FAQ: Reminders

🖨️

Frequently Asked Questions for Updox Reminders

Appointment Confirmations & Cancellations

Patients are getting reminders even after they've confirmed their appointment. How do I change this?

There's a checkbox right under the reminders schedule (**Menu - Admin - Reminders**) that says "send reminders after confirmation is received". Make sure that's unchecked.

How do my patients confirm or cancel an appointment from a text message?

Respond "yes" or "y" to confirm. Respond "no" or "n" to cancel an appointment. Keep in mind that patients must have the ability to cancel/confirm appointments for these responses to work (Menu - Admin - Reminders).

Reminders Not Received

If I reschedule an appointment will my patient still get all the reminders?

Yes and No please read below for additional information. Our reminders are based off of the appointment ID which is created when the appointment is scheduled. You are allowed up to 3 reminders for that appointment and this is controlled in Updox (Updox -MENU- Admin - Reminders).

- **If the appointment was changed before the first reminder is sent - <u>yes</u> they will get all reminders**
- **If the appointment is changed after the reminder - <u>No</u> . They will receive any additional reminders left in that series.**

My patient didn't get a reminder for a same-day appointment. Why?

Organizations specify intervals to send reminders in (**Menu - Admin - Reminders**). If your final reminder is set to be > 1 day before the appointment (e.g., the third reminder is set to 2 days or 1 week), patients won't receive same day reminder notifications.

I don't know why my patients aren't getting reminders - What should I do?

- Check to make sure that the patient has valid contact information in their profile - email address, cell phone number, home phone number (Updox - address book - Search for patient)
- Check the contact preference in the Updox address book for the patient (Updox address book - Search for patient - Scroll to the bottom of the profile)
- Review the information in the reminders dashboard. The dashboard will show the date and time the reminder has been sent or is scheduled and if it failed.
- Check the Calendar and the appointment type to make sure reminders have not been turned off for those

items specifically (Updox - Menu - Admin - Scheduling - "Do not send reminders")

Other

We have a default fallback method if patients are missing the contact information that reminders depend upon.

- Email reminders: if there isn't a valid email on file, then the system will send a notification via the home phone. If there isn't a valid home phone on file, then the system will send a notification to the patient's cell phone.
- Home telephone reminders: if there isn't a valid home phone on file, then the system will send a notification to the cell phone. If there isn't a valid cell phone on file, then the system will default to email.
- Cell reminders: if there isn't a valid cell on file, the system will send a notification to the home phone. If there isn't a valid home phone on file, the system will send a notification to the email.
- Text reminders: if there isn't a valid cell phone on file, the system will send a notification to the patient's home phone. If there isn't a home phone on file, then notifications will go to the patient's email.

I created a bunch of reminder scripts and now they're all gone!

You may be in **Menu - Admin - Templates**. Instead, go to **Menu - Admin - Reminders - Scripts** and you should see them there.

When patients receive email reminders, the email has a header with my *practice address*. Patients go to the practice address for their appointment, instead of to the location of their appointment. What do I do to fix this?

Please reach out to the support team and ask them to set "showPracticeAddressInReminderEmail" to false

If additional help is needed - Contact Us