Communications

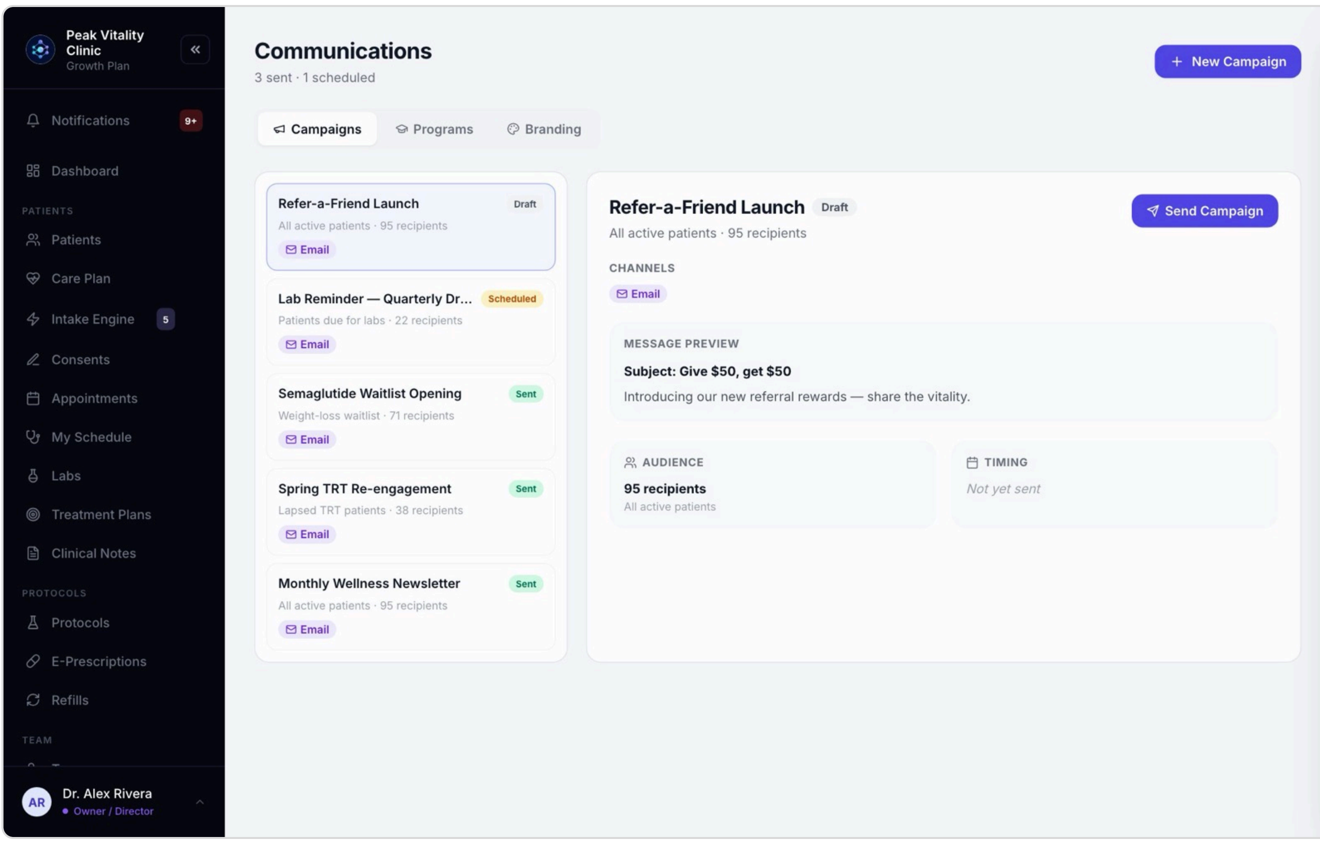
Send one message to a group of patients, build courses patients work through in their portal, and set how your emails look.

Page manual · For Owners, Managers · aminova.health/university/communications

1. THE PAGE AT A GLANCE

Communications has three tabs. **Campaigns** are one message sent to many patients at once. **Programs** are courses each patient works through in their portal, one part at a time. **Branding** is how your campaign emails look.

