

How to: Create Reminders Script Templates

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What is Updox Reminders?

Reminders is an appointment reminder solution that you can personalize to easily engage with patients and make sure they get the information they need and help ensure they keep their appointment.

This two-way messaging solution allows you to remind patients about upcoming appointments via text message, phone call or email, and allows patients to respond by confirming or cancelling the appointment directly from the message.

What are Reminders Script Templates?

The script of a reminder is what your message will say to patients to remind them of an upcoming appointment. Script templates allow you to personalize your messages and the information you want your patients to know about their upcoming appointments.

What do I need to do first?

Before you begin creating script templates, take the following items into consideration:

Use the prebuilt script library

For your convenience, a prebuilt library of scripts is available, with scripts available in both English and Spanish. This provides an easy way to get started. These scripts can be used as is or you can save a copy and customize to your needs.

Consider Appointment Types

TIP: If you'd like to use different scripts for different appointment types, create new scripts and make them specific to each of your appointment types.

NOTE: Depending on your EHR, your appointment types may be synced as part of the Updox integration. Appointment types are discussed in the "How to: Use Scheduling Configurations to Customize Reminders" video you will find in the Updox Learning Center.

Gather Contact Information

The outreach of Reminders is only as good as the information in your system so make sure to gather phone numbers, including cell phone numbers, and email addresses for your patients.

How do I set up Script Templates?

Follow these step-by-step instructions:

Step 1:

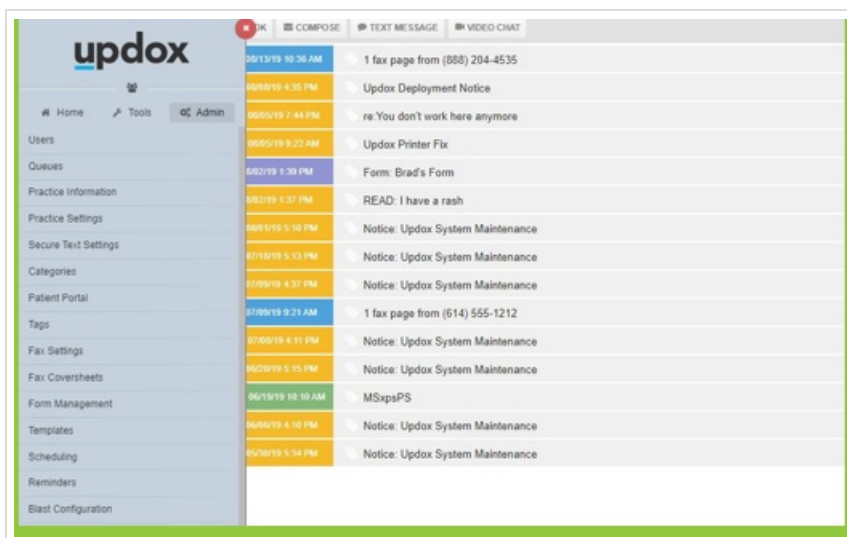
From the Inbox, go to Menu.

Step 2:

Select Admin.

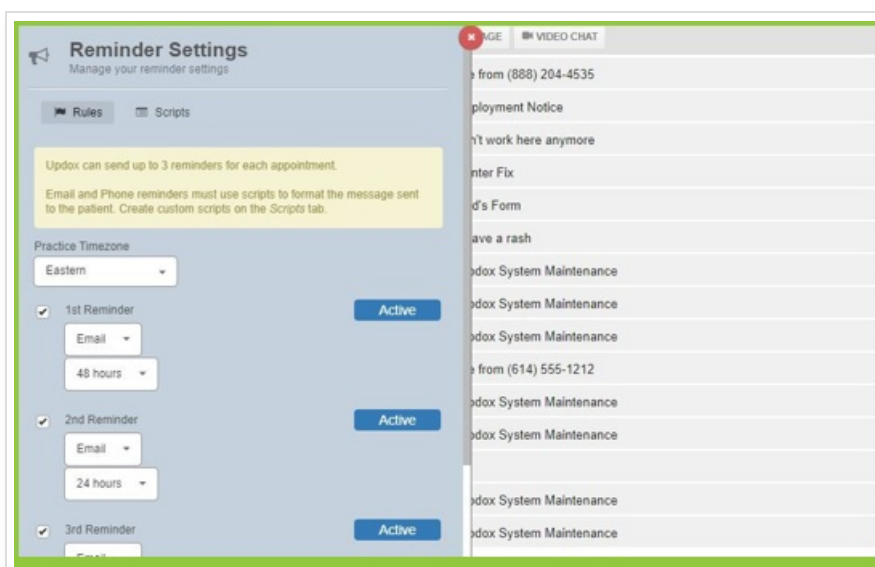
Step 3:

Select Reminders



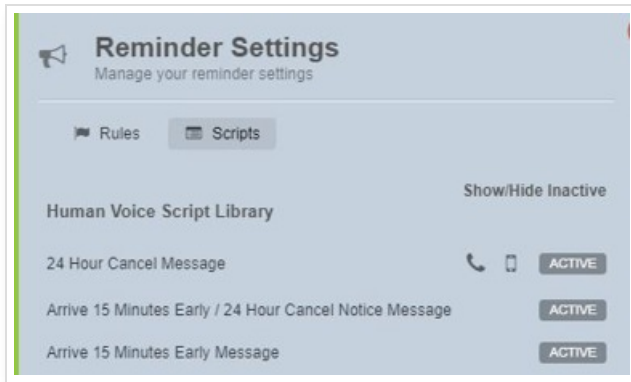
Step 4:

You will land on the Rules tab.



Step 5:

Select the Scripts tab at the top of the screen.



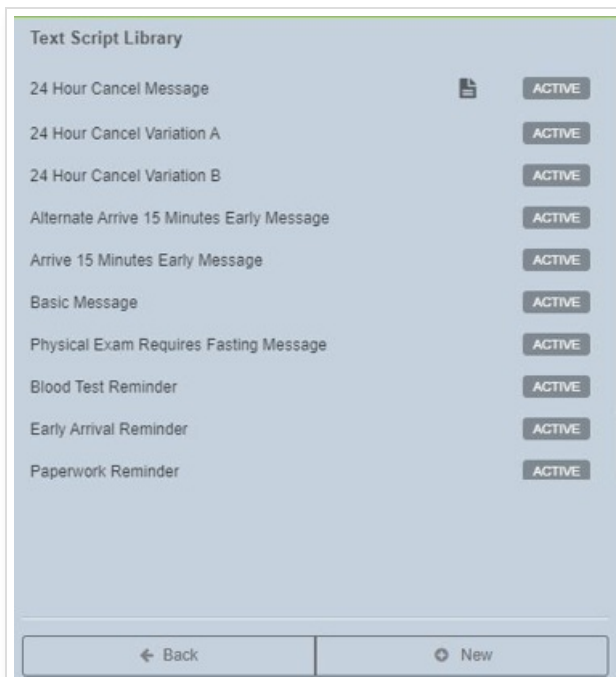
Step 6:

The library of scripts will be displayed and arranged by delivery method. Scroll to see the complete list of:

1. Phone (computer and human voice)
2. Email
3. Text

Step 7:

The current default script for each method is displayed with an icon.



Step 8:

To edit a prebuilt library script, select it from the list. A new window will open with the prebuilt message.



Step 9:

Within the displayed message, some words will appear inside of brackets. These are called variables.

NOTE: Variables will display actual data in the reminder message when it is sent. For example, your message will say “Bill” in place of the “[firstname]”.

- The complete list of variables is displayed in this screen.
 - The below screenshot indicates that certain script variables are required. This is no longer true, all script variables are optional.
- Rename this script with a new name so that it appears in your library of scripts

The screenshot shows a 'Text Script' configuration window. The 'Script Name' field is highlighted with a red box and contains '24 Hour Cancel Message'. The 'Personalize your message' section is also highlighted with a red box and lists variables: [firstname], [date], [time], [with], [practitioner], [practicephone], and [practicephone]. A 'Preview' button is visible at the bottom right.

