

PatientXpress

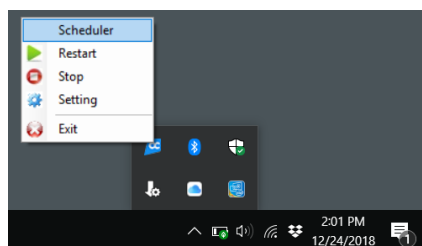
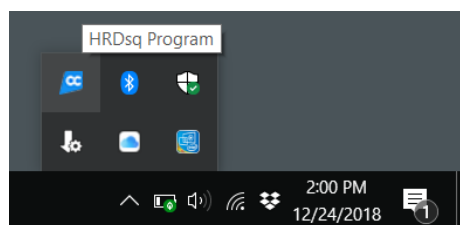
Scheduler

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](#).



Schedule Type	Schedule Name	Run Type	Invoke Time	Days(Before/After)	Message 1...	Message 1...
Appt Recall	Text Recall	RunDaily	9:00 AM	0	You are du...	
Insurance Service	Insurance Verify	RunDaily	8:00 AM	0	-	-
Appt Confirmation	Email Confirmation	RunPartic...	1:24 PM	0	[NameF], w...	
Appt Confirmation	Text Confirmation	RunDaily	8:38 AM	0	[NameF], w...	
Appt Reminder	Text Reminder	RunDaily	8:41 AM	0	[NameF], w...	
Birthday	Birthday	RunDaily	8:42 AM	0	Dear ?FN...	

Schedule Type

Daily Run Particular Date

Select Type:

Name: Send Type:

Start Time:

Days(Before/After) : Days

Select Clinic:

Message in english:

Message in spanish:

Note : These variables can be used [FName], [date], [day], [time], [DueDate], [Feedback] and [Appointment] from existing string.

- 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.

