# How to Set Up a Follow-Up Reminder

07/24/2024 4:55 pm EDT

A follow-up reminder reminds patients to make appointments on a recommended date that you decide. Follow-up reminders can be set up in advance in a way that works best for reminding your patients to make appointments on the date that you recommend.

**Setting Follow-Up Reminders**

1. Go to **Schedule** > **Follow-Up Reminders**.



2. In the Follow-Up Reminder Settings, click **+Add New Reminder** to add a new reminder type (email, text, or phone call) or you can make changes to an existing reminder.



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

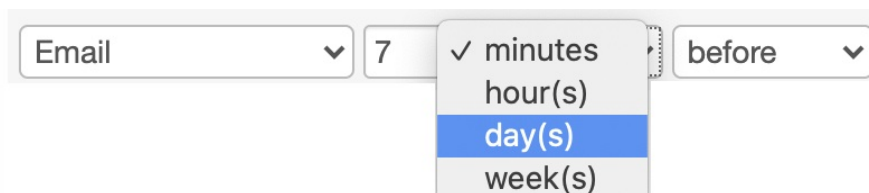4. Enter a number in the field between the reminder type and unit of time drop-down menus. This number will determine when the reminder goes out with the rest of the settings.
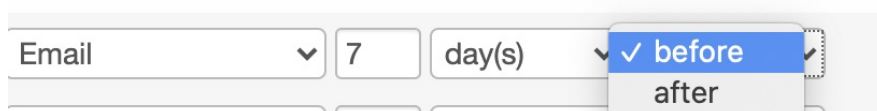
| Email | ▾ | 7 | day(s) | ▾ | before | ▾ |

5. Select a unit of time from the dropdown. This will determine when the reminder goes out with the follow-up date selected.
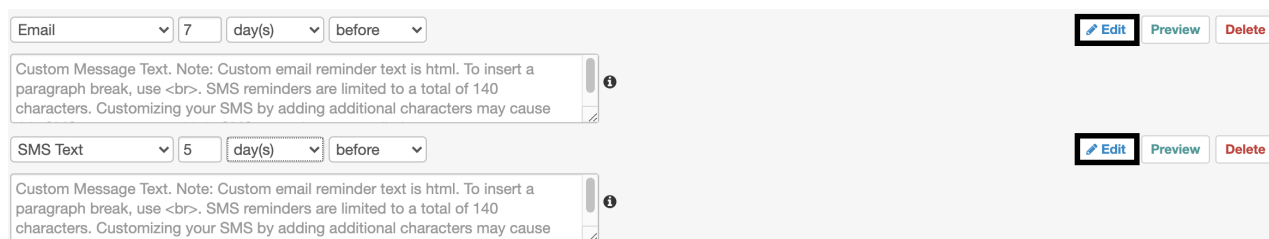
| Email | ▾ | 7 | ✓ minutes | before | ▾ |
| | | | hour(s) | | |
| | | | day(s) | | |
| | | | week(s) | | |

6. Select when you would like the reminder to go out with the date selected, either before or after.

| Email | ▾ | 7 | day(s) | ▾ | ✓ before |
| | | | | | after |

In the example we have set, we are sending out an email 7 days before the date we will select.

7. Clicking the **Edit** next to an email or text reminder allows you to enter additional information to your email and text reminders.

| Email | ▾ | 7 | day(s) | ▾ | before | ▾ | 🖉 Edit | Preview | Delete |

Custom Message Text. Note: Custom email reminder text is html. To insert a paragraph break, use <br>. SMS reminders are limited to a total of 140 characters. Customizing your SMS by adding additional characters may cause  ⓘ

| SMS Text | ▾ | 5 | day(s) | ▾ | before | ▾ | 🖉 Edit | Preview | Delete |

Custom Message Text. Note: Custom email reminder text is html. To insert a paragraph break, use <br>. SMS reminders are limited to a total of 140 characters. Customizing your SMS by adding additional characters may cause  ⓘ
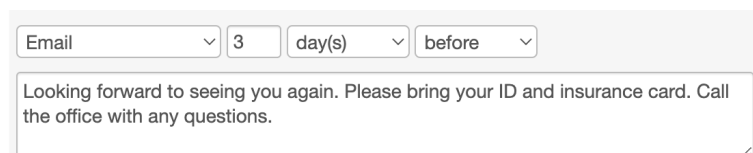
**Notes:**

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.

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

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 **<br>** (HTML line break). Otherwise, the message will be delivered in one paragraph.

**Example 1**: No use of **<be>**.

| Email | ▾ | 3 | day(s) | ▾ | before | ▾ |

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

reminders@drchrono.com

Dear Laurie Sample,

This is a reminder that you should schedule an appointment with Dr. James Smith on or after Thursday April 21.
Please follow this link to schedule an appointment: https://drchrono.com/follow_up/b2fdc943-a0cb-4d7d-b91d-13cf53fcb456/

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

Regards,
Family Practice

## Example 2: Use of **<br>** for a new line.

| Email | 3 | day(s) | before |
|---|---|---|---|

Looking forward to seeing you again.<br> Please bring your ID and insurance card. <br>Call the office with any questions.

reminders@drchrono.com

Dear Laurie Sample,

This is a reminder that you should schedule an appointment with Dr. James Smith on or after Thursday April 21.
Please follow this link to schedule an appointment: https://drchrono.com/follow_up/1f0f07e0-98ad-40bd-b875-c4f4fccf370a/

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

Regards,
Family Practice

## Example 3: Use of **<br>** for a new paragraph.

| Email | 1 | day(s) | before |
|---|---|---|---|

Looking forward to seeing you again.<br> <br>Please bring your ID and insurance card. <br><br>Call the office with any questions.