Step 10:

If desired, you can also add a Spanish version of the script. Click the “Add Spanish Version” button below any script, and a window will appear, allowing you to add a Spanish version.

The screenshot shows the 'Manage Script content and languages' window. The 'English Message' field is highlighted with a red box and contains the text: 'Hello, this is [practitioner] calling with a message for [firstname]. You have an appointment on [date] at [time] with [with]. Please remember that we require 24 hours notice for any cancellations. Please call the office at [practicephone] with any questions or conflicts. Thank you.' The 'Add Spanish version' button is highlighted with a red box.

Step 11:

Updox does not translate your scripts into Spanish. While we have Spanish versions of our Library scripts in place, you will need to enter your custom scripts already translated.

The screenshot shows a form titled "Spanish Message". It contains a text area with the following text: "Hola, esta llamada es de [practicename] para recordar a [fullname] que tiene una cita el [date] a las [time] con [with]. Póngase en contacto con nosotros 24 horas de anticipación al [practicephone] si debe cancelar su cita. Gracias." Below the text area is a field labeled "Enter a 10-digit phone number to preview this script" with a "Preview" button. At the bottom right, there are "Cancel" and "SAVE" buttons.

NOTE: Variables function the same in Spanish versions as English, so be sure to include them as needed.

Step 12:

Each method (phone, email, text) is required to have a script designated as the default. To set a script as the default, check the box.

NOTE: The default script will always be used for reminders that are not specific to an appointment type. Scripts based on appointment type override the "Default" script.

The screenshot shows a form titled "Text Script". It includes a "Script Name" field with the value "24 Hour Cancel Message" and a "MAKE A COPY" button. A checkbox labeled "Default text script" is checked and highlighted with a red box. Below this, there is a section "Personalize your message" with instructions: "Use the variables below to personalize your message. Variables will always appear in English". A list of variables is provided:

- **[[firstname]]**: The patient's first name
- **[[date]]**: The date of the appointment
- **[[time]]**: The time of the appointment
- **[[with]]**: The calendar the appointment appears on
- **[[practicename]]**: The practice name
- **[[practicephone]]**: The practice phone number

At the bottom, there is a "Preview" button and a "Need help?" link.

Step 13:

Preview your changes by selecting the "Preview" button.

Text Script

Script Name MAKE A COPY

24 Hour Cancel Message

Manage Script content and languages
When making changes to a script, update all language versions to maintain consistent messaging.

English Message

Hello, this is [practicename] reminding [firstname] that you have an appointment on [date] scheduled for [time] with [with]. Please contact us 24 hours in advance at [practicephone] if you must cancel your appointment.

Personalize your message
Use the variables below to personalize your message. Variables always appear in English

