


Broadcast campaign

† Modified on 12/11/2024 12:40 pm EST

Sending (Broadcasting) Using a Blank Campaign

We recommend using this option if you want to create a quick one-time Broadcast Communication Campaign (i.e. "Our office will be closed on Friday").

1. Select **Patient > Communications... > Broadcast Campaign**.
2. Select "***Start a blank Campaign***"
3. Configure your patient search parameters (default criteria for determining which patients will receive the message):
 1. **Date Search Options:** Select whether you want to search by days or by dates.
 1. Populate the applicable date/days filter(s) from the drop-down menu and the number of days or dates for the filter(s) (days since last appointment, days since last seen, etc.).
 2. **Appointment Search Options:** Select the appointment options you want to search by.
 1. Populate the applicable appointment filter(s) from the drop-down menu (appointment status, resource, etc.).
 3. **Patient Search Options:** Select the Patient options you want to search by.
 1. Populate the applicable patient filter(s) from the drop-down menu (age, gender, balance, etc.).
 4. **Claim Search Options:** Select the Claim options you want to search by.
 1. Populate the applicable claim filter(s) from the drop-down menu (diagnosis codes, procedure codes, excluded codes, etc.).
4. Click **Search**.
 1. You will be presented with a preview list of the patients that were retrieved based on the search criteria you selected.

 You can exclude a patient from receiving the communication by unchecking the checkbox next to the patient's name on the list.

2. Modify the "***Send Message On***" date and time to specify when you want the message to be sent.

Start Campaign		Campaign	🔍	Send Message on 12/09/2024 📅 at 02 : 59 PM ▼	✕ Close	View Applied Filters	⬆ ⬇ ⬆		
<input checked="" type="checkbox"/>	Method Preferred ▼	Language	Alerts	Patient Name	Account #	Email	Phone	SMS Opt-In?	Balance

⚠ Please note that when scheduling a campaign communication it must be scheduled at least 5 minutes in the future.

5. Click **Start Campaign**.

1. Enter a Campaign Title.
2. Enter your message body. You can also add/edit your patient details (variable fields) by right-clicking on the message body and selecting the variable from the list (Patient Last Name, Primary Insured First/Last Name, Guarantor First/Last Name, etc.).
3. Click **Next**.
4. The preview window displays the campaign and template title, the number of patients who will receive the message, the date and time of the scheduled send, how they will be sent, and a preview of the message that will be sent.

One-Time Campaign: Office Closed on Friday for Maintenance

The **Office Closed on Friday for Maintenance** campaign will be sent to 17 patients on 12/09/2024 at 03:11 PM.
 • 17 emails will be sent

Email

Dear [Patient First Name]

We will be undergoing office maintenance on Friday 12/13/2024 and our office will be closed. We will reopen for normal business on Monday 12/16/2024.

Sincerely,
 [Office Name]

Send Sample

Save as a new Campaign Template to re-use this message later

Start Campaign Cancel


6. Click **Start Campaign**.

🔗 Your campaign is now scheduled to be sent on your selected date/time. Please visit our [Track a Campaign Help Article](#) to see any existing or scheduled campaign messages.

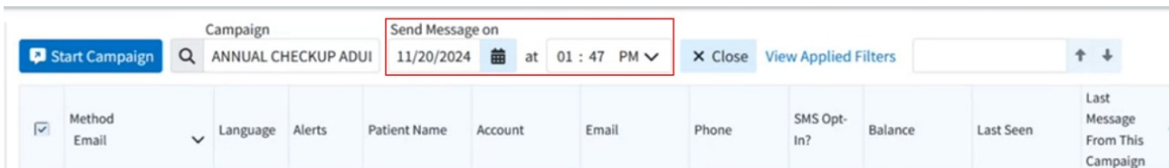
Sending (Broadcasting) a Campaign From a Template

We recommend using a previously created template to broadcast messages to patients. Visit our [Add a Broadcast Campaign Template Help Article](#) for more information on how to create/save a template.


1. Select **Patient > Communications... > Broadcast Campaign**.
2. Select the "**Use a template**" option from your filters
 1. Search for the pre-built campaign by title or message or browse through the existing campaigns and select your template.
3. Click **Search**.
 1. You will be presented with a preview list of the patients that were retrieved based on the search criteria you selected.

 You can exclude a patient from receiving the communication by unchecking the checkbox next to the patient's name on the list.

2. Modify the "**Send Message On**" date and time to specify when you want the message to be sent.



Campaign		Send Message on		View Applied Filters							
<input type="checkbox"/>	Method Email	Language	Alerts	Patient Name	Account	Email	Phone	SMS Opt-In?	Balance	Last Seen	Last Message From This Campaign

 Please note that when scheduling a campaign communication it must be scheduled at least 5 minutes in the future.

4. Click **Start Campaign**.
 1. The preview window displays the campaign and template title, the number of patients who will receive the message, the date and time of the scheduled send, how they will be sent, and a preview of the message that will be sent.

One-Time Campaign: Annual Checkup: Adult

The **Annual Checkup: Adult** campaign will be sent to 21 patients on 11/21/2024 at 13:00:00.

- 21 emails will be sent

Email

Dear [Patient First Name],

It's time for your **annual checkup** with [Provider Name]! Regular checkups help to monitor your risk for illness and can identify problems early, **before they become serious**.

Most health insurance plans cover the full cost of annual preventive care visits.

To schedule your health checkup, please call our office today at [Office Phone Number].

Sincerely,

[Office Name]




Send Sample

Start Campaign

Cancel

5. Click **Start Campaign**.

 Your campaign is now scheduled to be sent on your selected date/time. Please visit our [Track a Campaign Help Article](#) to see any existing or scheduled campaign messages.