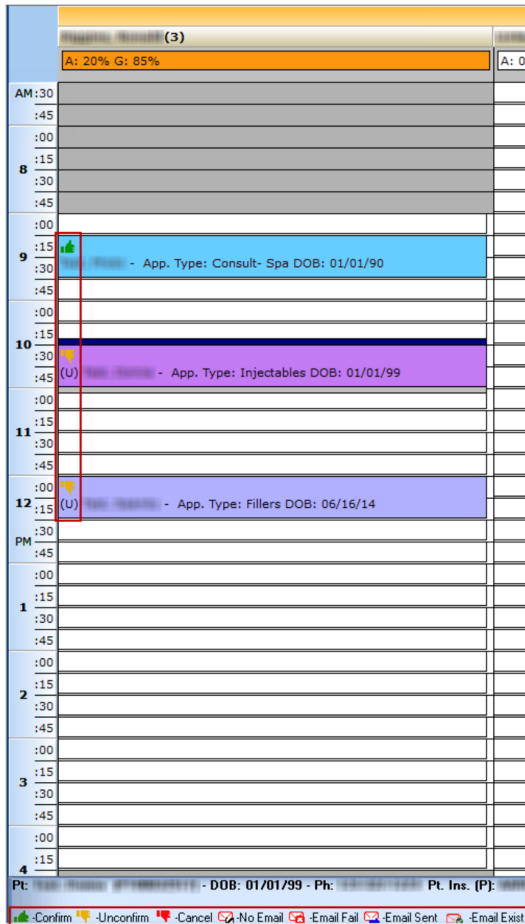


Figure 28 On the Scheduler screen, the symbols to the left of the patients’ names indicate the status of the appointments of the corresponding patient.

Mark the appointment as missed

If the patient fails to attend the appointment, you can mark it as missed. When an appointment is marked as missed, a notification email about the missed appointment is sent to the patient. You can access this functionality in the Scheduler and Check In/Out modules.

Note:

This functionality is available only if the **Appointment Reminder** check box in the **Schedule Entry** window was selected for patient.

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

1. In the center pane of the **Scheduler** screen, right-click the patient’s name, and then select **Missed**.

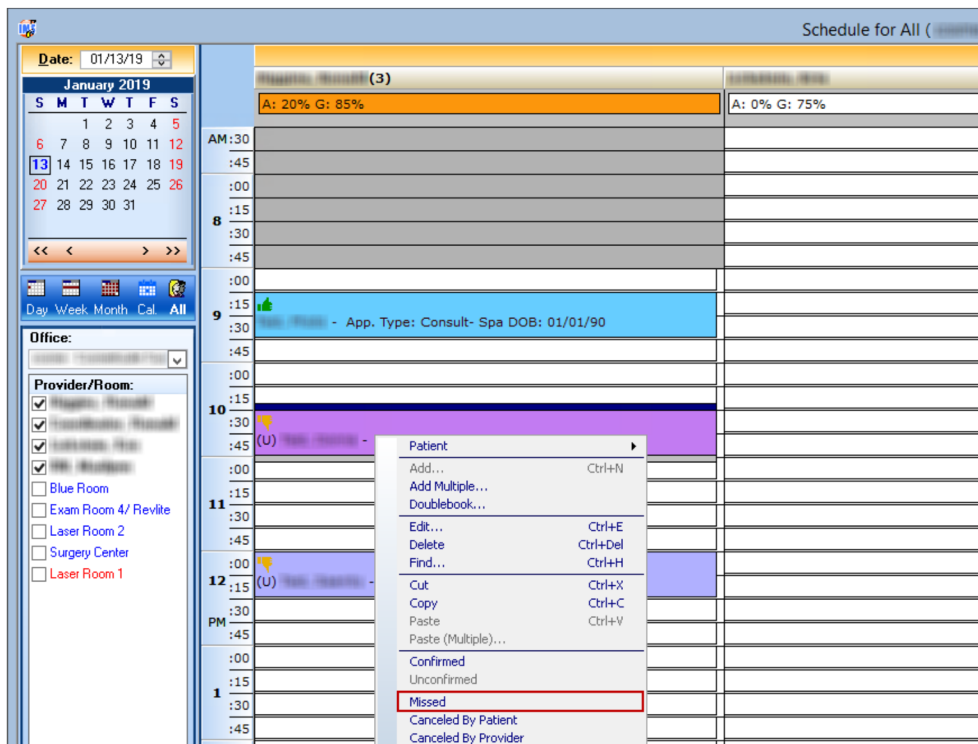


Figure 29 On the **Scheduler** screen, right-click the patient’s name, and then click **Missed** to mark the appointment as missed.

