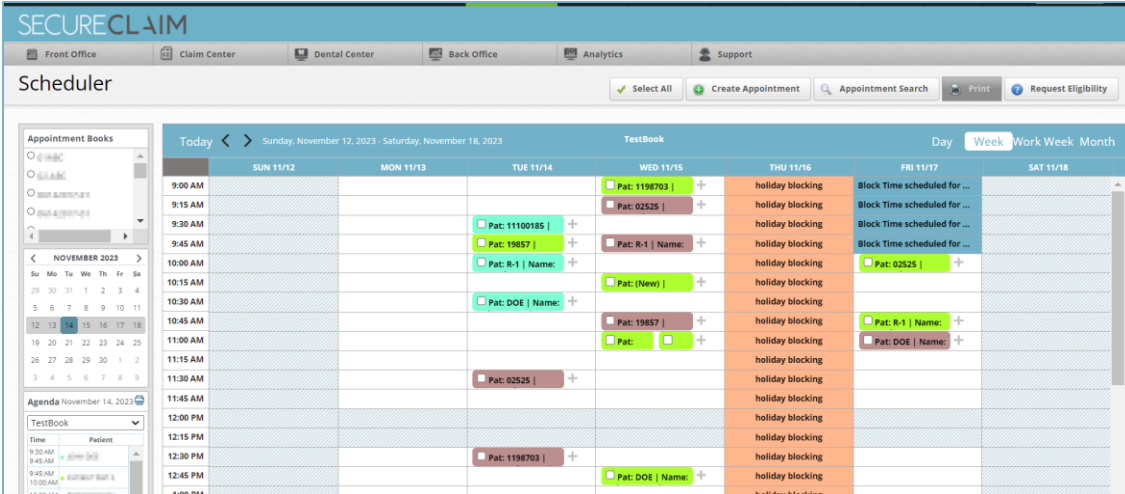


Improved Appointments Book and Receive Confirmations through Text Messaging

Appointment Scheduler: New Look & Improved Functionality

The SecureClaim Appointment Scheduler has been updated to provide a fresh, modern look with **new** and **improved** features. These improvements make schedule management easier and more efficient.

Get better visualization of the day's schedule, make appointments faster and easier, connect with your patients for confirmations and reminders, and much more with SecureClaim's fully revamped **Appointment Scheduler**. Keep reading to see all the improvements and new features the new Scheduler offers to keep your practice running smoothly and more efficiently than ever!



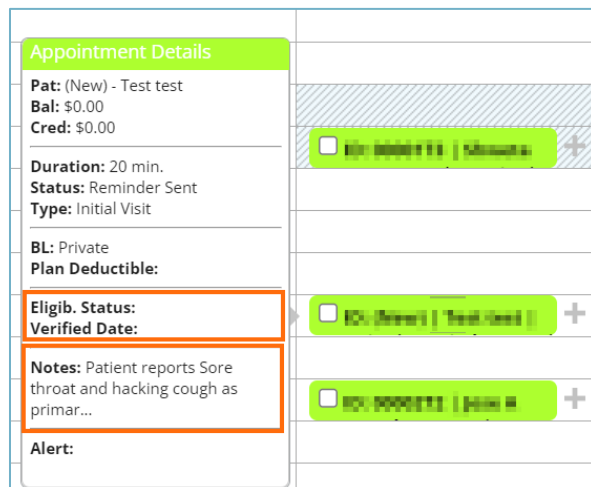
| Today < > | SUN 11/12 | MON 11/13 | TUE 11/14 | WED 11/15 | THU 11/16 | FRI 11/17 | SAT 11/18 |
|-----------|-----------|-----------|--------------------|--------------------|------------------|------------------------------|-----------|
| 9:00 AM | | | | Pat: 1198703 + | holiday blocking | Block Time scheduled for ... | |
| 9:15 AM | | | | Pat: 02525 + | holiday blocking | Block Time scheduled for ... | |
| 9:30 AM | | | Pat: 11100185 + | | holiday blocking | Block Time scheduled for ... | |
| 9:45 AM | | | Pat: 19857 + | Pat: R-1 Name: + | holiday blocking | Block Time scheduled for ... | |
| 10:00 AM | | | Pat: R-1 Name: + | | holiday blocking | Pat: 02525 + | |
| 10:15 AM | | | | Pat: (New) + | holiday blocking | | |
| 10:30 AM | | | | | holiday blocking | | |
| 10:45 AM | | | Pat: DOE Name: + | | holiday blocking | | |
| 11:00 AM | | | | Pat: 19857 + | holiday blocking | Pat: R-1 Name: + | |
| 11:15 AM | | | | Pat: + | holiday blocking | Pat: DOE Name: + | |
| 11:30 AM | | | Pat: 02525 + | | holiday blocking | | |
| 11:45 AM | | | | | holiday blocking | | |
| 12:00 PM | | | | | holiday blocking | | |
| 12:15 PM | | | | | holiday blocking | | |
| 12:30 PM | | | Pat: 1198703 + | | holiday blocking | | |
| 12:45 PM | | | | Pat: DOE Name: + | holiday blocking | | |
| 1:00 PM | | | | | holiday blocking | | |

Faster and More Responsive Interface

The newest update includes software improvements to reduce load times and improves the application responsiveness, for a more seamless user experience. Complete scheduling and move between tasks quickly and easily.

