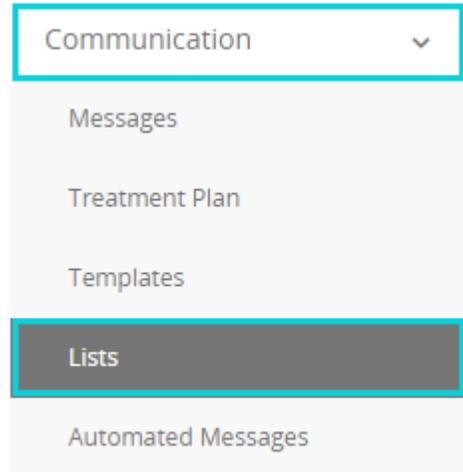# CREATING A LIST OF PATIENTS

01

Login to home.lh360.com

From the menu bar on the left of your Dashboard, click **COMMUNICATION**
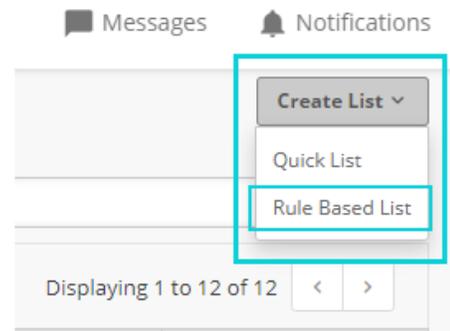
Under Communication, click **LISTS**

Communication ⌄

Messages

Treatment Plan

Templates

Lists

Automated Messages

02

In the upper right, click the **"Create List"** button.

Select **"Rule Based List"**

💬 Messages   🔔 Notifications

Create List ⌄

Quick List

Rule Based List

Displaying 1 to 12 of 12   ‹   ›

03

From CREATE LIST:

Give the list a **LIST NAME** *(required)*

Provide additional details under **LIST DESCRIPTION** *(optional)*

Create List

Group your customers into lists

Details

List Name *

List Description

Start building your list by clicking the **SELECT CRITERIA** button to select the characteristics you want the contacts on your list to have. Here is an example of a list of patients with appointments on future dates.

Select Criteria

04

EXAMPLE:
Select **Future Appointment Dates.**

Set **Date Range.**

Click **ADD CRITERIA.**

First Visit Date

Future Appointment Confirmation

Future Appointment Dates

Future Non-Recall Appointment Confirmation

Future Non-Recall Appointment Dates

Select Criteria for Future Appointment Dates

Has Future Appointment Dates

No ( ) Yes

⦿ Static

◯ Rolling

Start

4/13/2020

End

4/24/2020

Has Future Appointment Dates: Yes

Date Range: *13 April, 2020 - 24 April, 2020*

Reset Selection

Previous   Cancel   **Add Criteria**

Selected Criteria

Future Appointment Dates
13 April, 2020 - 24 April, 2020

05

Use the **Add Criteria** button to add as many parameters as you would like to your list.

Once you have finished selecting the criteria you wish to add, click the **SAVE LIST** button in the lower Left.

Add Criteria

Save List   Cancel

06

We also offer plenty of other great List options. Here is an example of creating a Past Due for Recall List.

EXAMPLE:

Select Criteria:

Is Active – Yes

Select Criteria for Is Active

Is Active
No ⬤ Yes

Previous   Cancel   Add Criteria

On Recall – Yes

On Recall
No ⬤ Yes

Previous   Cancel   Add Criteria

Now it is time to generate your dates. Remember Lighthouse messages in intervals of 3 months, 6 months, and 1 year past due.

Select Criteria:

Recall Due Date – Then you can choose your patients Recall Due Dates

You can of course generate any start date and end date that you prefer. Our recommendation is to always stay about one month at a time, it helps give you a more manageable list.

Our last step is to remove patients who already have scheduled cleanings.

Select Criteria:

Future Recall Appointment Date - Toggle "Has Future Recall Appointment Date" to No.

Your selected criteria will look something like this:

Details

List Name *

One Year Past Due

List Description

Patients One Year Past Due in April 2020

Selected Criteria

Is Active

Yes

[Edit] [Delete]

On Recall

Yes

[Edit] [Delete]

Recall Due Date

1 April, 2019 - 30 April, 2019

[Edit] [Delete]

Future Recall Appointment Date

Has Future Recall Appointment Date: No

[Edit] [Delete]

[Add Criteria]

[Save List] Cancel

You will also get a preview of the number of patients your list will generate over the left. If the list is too large you can always add more criteria to help narrow the list of patients. Once this is complete you will want to select Save List.

