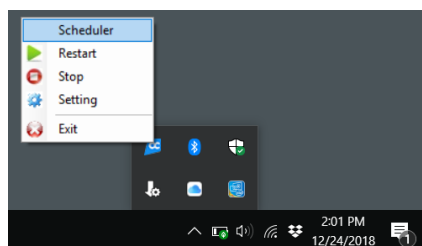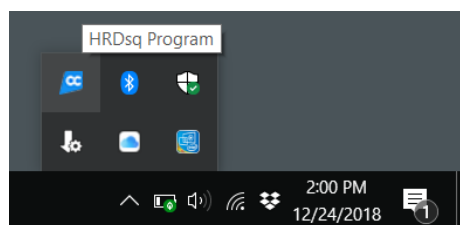# PatientXpress

Scheduler

1. Scheduler

The Scheduler is what manages the **automated process** of PatientXpress. Items such as birthday, appointment confirmation, appointment reminders, appointment recalls, insurance service, patient feedback, call logs, and custom queries are all managed here.

6.2 Managing the Scheduler
- Head to the practice's server and open the hidden icons tray and right click on PatientXpress Scheduler (CC) button to select **Scheduler**.

- Under **Schedule Type**, there are options for Daily and Run Particular Date.
  - **Daily:** Practice must set up a time for this service to begin working, the service will begin running at the selected time daily.
  - **Run Particular Date:** Practice must select a specific date and time for this service to run one time**.**

- The drop-down menu under **Select Type** will have a variety of services. You must select which service, so that the remaining details can correspond to it.
  - **Name** allows you to provide a custom name for the service.
  - **Days(Before/After)** will ask for the amount of days prior you'd like to begin the service.
  - **Message in English/Spanish**: You may type out a message in either language.
  - Once satisfied, click **Create** and save your new scheduler type.
  - To edit a template, we perform the same steps but at the end, we click **Update**.
- Once all changes are made, we must restart the automation service.