Reminders User Guides

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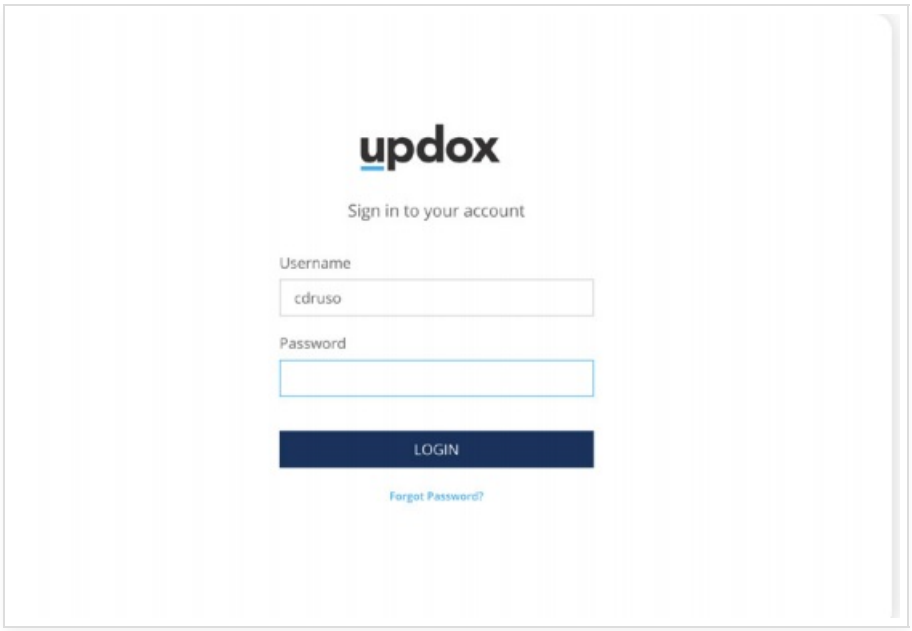
A quick guide to get your practice using Reminders!

Step 1: Log Into Updox

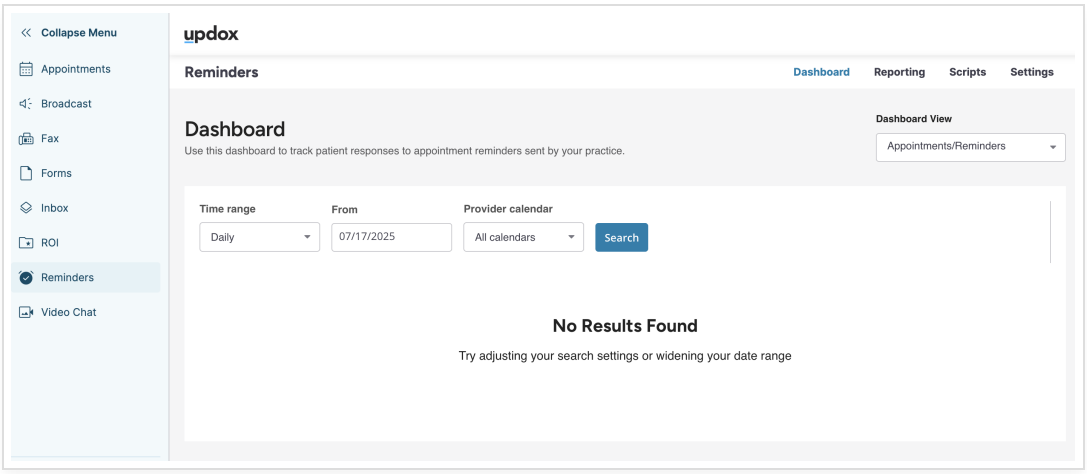
Enter your username and password to log in to your Updox account.



