

Introduction to PatientTrak March, 2022 Release

Release No. 20220310.2

This release includes enhancements and fixes to the PatientTrak application. Complete information and procedures for implementing the enhancements are included in the applicable sections of this document.

The latest version of Google’s Chrome browser is recommended.

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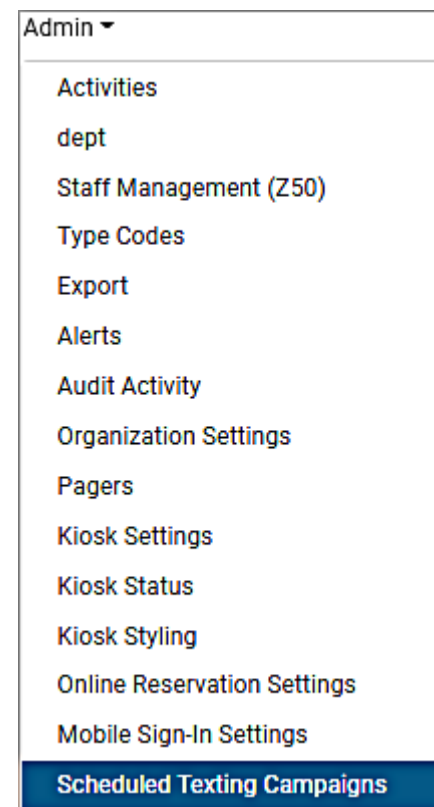
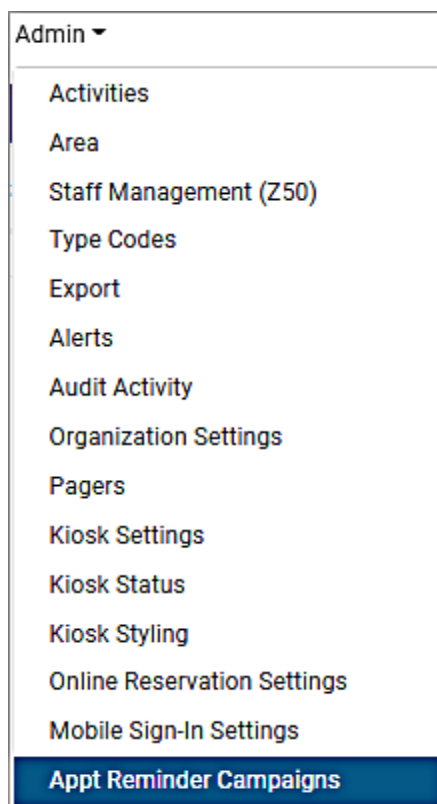
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Fixes

- Fixed an issue where all same day, consolidated appointments are cancelled when a patient responds “0” to cancel their appointments.
- Fixed an issue where some patients were receiving multiple text messages for the same Scheduled Text Campaign.
- Fixed a Time Reporting issue.

Enhancements

Appointment Reminders are now labeled “Scheduled Texting Campaigns”.



Follow Up Scheduled Texting Campaigns.


Users can now setup Scheduled Texting Campaigns to be send to a patient after their visit or if a patient missed their appointment.

- Select “Scheduled Texting Campaign” option in the Admin dropdown menu.
- Click on the “Follow Ups” tab on the Schedule Texting Campaigns page, and then click on the green “Add” button.

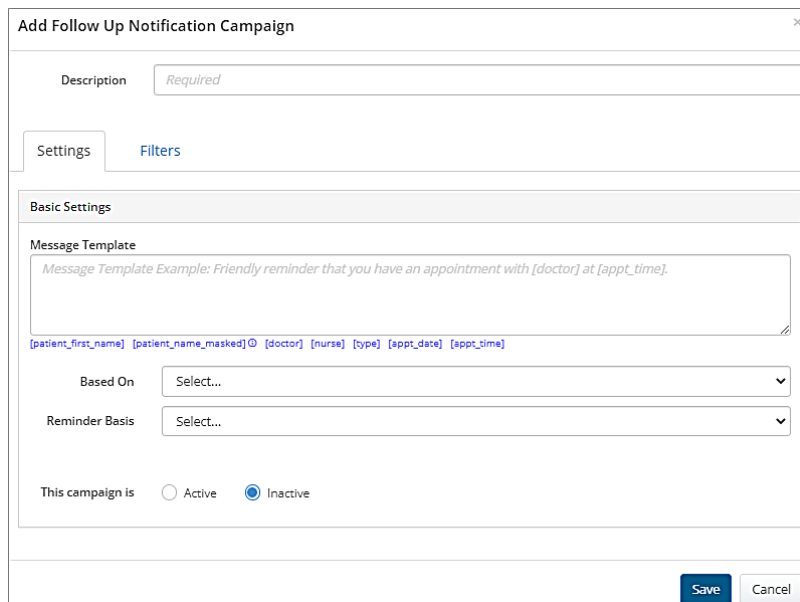


Scheduled Texting Campaigns

Reminders **Follow Ups**

Follow Up Notifications  **Add** 

- Enter in the desired parameters.



Add Follow Up Notification Campaign

Description Required

Settings **Filters**

Basic Settings

Message Template

Message Template Example: Friendly reminder that you have an appointment with [doctor] at [appt_time].

[patient_first_name] [patient_name_masked] [doctor] [nurse] [type] [appt_date] [appt_time]

Based On Select...

Reminder Basis Select...

This campaign is ☐ Active ☒ Inactive

Save Cancel

- Users may also filter out the campaigns to be sent only to specific patients. Just select the “Filters” tab and select the desired parameters.

The screenshot shows a dialog box titled "Add Follow Up Notification Campaign". At the top, there is a "Description" field with a red "Required" label. Below this are two tabs: "Settings" and "Filters", with "Filters" currently selected. The "Filters" section contains several dropdown menus: "Doctor:" (set to "Include all"), "Type:" (set to "Include all"), and "Scheduled dept:" (set to "Include all"). Below these are two checkboxes, "Account Num..." and "Misc3:", each followed by a grey button labeled "--ALL--". At the bottom right of the dialog are "Save" and "Cancel" buttons, with "Save" being a dark blue button.

NOTE: All Scheduled Texting Campaigns are set to “INACTIVE” by default.