2. In the **Missed Appointment** window, enter the necessary information, and then select the applicable action.

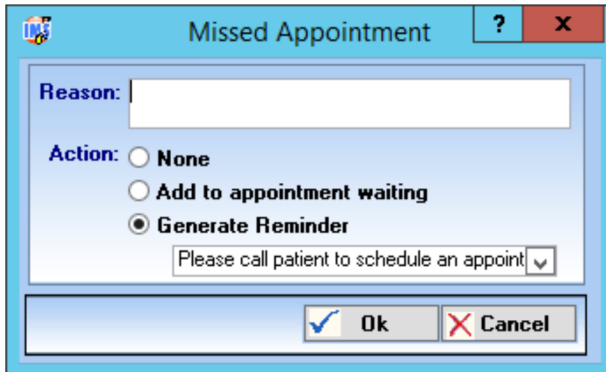


Figure 30 The Missed Appointment window

3. Click **Ok**.

Mark the appointment as missed in Check In/Out. When an appointment is marked as missed, you can allow the system to send a letter about the missed appointment to the patient.

To mark an appointment as missed on the **Check In/Out** screen, right-click the patient's name in the **Appointments** pane, and then select **Missed**.

To mark multiple appointments as missed, click **Option** in the lower section of the **Appointments** pane, and then select **Mark All No Show as Missed**.

Note:

IMS sends a letter to the patient who missed the appointment, notifying that the patient has failed to attend the appointment.

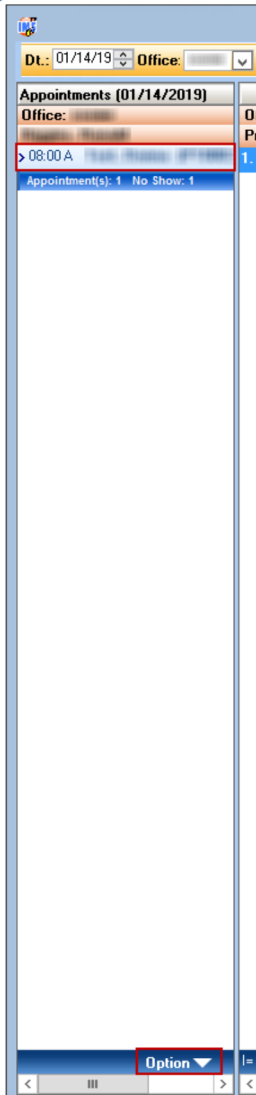


Figure 31 On the Check In/Out screen, click **Option**, and then select **Mark All No Show as Missed** to send the notification to multiple patients who have missed their appointments.

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.
3. 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**.

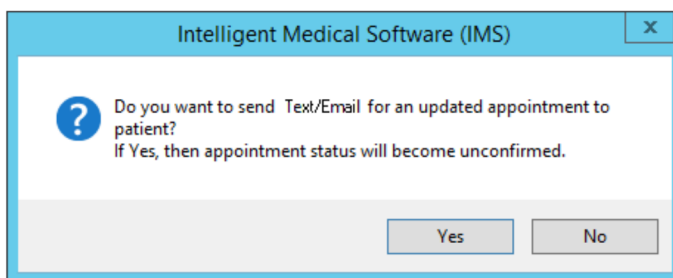


Figure 32 To send a text with the updated appointment details, click **Yes** when the confirmation message appears.


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 up the email service for the Appointment Reminder module](#).

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, select whether the document is **Received** or **Sent** from the first **Document** list in the right pane.
6. 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 **Email** check box.

Note:

If the patient doesn't have an email address recorded in Patient Master, the "For Notification, Patient's email address not found. Do you want to add it?" message appears. Click **Yes** to open the patient's record on the **Patient Master** screen where you can enter his or her email address.