**reminders@drchrono.com**

Dear Laurie Sample,

This is a reminder that you should schedule an appointment with Dr. James Smith on or after Thursday April 21.
Please follow this link to schedule an appointment: https://drchrono.com/follow_up/1f0f07e0-98ad-40bd-b875-c4f4fccf370a/

Looking forward to seeing you again.

Please bring your ID and insurance card.

Call the office with any questions.

Regards,
Family Practice

8. Clicking **Preview** allows you to see the message.

| Email ▾ | 3 | day(s) ▾ | before ▾ | | ✏ Edit | Preview | Delete |

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

## Email Message Preview                                             ✕

**Subject: DrChrono.com: Follow-up appointment reminder with**

Dear John Doe,

This is a reminder that you should schedule an appointment with
              or after Tuesday August 25.
Please follow this link to schedule an appointment:
https://drchrono.com/follow_up/.../

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

Regards,

9. Once you have set your Follow-Up Reminders, click **Update Reminders**.

| Email ▾ | 3 | day(s) ▾ | before ▾ | | ✏ Edit | Preview | Delete |

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

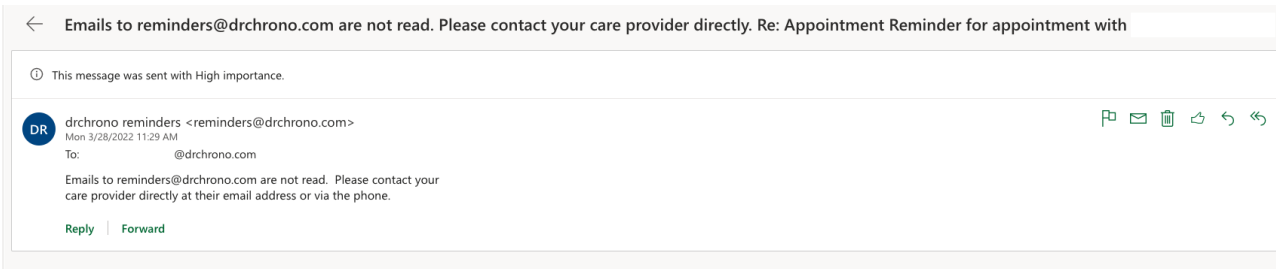**+ New Reminder**

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

Reset Reminders to Default                                   Update Reminders

**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.

**Scheduling Follow-Up Reminders**

1. From the Schedule Appointment window, select the **Appointment** tab.

2. Check the **Arrange a Follow-Up Reminder** box.

3. Select a **Follow-Up Date**.

4. Enter a **Follow-Up Reason**.

5. Click **Save & Close** or **Save**.

**Schedule Appointment**

| **Appointment** | Billing | Eligibility | Vitals | Growthcharts | Flags | Log Comm. | Revisions | Custom Data | MU Helper |

**Type** ⦿ Appointment ◯ Video Visit ⓘ ◯ Break ☐ Walk-in ☐ Transition of Care ☐ New Patient ☐ Referral

WARNING: This patient is pre-populated sample data.   Patient Statement Balance: **$824.00** Generate Statement   Balance: **$824.00**   29 past appointments

Primary Insurance: Cigna []   CDS: Mammogram screening for all women aged 40-74   ⚑ cypress:

| | | | | |
|---|---|---|---|---|
| **Provider** | Nick Riviera | | **Billing** | - If different to provider - |
| Patient | Jenny (Jen) Harris | ➕ ✏ ➦ | Office: | Primary Office   ➕ ✏ |
| Reason: | | | Profile: | --------- |
| Scheduled: | 08/25/2020  Time 12:20PM ⬍ | | Exam: | Exam 1 |
| Duration: | 30  minutes ☐ Allow overlapping | | Color: | [orange bar] |
| Notes: | | | Status: | |
| Consent Forms: | ✕ HIPAA Data Use Agreement (default)  ✕ No Show Policy (default) | | | 🖉 View Clinical Note   View All Appointments |

☐ Recurring Appointment
☑ Arrange a Follow-up Reminder ←

Patient will be reminded to make a follow up appointment around this date.
Follow Up Date 02/25/2021 ←
→ Reason 6 Month Check Up   e.g.: 6 month checkup

☐ View Active Reminders:

Delete | **Save & Close** | **Save** | Cancel

With the example created in this article, the patient will receive their Follow-Up Reminders on the following schedule:
- An email reminder will go out 7 days before 2/25/2021
- An SMS text message will be delivered 5 days before 2/25/2021

- A phone reminder will go out 3 days before 2/25/2021

**Scheduling Follow-Up Reminders from the Patient's Chart**

1. From the patient's chart select the **Demographics** section (left side list).

2. Once in the Demographics, click the **Important** tab.

3. Scroll down to **Follow-Up Date.**

3. Select a **Follow-Up Date**.

4. Enter a **Follow-Up Reason**.

5. Click **Save Demographics**.