Step 2: Reminder Configuration

To set-up your reminders, go to the **Reminders** option in the main menu and select **Settings.** You'll be able to configure the following:

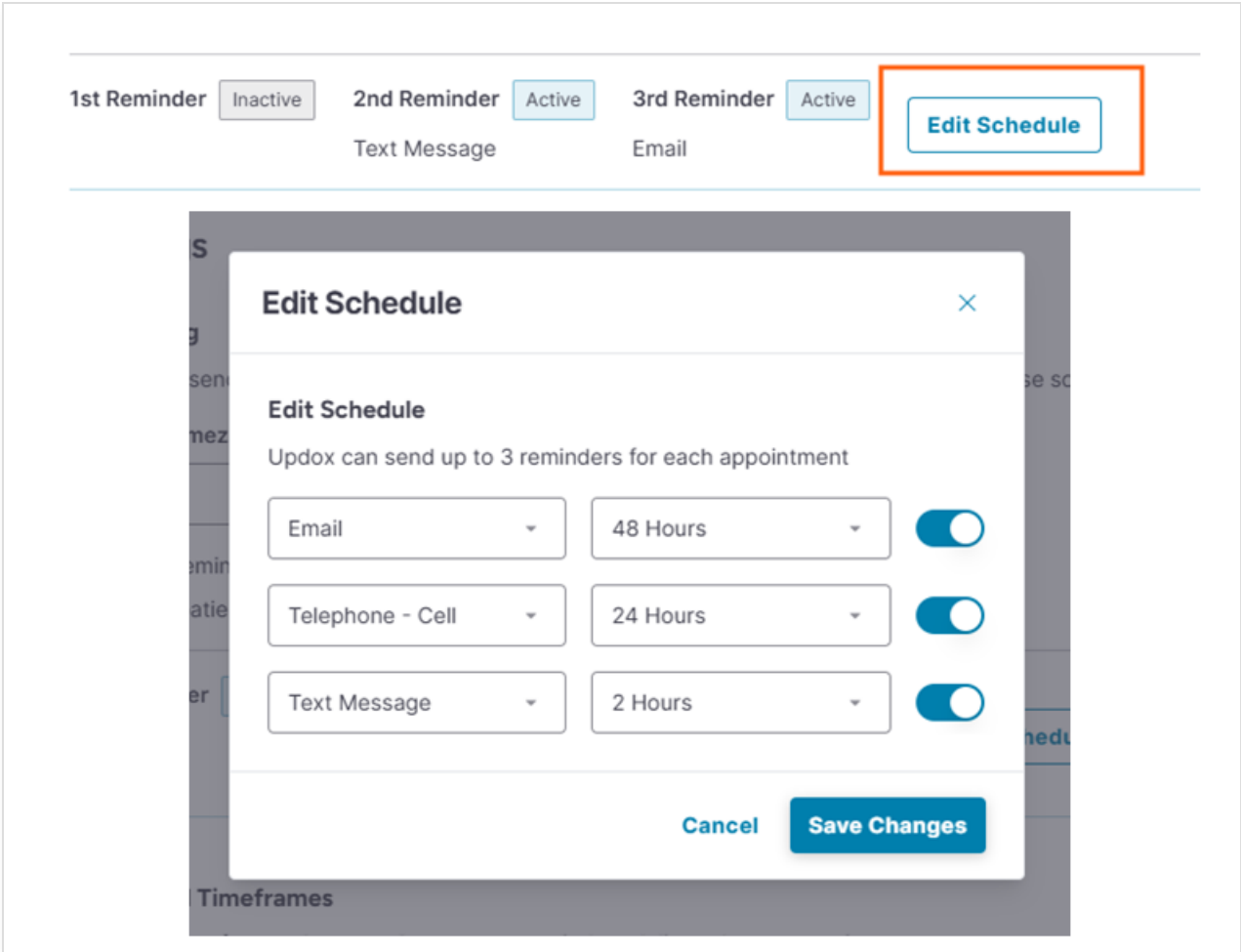
- Delivery method
- Timing
- Response types
- Custom scripts (select the **Scripts** option for this one.)

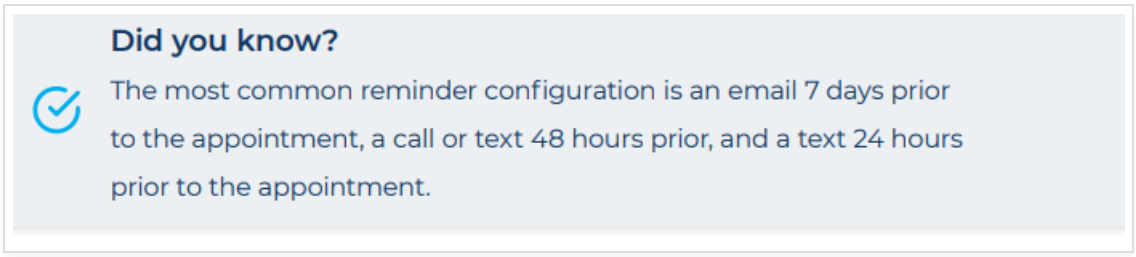


Note: Only users with **Admin** access can view and manage the Settings for Reminders.

