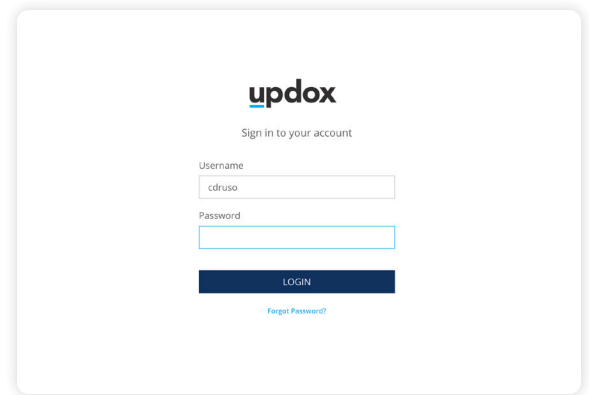# Reminders

A **quick guide** to help get you started.

How to use Updox Reminders

A quick guide to get your practice using Reminders today.

1

Log in to Updox

Enter your username and password to log in to your Updox account.

2

Reminder configuration

To set-up your reminders, choose Menu — Admin — Reminders.

You'll be able to configure the following:

- Delivery method
- Timing
- Response types
- Custom scripts

3

Delivery method

You can choose up to three automated reminders per appointment. Each reminder can have the same or different delivery method and customizable timeframe to be sent prior to the scheduled appointment time.
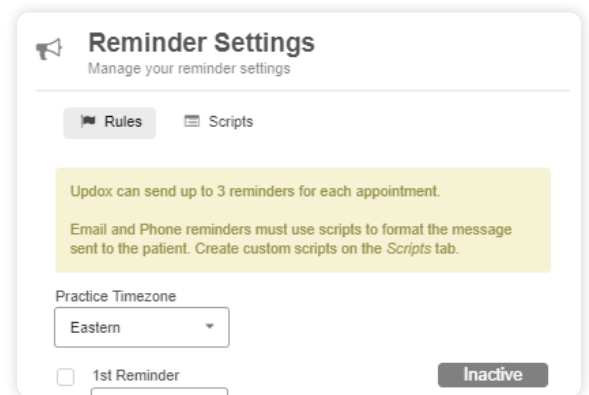
Did you know?

The most common reminder configuration is an email 7 days prior to the appointment, a call or text 48 hours prior, and a text 24 hours prior to the appointment.

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Timing

There are two options for blackout
time windows.

(4)

1. Blackout weekends: Checkbox.
   If selected, reminders will not go out
   on Saturdays and Sundays.
2. Nightly blackout start time /
   Morning blackout end time: Timeframe.
   These settings will ensure that no reminders
   are sent during the selected timeframe.
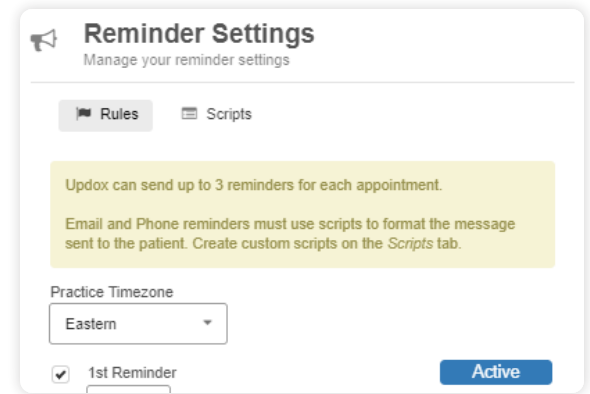
General configuration

You can choose additional customization by selecting checkboxes next to the
following areas:

(5)

- Send reminders after confirmation is received: After a patient confirms,
  this will still ensure reminders (without the option to reply) go out as scheduled.
- Allow patients to cancel an appointment from the reminder: If you want the
  patient to be able to cancel appointments from the reminder, check this option.
- Allow patients to call the office from the reminder: For phone reminders,
  this will give the patient the option to press four to be automatically
  transferred to a phone line at your practice.

