

# Reminders User Guides



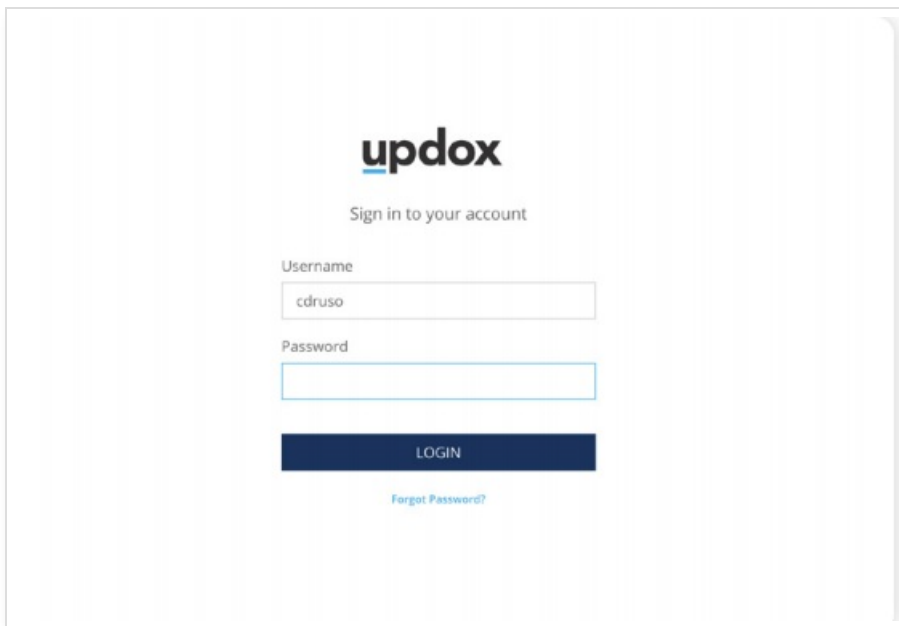
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## A quick guide to get your practice using Reminders!

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### 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 is the Updox logo. Below it is the text "Sign in to your account". There are two input fields: "Username" with the value "cdruso" and "Password" which is empty. Below the fields is a dark blue "LOGIN" button. At the bottom, there is a link for "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.

## Reminder Settings

Manage your reminder settings

Rules Scripts

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

1st Reminder Inactive  
Method  
-- None Selected --

2nd Reminder Inactive  
Method  
-- None Selected --

3rd Reminder Inactive  
Method  
-- None Selected --

### 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 blackout time windows.

1. **Blackout weekends:** Checkbox: If selected, reminders will not go out on Saturdays and Sundays.
2. **Nightly blackout start time / Morning blackout end time:** Timeframe. These settings will ensure that no reminders are sent during the selected timeframe

Disable weekend reminders (All reminders normally scheduled for weekend delivery will instead be delivered just before blackout start time on Friday)

Blackout weekends

Nightly blackout start time


Morning blackout end time

## 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.
  - Remember to always click 'Save' when changing any configuration options

Enter the telephone number a patient should call regarding appointment questions.


 [Manage Appointment Phone Numbers](#)

Allow patients to cancel an appointment from the reminder

Allow patients to call the office from the reminder

Selecting this option will disable the sending of multiple reminders to patients with more than one appointment within the specified time frame. Can be used for bundled appointments

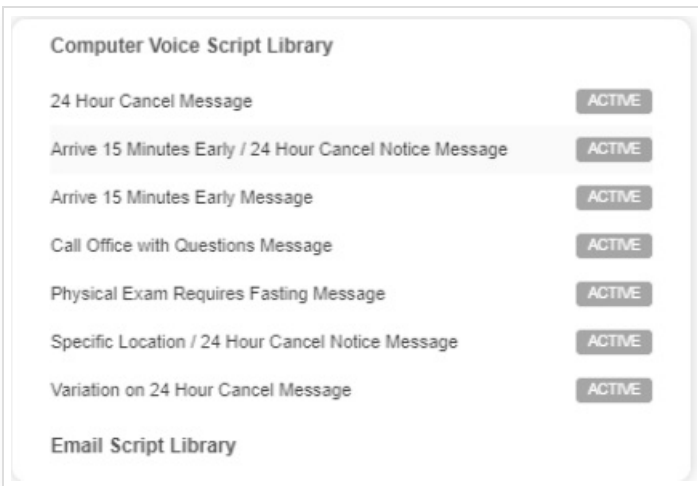
**Did you know**

 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

There are default scripts automatically assigned set-up Menu — Admin — Reminders, then Scripts.

- The default script per method will be indicated with the method icon.
- To review and test the script, double click into the title of the script.
- To customize the script, choose Make a Copy, then edit as needed



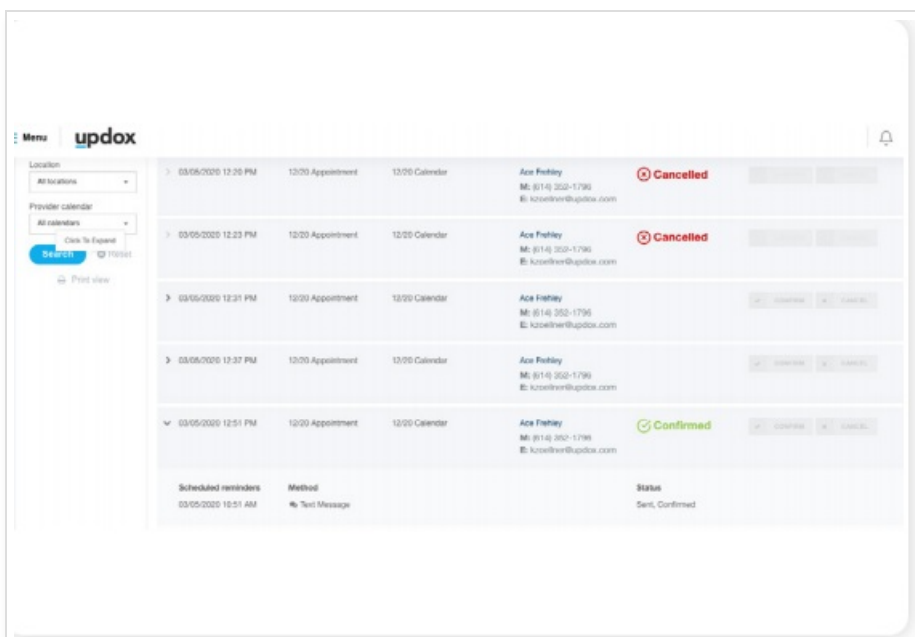
## Additional Information

### Activating Reminders

Once you have finished your configuration, you are able to activate your reminders by checking the box next to 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, click Menu — Home — Reminder dashboard.
  - This will show which customers have yet to confirm for additional outreach from office staff.
  - If you are using an integrated E.H.R with reminders, you will also be able to view reminders responses in your calendar.



### Did you know



When customizing reminder scripts, you can use the token to the right to personalize the message.

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