



# Vyne Trellis Essentials: Activate Patient Outreach

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## Virtual Instructor-led Training Outline

### Course Overview: Essential Activate Workflow

This course provides essential knowledge for using Vyne Trellis to streamline patient outreach through Campaigns, Recall Reminders, and Review requests. Learners will explore practical scenarios for activating Patient Outreach, starting with best practices for sending Campaigns to ensure effective communication.

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### Getting Started: Confirm the Customer Completes the Pre-Requisites

**Vyne Trellis Intake and Activate:** Complete the Intake and Activate online learning modules on the [Vyne Trellis Training](#) page

**Vyne Sync Setup:** Configuring and syncing Vyne Trellis with your PMS system.

**Verify Legal Business Information:** Completing the process in Vyne Trellis to enable texting.

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### Learning Outcomes

After completing this virtual instructor-led class, learners will be able to

1. Automate **Recall Reminders** by configuring personalized notification schedules to ensure timely patient follow-ups.
2. **Manage** patient reviews by setting up automated requests, integrating them into the practice's website, and handling review feedback effectively.

3. Use Vyne Trellis to **streamline** patient outreach through Campaigns, Recall Reminders, and Review Requests to improve patient engagement.
  4. **Monitor** and **analyze** review data to improve patient satisfaction and enhance the practice's online reputation.
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