# Creating and Using Reminder Profiles

07/24/2024 1:35 pm EDT

A reminder profile is a preset list of reminders you can choose from to alert your patients of their upcoming appointments. Reminder profiles are easy to set up and provide an efficient way to remind your patients via email, text, and phone calls.

Creating patient reminders is easy but it requires two separate steps. Creating the reminder profile and then applying the reminder profile to the appointment.

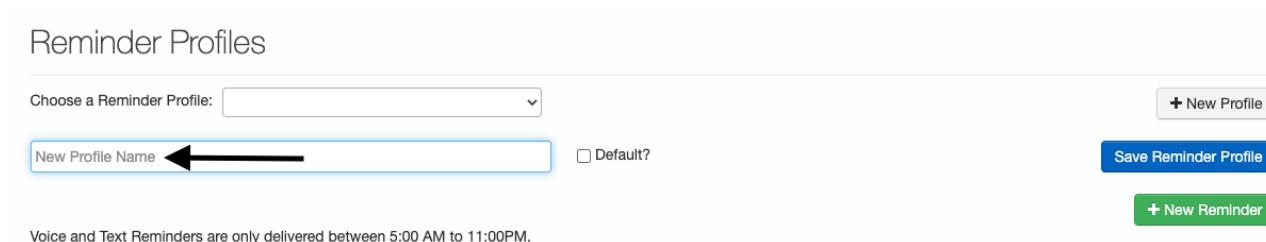**Creating Reminder Profiles**

1. Hover over the **Schedule** tab and click **Reminder Profiles**.
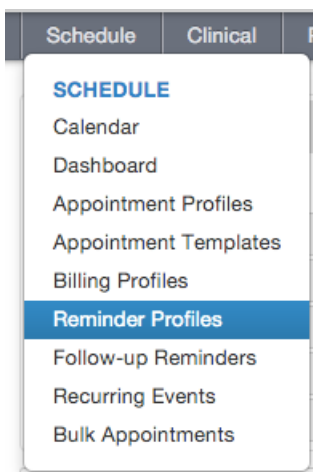
2. To create a new profile from scratch, click the grey **+New Profile** button.
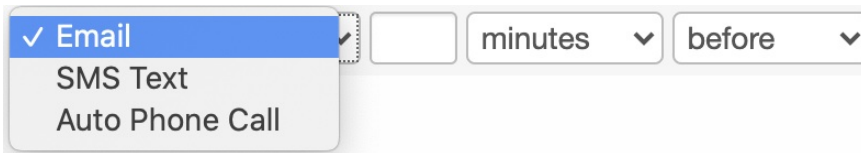

3. Enter a name in the **New Profile Name** box.

4. To add new reminders click the green **+New Reminder** button.

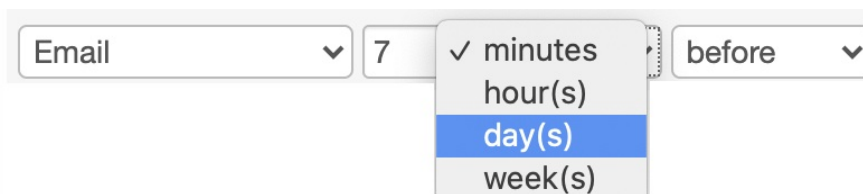5. Select the type of reminder from the dropdown. DrChrono offers one-way email, text, and phone calls.

✓ Email		minutes ⌄	before ⌄
SMS Text			
Auto Phone Call			

6. 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.
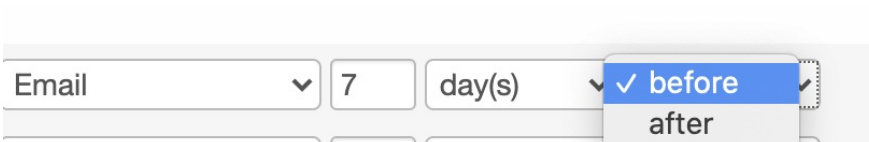
| Email ⌄ | 7 | day(s) ⌄ | before ⌄ |

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

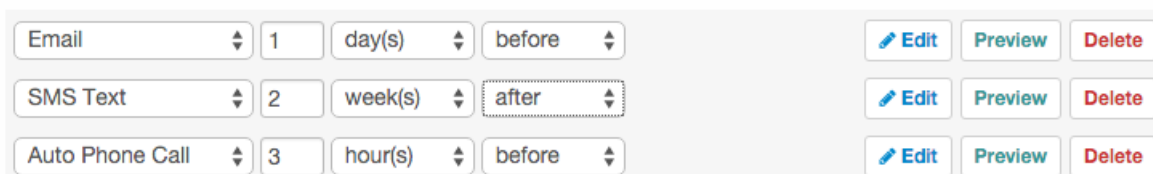| Email ⌄ | 7 | ✓ minutes | before ⌄ |
		hour(s)	
		day(s)	
		week(s)	

8. Select when you would like the reminder to go out in relation to the date selected, either before or after.

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

In the example above, an email will go out 7 days before the scheduled appointment.
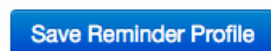
9. You can add multiple reminders by clicking the green **+New Reminder** button until you have all the reminders you want for one profile.