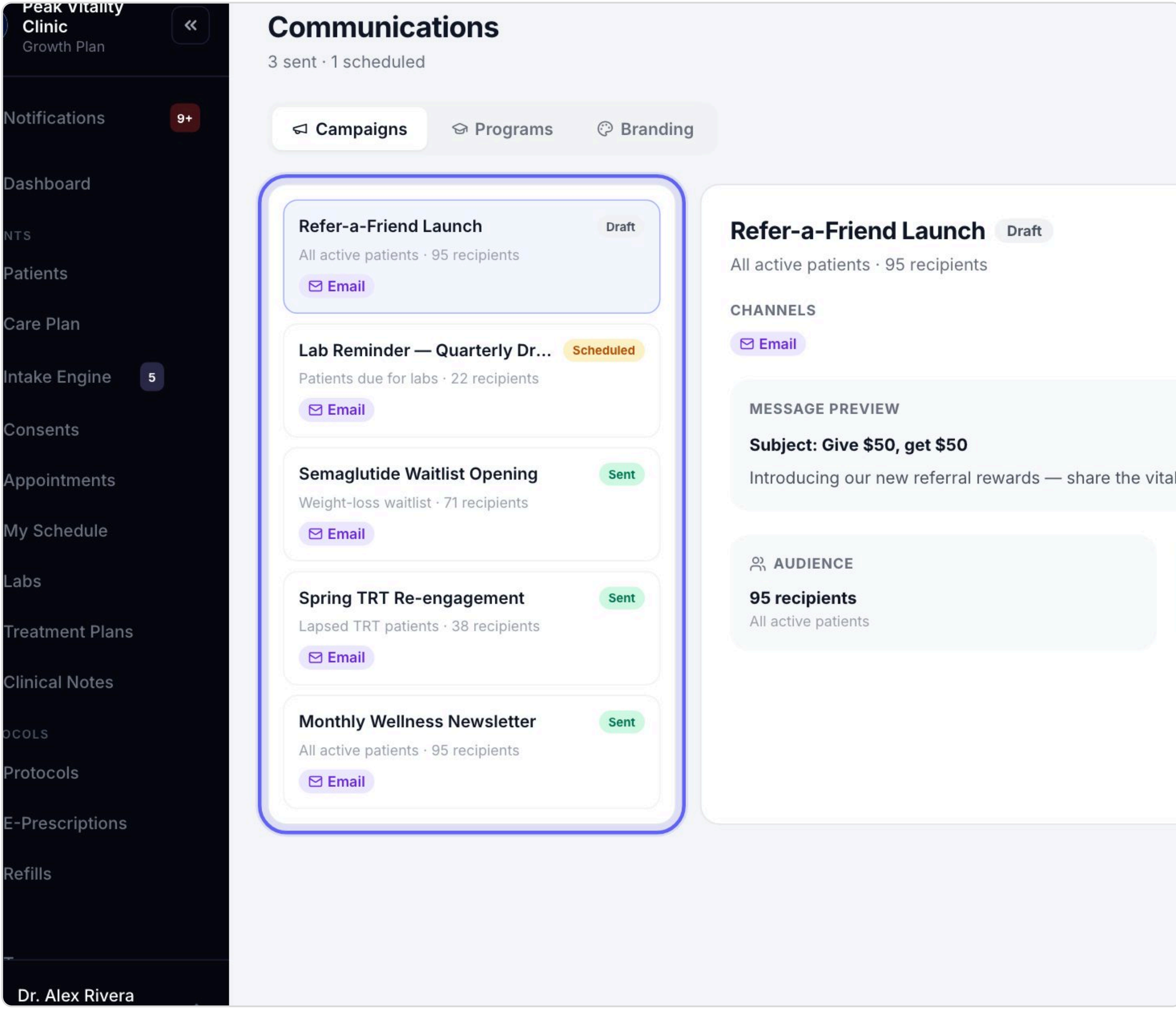
Only owners and managers can use this page. Anyone else who opens it sees one line saying so.



Communications, on the Campaigns tab.