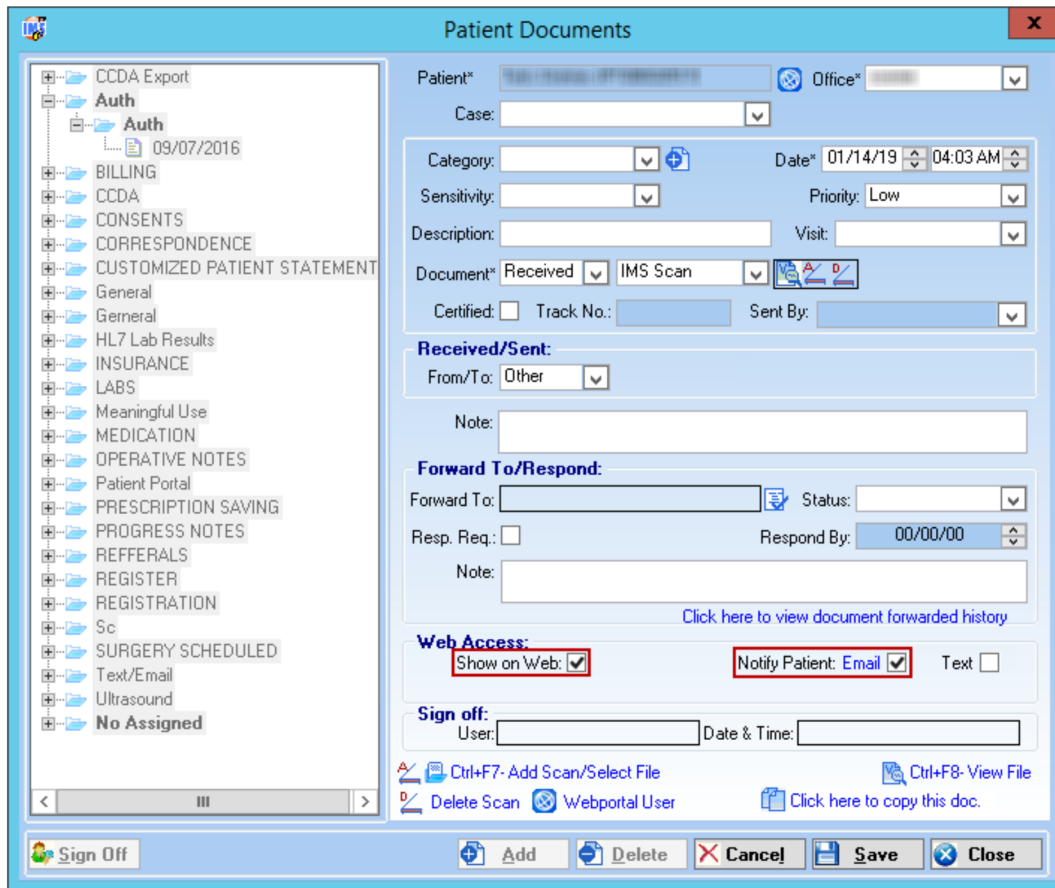


Figure 33 In the Patient Documents window, select the **Show on Web** check box, and then select the **Email** check box to notify the patient via email.

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

Send the patient's patient notes to the patient

To send patient notes, do the following:

1. On the IMS menu bar, click **Utilities**, point to **Patient**, and then click **Note**.
2. In the **Patient Note** window, enter the necessary details, and then type the note in the **Note** box.