Email	⬍	1	day(s)	⬍	before	⬍	✏ Edit	Preview	Delete
SMS Text	⬍	2	week(s)	⬍	after	⬍	✏ Edit	Preview	Delete
Auto Phone Call	⬍	3	hour(s)	⬍	before	⬍	✏ Edit	Preview	Delete

10. Once you're done, click the blue **Save Reminder Profile** button.

Save Reminder Profile

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

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

Reminder for Appointment with Springfield General Practice Inbox ×

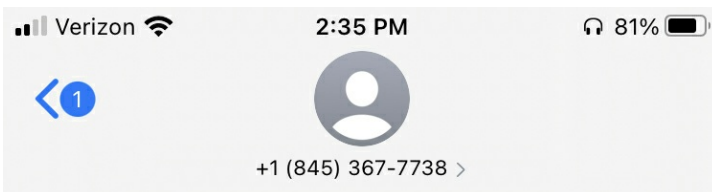**reminders@drchrono.com**
to me ▾

📎 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: https://drchrono.com/appointment_reminder/e9d494fa-2dc9-4929-a1cb-f0842f314a90
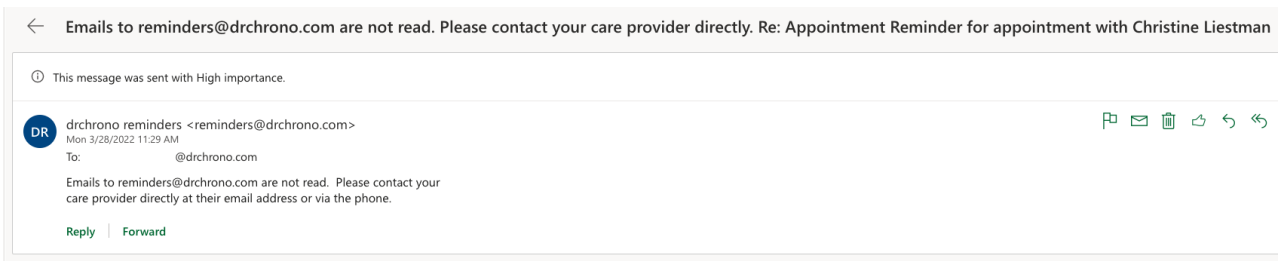
Regards,
Springfield General Practice

.ıl Verizon 📶   **2:35 PM**   🎧 81% 🔋

‹ ❶

👤

+1 (845) 367-7738 ›

Text Message
Today 7:50 AM

You have an appointment with
Family Practice on September
29, 2021 at 8:00:00 AM EDT. If
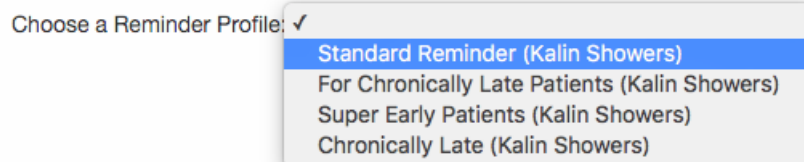you need to reschedule, please
call 443-555-5555

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.

← Emails to reminders@drchrono.com are not read. Please contact your care provider directly. Re: Appointment Reminder for appointment with Christine Liestman

ⓘ This message was sent with High importance.

DR drchrono reminders <reminders@drchrono.com>
Mon 3/28/2022 11:29 AM
To: @drchrono.com

🏳 ✉ 🗑 👍 ↩ ↩

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.

Editing Existing Reminder Profiles & Reminders

1. Select the reminder profile you would like to edit from the drop-down menu.

Choose a Reminder Profile: ✓

Standard Reminder (Kalin Showers)
For Chronically Late Patients (Kalin Showers)
Super Early Patients (Kalin Showers)
Chronically Late (Kalin Showers)

2. This will pull up all the reminders associated with the profile. You can edit a reminder, preview a reminder, or delete a reminder entirely.

3. Make the changes you need and click **Save Reminder Profile**.

Adding Additional Messaging to Email and Text Reminders

You can add additional information to text and email reminders.

1. Click **Edit** next to the email and/or text message reminder.

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

3. Click **Preview** to see what the message will look like.

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

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

Phone Reminders: You can't change or edit the phone reminder that is sent out. If you send out a phone reminder,

here is the message that will be played for the customer:

*This is an automated appointment reminder from "**Provider's Name**". You have an appointment with "**Provider's Name**" on "**Day, Month, Date, Time**". If you need to reschedule your appointment please call "**Office Number**". Please press 1 to confirm this appointment. Please press 2 if you are not a patient of "**Provider's Name**". Please press 3 if you would like to be directly connected to the office of "**Provider's Name**".*

Applying Reminder Profiles

There are two ways to apply reminder profiles: by default and at the appointment level.

Applying Reminder Profiles by Default

You also have the option to set a reminder profile as **Default**. If this option is applied, reminders associated with that profile will be sent out to all patients without any other action needed.

Check the **Default?** box and click **Save Reminder Profile**.

Applying Reminder Profiles at the Appointment Level

1. Go to your schedule by clicking **Schedule** > **Calendar**.

2. Open an existing appointment or schedule a new one.
   - Select the **Appointment** tab.
   - Click the **View Active Reminders** checkbox.

- Select a profile from the **Choose a Reminder Profile** dropdown menu.
- Click **Save & Close** or **Save**.

Once the reminder profile is selected, you can, if needed, edit the reminders for the scheduled appointment.

Reminder Profiles on the iPad

When creating appointments from the EHR app and the Check-In app it will automatically apply the last used reminder profile to the appointment. If you don't want any reminders associated with the appointment, please log into the website and remove the reminders from the appointment.

Notes on Adding Text to Reminder Emails and Text Messages

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 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 ⌄ | 7 | day(s) ⌄ | before ⌄ |

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 OfficeTuesday, 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 ⌄ | 7 | day(s) ⌄ | before ⌄ |

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.