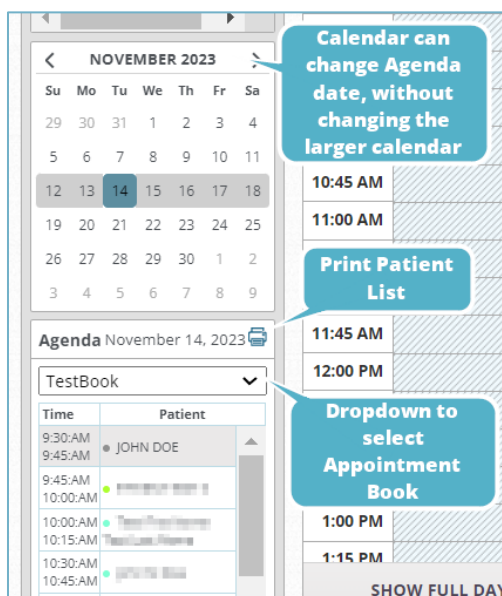
Improved Tooltips

The “hover over” tooltip menu has been improved to include the eligibility **Verified Date** and **Appointment Notes**. Quickly see important details without having to open the appointment window



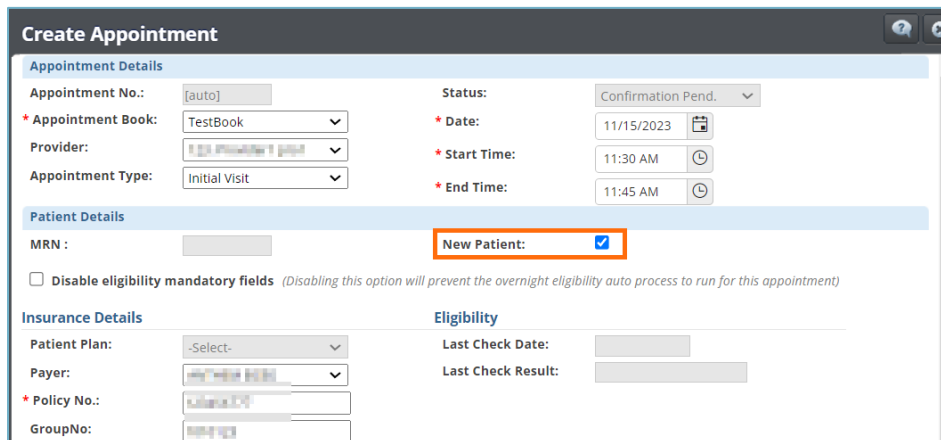
Agenda Sidebar

The **Agenda** calendar and sidebar allow you to select an appointment book and show a quick-view patient calendar for any selected date. This allows you to more easily view the patient list for an alternate appointment book to compare, or the same appointment book on a different date. You can even print the list of patients from the agenda list by using the quick print icon.



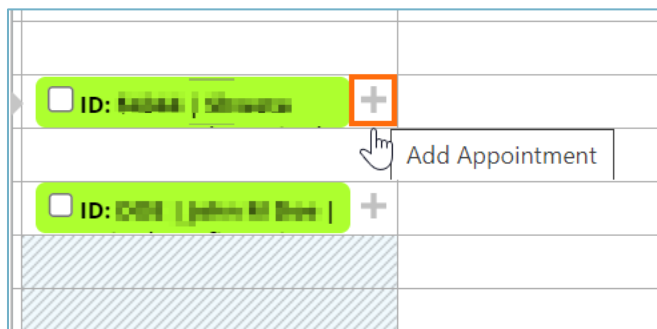

Create Patient from Appointments

Streamline your workflow by creating new patients directly from appointments. Save time and eliminate the need for additional manual data entry.



Add More Appointments with the + Icon

Need to add multiple appointments in a single time slot? The new + icon allows you to effortlessly add as many appointments as needed to a single slot, ensuring you make the most of your schedule.



