

FOCUSED • SMART • EFFECTIVE



AUTOMATICALLY  
SENT.  
PERSONALLY  
RECEIVED.



# Advanced**Messaging**

Our simplest way to send relevant messages that  
delight patients & sell more services.



### Focused

You are able to segment your entire patient list and send specific messages to improve patient engagement.



### Smart

Because of the seamless data integration & automated processes, you get accurate, relevant & effective communications to patients with minimal effort.



### Effective

Each interaction with your patients can result in greater loyalty & top of mind awareness while bringing in new revenue opportunities.

## COMMUNICATE WITH PATIENTS

Patients can choose their preferred method of communication between email & text. Enjoy a simple, automated & integrated messaging system that anyone in your practice can use. Communicate office changes such as schedules, new locations, new providers & payment methods.

You can also invite patients to schedule appointments for recall visits, specials & sales promotions. Target patients by active/inactive status, geography, diagnosis code, birthday/age & insurance.

# See how easily you can communicate with patients.

## Create a birthday card campaign.

Easily create personalized email & text templates for each campaign or reuse & modify past templates for new campaigns. You can add data fields such as patient name & subject line to personalize each message. You can also include your logo & attention-grabbing images.

The screenshot shows a form for creating a birthday campaign. The 'Subject' field contains 'Happy Birthday!'. The 'Email Message' field contains a colorful 'HAPPY BIRTHDAY To You' graphic, a placeholder for the patient's name '({{PFullName}})', and the text 'Wishing you a wonderful birthday. From Meadowcreek Family Practice'. A 'Clear' button is at the bottom right.

The screenshot shows the 'Flu Campaign: Patient Selection' interface. It has a 'Selection Criteria' section with a list of criteria: 'Patient Criteria', 'Daily Birthday', 'New Patient Code', 'All Patients', and 'Young Patients Asthma'. To the right, there are dropdown menus for 'Category' (set to 'Patient'), 'Comparison' (set to 'After'), and 'Scars With' (set to 'Scars With').

## Customize your message & audience.

Select which patients receive texts & which receive emails by choosing from existing criteria or create a new set. There are many different fields available, including patient demographics, insurance, diagnosis codes & more.

## Review, finalize & send your message

Portal forms can be accessed from the homepage of the portal. The Patient Forms icon lets you see which family members have outstanding patient forms assigned.

The screenshot shows the 'Flu Campaign: Summary' interface. It displays campaign details: 'Campaign Name: Flu Campaign', 'Campaign Type: Email', 'Start Date: 3/20/17', 'Interval: Once', 'Send To: Young Patients Asthma', and 'Total Recipients: 0'. Below this, there is an 'Email Subject' field with the text 'Spread fun. Not Flu!' and an 'Email Body' field with a personalized message starting with 'Dear {{PFullName}},'.