

July 22 - JComm: Custom Reminders, Instant Sends, and Newsletter Design using CanvaNew Page

The video provides an overview of recent system updates and demonstrates advanced techniques for automating patient communication using JCOM.System Updates

- **Charting Enhancements:** Practitioners can now set a default chart template and enable multiple templates to choose from during a patient encounter. Note that currently, once a template is enabled, it cannot be deselected.
- **Bulk Faxing:** Users can now select and fax multiple documents simultaneously from a patient's profile. The system currently supports sending these to a single recipient.

Feature Title: Practitioner-Selectable Chart Templates

Problem Solved: Practitioners were previously subjected to all available chart templates every time they charted, creating unnecessary clutter for those who only use specific templates.

Core Functionality: Practitioners can set a default chart template that loads automatically when opening a patient chart. Additional allowed chart templates can be toggled via an "enabled" state and manually added to an active session via a plus (+) menu on the charting dashboard.

Technical Implementation / Config:

- Navigate to **Practitioner Profile > Chart Templates**.
- Toggle the **Default** setting for the primary template.
- Toggle the **Enabled** setting for secondary allowed templates.

Caveats & Limitations:

Once an enabled template is added to an active charting session, it cannot currently be deselected or removed from that session.

Missing Technical Detail: The speaker referenced a future update to enable deselecting templates but did not explain implementation steps.

keywords: chart templates, default charting, practitioner profile, EHR, workflow

Feature Title: Bulk Document Faxing

Problem Solved: Transmitting multiple patient records or forms via fax required individual, repetitive single-document fax actions. **Core Functionality:** Users can now select multiple documents simultaneously from a patient's profile and execute a single batch fax action.

Technical Implementation / Config:

- Go to **Patient Profile > Documents**.
- Use individual checkboxes next to target files or select the top **Select All for Fax** option.
- Click **Fax** in the bottom action menu to launch the outbound fax window.

Caveats & Limitations:

The batch outbound fax can only be sent to a single recipient (e.g., one specific pharmacy or clinic) per action; it does not support multi-recipient broadcasting.

keywords: bulk fax, document management, patient records, electronic fax, batch action

Feature Title: Remote Visit Appointment Type & Dynamic Location Field

Problem Solved: Booking telehealth or off-site visits lacked designated appointment classification and automated location details in patient notifications.

Core Functionality: Adds a dedicated **Remote** visit type to appointment scheduling. Selecting this type renders a manual location field that dynamically populates into automated patient appointment reminders.

Technical Implementation / Config:

- Open appointment details in the **Home Schedule**.
- Set the visit type drop-down to **Remote**.

- Enter specific meeting details or URLs into the dependent **Location** input field.

keywords: remote visits, scheduling, appointment reminders, telehealth, location tags

Feature Title: Multi-Stage & Secondary Patient Reminders (JCOM)

Problem Solved: Native system settings only allow a single default appointment reminder, limiting a clinic's ability to send cadence-based follow-ups or preparation instructions.

Core Functionality: Uses JCOM to schedule secondary email or SMS reminders triggered by upcoming scheduled appointments.

Technical Implementation / Config:

- Navigate to **JCOM (Megaphone icon) > New Campaign > Select Email or Text.**
- Set **Trigger** to `Every Appointment`.
- Configure **Scheduling / Send On** settings (e.g., `2 days prior`, `1 day prior`).
- Ensure the **One sent per patient** checkbox is **UNCHECKED** to ensure recurring notifications for ongoing patients.
- Add dynamic message variables using system **Go Tags** located beneath the body text area.
- Set **Start Date** to today or a future date and check **Ongoing**.

Caveats & Limitations:

Campaign start dates cannot be backdated.

Day-of execution (e.g., sending at 7:00 AM on the appointment day) risks delayed delivery due to automated batching queues; 1–3 days prior is required for reliable delivery.

Best Practices

Uncheck **One sent per patient** so returning patients receive reminders for subsequent bookings.