2. YOUR CAMPAIGNS

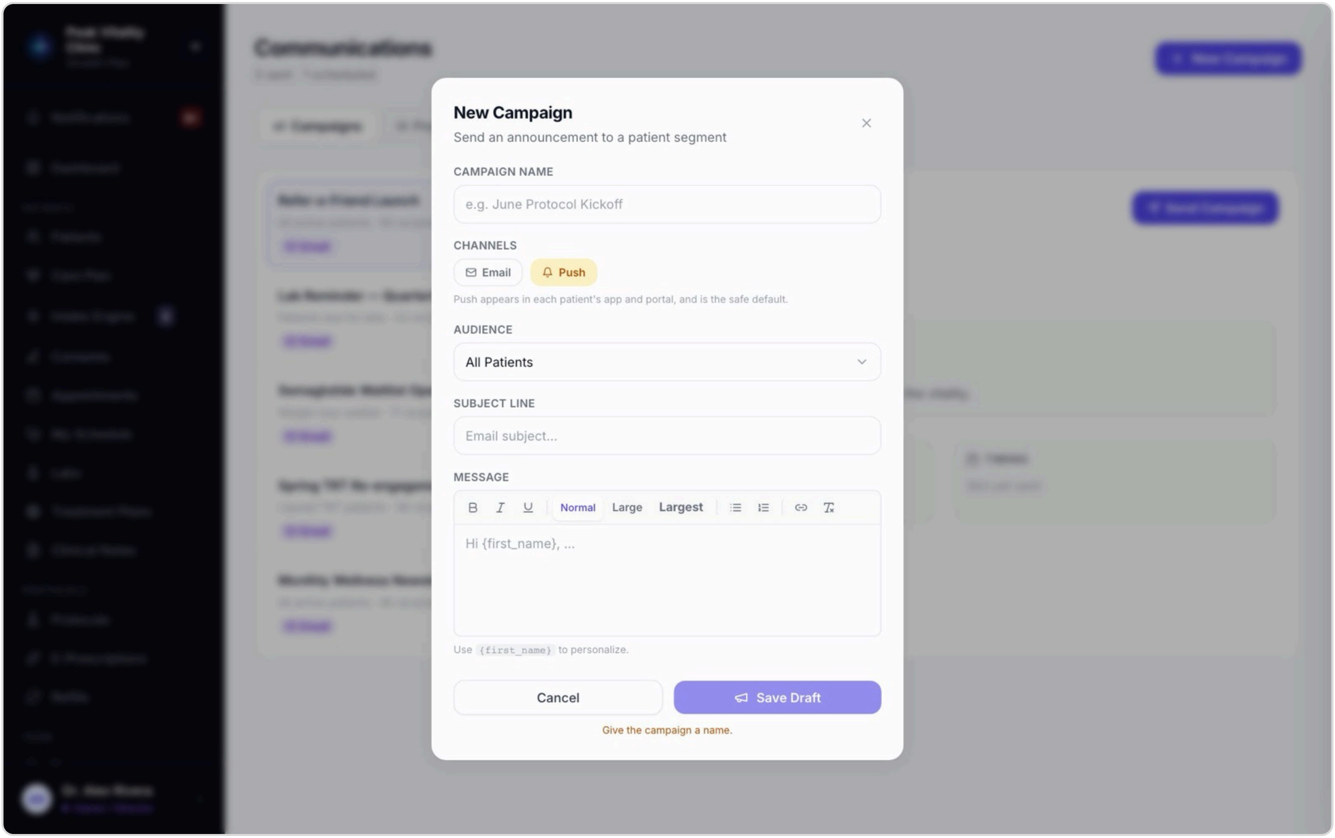
1. The list on the left shows each campaign, who it is for, how many patients that is, and how it goes out: **Push**, **Email** or both.
2. The colored tag says where it stands: **Draft**, **Sent**, **Part-sent** or **Failed**.
3. Click a campaign to open it on the right, with its **Message Preview**, **Audience** and **Timing**.



Every campaign, with who it goes to and where it stands.

3. START A NEW CAMPAIGN

1. Click **New Campaign**.
2. Type a **Campaign Name**.
3. Add a **Subject Line**. It is the title patients see, in their app or at the top of the email. With no subject line, the campaign name is used.
4. Choose the channels, the audience and the message, as the next sections show.
5. Press **Save Draft**. Nothing is sent yet.

