Invitations

- Set preferences prior to the first-time using Invitations.
  - See separate documentation, Clinical and Clerical Staff Personalization, for instructions on setting preferences.

Navigating Invitations:

- The Invitations toolbar includes the following buttons:

Button	Name and Action
🖨	**Generate Communications:** Generates printed letters or electronic messages for all patients who are due for a letter and are included as part of the currently-selected tab and advanced filter.
📊	**Status:** Displays the client-defined tracking statuses for the program and allows you to update the tracking status for the selected patient.
🖌	**Export:** Creates a .CSV file in the selected drive with the selected patients and data from all columns, including columns not currently active, in the tracking list.
📄	**View Documents:** Displays the letters generated on the tracking instance in reverse-chronological order. You can reprint the letters from this window.
📜	**View History:** Shows the history of changes made to that invitation.
🔍 Find	**Find Patient:** Opens Patient Search and allows you to create a patient-specific program tab.

- **Note**: The View Documents and View History buttons are only available when viewing single patients.
- **Do not use the Schedule button**.
  - This button is an old feature no longer supported.

Creating Invitations for multiple patients:

1. On the main toolbar, Click on [Invitations]
2. Click the dropdown arrow and select a **Program**.
3. Change the Display Date if needed.
4. A list of patients with the selected Program due will display.
   a. Patients Without History tab will show a list of patients who have not yet had the specified visit documented.
5. To send an Invitation to **all** Due or Overdue patients, do **not** select any patients on the list. Communications will be generated for all patients.
   a. To select patients from the list, check the box next to the Patient Name to select the Patient(s) you would like to generate an Invitation for.
6. Click **Generate Communication**.

a. Invitations will be sent, by default, to the patient portal if available.
b. If the patient does not have a portal, select a Printer to print the letter(s).

7. When Generating Communications, a status bar will appear at the bottom right of the screen. It will fill up with a green color when the communication has been generated.

| Printing/sending complete | [green bar] | Messages Sent: 1 / Letters Printed: 0 |

> If generating Invitations for all patients, only 25 letters will print at a time, you must click Next to proceed to printing the next set.

Creating an Invitation for a specific patient:

Invitations may be printed for a specific patient when needed.

1. Click on **Find Patient**.
2. **Check the box** to select the desired Invitation.
3. Click **Generate Communications**.
   a. Invitations will default to be sent to the patient portal if available.
   b. If the patient does not have an active portal, select a printer to print the Invitation(s).

> Generate Communications is only available within 60 days of the Recommendation Due Date if the Recommendation Status displays Not Due Until. Generate Communications is available if the Recommendation Status is in a Due or Overdue state.

Changing Tracking Status:

Tracking Status will be updated automatically once a patient has qualified or after a letter is sent. There may be instances that Tracking Status needs updated manually.

1. Check the box to select a patient or select the row itself. (You can select multiple patients).
2. Click the **Status** in the **Tracking Status** column and select the appropriate tracking status from the list.
   a. If you select multiple patients, click Status on the toolbar and select the appropriate status from the list.
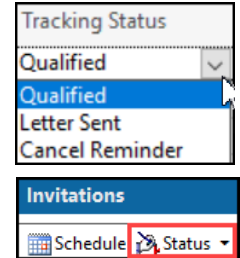
Viewing Sent Invitations and Reprinting Invitations:

Invitations that have been created can be viewed and reprinted from either Documentation or Invitations.

- **Viewing from Documentation**:
    1. Navigate to **Documents** on the Ambulatory Workflow or **Documentation** on the Menu.
    2. Click on the **Health Maintenance Reminder Patient Letter** to view the Document.
    3. If needed to reprint, click on the **Print** button or icon.
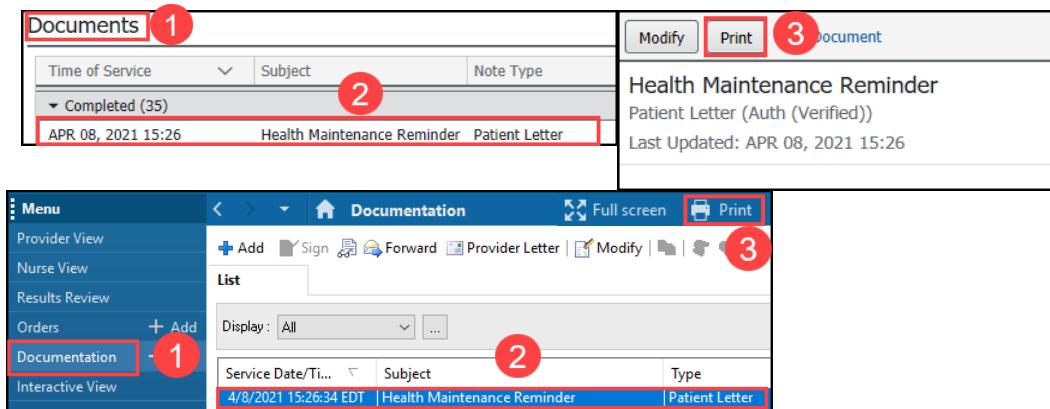
- **Viewing from Invitations**:
    1. Click **Find Patient**.
    2. Select the **Program**.
    3. Click **View Documents**.
    4. A list of Documents will show in bottom portion of the screen.
    5. **Double click** on the **Document** to open.
    6. If needed to reprint, click on the **Print** icon within the open Document.