AlertMD Integration

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Overview of AlertMD Integration

Our application now has the ability to integrate with AlertMD's Margie automated referral and recall management engine. Margie converts more referrals and recalls into appointments with automated outreach to increase patient volume. Easily integrate Margie's automated phone, chat and messaging system with your practice. Send images, videos, and interactive responses to your patients for improved patient engagement.
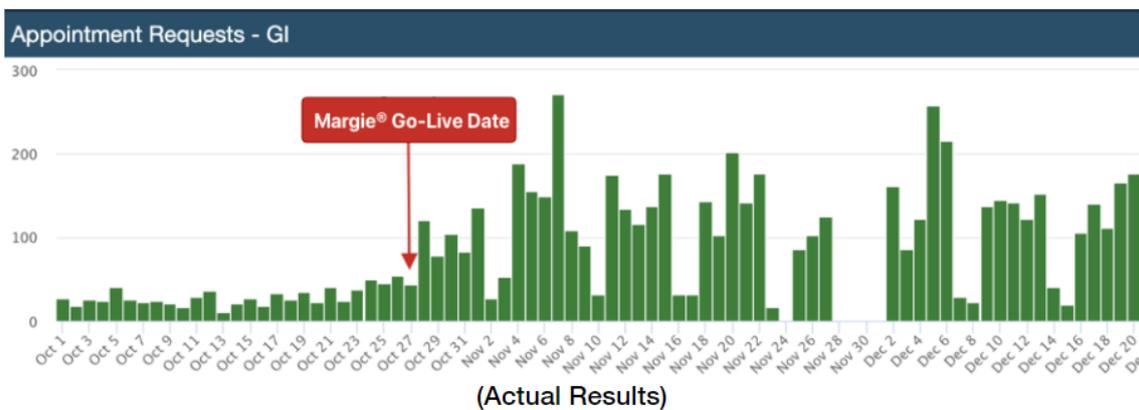
This integration will:

1. Allow you to manage referral and recalls directly in the iScheduler
2. A nightly file will be sent to AlertMD to begin automatic calls/text/emails to the patients provided
3. Patients will be prompted to talk to the practice when they are ready to schedule the appointment

The benefits of this integration include:

1. Provides a single, automated way to manage referrals and recalls

Recall List

Chart #		Last Name			Begin Date	11/02/2020		Primary ID		▼
Status	▼	First Name			End Date			Value		
		Resource	▼		Max Rows	25	Search	Clear		

Search Results — Row 0 of 25

	Sel	Appointment Date	Patient Chart	Last Name	First Name	▲ Resource Name	Due Date	Status	Home Phone
1	☐		11379	Clark	BRAD	Newhart MD, Willi...	01/01/2021	Recall	
2	☐		21005	Clark	KENNETH	Lincoln MD, Jonat...	02/01/2021	Recall	
3	☐		20860	Heinlein	STEPHANIE	Lincoln MD, Jonat...	04/10/2021	Recall	
4	☐		10958	Blake	DEBBIE	Lincoln MD, Jonat...	09/01/2021	Recall	
5	☐		19457	Thompson	LARRY	Quillen MD, Jon T.	09/08/2021	Recall	
6	☐		10299	King	JAMES	Lincoln MD, Jonat...	09/14/2021	Recall	
7	☐		18736	Quillen	ANNA	Xavier MD, Kristo...	10/03/2021	Recall	
8	☐		9445	Newhart	JOHN	Myers NP-	11/02/2020	Recall	
9	☐		21110	Quillen	BENNY	Irving NP-	11/02/2020	Recall	
10	☐		9702	Quillen	JOHN	Quillen MD, Jon T.	11/03/2020	Recall	
11	☐		19264	Myers	DENNIS	Myers NP-	11/03/2020	Recall	
12	☐		13191	Newhart	JAMES	Myers NP-	11/03/2020	Recall	
13	☐		14000	Myers	JAMES	Goldsmith MD, Cl...	11/03/2020	Recall	
14	☐		16715	Clark	ROBERT	Myers NP-	11/04/2020	Recall	
15	☐		12121	Clark	SAMUEL	Xavier MD, Krista	11/04/2020	Recall	

New | Open | Open Patient | Schedule | Letters [▼] | Print Letter | Close

2. Eliminates phone tag between your practice and the patient

3. Regulate volume and manage refill rates
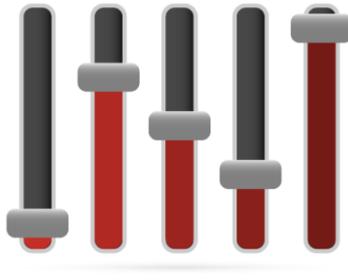
Setup the AlertMD Integration

Access

In order to access the AlertMD process several key items must be activated for the practice. This includes contacting iSalus to setup the integration for your practice.

