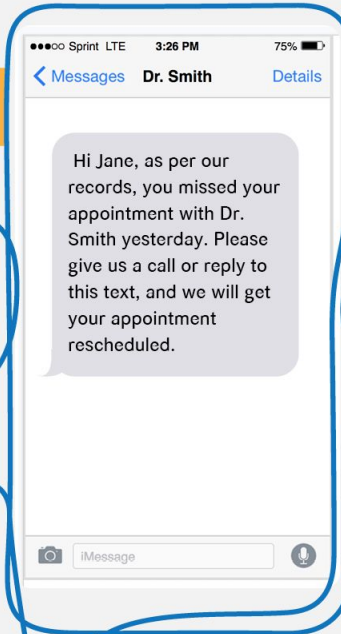


# 1. Reactivation for Cancelled & No Show Appointments Not Rescheduled

## List Criteria:

The screenshot shows a search interface with two sections. The top section is titled 'Create an individual list' and has a dropdown menu set to 'All Appointments Dev.'. Below this, it states 'This search will produce approx. 41 results'. Under 'Optional filters:', there are two filters: 'Appointment date (range ...)' with a value of '-2, -1' and 'Appointment Status Id' with a value of '9'. The bottom section is also titled 'Create an individual list' and has a dropdown menu set to 'All Appointments Dev.'. It states 'This search will produce approx. 4 results'. Under 'Optional filters:', there is one filter: 'No Show date (range offset)' with a value of '-2, -1'.

## Sample Message



## 2. Patient Retention Reactivation

### List Criteria:

The screenshot displays two identical search criteria panels. Each panel has a dropdown menu set to 'All Appointments Dev.' and a 'remove' link. The first panel shows 'This search will produce approx. 3,721 results' and 'Optional filters: Add another filter'. It includes two filter inputs: 'Appointment date (range ...)' with values '-500, -365' and 'Non-cancelled appointme...' with value '1'. Below these is a radio button selection for 'Subtracted'. The second panel shows 'This search will produce more than 10,000 results' and the same filter inputs, but with the 'Appointment date' values set to '-364, 180'.

### Sample Message

“Hi, this is Dr. Smith from Wellness Medical Practice. Your health is our top priority, and I wanted to reach out to let you know it has come time for your annual wellness visit. Please press 1 to connect to the front desk and reschedule your appointment.”



### 3. Care Protocol Reactivations

#### List Criteria:

Create an individual list  
remove

All Appointments Dev. ▼  
This search will produce approx. 0 results

Optional filters: Add another filter

Appointment date (range ...) ▼ -500, -120  
remove

Non-cancelled appointme... ▼ 1  
remove

CPT Code ▼ 66989, 66991  
remove

Add new search to be:  Added  Subtracted  Intersected

---

Create an individual list  
remove

All Appointments Dev. ▼  
This search will produce approx. 0 results

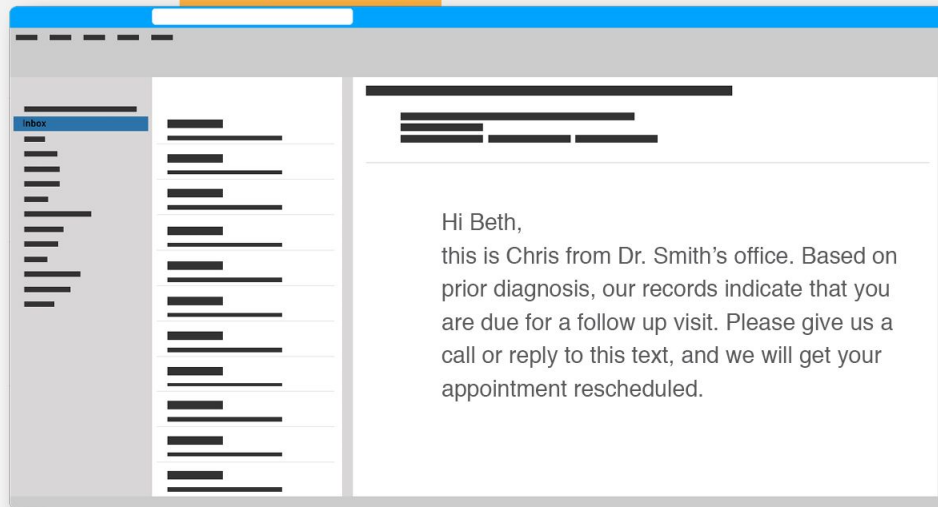
Optional filters: Add another filter

Appointment date (range ...) ▼ -119, 150 remove

Non-cancelled appointme... ▼ 1 remove

Alt Doctor ID ▼ × Dr. Consult Heimmel × remove

#### Sample Message



## 4. Pre & Post Appointment Workflow Automation

PRE APPT.