* = required

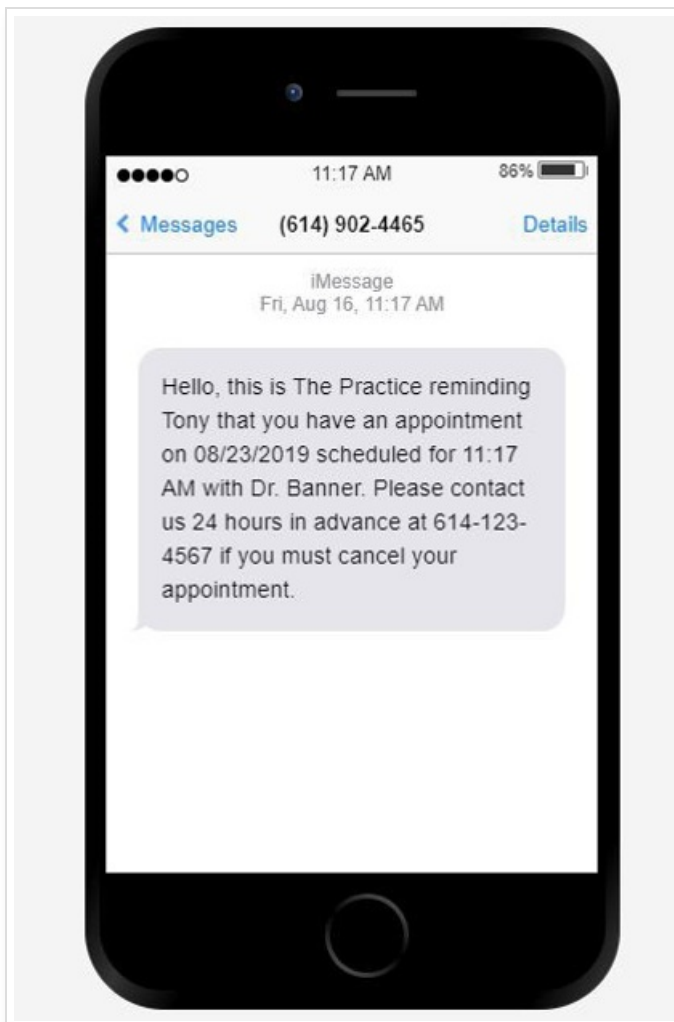
- [firstname]*
The patient's first name
- [date]*
The date of the appointment
- [time]
The time of the appointment
- [with]
The calendar the appointment appears on
- [practicename]
The practice name
- [practicephone]
The practice phone number

Preview Need help?

Step 14:

Your message will be displayed exactly as it will appear when your patient receives the message.

Notice how the variables have been replaced with actual data.



Step 15:

To edit an existing script, click the "Make A Copy" button. A copy will be made, which will allow you to make edits.

Text Script


Script Name MAKE A COPY

24 Hour Cancel Message

Manage Script content and languages
When making changes to a script, update all language versions to maintain consistent messaging.

English Message

Hello, this is [practicename] reminding [firstname] that you have an appointment on [date] scheduled for [time] with [with]. Please contact us 24 hours in advance at [practicephone] if you must cancel your appointment.

 Preview

Step 16:

Your script will now appear in the script library, allowing you to make edits and save them.



How Do I Set Up New Script Templates?

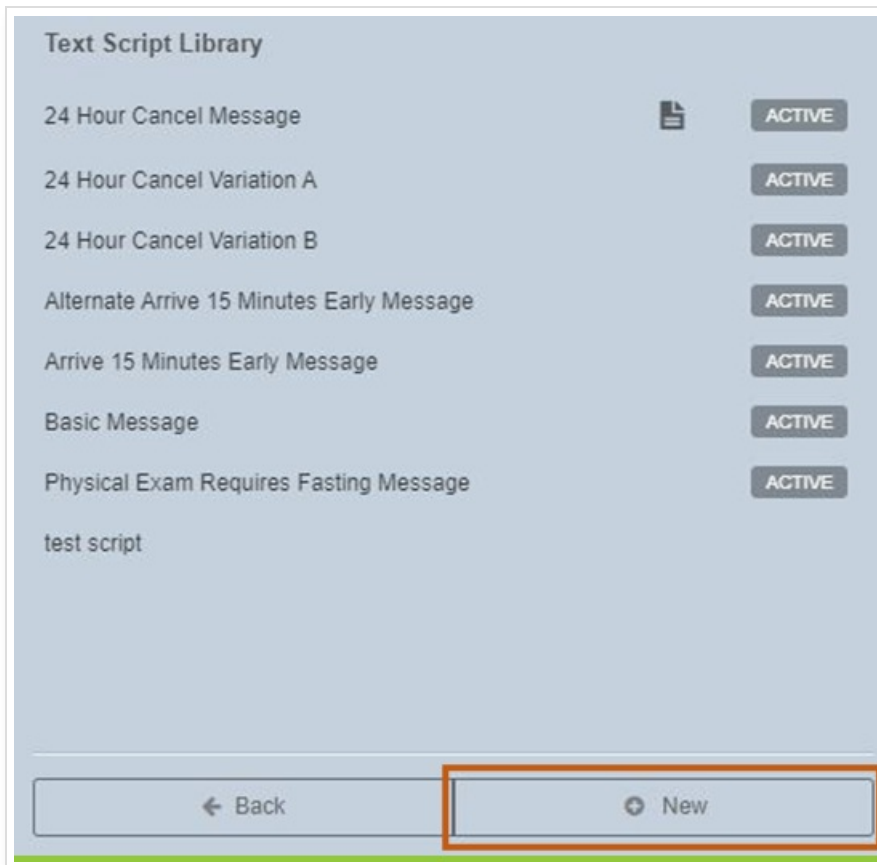
The process for setting up new Script Templates is the same.