Step 3: Delivery Method

You can choose up to three automated reminders per appointment. Each reminder can have the same or different delivery method and customizable timeframe to be sent prior to the scheduled appointment time.





Step 4: Timing

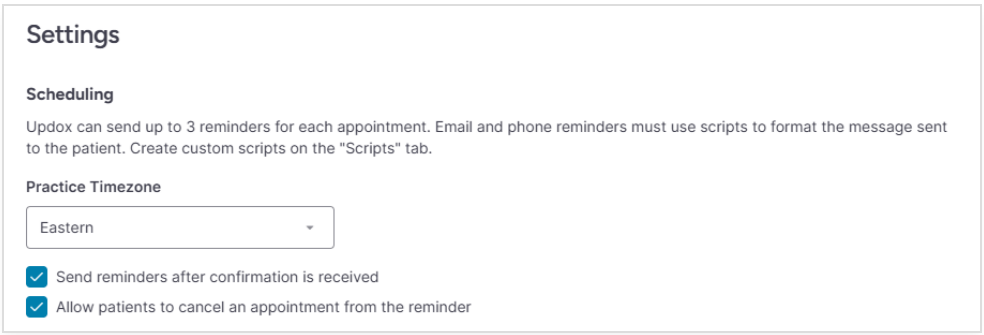
There are two options for reminders restriction time windows:

1. **Delivery restricted start time / Delivery restricted end time:** These settings will ensure that no reminders are sent during the selected timeframe
2. **Restrict Weekends:** If selected, reminders will not go out on Saturdays and Sundays.

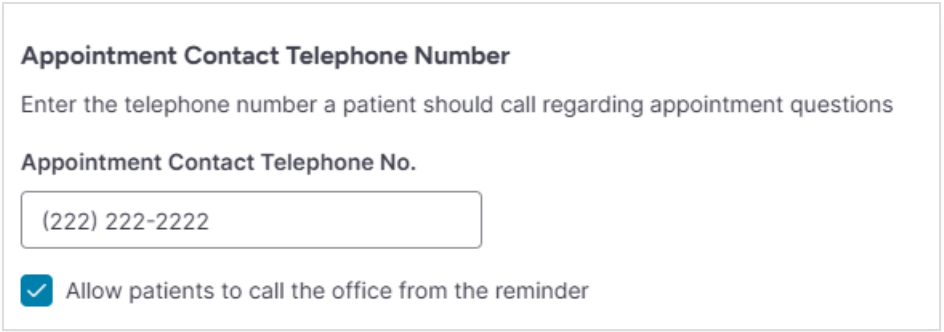
Step 5: General Configuration

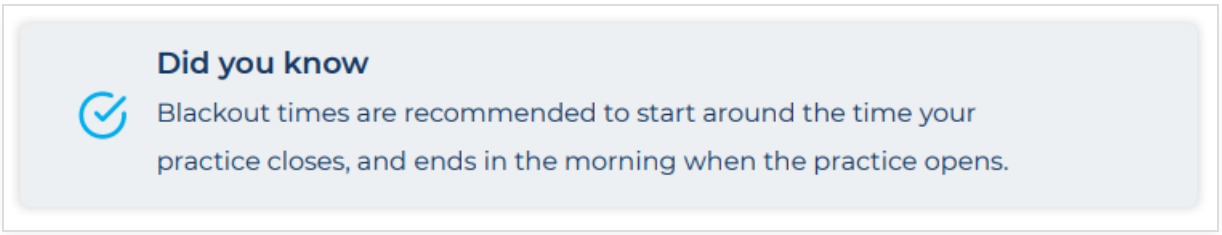
You can choose additional customization by selecting checkboxes next to the following areas:

- **Send reminders after confirmation is received**: After a patient confirms, this will still ensure reminders (without the option to reply) go out as scheduled.
- **Allow patients to cancel an appointment from the reminder**: If you want the patient to be able to cancel appointments from the reminder, check this option.