 **RALEIGH**  
OPHTHALMOLOGY, P C

### Important Information About Your Cataract Evaluation

Thank you for choosing Raleigh Ophthalmology for your cataract evaluation. Please prepare for your appointment on **(small\_date)** at **(time)** by watching the attached video link.

As a reminder, stop wearing soft contact lenses at least two weeks before your evaluation and hard contact lenses at least three weeks before your evaluation.

Please plan on at least 2 hours 30 minutes for your evaluation appointment.

We look forward to welcoming you to our office.



POST APPT.

 **RALEIGH**  
OPHTHALMOLOGY, P C

### Important Information About Your Cataract Evaluation

Thank you for choosing {Practice Name} for your Cataract Evaluation. We are looking forward to assisting you along this journey!

After your visit with (Dr. Name), you can expect a call from one of our board certified clinicians to walk through the best options for you.

Please take a moment to review the video below that will outline {Practice Name} recommendations based on your evaluation.

If you have any questions do not hesitate to contact us!



VITAL INTERACTION™

## 5. Targeted Bulk Sending Campaigns



**BREAST  
CANCER  
AWARENESS MONTH**

Create an individual list

All patients ICDCodes 2  
This search will produce approx. 826 results

Optional filters: [Add another filter](#)

Appointment type: Mammogram [remove](#)

Add new search to be:  Added  Subtracted  Intersected


Create an individual list

All patients ICDCodes 2  
This search will produce approx. 571 results

Optional filters: [Add another filter](#)

Appointment date (range offset): 0, 90 [remove](#)

[+ Add a new operation \(optional\)](#)



ADSC E-LIN *Approved* FOREVER YOUNG AND CLEAR

FOREVER YOUNG AND CLEAR MEMBERSHIP (MINIMUM 4 MONTHS)

In-Office Treatments **\$199** per month (Choose one per month)

- IPL
- LHR (2 small or 1 medium area)
- Chemical Peel
- Microneedling (MN)
- Diolite (10 sun spot max)

Save hundreds of dollars when you upgrade to any of the Packages:

- PRP + MICRONEEDLING x 4
- Matrix Level 2 x 4
- Agnes + Vivace x 2
- Vivace + Matrix Level 1 x 3

Other Treatments 20% off

Sprint LTE 11:50 AM 75%

< Messages Dr. Smith Details

It's save your vision month! Schedule a regular exam and learn how to avoid eye strain. Call 555-555-0912 to schedule an appointment.

MARCH IS SAVE YOUR VISION MONTH

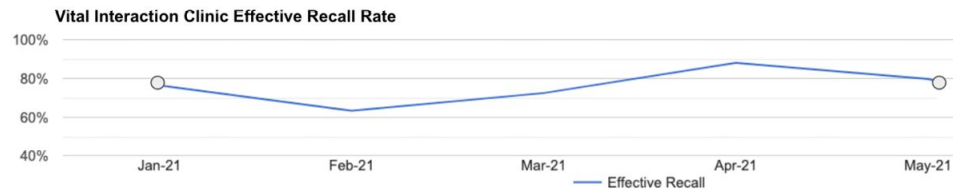


Eyes are an important part of your health.

Message input field with camera icon and microphone icon

# Reporting

Month	Jan-22	Feb-22	Mar-22	Apr-22	May-22
Total Future Appointments from Recalled Patients	244	185	332	562	118
Total Recalls	319	292	458	638	148
Recall % (No Baseline information available)	76.5 %	63.4 %	72.5 %	88.1 %	79.7 %



Category	Count	Percentage
Previous Family App	0	0%
Inbound Call Back	2	5.71%
Cancelled/Resch in PM System	1	2.9%
Scheduled After Reminder Time	4	11.43%
Do Not Send Message	0	0%
<b>Total:</b>	<b>35</b>	<b>100%</b>