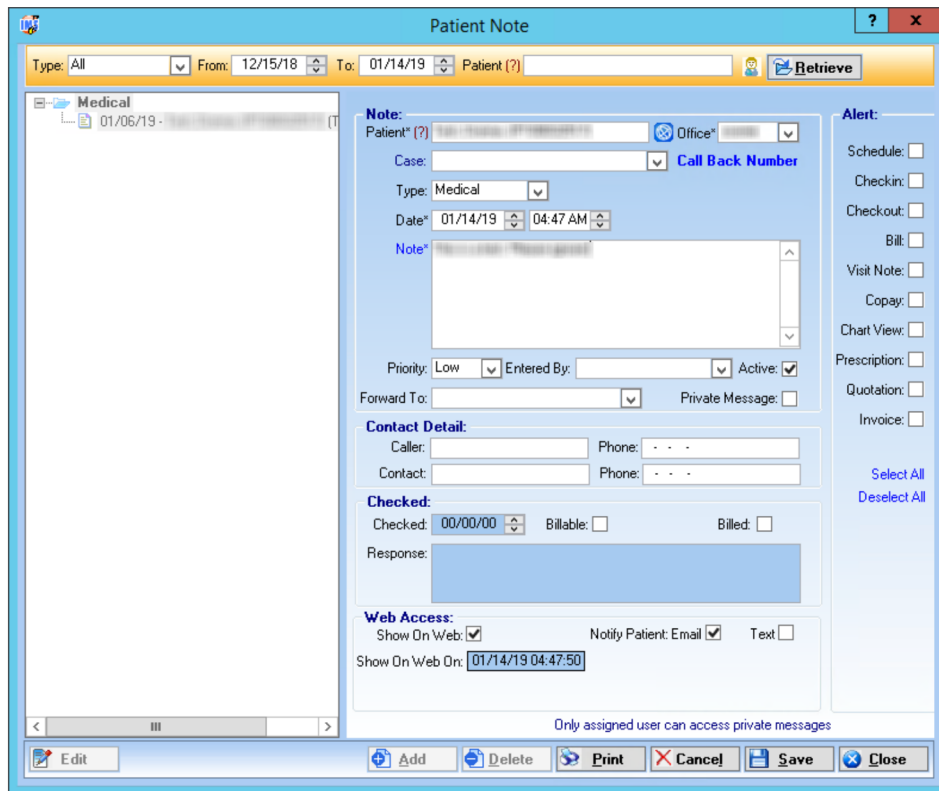


Figure 34 The Patient Note window


3. In the **Web Access** pane, select the **Show On Web** check box, and then select the **Email** check box.
4. Click **Save**, and then click **Close**.

Send patient statements through email

With email service, you can attach patient statements to an email message and send them to patients.

To send a patient statement via email, follow these steps:

1. On the IMS menu bar, click **Billing**, point to **Patient Statements**, and then click **Patient Statement - Customized**.

2. On the gold bar of the **Patient Statement** window, enter the necessary filter criteria, and then click the **Retrieve** symbol .
3. In the leftmost column, select the check box beside **Chart No** of the entry that you want to access, and then click **Upload on Portal** on the lower pane.
4. When the message “Are you sure you want to Upload Patient Statement on Web?” appears, click **Yes**.

