

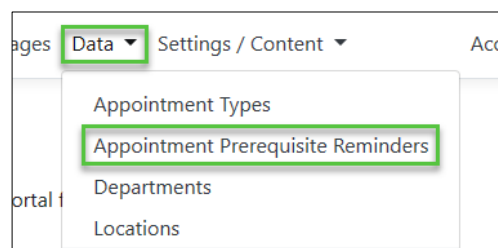
How to add or edit appointment prerequisite reminders

Scenario

This guide shows how to add and edit an Appointment Prerequisite Reminder in the My GNCR Management Portal.

Add an Appointment Prerequisite Reminder

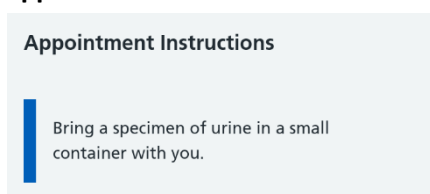
1. Select the **'Data'** menu and then select **'Appointment Prerequisite Reminder'**




2. Click **'Add'** 

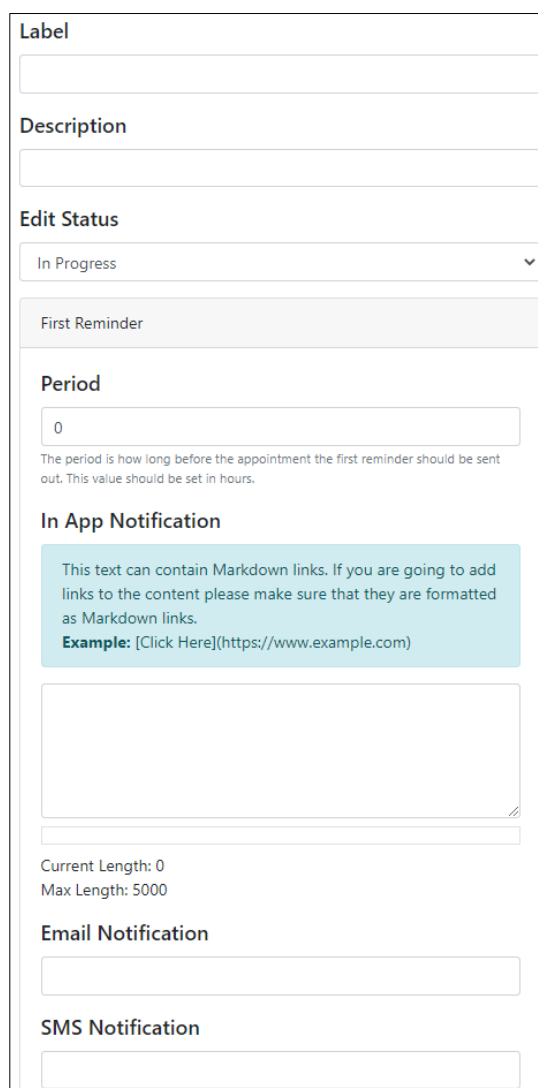
3. Enter a **Label** – this is the name of your reminder in the Management Portal. This is used to associate the reminder to an Appointment Type.

4. Enter a description of the reminder. **The information in the description box will display in the App as the Appointment Instructions.**



5. Set the **Edit Status** as appropriate as per your organisations operating procedures.
6. Enter the time in hours before the appointment for the **first reminder**.
7. Enter the **text** for the reminder into each notification type box. In App notifications can contain Markdown links.
8. Repeat for the **second reminder**.
9. Click **'Submit'** 
10. A confirmation message will display:

Appointment Prerequisite Reminder was successfully saved.

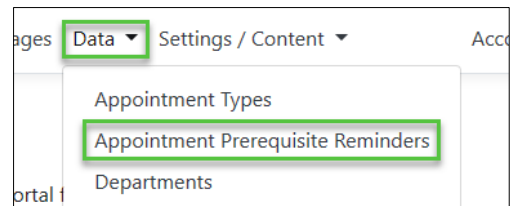


The form contains the following fields and sections:

- Label:** A text input field.
- Description:** A text input field.
- Edit Status:** A dropdown menu with 'In Progress' selected.
- First Reminder:** A section containing:
 - Period:** A text input field with '0' entered.
 - The period is how long before the appointment the first reminder should be sent out. This value should be set in hours.
 - In App Notification:** A text area with a light blue tip: "This text can contain Markdown links. If you are going to add links to the content please make sure that they are formatted as Markdown links. **Example:** [Click Here](https://www.example.com)".
 - A text area for the notification content.
 - Current Length: 0
Max Length: 5000
- Email Notification:** A text input field.
- SMS Notification:** A text input field.

Edit an Appointment Prerequisite Reminder

1. Select the **'Data'** menu



2. Select **'Appointment Prerequisite Reminder'**

3. Select the **Filter** drop down

A screenshot of a 'Filters' dropdown menu. The word 'Filters' is on the left, and a green callout bubble with the number '3' points to a downward-pointing arrow on the right.

4. Enter the **Label** of the Prerequisite Reminder you wish to update

5. Select **'Filter'**

A screenshot of a filter form. It has a 'Label' text input field (highlighted with a green callout bubble '4') and an 'Exists' dropdown menu with 'Select...' as the current selection. A blue 'Filter' button is on the right, with a green callout bubble '5' pointing to it.

6. Alternatively, locate it using the **list** at the bottom of the screen:

Label	Description	Status	
Warfarin 24 hour	Stop taking your warfarin 24 hours before your appointment	Complete	Edit - View
Comfortable clothing	Please wear comfortable clothing and shoes to your appointment	In Progress	Edit - View

Navigation: Previous | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Next

7. Locate the item in the list/results and click **'Edit'**

Label	Description	Status	
Warfarin 24 hour	Stop taking your warfarin 24 hours before your appointment	Complete	Edit - View

A green callout bubble with the number '7' points to the 'Edit - View' link in the first row.

8. Make changes as required and the click **'Submit'**

Submit

9. A confirmation message will display:

Appointment Prerequisite Reminder was successfully saved.

10. If this reminder has been associated to an appointment type any changes will reflect immediately for the patient using the App.