:dit a Broadcast Campaign Template

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ollow these steps to edit an existing Broadcast Communication Campaign Template.

1. Select **Patient** > **Communications...** > **Templates.**
2. Click **Show All**.
3. Select your campaign from the list.
4. Click the **Email** tab and Use the email message editor to edit your email message as needed.
    1. **Edit the email message** by adding or removing text from the email. 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.).
5. Click **Text** (if using text messages) and edit your text message as needed.
    1. **Edit the Text message** by adding or removing any necessary text. You can also add/edit your patient details variable fields by right-clicking on the reminder message body and selecting the variable from the list (Patient Last Name, Primary Insured First/Last Name, Guarantor First/Last Name, etc.).

       > Our prebuilt Campaign Email and Text Messages are also available in Spanish. If you want to send a Spanish message to patients who have their language preference set to Spanish, simply check the "***Enter the message in Spanish as well***" box.
6. Click **Phone** (if using phone voice messages) and edit your message as needed.
    1. **Edit the Phone message** by adding or removing any necessary text. You can also add/edit your patient details variable fields by right-clicking on the reminder message body and selecting the variable from the list (Patient Last Name, Primary Insured First/Last Name, Guarantor First/Last Name, etc.
7. Click **Search Criteria** and edit the patient search parameters (default criteria for determining which patients will receive the messages) as needed
    1. **Date Search Options**: Select whether you want to search by days or by dates.
    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, procedur codes, excluded codes, etc.).

8. Click **Review**.

    1. You will be presented with a preview list of the patients that were retrieved based on the search criteria you selected.

        > You can remove a patient from the list by selecting the Exclude checkbox next to the patient's name on the list.

    2. By selecting the corresponding tabs beneath the preview patient list, you will be able to view/send a sample of your email and text messages.

9. Click **Save**.