Adding Reminders to an Appointment

07/24/2024 12:09 pm EDT

Reminders can be used to remind your patients about their upcoming appointments. Reminders can be set up in two ways in DrChrono: in the appointment window or with reminder profiles. We will look at adding reminders at the appointment level in this article.

DrChrono offers 3 types of reminders email, text, and phone calls.

Setting Reminders in the Appointment Window

1. Go to **Schedule** > **Calendar**.

ScheduleClinicalPaSCHEDULING TOOLSCalendarAvailability SearchAppointments DashboardDashboardAppointment ProfilesAppointment TemplatesBilling ProfilesReminder ProfilesFollow-up RemindersRecurring EventsBulk Appointment Recovery

2. Open an appointment window and select the **Appointment** tab. Check the **View Active Reminders** box and then click **+New Reminder**.

Schedule Appointment									
Appointment	Billing	Eligibility	Vitals	Growthcharts	Flags	Log Comm.	Revisions	Custom Data	MU Helper
Type () Appointment Video Visit () Walk-in Transition of Care Referral									
WARNING: This patient is pre-populated sample data. Patient Statement Balance: \$999.00 Generate Statement Balance: \$999.00 30 past appointments									
Primary Insurance: Cigna [] CDS: Mammogram screening for all women aged 40-74 🛤 cypress:									
Provider	James Smi	th	~		Billing	- If different	to provider -	~	
Patient	Jenny (Jen)	Harris - 02/11/	1980 🗣 🕇	🕜 💽	Office	: Primary Off	ice	v 🕇 🍐	
Reason:					Profile	:		~	
Scheduled:	08/24/2020	Time 09:	30AM 🗘	2	Exam	: Exam 1		~	
Duration:	30 mir	nutes 🗌 Allow	overlapping		Color	:			
Notes:					Status	:		~	
						> 24h			
Consent	× HIPAA D	ata Use Agreem	ent (default)			🕑 Vie	w Clinical Note	Ð	
Forms:	× No Show	Policy (default)]			View A	II Appointmen	ts	
Recurring Appointment A scheduled appointment cannot be converted to a recurring series. Arrange a Follow-up Reminder View Active Reminders:									
Choose a Rem	inder Profile:			~					
Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.									
				Delete Save & Clo	ose Save	Cancel			

3. Select the **type** of reminder from the dropdown. DrChrono offers one-way email, text, and phone calls.

Choose a Reminder F	Profile:	
✓ Email SMS Text	minutes V before V	Image: state Preview Delete
Auto Phone Call		+ New Reminder
Voice and Text Remind	ders are only delivered between 5:00 AM to 11:00PM.	

4. Enter a **number** in the field between the reminder type and unit of time drop-down menus. This number will determine when the reminder goes out in relation to the rest of the settings.

Select a **unit of time** from the dropdown. This will determine when the reminder goes out in relation to the appointment.

Choose a Reminder Profile:		~	
Email V 7	✓ minutes hour(s)	before V	Edit Preview Delete
	day(s) week(s)		+ New Reminder
Voice and Text Reminders are o	n nook(s)	reen 5:00 AM to 11:00PM.	

5. Select when you would like the reminder to go out in relation to the scheduled appointment, either **before or after**.

Choose a Reminder Profile:		~	
Email V	day(s) ✓ ✓ before after	2	✓ Edit Preview Delete
Voice and Tout Deminders are	anti-delivered between 5:00 AM	to 11-000M	+ New Reminder
voice and Text Reminders are d	only delivered between 5:00 AM	to TEUPIN.	

In this example, we are sending out an email 1 day before the appointment.

6. To set more reminders, click **+New Reminder** and follow the same process. When finished click **Save & Close** or **Save.**

Email	*	7	day(s)	*	before	~	A Edit Previ	ew Delete
SMS Text	~	2	day(s)	~	before	~	Sedit Previ	ew Delete
Auto Phone Call	*	1	day(s)	*	before	*	Sedit Previ	ew Delete
pice and Text Remin	Iders	are on	ly delivered l	betwe	en 5:00 Al	vi to 1	+ Ne	w Reminde

Below are examples of the standard text, email, and voice reminders.

Text reminders include the option for patients to opt out of receiving text reminders.



Note: DrChrono only supports SMS text reminders to US-based numbers and US territories.

Reminder for Appointment with Springfield General Practice Inbox ×

e C

reminders@drchrono.com to me ▼ Mon, Apr 12, 1:15 PM 😚 🔦 🗧

Dear Jenny Harris,

You have an upcoming appointment with Springfield General Practice on Monday, April 12, 2021 at 1:30:00 PM Eastern Daylight Time.

