

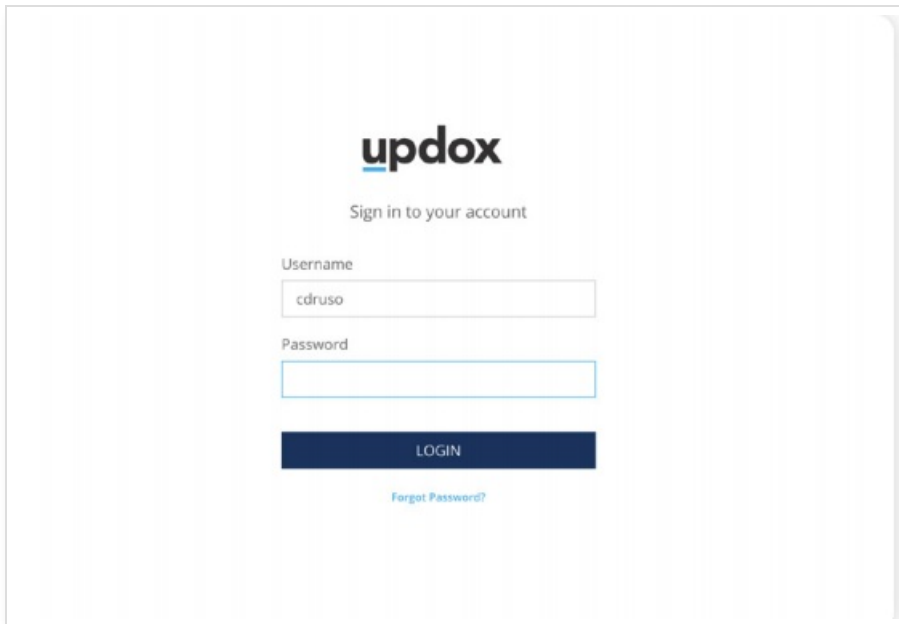
Reminders User Guides

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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.



The screenshot shows the Updox login interface. At the top center is the 'updox' logo. Below the logo is the text 'Sign in to your account'. There are two input fields: 'Username' containing 'cdruso' and 'Password' which is empty. Below the password field is a dark blue button labeled 'LOGIN'. At the bottom of the form area is a link that says 'Forgot Password?'.

Step 2: Reminder Configuration

To set-up your reminders, choose Menu — Admin — Reminders. You'll be able to configure the following:

- Delivery method
- Timing
- Response types
- Custom scripts

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.

1st Reminder Inactive

2nd Reminder Active

3rd Reminder Active

Text Message

Email

[Edit Schedule](#)

Edit Schedule

Updox can send up to 3 reminders for each appointment

Email	48 Hours	<input checked="" type="checkbox"/>
Telephone - Cell	24 Hours	<input checked="" type="checkbox"/>
Text Message	2 Hours	<input checked="" type="checkbox"/>

[Cancel](#) [Save Changes](#)

Did you know?



The most common reminder configuration is an email 7 days prior to the appointment, a call or text 48 hours prior, and a text 24 hours prior to the appointment.

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.

Restricted Timeframes

Choose a timeframe when you **do not want** reminders delivered to your patients.

Delivery restricted start time

11:00pm

Delivery restricted end time

6:30am

Restrict Weekends

Choose not to deliver reminders to your patients on weekends (all reminders normally scheduled for the weekend will instead be delivered just before the delivery start time on Friday).

Restrict delivery on weekends

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.

Settings

Scheduling

Updox can send up to 3 reminders for each appointment. Email and phone reminders must use scripts to format the message sent to the patient. Create custom scripts on the "Scripts" tab.

Practice Timezone

Eastern

- Send reminders after confirmation is received
- Allow patients to cancel an appointment from the reminder

- **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.

Appointment Contact Telephone Number

Enter the telephone number a patient should call regarding appointment questions

Appointment Contact Telephone No.

(222) 222-2222

- Allow patients to call the office from the reminder

Did you know



Blackout times are recommended to start around the time your practice closes, and ends in the morning when the practice opens.

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.

The screenshot displays the 'Scripts' management interface. On the left, a sidebar titled 'Library Scripts' shows a list of 28 scripts, with '24 Hour Cancel Message' selected and highlighted. The main content area shows the details for the '24 Hour Cancel Message' script, which is associated with the 'Email' method. At the top right of the main area are buttons for 'Duplicate Script' and 'Edit Script'. Below the script name, the 'Basic Script Information' section shows 'Script Name: 24 Hour Cancel Message' and 'Default Script: No'. The 'Manage Script Content' section includes a note: 'When making changes to a script, update all language versions to maintain consistent messaging.' Underneath, the 'English Message' content is displayed as a code block: `[firstname],<div>
</div><div>You have an appointment on [date] at [time] with [with]. Please remember that we require 24 hours notice for any cancellations.</div><div>
</div><div>Thank you,</div><div>
</div><div>[practicename]</div><div> [practicephone]</div><div>
</div>`. A 'Preview' button is located at the bottom right of the content area.

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.

Edit Schedule ×

Edit Schedule

Updox can send up to 3 reminders for each appointment

Email	48 Hours	<input checked="" type="checkbox"/>
Telephone - Cell	24 Hours	<input checked="" type="checkbox"/>
Text Message	2 Hours	<input checked="" type="checkbox"/>

Cancel Save Changes

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.
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