Step 1:

Navigate to the library of scripts page by following Steps 1-6 above.

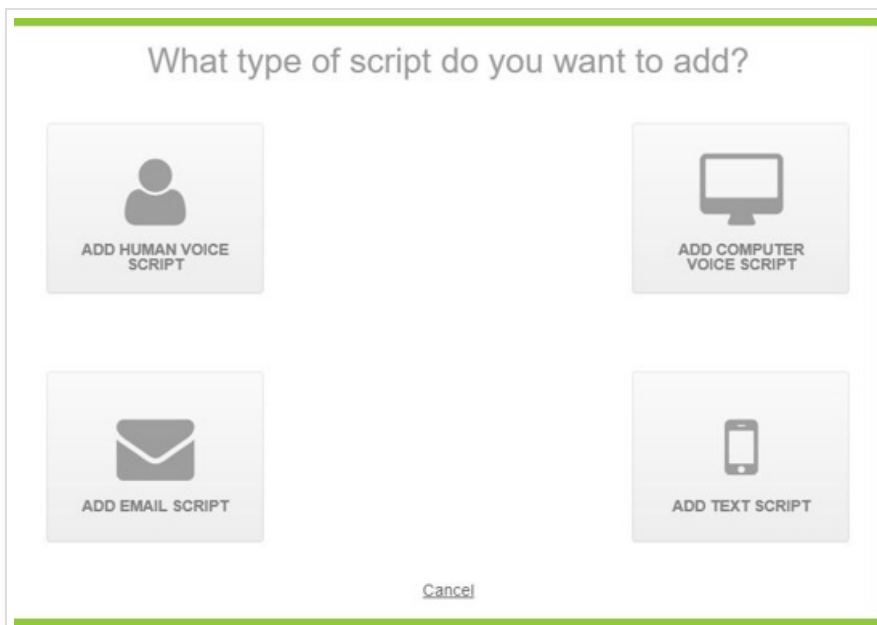
Step 2:

Instead of selecting an existing script, select "New" at the bottom of the Scripts tab



Step 3:

Choose what kind of script you want to create.



Step 4:

A blank screen will appear to create your script template.

Make sure to include:

1. A Script Name
2. Text for the script
3. Variables, if you want. They aren't required.
4. A Spanish version, if desired

TIP: If you choose to customize your scripts based on appointment type, you will select "New" to create scripts. Prebuilt library scripts are not based on appointment types.

Text Script

Script Name

Active
 Default text script

Manage Script content and languages
When making changes to a script, update all language versions to maintain consistent messaging.

English Message

[+ Add Spanish version](#) [Preview](#)

Personalize your message
Use the variables below to personalize your message. Variables will always appear in English

* = required

- **[firstname]***
The patient's first name
- **[date]***
The date of the appointment
- **[time]**
The time of the appointment
- **[with]**
The calendar the appointment appears on
- **[practitioner]**
The practitioner name
- **[practitionerphone]**
The practitioner phone number

[Need help?](#)

[← Back to script types](#)

The above screenshot indicates that certain script variables are required. This is no longer true, all script variables are optional.