

Reminders Dashboard



Last Modified on 07/12/2022 3:20 pm EDT

When using Updox Reminders with a connected EHR, you are probably reviewing appointment confirmation and cancellations in your existing calendar.

However if you aren't currently utilizing the Reminders Dashboard, you are missing out on some key benefits.

To access, click on Menu --> Reminders Dashboard:

- Pick the time range of appointments and review the response column. A green check mark indicates a confirmed appointment, while a red 'X' indicates a cancelled appointment.
- Click on 'Response' to filter reminders that patients haven't answered. This will give you a condensed list of patients who may need an additional message through Updox Text or a phone call.
- If the patient reaches out to the practice via another method, a practice representative can confirm or cancel an appointment from this view.
- If the patient has invalid data for a reminder delivery method (such as phone number or email), you'll be able to see that on the Dashboard.
- To see an overall summary of overall performance of reminders, click on the 'Dashboard View' in the upper right hand corner, and switch the view to 'Reminder Summary'.

Location	Appointment	Calendar	Provider	Status	Actions	
All locations	09/05/2020 12:20 PM	12/20 Appointment	12/20 Calendar	Ace Fretley M: (614) 352-1795 E: kzoelner@updox.com	Cancelled	CONFIRM CANCEL
Provider calendar	09/05/2020 12:23 PM	12/20 Appointment	12/20 Calendar	Ace Fretley M: (614) 352-1795 E: kzoelner@updox.com	Cancelled	CONFIRM CANCEL
All calendars	09/05/2020 12:31 PM	12/20 Appointment	12/20 Calendar	Ace Fretley M: (614) 352-1795 E: kzoelner@updox.com		CONFIRM CANCEL
	09/05/2020 12:37 PM	12/20 Appointment	12/20 Calendar	Ace Fretley M: (614) 352-1795 E: kzoelner@updox.com		CONFIRM CANCEL
	09/05/2020 12:51 PM	12/20 Appointment	12/20 Calendar	Ace Fretley M: (614) 352-1795 E: kzoelner@updox.com	Confirmed	CONFIRM CANCEL

Scheduled reminders	Method	Status
09/05/2020 10:51 AM	Text Message	Sent, Confirmed