

Adding Reminders to an Appointment

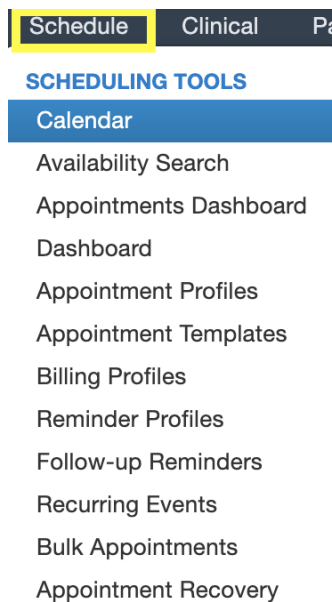
07/24/2024 12:09 pm EDT

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**.



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 Smith

Patient: Jenny (Jen) Harris - 02/11/1980

Reason:

Scheduled: 08/24/2020

Time: 09:30AM

Duration: 30

minutes

Allow overlapping

Notes:

Consent

Forms:

HIPAA Data Use Agreement (default)

No Show Policy (default)

Billing: - If different to provider -

Office: Primary Office

Profile: -----

Exam: Exam 1

Color:

Status:

> 24h

[View Clinical Note](#)

[View All Appointments](#)

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.

Arrange a Follow-up Reminder

View Active Reminders:

Choose a Reminder Profile:

Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

[+ New Reminder](#)

[Delete](#)

[Save & Close](#)

[Save](#)

[Cancel](#)

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

Choose a Reminder Profile:

Email
 SMS Text
 Auto Phone Call

minutes

before

[Edit](#)

[Preview](#)

[Delete](#)

[+ New Reminder](#)

Voice and Text Reminders 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

7

minutes
 hour(s)
 day(s)
 week(s)

before

[Edit](#)

[Preview](#)

[Delete](#)

[+ New Reminder](#)

Voice and Text Reminders are only delivered between 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 1 day(s) before after

[Edit](#) [Preview](#) [Delete](#)

[+ New Reminder](#)

Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

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**.

Choose a Reminder Profile:

Email 7 day(s) before after

SMS Text 2 day(s) before after

Auto Phone Call 1 day(s) before after

[Edit](#) [Preview](#) [Delete](#)

[Edit](#) [Preview](#) [Delete](#)

[Edit](#) [Preview](#) [Delete](#)

[+ New Reminder](#)

Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

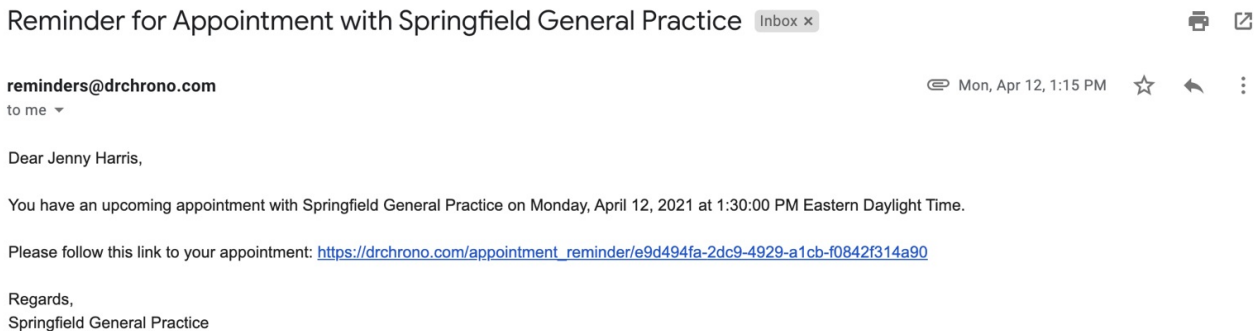
[Delete](#) [Save & Close](#) [Save](#) [Cancel](#)

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

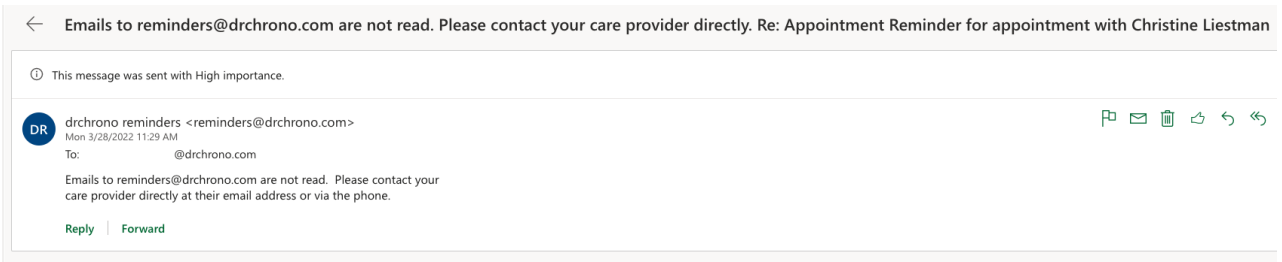
Text reminders include the option for patients to opt out of receiving text reminders.



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



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.



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 7 day(s) before

Looking forward to seeing you.

SMS Text 2 day(s) before

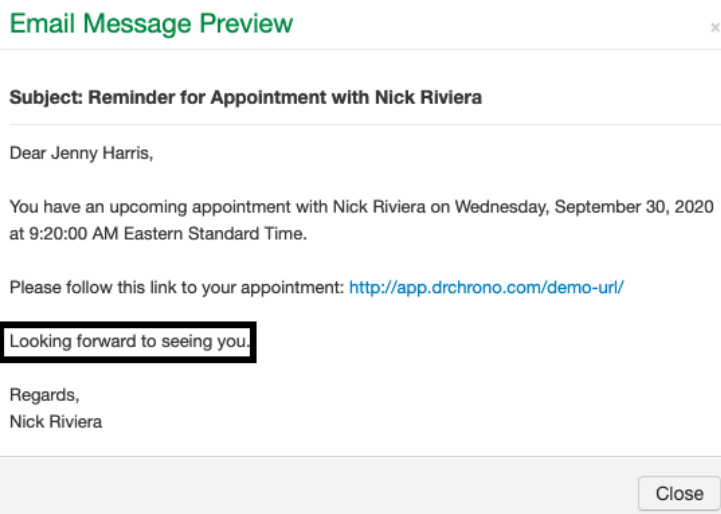
Looking forward to seeing you.

Auto Phone Call 1 day(s) before

Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

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

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



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

SMS Text Message Preview

x

You have an appointment with Nick Riviera on September 30, 2020 at 9:20:00 AM EST. If you need to reschedule, please call 443-555-5555. **Looking forward to seeing you.**

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 `
`.

Email day(s)

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

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 day(s)

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

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/417f756d-245b-4b83-88a7-3184ce09a451

...

**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 day(s)

Looking forward to seeing you,

Please remember to bring your ID and insurance card,

Call the office with any questions.

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: https://drchrono.com/appointment_reminder/df869398-690d-4947-b742-5a48c9fc9d58



Looking forward to seeing you.

Please remember to bring your ID and insurance card

Call the office with any questions.