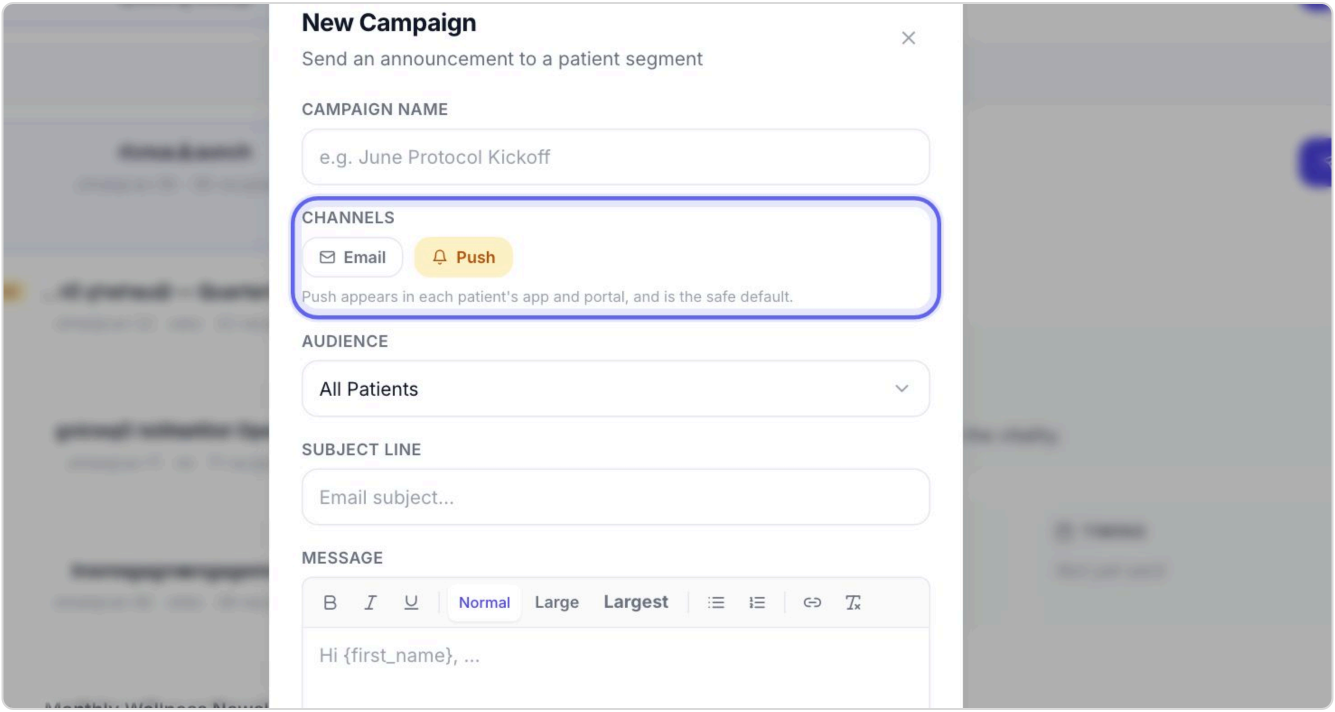


New Campaign: a name, the channels, who gets it, and the message.

> **Tip.** If **Save Draft** is grayed out, the line under it says what is missing, like a subject line or a message.

4. PUSH OR EMAIL

1. **Push** shows up in each patient's app and portal. It is picked for you, and it is the safe choice.
2. **Email** goes to the patient's inbox. Turn it on only when you need it. Email needs a **Subject Line**.
3. You can pick both.

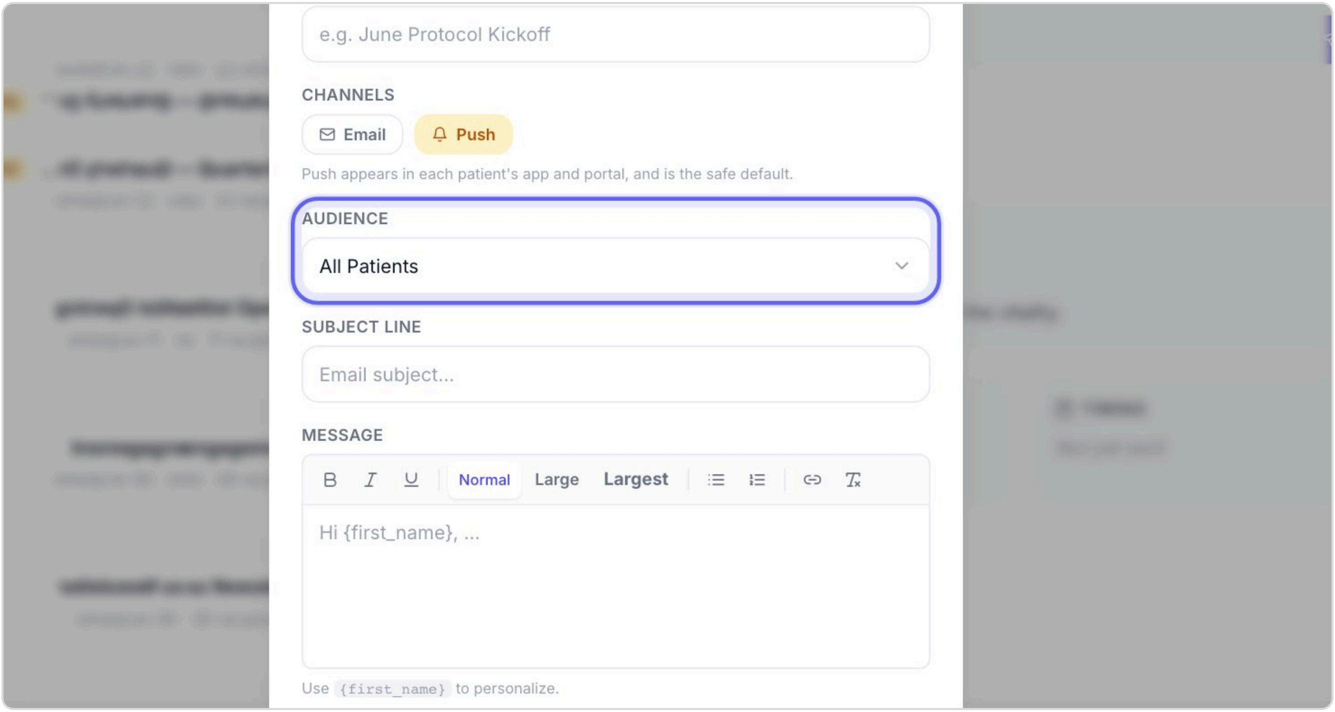


Channels: Push, Email, or both.

Tip. Sending a lot of email at once can land your clinic in spam folders, reminders included. Email only goes to patients who haven't unsubscribed, and a big send goes out in hourly batches.

