Send a Broadcast Message Using the Recall List

Last Modified on 05/03/2024 9:34 am EDT

The Recall List is designed to allow a practice to add patients to an ongoing list in order to manage a list of patients who need appointments scheduled. The Recall List can be used for many different reasons, however, the most common scenario is to add a patient to the Recall List when the selected provider either does not have any availability or the schedule is not available to schedule. See iScheduler Toolbar for more information on how to add patients to the Recall List.

Broadcast Messages are a way to send a generic message in mass to a list of unique patients, based on similar criteria from the Recall List. Broadcast Messages can be used for scenarios like advertising that it's time to schedule an appointment, or the schedules are open for future dates and patients should contact the practice to schedule an appointment.

The following steps will explain how to produce a list of patients that can ultimately be uploaded to Updox in order to configure a Broadcast Message.

Exporting the List

1. Navigate to the Search Recall button in the iScheduler Toolbar

| 🔒 🔹 iScheduler | |
|---------------------------------------|--------------------------------------------------------|
| 🔽 Today 🖶 Time Period 🛛 🔽 Search Open | 🗘 Search Recall 🔲 Intake Schedule 🔛 Patient 🔹 🖻 Help 🔹 |
| 🕒 🕘 April 26 th , 2024 | Open recall search |
| Diddle MD, Demale (2) | |

2. Using the appropriate criteria, generate a list of patients

| | Recall Search | | | | | | | | | | | X |
|---|---------------|------------|---------------|-----------|------------|------|------------|------------|---------|---------------|----------------|---|
| | Chart # | Last Name | | | | | Begin Date | Primary ID | Туре | | | ~ |
| | Status | First Name | | | | | End Date | Primary ID | Value | | | |
| - | Recall 🗸 | | | | | | 05-31-2024 | | | | | |
| - | | Resource | | | | | Max Rows | | | | | |
| - | | Head, Bla | ike | | ~ | · | 50 | Q Searc | th 🔷 Cl | ear | | |
| | Appointment D | ate | Patient Chart | Last Name | First Name | Reso | urce Name | Due Date | Status | Home Phone | Work Phone | 0 |
| - | | | 24868 | Wade | Alexandra | Head | l, Blake | 05/05/2024 | Recall | 013030-040 | 0.05 848-0.07 | 1 |
| 1 | | | 25007 | Head | Chandler | Head | l, Blake | 05/05/2024 | Recall | 0110-014-0164 | 0.010.004-0000 | 1 |
| | | | 26421 | Test | Carole | Head | l, Blake | 05/05/2024 | Recall | 00000-000- | | |
| 1 | | | | | | | | | | | | |

3. Select specific patients, or choose the "Select All" to choose all patients displayed in the Search results

| Recall Search | | | | |
|------------------|------------|---------------|-----------|------------|
| Chart # | Last Name | | | |
| Status Recall | First Name | | | |
| - Vecali + | | | | |
| | Resource | | | |
| | Head, Bla | ke | | |
| Appointment Da | ate | Patient Chart | Last Name | First Name |
| | | 24868 | Wade | Alexandra |
| | | 25007 | Head | Chandler |
| | | 26421 | Test | Carole |

4. Navigate to the Export tool and Choose "Broadcast (Excel)"

| | Appointment Date | Patient Chart | Last Name | First Name | Resource Name | Due Date | Status | Home Phone | Work Phone | o |
|-----|----------------------|------------------|-----------|----------------|---------------|------------|--------|----------------|-----------------|-----|
| | | 24868 | Wade | Alexandra | Head, Blake | 05/05/2024 | Recall | 1000 | propagation and | 1 |
| | | 25007 | Head | Chandler | Head, Blake | 05/05/2024 | Recall | (10) IN 100 | program and | 1.1 |
| | | 26421 | Test | Carole | Head, Blake | 05/05/2024 | Recall | (10) 100 100 | | |
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| 4 | | | Bro | adcast (Excel) | | | | | | • |
| _ | | | | J | | | | | | |
| • N | ew 🗹 Edit 🗹 Open Pat | tient 🛗 Schedule | Export • | | | | ~ | 🖶 Print Letter | | |

5. Name the spreadsheet appropriately and save as a .CSV file type to an accessible place on your computer

| 🧿 Save As | | × |
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Login to Updox

NOTE: Users must be provided a login to Updox in order to complete the next set of steps. Please contact Support@isalushealthcare.com for information regarding logins to Updox.

- 1. Navigate to Updox Account Login
- 2. Sign-in using credentials provided
- 3. Navigate to Menu > Tools



- 4. Locate File Upload (.csv)
- 5. Select Updox Standard Maps

| Browse for a .csv file to upload Choose File No file chosen | |
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| Select Your File Type | • |

6. Choose Broadcast Patient List

| Updox Standard Maps | • |
|------------------------|---|
| Broadcast Patient List | • |

7. Enter a name for the file

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8. Choose File from your computer and upload

File Upload (.csv)



9. Choose Upload File Button

File Upload (.csv)

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| | UPLOAD FILE |
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10. Verify that your list has uploaded by navigating to Menu > Admin > Broadcast Configuration

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Creating a Broadcast Message

The Updox Broadcast tool will allow you to send one-way messages to a list of patients from your uploaded Recall List.

Please read how to send a Broadcast Message from the Updox system here.

Creating a Broadcast Template

Broadcast templates are messaging templates with pre-set text to make sending common messages quick within Updox.

Please read how to create a Broadcast Template from the Updox system here.