Features

In order to have a feature activated, the practice must request this from iSalus by contacting our support team.

The support team will need to activate the following product:

- AlertMD

The team will also configure HL7 interfaces for ADT (Demographics) and SIU (Scheduling) integrations that facilitate the process.

Appointment Type Settings

The AlertMD integration allows for both Referral and Recall management. Both processes utilize the 'Recall' list within the iScheduler. To distinguish between a Referral and a Recall, the Appointment Type must determine this.

1. Navigate to **Setup > Appointment Types**
2. Select the appointment type that would be considered a Referral
3. Check the **AlertMD Referral Indicator** checkbox

4. Click **Save**


Using the AlertMD Integration

Once the AlertMD Integration has been configured for your practice, you will be able to start adding patients to the queue using the Recall List in the iScheduler.   This is an automated process - all you have to do is actively manage the recall list for your practice.
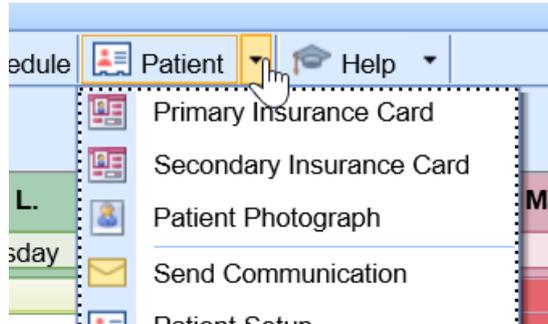
Adding a patient to the Recall List
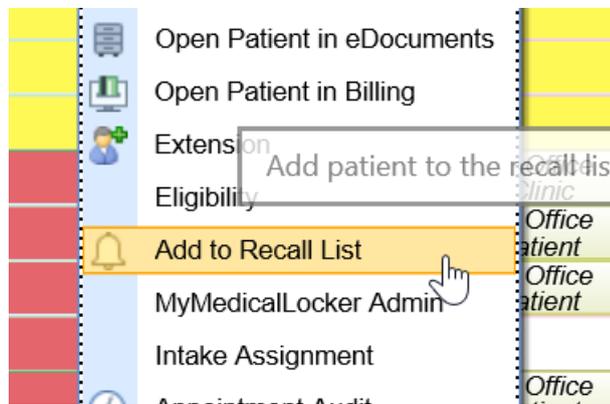
1. Navigate to the **iScheduler**

2. **Search** for or **select** a patient that needs to be added to the list
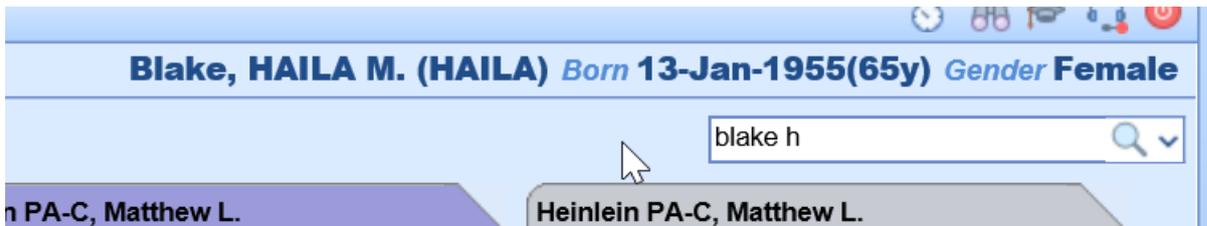
3. **Click the dropdown next to the patient index card** to reveal more options

4. Select **Add to Recall List**

5. **Enter the necessary details for the Referral/Recall**
    1. *NOTE: The Appointment Type will dictate if this is considered a Referral or a Recall in AlertMD. Be sure to setup the appointment types in your system to make this distinction.*

6. Click **OK** to save

Nightly File Drop

On a nightly basis, the system will check for new patient's added to the Recall/Referral list and send this data to AlertMD. Two files are created - a Referral file and a Recall file based on the appointment type selected on the

recall setup screen.

The system will automatically identify all patients in teh recall list where the Due Date > Today and the status of the recall = Recall.

Real Time Demographic Updates

In real time, as patient demographics are updated or created, an ADT (demographics) HL7 file will be electronically delivered to AlertMD to ensure the most up to date demographics are on file.

Real Time Scheduling Updates

In real time, as a patient appointment is created or changed, a SIU (scheduling) HL7 file will be electronically delivered to Alert MD to ensure that patients that have scheduled an appointment already are not contacted unnecessarily.