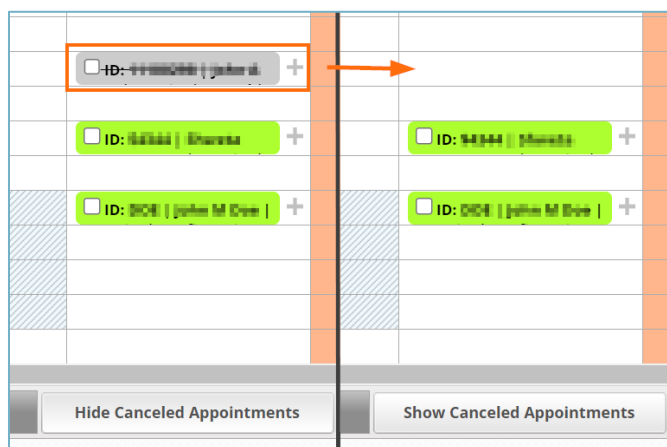
Holidays Displayed in Scheduler

Holidays and **Block Time** are now clearly labeled in the Scheduler time slots. Stay organized and avoid scheduling conflicts during these busy times. Holidays and Block time show the labels that you give them during setup, so you don't have to look at Back Office to know the reason for the holiday or time block.

| INMEDIATA | | Day | | Week | Work |
|-----------|--|--------------|---|------|------|
| | WED 11/27 | THU 11/28 | FRI 11/29 | | |
| | | Thanksgiving | Half Day Vacation | | |
| | | Thanksgiving | Half Day Vacation | | |
| | <input type="checkbox"/> ID: 11111111 + | Thanksgiving | Half Day Vacation | | |
| | | Thanksgiving | Half Day Vacation | | |
| | <input type="checkbox"/> ID: 111111 + | Thanksgiving | Half Day Vacation | | |
| | | Thanksgiving | Half Day Vacation | | |
| | <input type="checkbox"/> ID: 1111 john + | Thanksgiving | Half Day Vacation | | |
| | | Thanksgiving | Half Day Vacation | | |
| | | Thanksgiving | | | |
| | | Thanksgiving | <input type="checkbox"/> ID: 11111111 + | | |
| | | Thanksgiving | | | |

Keep or Remove Canceled Appointments

See Canceled appointments in the books to monitor changes and cancellations or streamline your view with a click and see only active appointments.



We have added a **Work Week** view to the Scheduler, giving you a more focused and streamlined view of your appointments. Easily plan and manage your week with this new view. Schedule options now include **Day**, **Week**, **Work Week**, and **Month** views.

Additionally, the **Month** view has been updated with a counter to show how many appointments are scheduled per day, giving you a quick overview of the workload.

To provide a clearer understanding of your appointments, the new Scheduler also includes better visualization options. You can now toggle between the **Show Full Day** and the new **Business Hour** view. Business Hour view highlights your available time slots within your set business hours.

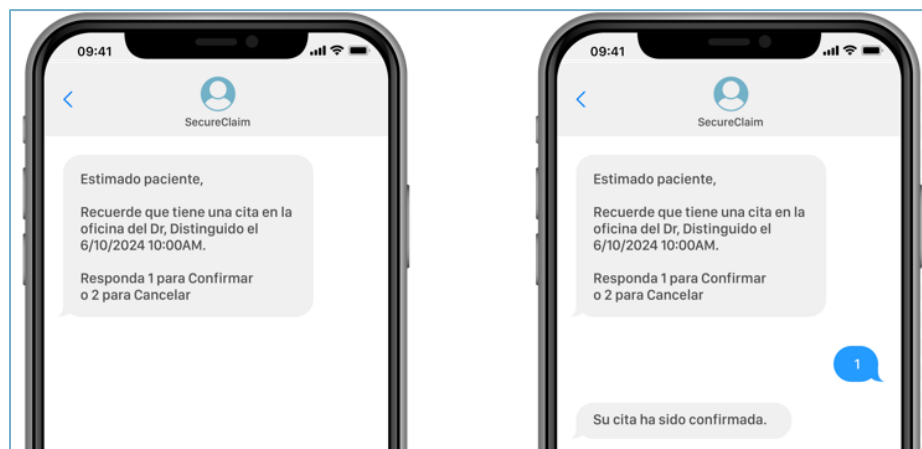


Reminder messages and appointment confirmations

In today's mobile-oriented world, texting is an important part of running your practice, as it is used to inform and remind patients about their upcoming appointments. Decrease no-shows and increase patient satisfaction by using text and email reminders.

The new feature offers an innovative and **automatic** solution for sending **confirmation messages** and appointment reminders. When an appointment is created, the system will **automatically** send a confirmation text message to the patient, notifying them that their appointment has been scheduled. This message will also be sent when the appointment date is changed, which is ideal for those times when there are schedule changes in your office and patient appointments need to be adjusted accordingly. Also, an additional reminder will be sent two days before the scheduled appointment date automatically, reducing the workload for the office staff of performing this task manually and the possibility of error due to forgetting. Reminder messages include a confirmation message that allows patients to confirm or cancel their appointment by simply choosing between options 1 for Confirm or 2 for Cancel. The patient's response to the confirmation request automatically updates the appointment status in the appointment book to "Confirmed" or "Cancelled", depending on the patient's choice of response.

