Email Configuration 2

> This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

CareRight allows you to automatically send Appointment related Email messages either:

- ·A set time after an appointment is created (from 0 minutes); or,

- ·A set number of days before an appointment occurs.

To do this you need to set up an Appointment Trigger. Before proceeding. you need to have created:

- A Message Type and Template (for the email message that will be sent); and,

- Appointment Types.

Step A: Create an Appointment Trigger

Appointment triggers are associated with an Appointment Type.

For example:

- an appointment type of "Surgery A" may have a corresponding appointment trigger that sends a reminder/confirmation Email 72 hours before the surgery.

- an appointment type of "New Patient Consult" may have a corresponding appointment trigger associated with it that sends a "welcome" Email 30mins after the appointment is made and a reminder Email 48 hours before the appointment.

Appointment Trigger Type A - On Creating an Appointment

To add an Appointment Trigger that sends a Email when an appointment is created (or a set number of minutes after creation), follow these steps:

1. Click **Administration**.

2. Click **Appointments**

3. Click **Appointment Triggers**.

4. Click **New Creation Trigger**.

5. Complete the fields using the table below as a reference.

6. Click **Create Appointment Trigger**.

Field Name	Description	Example
Name	The name of the trigger, used when linking to Appointment Types	New Appointment Notification
Required Condition	Trigger only activates if appointment is in this condition. (e.g. Any Unconfirmed condition, Any confirmed condition, Any condition, etc). Remember, each appointment status is mapped to a condition e.g. confirmed, unconfirmed, complete or cancelled. see Email Setup for more details on this.	Any Unconfirmed Condition
Minutes to wait before firing	Number of minutes after the appointment is booked before the email is sent.	30

Appointment Trigger Type B - Reminder a set period before the appointment occurs

To add an Appointment Trigger that sends an Email *X* days before an appointment, follow these steps:

1. Click **Administration**.

2. Click **Appointments**

3. Click **Appointment Triggers**.

4. Click **New Reminder Trigger**.

5. Complete the fields using the table below as a reference.

6. Click **Create Appointment Trigger**.

Field Name	Description	Example
Name	The name of the trigger, used when linking to Appointment Types	2 Day Notification
Required Condition	Trigger only activates if appointment is in this condition. (e.g. Any Unconfirmed condition, Any confirmed condition, Any condition, etc).	Any Unconfirmed Condition
	Remember, each appointment status is mapped to a condition e.g. confirmed, unconfirmed, complete or cancelled. see Email Setup for more details on this.	
Activation Time	A fixed time of day to activate the Trigger (e.g 7pm).	19:00
Days before the appointment to fire	Number of days prior to the appointment day that determines the date to activate the trigger.	2

An example trigger might be:

```
Trigger Name: 2 Day Notification.
Appointment Condition: Any Unconfirmed
Activation Time: 7pm (19:00).
Trigger Period: 2 days
```

This trigger would activate daily at 7pm. It would look for *all unconfirmed* appointments on the date 2 days from today. Triggers may fire multiple times for the same appointment.

For example, using the above trigger (2 Day Notification) if a patient's appointment is set for Friday and they are sent an email on Wednesday they may ring and change the appointment to the following Monday.

This means that they will receive another Email on the Saturday. Note that appointment reminder triggers activate regardless of when the appointment was created.

If an appointment is created at 6:45pm 2 days before an appointment and there is a trigger set for 7pm, the Email will still be sent to the Patient requesting a confirmation, even if they are potentially still on the phone with the CareRight user.

Step B: Appointment Type Configuration

Now that you have created the Message Type, Template and Appointment Trigger, it is time to link these to an Appointment Type.

An Appointment Type can have many combinations of triggers and message types. This means you can have multiple Email messages sent at different times for an Appointment Type. Messages, triggers and appointment types are not location specific so all locations use the same configuration.

Follow these steps to set up triggers for an appointment type:

1. Click **Administration**.

2. Click **Appointments**

3. Click **Appointment Types**.

4. Click **Message Types** for the Appointment Type.

5. Click **New**.

6. Click **Create Appointment Trigger Config**.

Field Name	Description	Example
Appointment Trigger	The name of the Appointment Trigger that determines the conditions under which this notification is activated.	2 Day Notification
Message Type	The appointment Email/SMS Message Type to use for the notification	Appointment Reminder
Template Override	Template overrides allow you to customise the message sent to Patient for each appointment type even though the user is sending the one Message Type	

An example Appointment Type, Trigger and Message configuration might be:

Appointment Type: Initial Consultation (60mins)

```
Trigger 1:
Appointment Trigger: Appointment Creation (after 30 minutes, when appointment is Unconfirmed only)
Message Type:  Email - New Booking
Template Override: Thankyou - Thank you for booking (update appointment status on reply)
```

```
Trigger 2:
Appointment Trigger: Appointment Reminder (2 days before)
Message Type: Email - 2 Day Notification (at 7pm, 2 days prior to appointment, when appointment is Unconfirmed
Template Override: [blank]
```

Upon booking an *Initial Consultation (60mins)* appointment:

- Trigger 1 would activate 30 minutes after the booking was made. It would check that the appointment is unconfirmed and send a "New
  Patient Email".
- Trigger 2 would activate daily at 7pm. It would look for *all unconfirmed* appointments on the date 2 days from today and send a "Appointment
  Reminder" Email for each.