5. WHO GETS IT

1. Open **Audience** and pick a group: **All Patients**, **Active Patients**, new patients, patients with a visit in the next 7 days, patients who owe money, or **Active members**.
2. Pick **Patients with an appointment on…** and choose a date to reach everyone booked that day, like when you have to close.
3. Pick **Patients on a protocol…** and choose the protocol. Only patients on it right now are included.

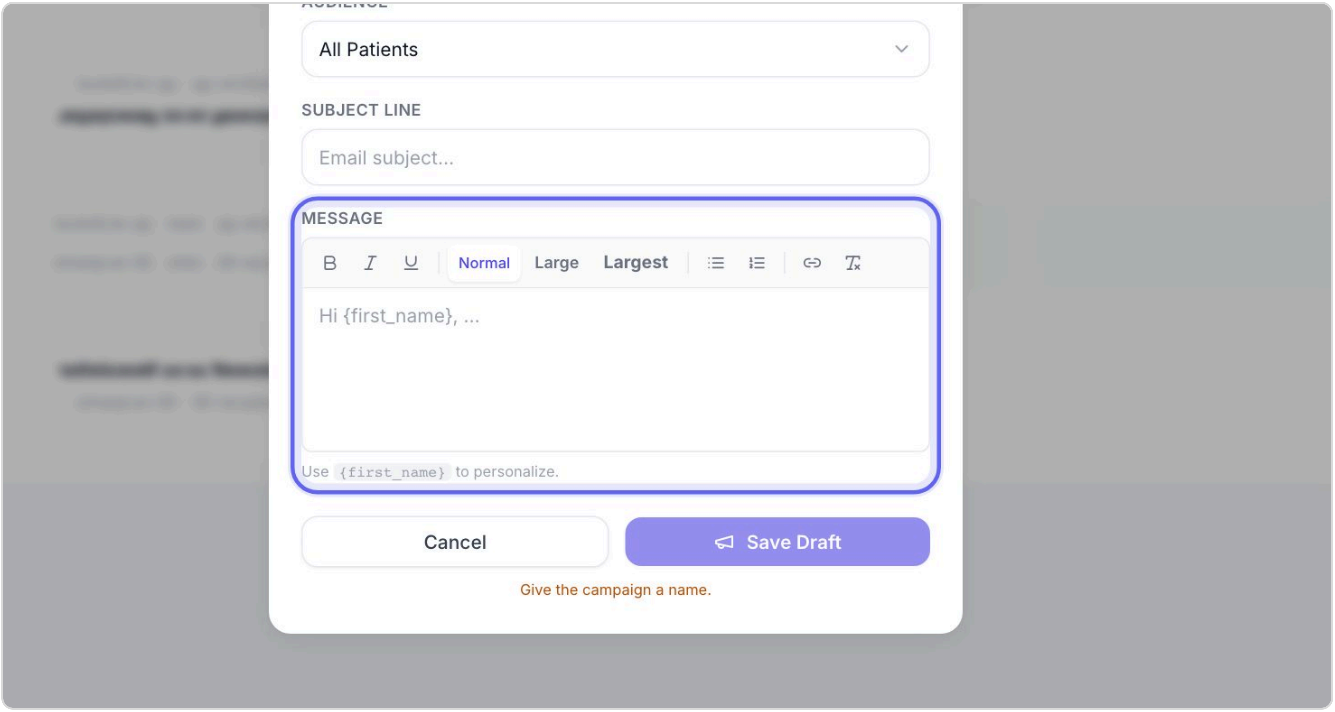


Audience: everyone, or one group of patients.

Tip. Patients who asked not to be contacted are left out on their own. So is your practice patient.

6. WRITE THE MESSAGE

1. Type your **Message**. You can make words bold, add lists and add links.
2. Type {first_name} where you want each patient's first name.
3. Email keeps your formatting. Push shows the same words as plain text.



The message box. {first_name} becomes each patient's own name.

7. CHECK IT, THEN SEND

1. Click the draft in your list and read it through on the right.
2. Press **Send Campaign**.
3. A box counts your audience again, right now, and says how it goes out. For email it also says who is left out and why.
4. Press the red **Send to** button to send. A sent message can't be taken back or changed.

> **Tip.** A very big send can stop partway. It then shows **Part-sent**. Press **Resume Send** to finish it. Nobody gets it twice.