Note: The **confirmation message response** is only available for **automatic reminder** two days before the appointment.



The settings for the new messaging feature are located in the **Create/Edit Appointment Book pop-up** window (Access via **Back Office > Appointment Books**, then select the desired appointment book to edit or click **Add Appointment Book** to create a new one) at the bottom of the window in the **Electronic Reminders** section.

Edit Appointment Book

Work Settings

| Work | Day | Work Start | Work End | Lunch Start | Lunch End | Max New Patients | * Max Old Patients |
|-------------------------------------|-----------|------------|----------|-------------|-----------|----------------------------------|----------------------------------|
| <input checked="" type="checkbox"/> | Sunday | 8:00 AM | 5:00 PM | 12:00 PM | 1:15 PM | <input type="text" value="100"/> | <input type="text" value="100"/> |
| <input checked="" type="checkbox"/> | Monday | 8:00 AM | 5:00 PM | 12:00 PM | 1:15 PM | <input type="text" value="100"/> | <input type="text" value="100"/> |
| <input checked="" type="checkbox"/> | Tuesday | 8:00 AM | 5:00 PM | 12:00 PM | 1:15 PM | <input type="text" value="100"/> | <input type="text" value="100"/> |
| <input checked="" type="checkbox"/> | Wednesday | 8:00 AM | 5:00 PM | 12:00 PM | 1:15 PM | <input type="text" value="100"/> | <input type="text" value="100"/> |
| <input checked="" type="checkbox"/> | Thursday | 8:00 AM | 5:00 PM | 12:00 PM | 1:15 PM | <input type="text" value="100"/> | <input type="text" value="100"/> |
| <input checked="" type="checkbox"/> | Friday | 8:00 AM | 5:00 PM | 12:00 PM | 1:15 PM | <input type="text" value="100"/> | <input type="text" value="100"/> |

Electronic Reminders

Select Reminder Templates

Appointment Reminder:

SMS: **Email:**

New & Rescheduled Appointment Notification:

SMS: **Email:**

Note: Choose a template for SMS and Email to use for Reminder Messages and Appointment Messages.

Use the drop-down menu to select the **SMS** (text) and **Email** (email) template for the appointment messages and reminders you want to use for the selected appointment book.

To view the text in the template or create a new one, click the **Reminder Template** button to go to the **Reminder Templates** settings page (this can also be found via **Application Settings > Others > Reminder Templates**) where you can edit or create templates with the desired text.



Add/Edit Reminder Message Template

| | |
|--|--|
| <p>* Template Name: <input type="text" value="SMS-REMINDER SMS"/></p> <p>* Method: <input type="text" value="SMS"/></p> <p>Email From: <input type="text"/></p> <p>Email Subject: <input type="text"/></p> | <p>* Type: <input type="text" value="Appointment"/></p> <p>SMS Confirmations: <input type="text" value="Confirm 1 Cancel 2"/></p> <p>* Message: <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">Hi, please remember your appointment: @APPTDATE]</div></p> <p style="text-align: right; color: red; font-size: small;">89 characters remaining</p> |
|--|--|

Note: Add @APPTDATE for date and time of the Appointment. Add @APPTDAY for Day of the Appointment only. SMS will include the selected SMS confirmation option.

Create Your Reminder Template

To create a reminder template:

1. Enter the name of the template in the **Template Name field**.
2. Choose the **reminder method** between SMS (text messages) or Email (email) in the **Method field**.
3. If you choose **Email**, the Email From fields will be enabled to place the sender email address and **Email Subject** to place the title of the email message.
4. Choose the Appointment reminder type from the **Type** drop-down menu,
5. Choose the type of confirmation message between English or Spanish from the **SMS Confirmations** drop-down menu.
6. Type the text of the message in the **Message field**.
7. Our intelligent character counter will perform a message size calculation to ensure it fits in a standard SMS message, even with the use of the date options (@APPTDATE for date and time or @APPTDAY date only).
8. When you're done, click on the **Save** button and the template will be created.
9. It can then be chosen in the settings of the appointment book of your preference.

Please remember: the **confirmation message response** is only available for **automatic reminder** two days before the appointment.





Try SecureClaim's New Appointment Scheduling Features Today!

Managing your appointments has never been simpler with SecureClaim's innovative appointment book functionality. Discover the updated design, improved tools, and increased efficiency. Use the new version today!

