How To: Bundling Appointment Reminders
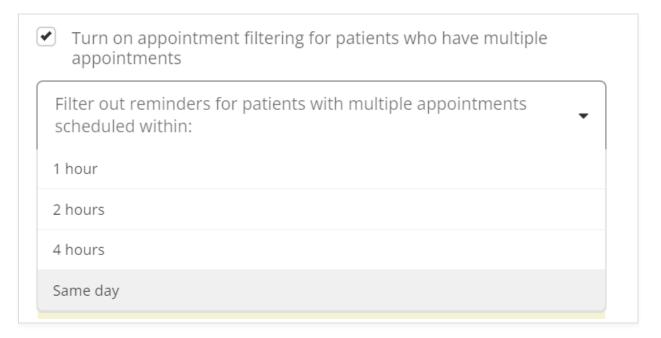
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Overview

Appointment Bundling is a feature that can be enabled within your Reminder Settings that allows for the ability to send all same-calendar day appointments for a patient into a single reminder message. In other words, if 'Patient A' has 3 (three) back-to-back appointments on the same calendar day(or within the Appointment Filter's set timeframe), with Appointment Bundling enabled the reminder message will state that *they have 3 appointments on that day for time 1, time 2, and time 3*. Patients can also confirm or cancel all appointments within the bundled reminder.

Enabling Reminder Appointment Bundling

You may enable this feature within the Admin Reminder Settings page by going to Menu → Admin → Reminders → scroll down until you find the "Appointment Bundling" checkbox shown below. Appointments will be bundled within the timeframe that is selected within the Appointment Filtering settings.

Heads Up! To enable this feature, you must also have Appointment Filtering turned on.

Message Template

When this setting is enabled, you may use the designated token to send your patients a message following the template below:

- "You have an appointment with `[with]` at `[location]` at `[time]` and an appointment with `[with]` at `[location]` at `[time]` "
  - The, "and an appointment with `[with]` at `[location]` at `[time]` " will be repeated for each additional appointment within the day (timeframe).

A token will be utilized in the Reminders UI to use this template and the overall message can be customized with additional messaging outside of the token. If the bundling setting is not turned on, customers will not be able to use the token. The token to use is denoted in the Reminders script UI when you are updating or creating a Reminders script. To use the appointment bundling template, the token is [apptbundling].

- [apptbundling]
  Bundle appointments based on the timeframe set in your appointment filtering settings. Appointments scheduled in this set timeframe will be bundled into a single reminder. Includes [with], [location], and [time] variables for each.

NOTE: With delivering the bundled appointment reminder within a single message, patients will be given the ability to either confirm or cancel *all* of their appointments included.