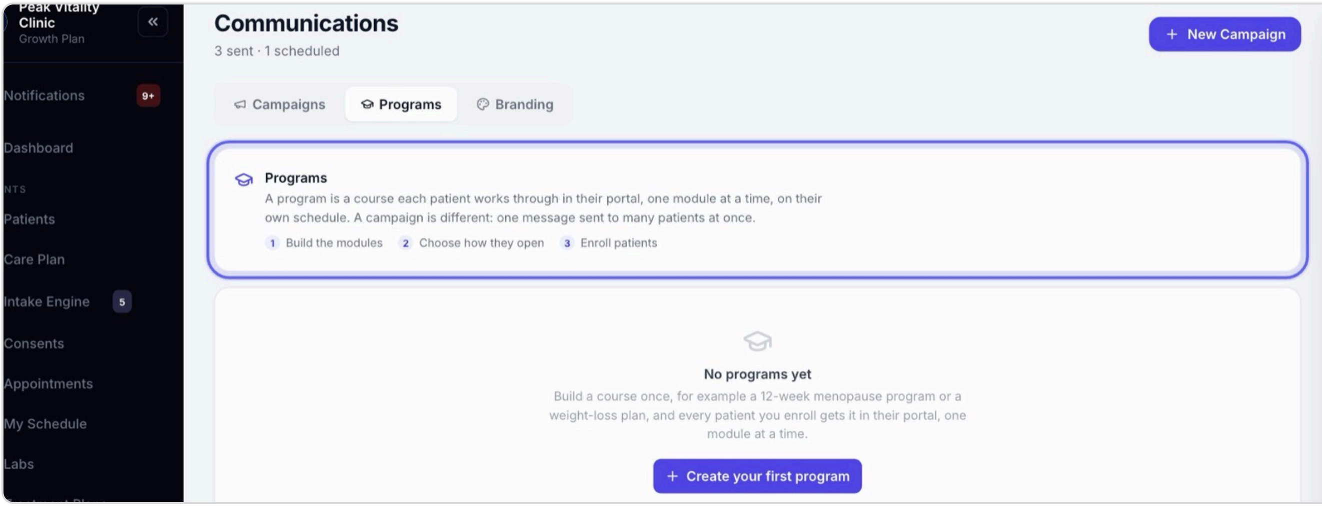
8. AFTER IT GOES OUT

1. **Delivered** is the share of the audience it reached.
2. **Reached / audience** is how many patients got it, out of how many it was for.
3. **Emails accepted** means the email was handed off to be delivered. It does not mean the patient opened it.
4. **In-app messages** is how many went to patients' apps and portals. **Not reached** counts anyone it missed.
5. If nothing went out, the campaign says **Failed**. Press **Try Again**.

9. PROGRAMS: COURSES FOR PATIENTS

A program is a course each patient works through in their portal, one module at a time, on their own clock. For example, a 12-week menopause course or a weight-loss plan.

Each program shows as a card with how its modules open, how many it has, and how many patients are active, paused or done.



Programs: build the modules, choose how they open, enroll patients.

10. BUILD A PROGRAM

1. Click **New program** (or **Create your first program**). Give it a **Name** and a short description, then press **Create and add the first module**.
2. On **Curriculum**, give each module a **Title** and its **Content**. Use **Add module** for more, and **Add a section** to group them.
3. On **Settings**, under **How modules open**, pick **Self-paced** (the next one opens when they finish the last), **Drip** (a set number of days after they join) or **Fixed dates** (the same date for everyone).
4. Press **Save program**.

11. ENROLL PATIENTS

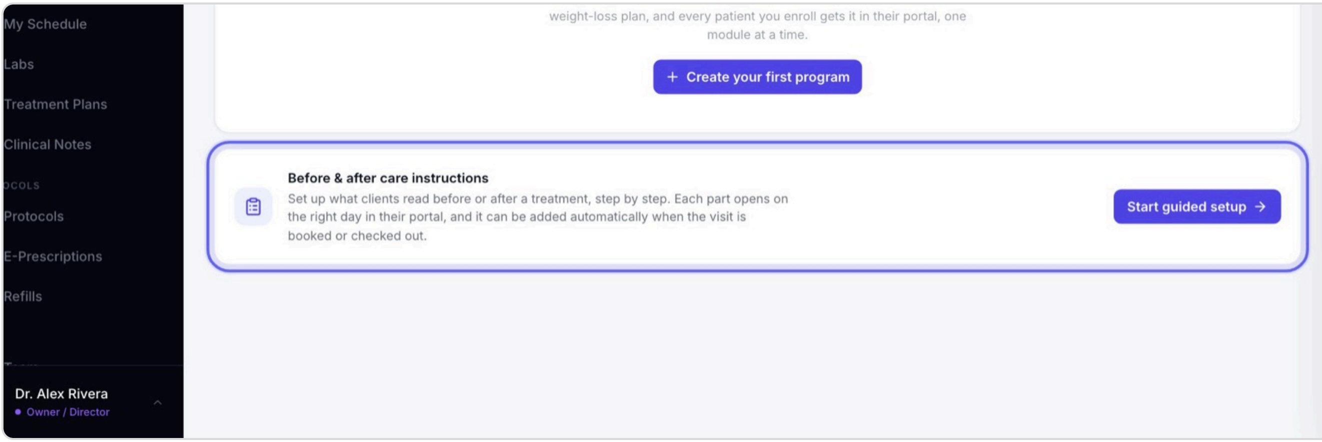
1. Open the program and go to **Enrollments**.
2. Search for the patient, pick a start date if you want one, and press **Enroll**. Leave the date empty to start today.
3. The table shows each patient's progress and last activity. Use **Pause**, **Resume** or **Unlock all modules** on their row.

