Email Configuration 2: Set Up Appointment Triggers

Once system admin set up the appointment trigger in the system they can use that trigger 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.

Before proceeding, user must need to create following items in the system:

- A Message Type and Template (for the Email message that will be sent).
- Appointment Types

1. Appointment Trigger overview

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 30 mins after the appointment is made and a reminder/confirmation email message 48 hours before the appointment.

A. Appointment Trigger Type A creation - On Creating an Appointment

To add an Appointment Trigger that sends a Email message 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 for reference.
6. Click **Create Appointment Trigger**.

Field Name	Description	Example
Name	The name of the trigger, used when linking to Appointment Types	e.g. 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, appointment status is mapped to a condition e.g. confirmed, cancelled .	e.g. Any Unconfirmed Condition
Minutes to wait before firing	Number of minutes after the appointment is booked before the email is sent.	30

B. Appointment Trigger Type B creation - 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	e.g. Appointment reminder email
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.	e.g. Any Unconfirmed Condition
Activation Time	A fixed time of day to activate the Trigger (e.g. 9:00am).	e.g. 9:00 am
Days before the appointment to fire	Number of days prior to the appointment day that determines the date to activate the trigger.	e.g. 2

An example trigger:

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

This trigger would activate daily at 9:00am. It would look for *all unconfirmed* appointments of that appointment type on the date 2 days from appointment date.

If an appointment is created at 8:45pm 2 days before an appointment and there is a trigger set for 9:00pm, the email will still be sent to the patient requesting a confirmation, even if he patient is potentially still on the phone with the CareRight user.

2. 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.

Once admin user created a n appointment trigger, appointment email correspondence template, user will require to configure the message type for an specific appointment type.An Appointment Type can have many combinations of Triggers and Message Types. This means you can have multiple email or SMS 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. Complete fields using the table below as a reference.

7. Click **Create Appointment Trigger Config**.

Field Name	Description
Appointment Trigger	The name of the Appointment Trigger that determines the conditions under which this notification is activated.
Message Type	The appointment email Message Type to use for the notification
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:**
> Trigger Name: Appointment Creation (after 30 minutes, when appointment is Unconfirmed only)
> email Message Type: appointment booked email
> Template Override: [blank]

> **Trigger 2:**
> Trigger Name: 2 Day Notification (at 7pm, 2 days prior to appointment, when appointment is Unconfirmed only
>)
> email Message Type: Appointment Reminder
> 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 "appointment booked email" email message.
- Trigger 2 would activate daily at 7pm. It would look for *all unconfirmed* appointments on the date 2 days days prior to appointment and send the "Appointment Reminder" email message.

Confirm an appointment via Email:

The system allows patients to confirm or cancel appointments via email. Once the admin sets up the appointment email template with the appropriate substitution variables, it can be configured under the appointment type. Based on the appointment trigger and message type setup, the system will send an email to the patient's provided email address to confirm their attendance at the appointment.
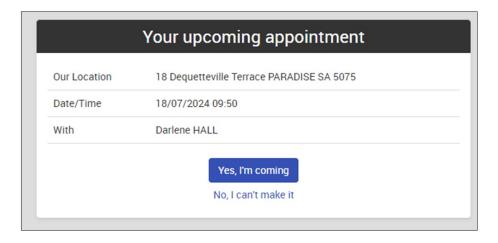
Example:

Hi Lady,
Your appointment is booked for 9:50AM on 18/07/2024 at Adelaide Clinic, 18 Dequetteville Terrace.

Please confirm your attendance

Regards,
ADL

Upon clicking the confirm your attendance link , system will displays following screen for a patient:

Your upcoming appointment

Our Location	18 Dequetteville Terrace PARADISE SA 5075
Date/Time	18/07/2024 09:50
With	Darlene HALL

Yes, I'm coming

No, I can't make it

If a patient clicks "yes" to confirm their attendance, the system will automatically change the appointment status from "booked" to "confirmed."

or

If a patient clicks "No", the system will automatically change the appointment status from "booked" to "cancelled. Appointment will also be removed from the dashboard -> appointment screen."