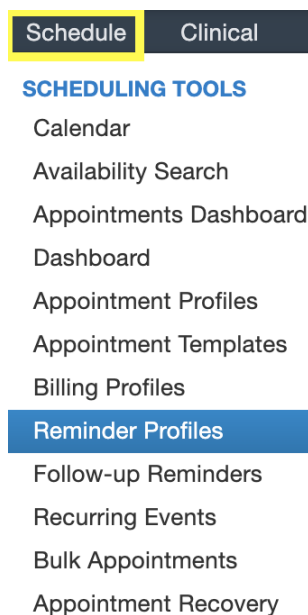# Editing Reminder Profiles and Appointment Reminders
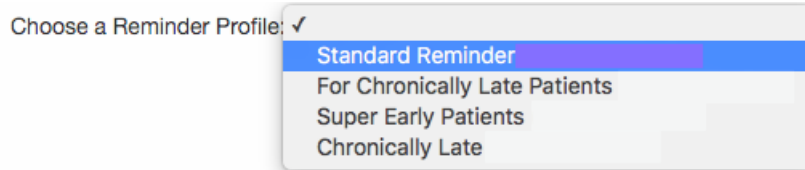
07/24/2024 2:15 pm EDT

DrChrono allows you to send reminders to patients for their upcoming appointments automatically. If you want to customize the timing and the type of correspondence and/or attach a custom message it is easily done. You can edit reminders at the appointment level or, if you are using reminder profiles, you can edit the profile.

Editing Reminders Profiles

1. Hover over **Schedule** and select **Reminder Profiles**.

| Schedule | Clinical |

SCHEDULING TOOLS

Calendar
Availability Search
Appointments Dashboard
Dashboard
Appointment Profiles
Appointment Templates
Billing Profiles
Reminder Profiles
Follow-up Reminders
Recurring Events
Bulk Appointments
Appointment Recovery

2. Select the reminder profile you would like to edit from the drop-down menu. If you'd like to learn more about creating Reminder Profiles read our article here.

Choose a Reminder Profile: ✓

Standard Reminder
For Chronically Late Patients
Super Early Patients
Chronically Late

2. Selecting the profile will pull up all the reminders associated with this profile.
- You can add a reminder by clicking **+New Reminder**.
- You can change the type (**email, text, phone call**), length, interval (**day, week, minute, hour**), or when the reminder goes out (**before/after**) by selecting the options from the dropdown. In the case of the length, you can enter a new number.
- You can change the additional text in your email and text reminders by typing in the text field.
- Click **Delete** to remove a reminder from the profile. Click **Delete Profile** to remove the profile entirely.
- Click **Save Reminder Profile** when your changes are complete.

Editing Reminders in an Appointment

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

2. Open an appointment window and select the **Appointment** tab. Check the **View Active Reminders** box.

Schedule Appointment   ✕

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

Type ● Appointment ○ Video Visit ❶   ☐ Walk-in ☐ Transition of Care ☐ Referral

WARNING: This patient is pre-populated sample data.   Patient Statement Balance: **$824.00** Generate Statement   Balance: **$999.00**   29 past appointments

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

Provider	Nick Riviera
Patient	Jenny (Jen) Harris - 02/11/1980 ▾ ✚ ✎ ⮌
Reason:	
Scheduled:	09/30/2020 Time 09:20AM ⬍
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: ⬅

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

Reminders for This Appointment

Delivery Attempted	Type	Reminder Delivered	Reminder Verified	Delivery Errors
Scheduled at 09/27/2020 09:20 AM	Auto Phone Call	Not Yet	No	
Scheduled at 09/28/2020 09:20 AM	SMS Text	Not Yet	No	
Scheduled at 09/29/2020 09:20 AM	Email	Not Yet	No	

2. **View Active Reminders** will pull up all the reminders associated with the profile.
  - You can add a reminder by clicking **+New Reminder**.
  - You can change the type (**email, text, phone call**), length, interval (**day, week, minute, hour**), or when the reminder goes out (**before/after**) by selecting the options from the dropdown. In the case of the length, you can enter a new number.
  - You can change the additional text in your email and text reminders by typing in the text field.
  - Click **Delete** to remove a reminder from the appointment.
  - Click **Save & Close** or **Save** when your changes are complete.

☑ View Active Reminders:

Choose a Reminder Profile: [   ]

Auto Phone Call	3	day(s)	before	✎ Edit	Preview	Delete
SMS Text	2	day(s)	before	✎ Edit	Preview	Delete
Email	1	day(s)	before	✎ Edit	Preview	Delete

Don't forget your insurance card.

+ 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 standard email and text 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 ▾

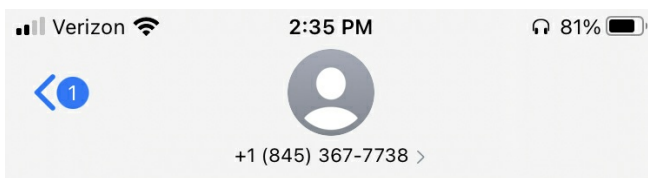Mon, Apr 12, 1:15 PM

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
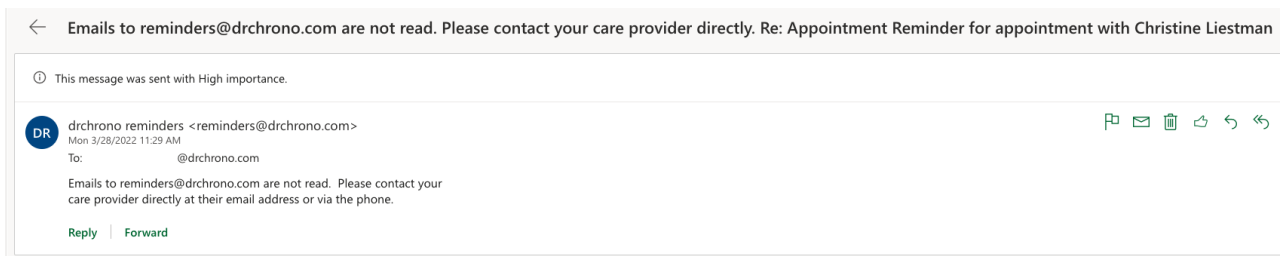
Regards,
Springfield General Practice

.ıll Verizon 🛜　　　**2:35 PM**　　　🎧 81% 🔋

◀ ①

+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.

Adding Additional Messaging to Email and Text Reminders

You can add/edit 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**".*

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 | v | 3 | day(s) | v | before | v |

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 | v | 7 | day(s) | v | before | v |

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 | v | 7 | day(s) | v | before | v |

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.