Tip. A module can also email the patient when it opens. Turn on **Email this module when it opens** on that module.

12. BEFORE AND AFTER CARE INSTRUCTIONS

1. Under **Before & after care instructions**, press **Start guided setup**.
2. Name the **Treatment**, and choose **After the treatment** or **Before the treatment**.
3. Split the instructions into parts. Each part opens on its own day. Day 0 opens when the visit is checked out, or when it is booked for "before" instructions.

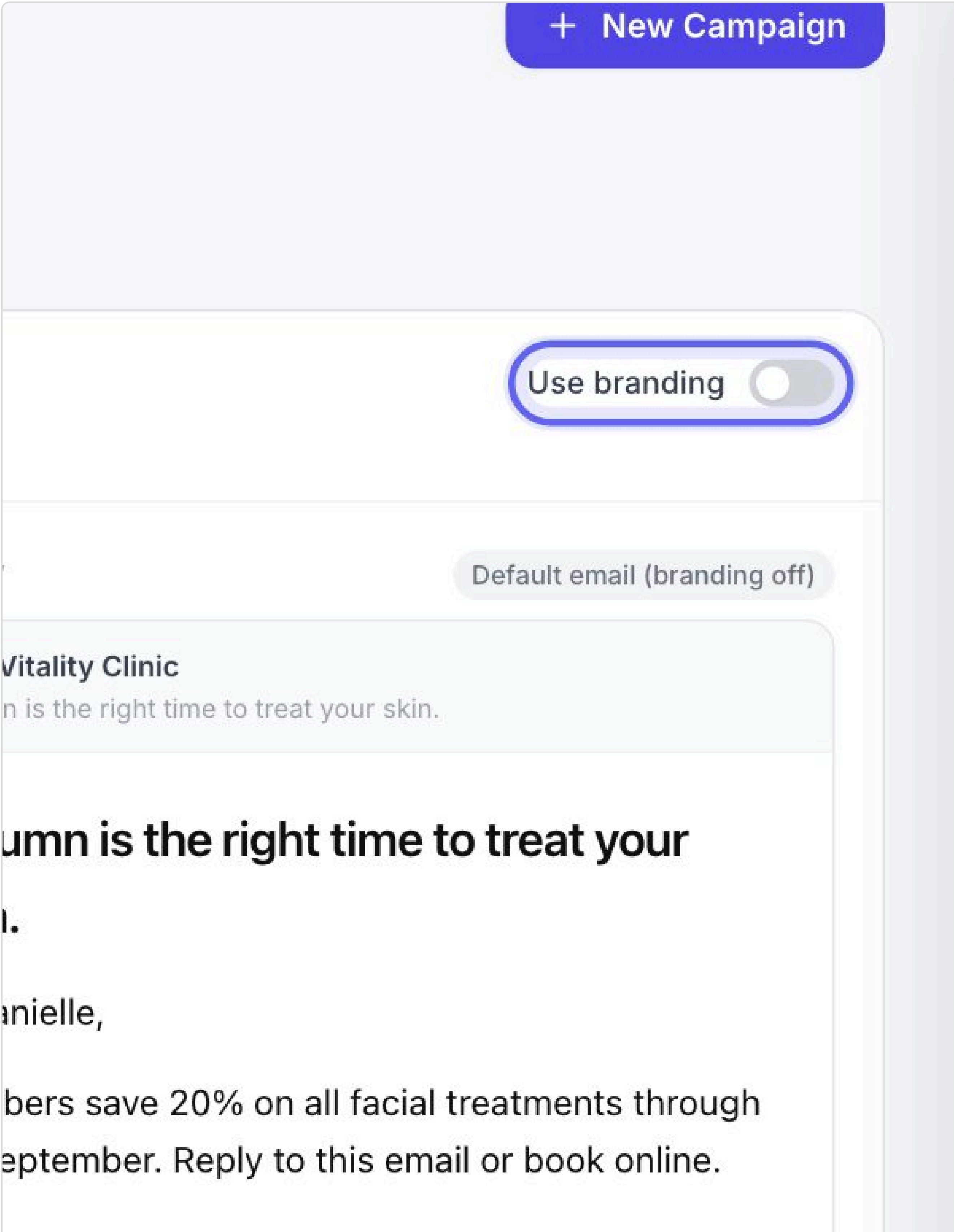
4. Tick the visit types it belongs to. When one of those visits is booked or checked out, the patient gets it in their portal on their own.
5. Check the summary and press **Create care instructions**.



