



Vyne Trellis Essentials: Patient Intake

Version 1.2

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Vyne Trellis Essentials: Intake

Virtual Instructor-led Training Outline

Course Overview: Essential Intake Workflow

This course equips learners to identify the key features of Vyne Trellis, apply automation to send appointment reminders and forms, and link forms to patient accounts. Participants will also analyze patient messaging workflows and evaluate real-world scenarios for managing patient intake.

Getting Started: Confirm the Customer Completes the Pre-Requisites

Vyne Trellis Intake: Complete the Intake 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.

Learning Outcomes

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

1. **Configure** automated reminders and forms, and manage patient appointments to streamline communication and improve patient preparedness.
2. Send **personalized** patient messages and use quick messages to enhance communication efficiency and reduce manual tasks.
3. **Utilize** the Reminders and Forms dashboards to monitor patient responses, track form completion, and update practice management systems.

4. **Apply** best practices for patient intake by customizing messaging settings, porting office numbers, and managing notifications for seamless workflows.