

How to: Configure Rules for Reminders

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Configuring Reminders Settings

The first step to configuring Reminders is setting up rules in Reminders Settings. Within Settings, you can:

- Choose how you want to deliver reminders (text messages, emails, or phone calls) and how often
- Select the time of day when you do not want reminders to be sent to patients
- Configure other settings for multiple appointments within a time frame, question call back number, etc.

What do I need to do first?

Before you begin configuring your Settings, take the following items into consideration:

Consider your patient population

The demographics of your patient population can impact your decisions. For example, if you primarily treat older patients, they may appreciate receiving reminders via phone calls. Or, you may need to consider reminders delivered in multiple languages.

The flexibility built into Settings lets you design reminders based on your practice needs.

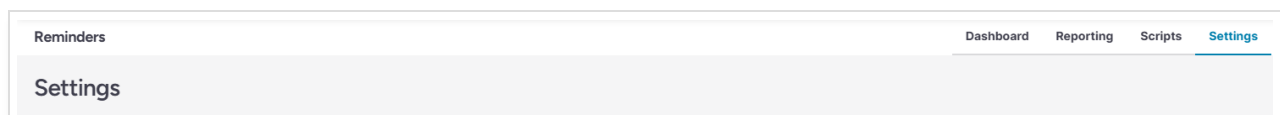
Think about these questions

Take the time to answer these questions before starting:

1. Will you remind patients with texts, emails, or phone calls? NOTE: If you choose texts, make sure you have cell phone numbers for your patients.
2. How many times do you want to remind patients?
3. Do you want patients to receive reminders on nights and weekends?

How do I set up a Reminders schedule?

From the Inbox, go to the **Reminders** app and select the **Settings** tab. This is where you will define all reminders-related schedules and settings.



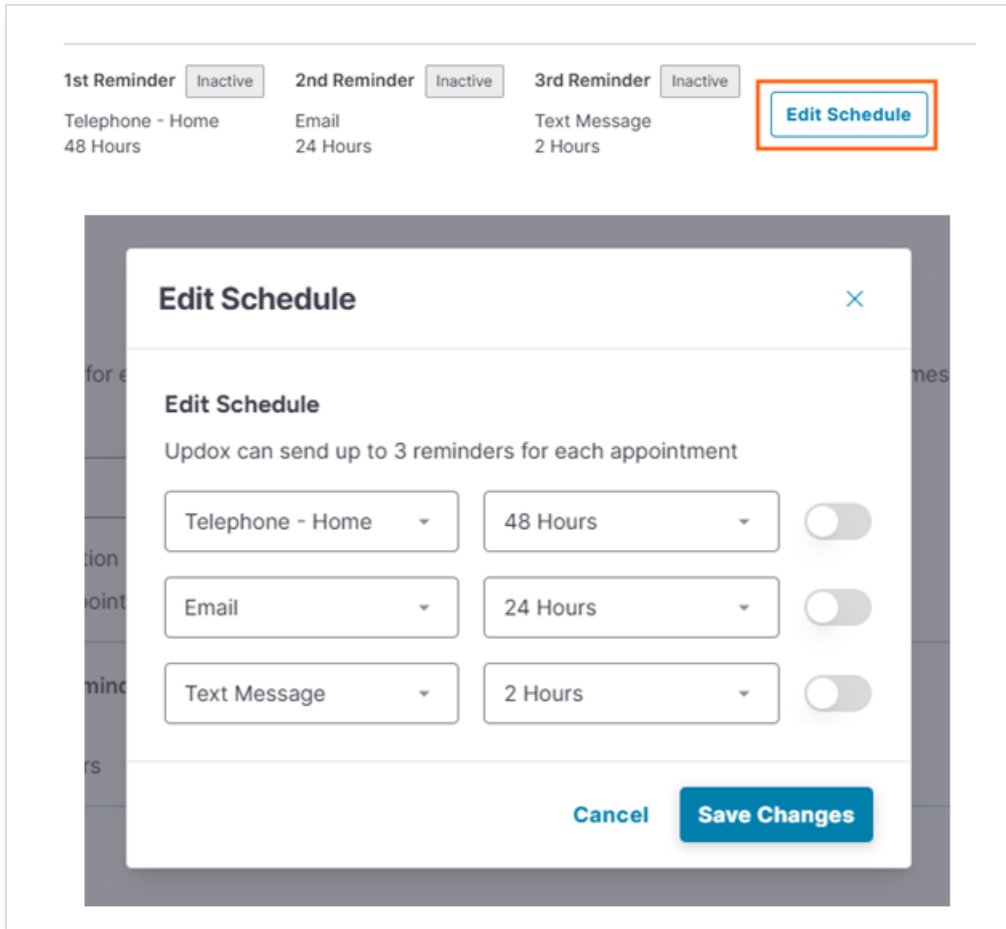
Select **Edit Schedule** and determine how many reminders to send for each appointment. You can send up to 3 reminders per appointment.