Start guided setup walks you through care instructions, step by step.

13. YOUR EMAIL LOOK

1. Open the **Branding** tab and turn on **Use branding**.
2. On **Color & type**, pick a **Brand color** and a **Typeface**.
3. On **Banner**, choose the banner at the top of your emails.
4. On **Footer details**, check your **Postal address**, **Phone** and **Website**. They start from your Clinic Profile. The address is required by law in marketing email.

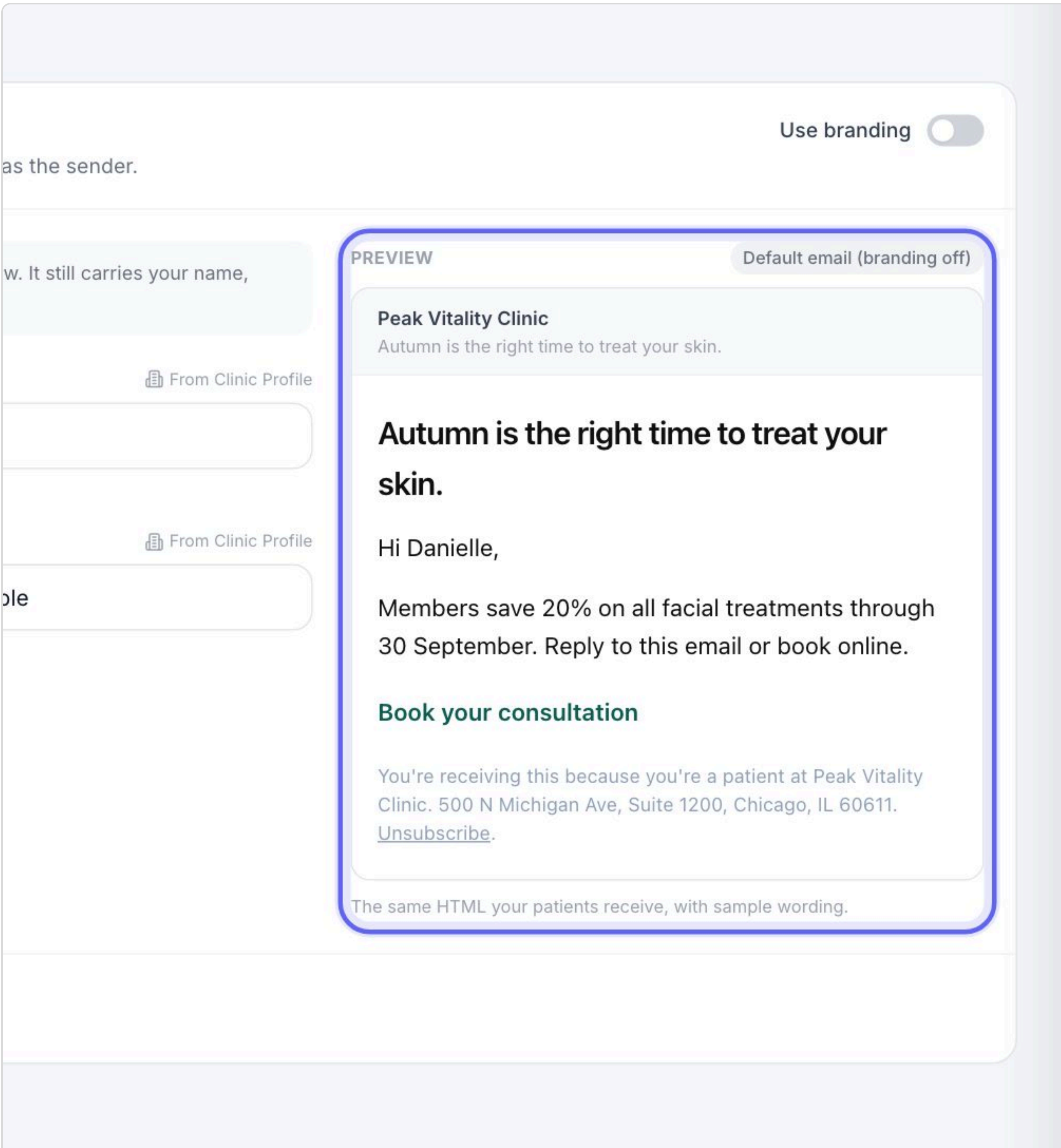


Use branding puts your color, typeface and banner on every campaign email.

Tip. With branding off, campaigns still go out as a clean, plain email with your name, footer and unsubscribe link.

14. SEE THE REAL EMAIL

On the right is the email your patients get, with sample words. It changes as you make changes. Press **Save branding** when it looks right. It is used from your next campaign.



The preview is the same email your patients receive.