You can view these List in your Dashboard by returning to Step 01.

07

Now that we have our List created there are a couple different things we can do with them.

FIRST: We can do a Mass Email to your patients on those List. You can do this by going to **COMMUNICATION** and then **MESSAGES** in your dashboard. Then in the top right you will select **CREATE A MESSAGE.** On the next page you will choose **CREATE YOUR OWN MESSAGE** in the top right again.


Under the **Add Contacts** you can either type the name of your List or choose it from the **VIEW CONTACTS & LIST**.


From there you can give your email blast a subject and fill out the body of the message.

SECOND: You can work the list patient by patient. You can do this by going to **COMMUNICATION** and then **LIST** in your dashboard. From there you can choose the List you want to work by selecting the **LIST NAME**.
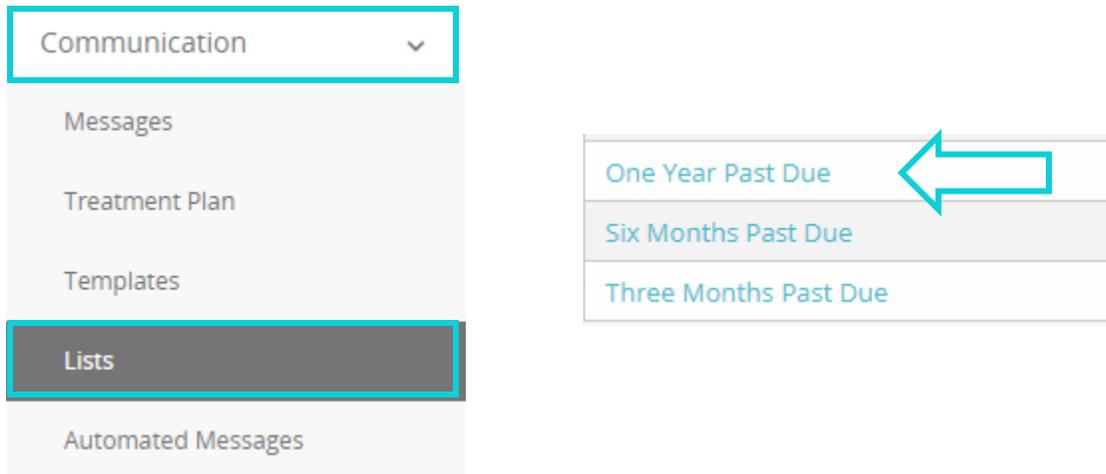
This will show you a list of all the patients on that list and their email address. You can change the order First or Last name in A-Z or Z-A alphabetical order. You can also search for a specific patient by name.
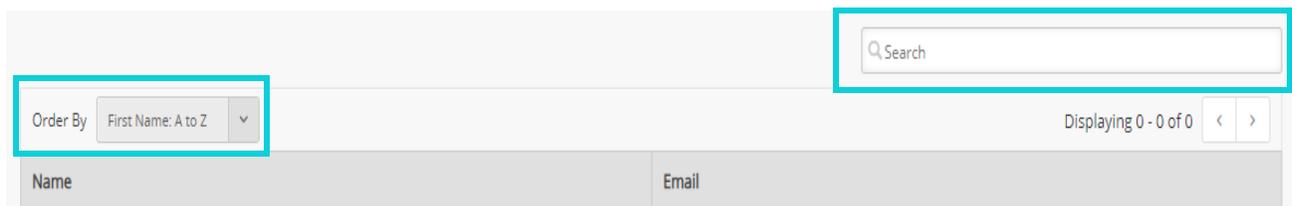
From this screen you can see what patients do not have email addresses. You can click on a patients name and it will bring you into their **Patient Record**. This is where you can find our **Two Way Text** feature to text this patient. This can be done on a per patient basis. We currently do not offer the ability to do mass texting because of certain government regulations.

THIRD: If you prefer to work outside of your Lighthouse dashboard. If you go through **COMMUNICATION** and then **LIST**, and click on your **LIST NAME**. In the top right will be an option to download all patient information into a CSV File.