Select a method from the drop-down menu to use for each reminder

NOTE: Methods set here will always be used unless the patient has specified a different preference.

Determine when to send reminders in relation to the appointment time by choosing an option from the drop-

down menu



NOTE: Reminders will start sending to your patients immediately when the switches beside each reminder are flipped **on**. It is best practice to leave the switch next to each reminder **off** until all settings are configured and you are ready to go live.

If you want to send the patient reminders after a confirmation has been received for the appointment, select the checkbox.

Send reminders after confirmation is received

If you want to restrict reminder delivery times to avoid interrupting patients' weekends and evenings, then select the delivery restriction start time (when reminders will stop for the evening) and the delivery restricted end time (when reminders will resume in the morning).

Check the box next to **Restriction delivery on weekends** to only send reminders between Monday and Friday.

In the example below, reminders will not be delivered to your patients between 8 p.m. and 6:30 a.m. or on weekends.

Restricted Timeframes

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

Delivery restricted start time

8:00pm

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

To add a phone number to the reminder message for patients to call the office if they have questions, enter a phone number under **Appointment Contact Telephone Number**.

Appointment Contact Telephone Number

Enter the telephone number a patient should call regarding appointment questions

Appointment Contact Telephone No.

(222) 222-2222

NOTE: If you have multiple locations, each with a different phone number, enter those here.

If you want patients to call your office to cancel instead of doing it directly from the reminder message they receive, uncheck **Allow patients to cancel an appointment from the reminder** in the **Scheduling** section.

Settings

Scheduling

Udopx 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

If you want to allow patients to call the office directly from the reminder message, check **Allow patient to call the office from the reminder**.

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

NOTES:

1. For text reminders, the phone number displays as a link.

2. The phone number entered in Appointment Contact Telephone No. is the number that will be used.

If you would like to avoid sending multiple reminder messages for patients with multiple appointments in the same day, select the **Turn on appointment filtering for patients who have multiple appointments** check box. Then choose how close together the appointments should be before grouping them together.

For example, a patient might have an appointment to see the provider, another appointment for the lab, and a third appointment for an x-ray. If all of these appointments are close to each other, you would want to group them together and only send one reminder.

Multiple Reminders

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

Turn on appointment filtering for patients who have multiple appointments

Same Day

1 Hour

2 Hour

4 Hour

Same Day

appointments within filter range in one reminder message. If disabling appointment bundling, please ensure that all variable removed.

Configure the human voice you want to use in your phone call recording.

Human Voice

Human voice - male is only available in English. Spanish reminders will be read by a female speaker.

No Preference

No Preference

English (Female)

English (Male)

Spanish

locations. Changing related settings will updated all rela

NOTES:

1. Set the voice as Spanish only if your patient population is largely Spanish speaking.
2. Variables you might include in a reminder such as the provider name or a location will be spoken by an English speaking computer voice.