- **Allow patients to call the office from the reminder**: For phone reminders, this will give the patient the option to press four to be automatically transferred to a phone line at your practice.





Step 6: Reminder Scripts

You can create and manage Reminder Scripts by navigating to the Reminders app and clicking on the **Scripts** tab.

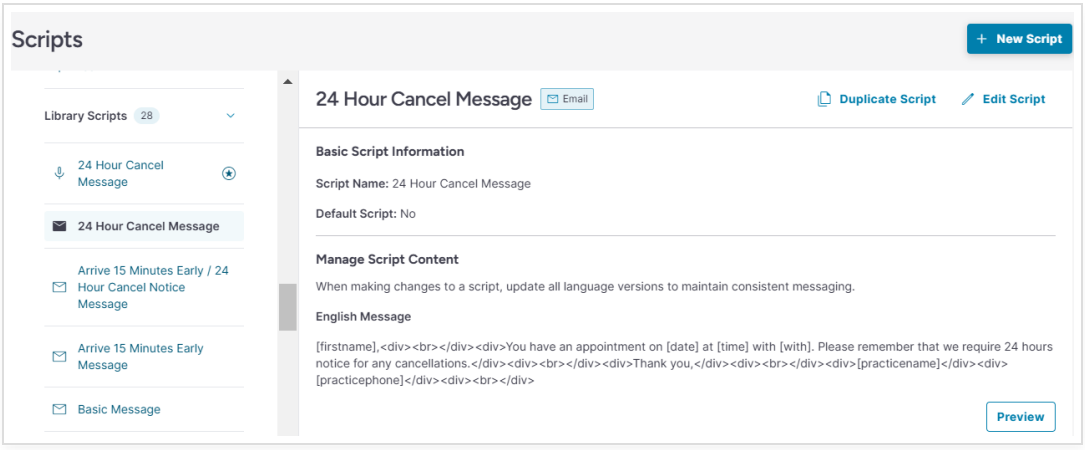
In this tab, you'll see any existing active Reminder scripts and also Library Scripts which are pre-built scripts to help you get started.

A star icon next to a script name indicates that the script is the default for the communication method.

To preview or make a Library Script the default for a method, click **Edit Script**.

If you want to customize a Library Script, choose **Duplicate Script** and then edit as needed.

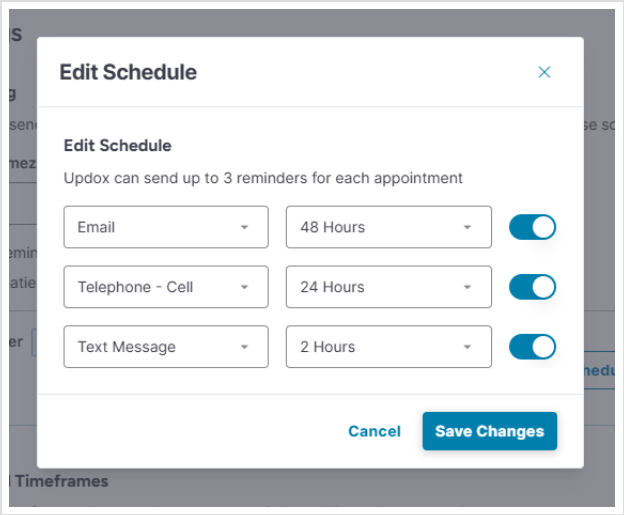
NOTE: You cannot duplicate Human Voice scripts because we are no longer supporting new scripts of that method.



Additional Information

Activating Reminders

Once you have finished your configuration, you are able to activate your reminders by checking the active switch next to the 1st, 2nd and 3rd reminder (depending on how many reminders you chose to send). Once checked, click Save.



Reminders Dashboard

- To view patient responses, or those who have yet to respond to a reminder, navigate to the **Dashboard** tab.
  - This will show you which customers have yet to confirm their appointment so office staff can reach out.
  - If you are using an integrated EHR with reminders, you will also be able to view reminders responses in your calendar.