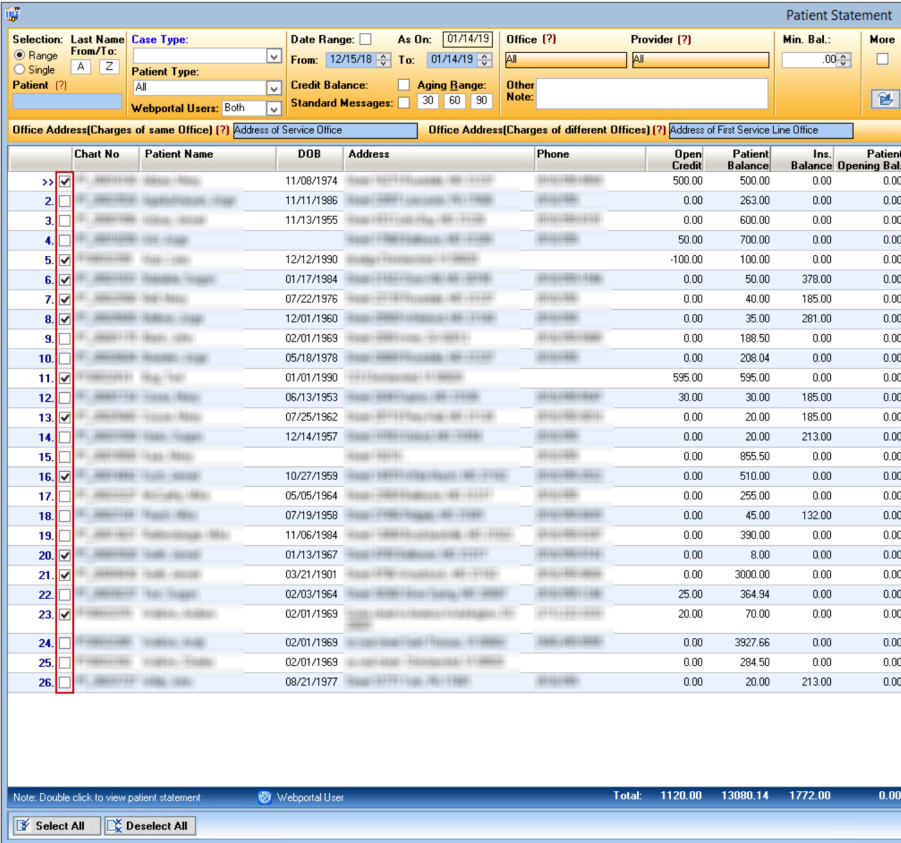


Chart No	Patient Name	DOB	Address	Phone	Open Credit	Patient Balance	Ins. Balance	Patient Opening Bal.
>>	1	11/08/1974			500.00	500.00	0.00	0.00
<input checked="" type="checkbox"/>	2	11/11/1986			0.00	253.00	0.00	0.00
<input type="checkbox"/>	3	11/13/1955			0.00	600.00	0.00	0.00
<input type="checkbox"/>	4	12/12/1990			50.00	700.00	0.00	0.00
<input checked="" type="checkbox"/>	5	12/12/1990			-100.00	100.00	0.00	0.00
<input checked="" type="checkbox"/>	6	01/17/1984			0.00	50.00	378.00	0.00
<input type="checkbox"/>	7	07/22/1976			0.00	40.00	185.00	0.00
<input checked="" type="checkbox"/>	8	12/01/1960			0.00	35.00	281.00	0.00
<input checked="" type="checkbox"/>	9	02/01/1969			0.00	188.50	0.00	0.00
<input checked="" type="checkbox"/>	10	05/18/1978			0.00	208.04	0.00	0.00
<input checked="" type="checkbox"/>	11	01/01/1930			595.00	595.00	0.00	0.00
<input checked="" type="checkbox"/>	12	06/13/1953			30.00	30.00	185.00	0.00
<input checked="" type="checkbox"/>	13	07/25/1962			0.00	20.00	185.00	0.00
<input checked="" type="checkbox"/>	14	12/14/1957			0.00	20.00	213.00	0.00
<input checked="" type="checkbox"/>	15	10/27/1959			0.00	855.50	0.00	0.00
<input checked="" type="checkbox"/>	16	10/27/1959			0.00	510.00	0.00	0.00
<input checked="" type="checkbox"/>	17	05/05/1964			0.00	255.00	0.00	0.00
<input checked="" type="checkbox"/>	18	07/19/1958			0.00	45.00	132.00	0.00
<input checked="" type="checkbox"/>	19	11/06/1984			0.00	390.00	0.00	0.00
<input checked="" type="checkbox"/>	20	01/13/1967			0.00	8.00	0.00	0.00
<input checked="" type="checkbox"/>	21	03/21/1901			0.00	3000.00	0.00	0.00
<input checked="" type="checkbox"/>	22	02/03/1964			25.00	364.94	0.00	0.00
<input checked="" type="checkbox"/>	23	02/01/1969			20.00	70.00	0.00	0.00
<input checked="" type="checkbox"/>	24	02/01/1969			0.00	3927.66	0.00	0.00
<input checked="" type="checkbox"/>	25	02/01/1969			0.00	284.50	0.00	0.00
<input checked="" type="checkbox"/>	26	08/21/1977			0.00	20.00	213.00	0.00

Note: Double click to view patient statement Webportal User Total: 1120.00 13080.14 1772.00 0.00

Select All Deselect All

Figure 35 In the **Patient Statement** window, select the patient who you want to send the billing statement to, and then click **Upload on Portal** to show the statement on IMS CarePortal.

5. In the **Select Letter Template** window, select the letter template that you want to use for the patient statement, and then click **Upload**.

- When the “Statement history added successfully.” message appears, click **OK**, and then click **Close**.

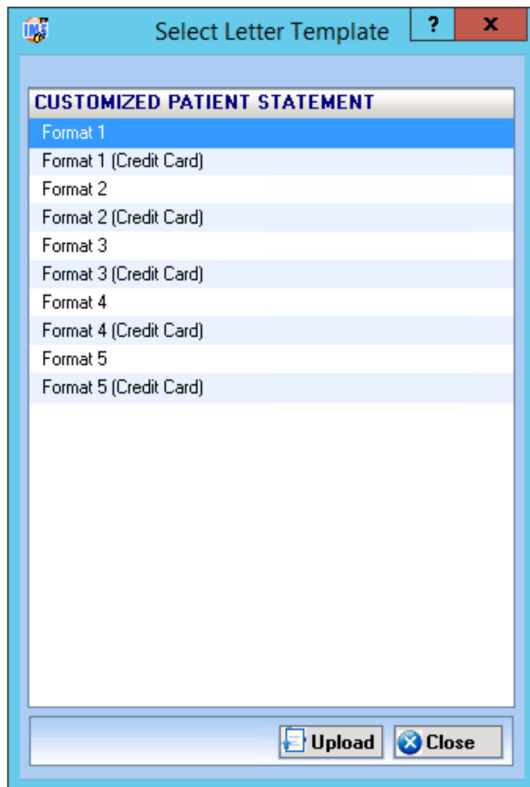


Figure 36 The Select Letter Template window

Note:

If you do not want to send patient statements, contact an authorized Meditab representative to customize IMS InTouch.