Please follow this link to your appointment: <u>https://drchrono.com/appointment_reminder/e9d494fa-2dc9-4929-a1cb-f0842f314a90</u>

Regards, Springfield General Practice

Note: Reminders are delivered from reminders@drchrono.com. This email address can not be customized or changed. If a patient replies to a reminder email they will receive the response below.

\leftarrow	Emails to reminders@drchrono.com are not read. Please contact your care provider directly. Re: Appointment Reminder for appointmen	t with Christine Liestman
<u> </u>	This message was sent with High importance.	
DR	drchrono reminders < reminders@drchrono.com> Mon 3/28/2022 11:29 AM To: @drchrono.com	⅊ᄜ薗৫५%
	Emails to reminders@drchrono.com are not read. Please contact your care provider directly at their email address or via the phone.	
	Reply Forward	

Additional Note: United States federal law prohibits sending text messages with content related to cannabis and cannabis products like CBD.

Adding Additional Messaging to Email and Text Reminders

1. Enter the text you would like to add to the email message in the text box.

View Active Reminders:

Choose a Reminder Profile:	
Email V 7 day(s) V before V	Edit Preview Delete
Looking forward to seeing you.	
SMS Text V 2 day(s) V before V	Edit Preview Delete
Looking forward to seeing you.	
Auto Phone Call v day(s) v before v	✓ Edit Preview Delete
oice and Text Reminders are only delivered between 5:00 AM to 11:00PM.	+ New Reminder
Delete Save & Close Save Cancel	

2. Click **Preview** to see the message.

Text will be inserted between the end of the message and the closing of an email

Email Message Preview	×
Subject: Reminder for Appointment with Nick Riviera	
Dear Jenny Harris,	
You have an upcoming appointment with Nick Riviera on Wednesday, September at 9:20:00 AM Eastern Standard Time.	30, 2020
Please follow this link to your appointment: http://app.drchrono.com/demo-url/	
Looking forward to seeing you.	
Regards,	
Nick Riviera	
[Close

With a text message, the additional text will be added to the end of the message.

SMS Text Message Preview

You have an appointment with Nick Riviera on September 30, 2020 a you need to reschedule, please call 443-555-5555. Looking forward	
	Close

To edit or make changes to individual reminders select the appointment and follow the steps above and save your changes.

Notes on Adding Additional Text to Reminders

Standard text reminders are limited to 140 characters. Customizing your text reminders may cause this limit to be exceeded, resulting in multiple text messages toward your monthly limit.

There is no text limit when adding additional text to email reminders. However, the editor for email reminders uses HTML. This means that if you would like to have your custom message rendered on different lines or in multiple paragraphs, you need to use a little bit of code with **
>**. Otherwise, the message will be delivered in one paragraph.

Example 1: No use of <be>.

Email	♥ 3	day(s)	✓ before ✓
Looking forward t card. Call the offic	0,		member to bring your ID and insurance

Dear Jenny Harris,

You have an upcoming appointment with Springfield Med Office Tuesday, August 25, 2020 at 11:30:00 AM Eastern Daylight Time.

Please follow this link to your appointment: https://drchrono.com/appointment_reminder/8fd2399c-2cf2-463a-b983-7b03fae42fda

Looking forward to seeing you. Please remember to bring your ID and insurance card.Call the office with any questions.

Example 2: Use of
 for a new line.

Email	♥ 7	day(s)	✓ before	~
Looking forward to card.				bring your ID and insurance

Dear Jenny Harris,

You have an upcoming appointment with Springfield Med OfficeTuesday, August 25, 2020 at 11:30:00 AM Eastern Daylight Time.

Please follow this link to your appointment: <u>https://drchrono.com/appointment_reminder/417f756d-245b-4b83-88a7-3184ce09a451</u>

Looking forward to seeing you. Please remember to bring your ID and insurance card. Call the office with any questions.

Example 3: Use of
 for a new paragraph.

Email	♥ 7	day(s)	✓ before	▶
Looking forward insurance card				per to bring your ID and ons.

Dear Jenny Harris,

This is a post-appointment reminder for your scheduled appointment with Medical MD Office on Tuesday, August 25, 2020 at 11:30:00 AM Eastern Daylight Time.

Please follow this link to your appointment: <u>https://drchrono.com/appointment_reminder/df869398-690d-4947-b742-5a48c9fc9d58</u>

Looking forward to seeing you.
Please remember to bring your ID and insurance care
Call the office with any questions