Schedule reminders 1–3 days prior to the appointment date to avoid batch processing delays on the morning of the visit.

Use secondary reminders to deliver specific pre-visit details such as parking, clinic intake protocols, or required items.

keywords: JCOM, appointment reminders, automated campaigns, go tags, scheduling triggers

Feature Title: Service-Specific & Product-Specific Automated Campaigns (JCOM)

Problem Solved: Generic communication fails to provide targeted intake documentation or post-purchase care instructions tailored to specific services or retail items.

Core Functionality: Triggers automated campaigns targeted either by specific scheduled services/categories or by invoiced products.

Technical Implementation / Config:

- **For Scheduled Items (e.g., Initial Assessments):**

- Set Trigger to `Scheduled Item` or `Scheduled Item Category`.
- Input the specific **Item Number / Code** and click **Go** to confirm.
- Set **Send On** timing (e.g., `2 days prior`) to allow time for intake form completion.

- **For Invoiced Items (e.g., Product/Equipment Purchases):**

- Set Trigger to `Invoiced Item` or `Invoiced Item Category`.
- Input the target **Product Item / Code**.
- Set **Send On** timing to post-purchase metrics (e.g., `1 day after` or `2 weeks after`).

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# Example Configuration Logic:
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Trigger Type: Scheduled Item
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```
Item Code: [PHYSIO-EVAL-01] -> Click [Go]
```

```
Send On: 2 Days Prior
```

```
One Sent Per Patient: Unchecked
```

```
Status: Ongoing
```

Caveats & Limitations:

Campaigns only support **one** item/product code per campaign rule. Multi-service coverage (e.g., distinct Physio, Chiro, and Massage initial visits) requires creating individual, separate campaigns for each item code.

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keywords: item triggers, invoice triggers, targeted campaigns, intake forms, post-care instructions
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Feature Title: Custom Field-Based Audience Targeting (JCOM)

Problem Solved: Lack of instant campaign triggering for static patient attributes can be bypassed by segmenting audiences based on profile custom fields.

Core Functionality: Filters patient audiences using mandatory custom profile fields (e.g., drop-down selections) to route targeted automated communications.

Technical Implementation / Config:

1. Field Creation:

- Navigate to **System Settings > System Entities & Types > Custom Fields**.
- Click **Add Field**, set type to **Drop-down**, define options, and enable **Include in Portal** as **Mandatory**.

2. List Generation:

- In JCOM, create a new **Patient List**.
- Scroll to **Custom**, select the created custom field, and select the target drop-down value.

3. Campaign Setup:

- Set Audience to the newly created Patient List.
- Set Trigger to `Custom Date Range`.
- Set Scheduling to `Day of`.
- **CHECK** the **One sent per patient** option.

Best Practices

Always use **Drop-down** control types rather than single-line text boxes for custom fields to eliminate casing/spelling mismatches during list filter evaluations.

Check **One sent per patient** for custom field attribute campaigns to prevent sending the same informational campaign repeatedly.

keywords: custom fields, patient segmentation, audience lists, custom date range, patient portal

Feature Title: Image-Based HTML Newsletter Embedding (Canva Integration)

Problem Solved: Native JCOM text editors lack advanced layout, branding, and graphical capabilities for newsletters, and raw HTML/source code imports from third-party tools are no longer supported.

Core Functionality: External graphic design assets (e.g., Canva templates) can be embedded into JCOM campaigns via formatted image files.

Technical Implementation / Config:

1. Design assets in external software (e.g., Canva) using free or standard templates.
2. Export/Download the completed asset as a `.JPG` or `.PNG` file.
3. In JCOM, open the campaign text body editor.
4. Go to **Insert > Image > Upload** the local `.JPG`/`.PNG` file.
5. Format image alignment (e.g., Center) and add supplementary hyperlinked plain text below the image if necessary.

keywords: Canva, image upload, newsletters, HTML campaigns, marketing templates

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