View an email attachment. To enhance the security of the patient’s information, you can turn on the feature that encrypts email attachments with a password. If you are a recipient of the email that has a password-encrypted attachment, it is necessary to enter a password to view the corresponding attachment.

If you want to turn on or off the setup that enables a password to protect your email attachments, contact support@meditab.com.

Note:

If you turn off the feature that encrypts email attachments with a password, the email attachments will not be password-encrypted.

To view the attachment, follow these steps:

1. Open the email that has the attachment.
2. In the email body, take note of your password.

Note:

The password combination depends on the kind of recipient. If the recipient is a patient, the correct password is a combination of the first two characters of the patient’s name (in lowercase) and his or her date of birth (in MMYYYY format). For the complete list of the password combinations for the applicable recipients, see Table 2 of [Appendix](#).

If the recipient’s information—that is required to generate the password—is not found in the applicable setup, IMS does not send the applicable email messages.

The instructions for determining the password of the applicable recipient is included in the body of the email.

Your password for the attachment is a combination of first 2 characters of your first name in lowercase (without any special character) and your date of birth in the MMYYYY format. Here are the few examples of the password format.

First Name	Date of Birth	Password (lower case only)
James	16 th May 1983	ja051983
Mary	17 th April 1970	ma041970
C	14 th October 1978	c101978

Please note that your password is case sensitive.

Figure 37 Take note of your password using the guide and examples included in the email.

3. Download the attachment.

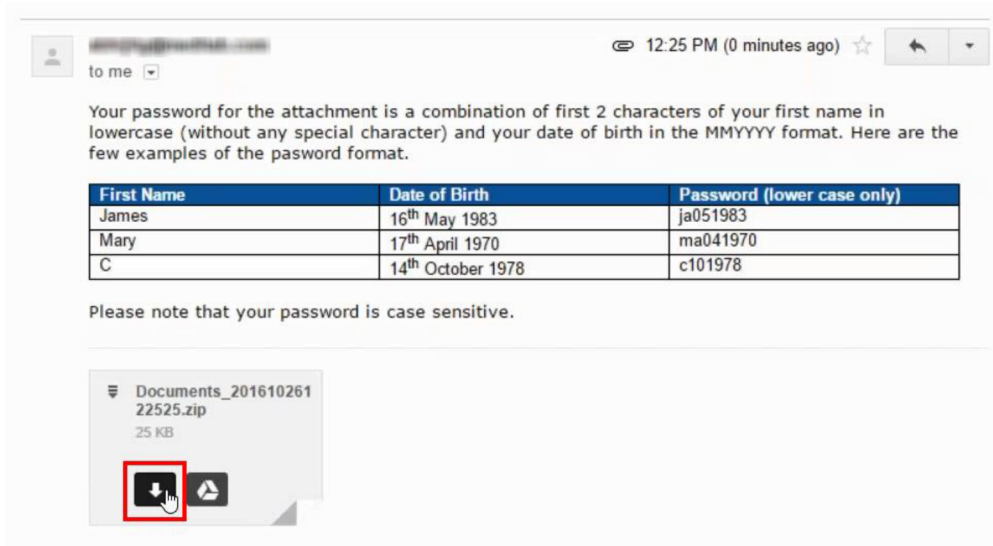


Figure 38 In the email, click the down-arrow symbol of the attachment to download it.

4. Open the downloaded attachment.
5. When the **Enter password** window opens, enter your password, and then click **OK**.

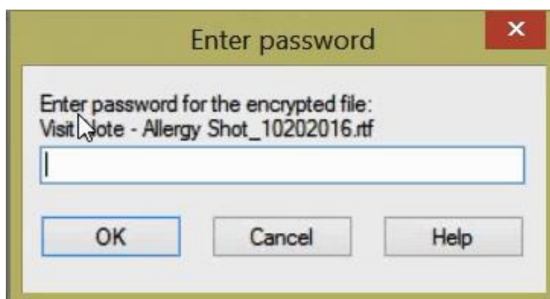


Figure 39 To view the attachment, enter your password in the **Enter password** window, and then click **OK**.

Send email messages to multiple patients

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

Send email messages to multiple patients through the Patient Special Search screen. To send email 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** screen, enter the necessary filter criteria, and then click **Search** in the lower pane.

Note:

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

3. In the right pane of the screen, select the check boxes to the left of the **Name** column to select the recipients of the email messages.