



ORTHO2

# Scheduled Reminders

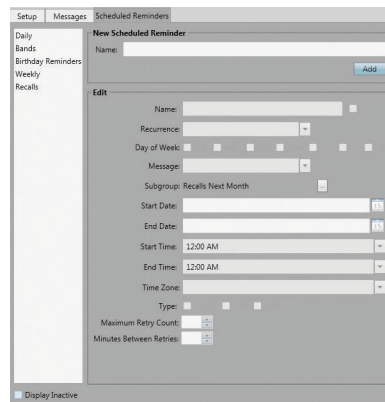
## For Edge Reminders

**E**dge Reminders is the perfect tool to easily send out phone, text, and e-mail reminders. And using the program just got a lot easier by setting up scheduled reminders! The new scheduled reminders feature can be used in both Edge and ViewPoint. Read through this page for Edge setup, and the next page for ViewPoint setup.



### Setting Up Scheduled Reminders

In the Home ribbon bar, click Editors in the Tools tab. Under Integrations click Reminders. Optionally, you can type Reminders in the search bar. Enter your user name and password. Note you will have to have permissions to access this page. Click Edge Reminders under Plugins.



Click the Scheduled Reminders tab below Settings. To create a new scheduled reminder, type the name of the reminder in the Name field. Click Add. To edit a reminder, click on it in the list to the left.

Under Edit fill in the following fields as needed:

- **Name** – Use a descriptive name for your scheduled reminder.
- **Toggle Inactive Flag** – Records you flag as inactive are not available for general use. However, they remain in effect for reporting and other data collection needs.
- **Recurrence** – Select how often you want the reminders to be sent: daily, weekly, monthly, etc.

- **Day of Week** – If you select the daily recurrence, enable each day of the week that you want the reminders to be run, generally Sunday–Thursday.
- **Message** – Choose the message to send when this reminder is run. If need be, create a new message in the Messages tab.
- **Choose Subgroup** – Select the subgroup to use when selecting who should receive the message. Only records that fit your selected subgroup will be included.
- **Start Date/End Date** – Enter the first date, and optionally the last date that you want the scheduled reminder to be activated. If you want the reminder to recur for an undetermined length of time, leave the end date blank.
- **Start Time/End Time** – Enter the starting and ending times for sending the reminder messages. Message delivery will be attempted only during the time of day you set.
- **Time Zone** – Select your time zone from the drop-down list to be sure the messages are delivered at the appropriate local time.
- **Choose Delivery Method(s)** – Enable each type of delivery method – telephone, e-mail, and/or text – that you want to use for this set of reminders. You flag which phone number/e-mail address to use for each type of message in the patient folder Contact details.
- **Retries** – Select the maximum number of retries, and minutes between retries for telephone messages. These fields, which are operator-specific, are ignored for e-mail and text messages. These fields override the values on the Setup tab of the Reminders editor.

Click the Save icon in the Quick Access Toolbar.

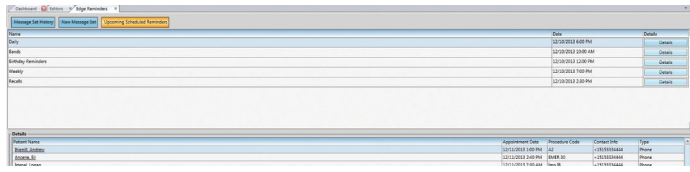
### Viewing Scheduled Reminders

Your scheduled reminders are now set for you. To see what reminders are scheduled, click Reminders in the

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Task tab of the Home Ribbon bar. Select Upcoming Scheduled Reminders. Here you can see the reminders that are scheduled. Click the Details button for each reminder to see who will be



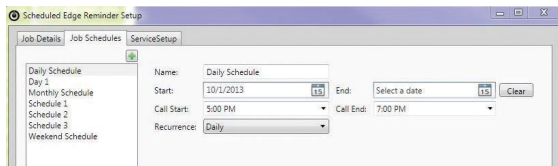
# ViewPoint

sent a reminder that day. If no reminders are scheduled for that day, nothing will appear in the Details window.

## Setting Up Scheduled Reminders

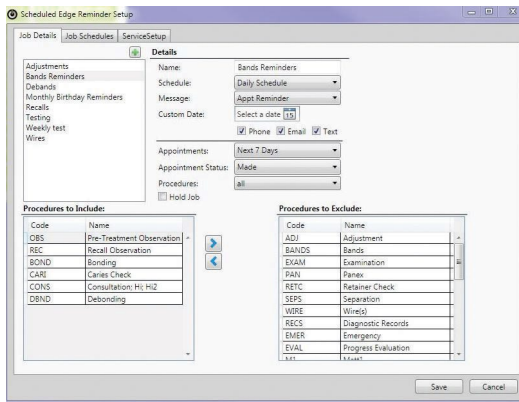
From the ViewPoint main menu, click Tools & Utilities, and then Outbound Integration. From the list, select Setup and Maintenance. Choose the Configuration tab, and then click Scheduled Job Setup.

Click the Job Schedules tab. Either select a record to work with, or click the green + to create a new record. If you create a new record, fill in the details for that record including: Name, Start/End Dates, Call Start/End Times, Recurrence. Note that the Day of the Week options are only available when you have selected either the Weekly or Bi-Weekly recurrence. Click Save to save your changes.



Next, click the Job Details tab, if not done so.

Either select a record to work with, or click the green + to create a new record. If you create a new record, fill in the Details information. Custom date is only used for an office closure message.



Select either All, Normal, Recall, or Custom for Procedures.

**All** – Places both normal (scheduled) and recall procedures in the list of procedures to be included.

**Normal** – Places only scheduled procedures, not recall procedures, in the list to be included.

**Recall** – Places only recall procedures, not scheduled procedures in the list to be included.

**Custom** – You choose the procedures yourself using the left and right arrows.

If you select one of these three options, you can use the arrows to move individual procedures to and from the Included and Excluded procedure boxes. After you create the job, you can optionally put it on hold until you are ready to use it by simply clicking the Hold Job option.

Finally, click the Service Setup tab. This configures the workstation(s) that you want to use for sending automated messages.

Click Enable/Disable to select/deselect this workstation as an Edge Reminders scheduled service station. Most offices need to enable only one workstation to run the service. However, if you choose to run the service on multiple workstations, Edge Reminders will coordinate all the services so that only one set of messages are initiated.

In addition, select the Service State. Start will cause this station to begin checking your Edge Reminders scheduled job details on an ongoing basis, and process those jobs as scheduled. Stop will suspend checking for scheduled reminder jobs. Restart clears and restarts the service. Click Save.

## Viewing Scheduled Reminders

Your scheduled reminders are now ready to be sent. To view upcoming reminders, click Edge Reminders Scheduled Jobs in the Daily Activities menu. Each of your future schedule reminder jobs are listed at the top of the window. Click a job to work with and then Job Date to see a list of patients that are included in that job. o

Job Details					
Job Name	Start Date	End Date	Start Time	End Time	Schedule
a new details	9/12/2013		5:00 PM	7:00 PM	Day 1
Adjustments	1/10/2014		5:00 PM	7:00 PM	Monthly Sche
Bands Reminders	10/1/2013		5:00 PM	7:00 PM	Daily Schedu
Monthly Birthday Reminders	10/1/2013		5:00 PM	7:00 PM	Daily Schedu
Recalls	1/10/2014		5:00 PM	7:00 PM	Monthly Sche

Job Dates		Patients Scheduled	
Date	Hold	Patient Name	Responsible Party Name
12/6/2013	<input type="checkbox"/>		
12/7/2013	<input type="checkbox"/>		