Remember to always click 'Save' when changing any configuration options.

Did you know

Blackout times are recommended to start around the time your
practice closes, and ends in the morning when the practice opens.
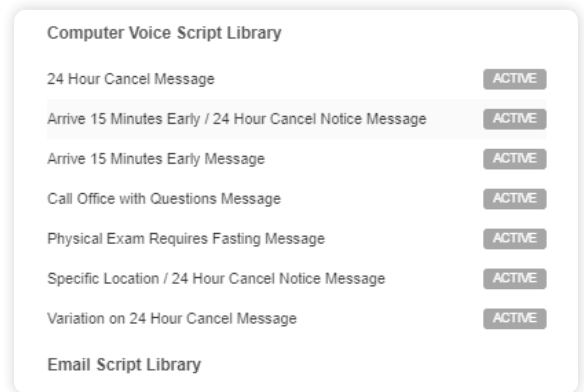
How to use Updox Reminders

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Reminder Scripts

6

There are default scripts automatically assigned set-up Menu — Admin — Reminders, then Scripts. The default script per method will be indicated with the method icon.
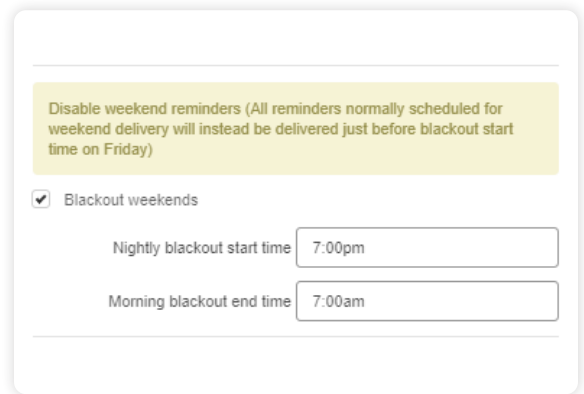To review and test the script, double click into the title of the script. To customize the script, choose Make a Copy, then edit as needed.

Computer Voice Script Library

24 Hour Cancel Message	ACTIVE
Arrive 15 Minutes Early / 24 Hour Cancel Notice Message	ACTIVE
Arrive 15 Minutes Early Message	ACTIVE
Call Office with Questions Message	ACTIVE
Physical Exam Requires Fasting Message	ACTIVE
Specific Location / 24 Hour Cancel Notice Message	ACTIVE
Variation on 24 Hour Cancel Message	ACTIVE

Email Script Library

Activating reminders

7

Once you have finished your configuration, you are able to activate your reminders by checking the box next to 1st, 2nd and 3rd reminder (depending on how many reminders you chose to send). Once checked, click Save.


Disable weekend reminders (All reminders normally scheduled for weekend delivery will instead be delivered just before blackout start time on Friday)

☑ Blackout weekends

Nightly blackout start time   7:00pm

Morning blackout end time   7:00am

Reminder dashboard

8

To view patient responses, or those who have yet to respond to a reminder, click Menu — Home — Reminder dashboard. This will show which customers have yet to confirm for additional outreach from office staff. If you are using an integrated E.H.R with reminders, you will also be able to view reminders responses in your calendar.
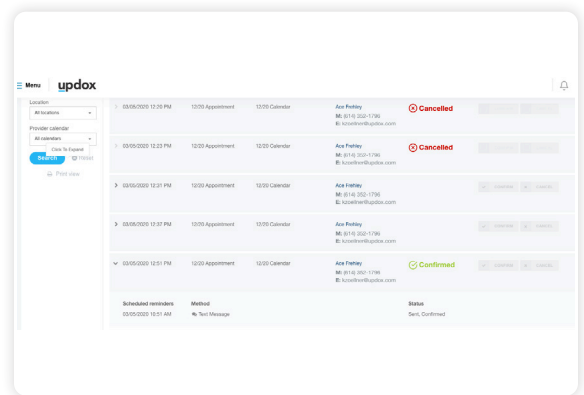
Did you know

✓ When customizing reminder scripts, you can use the token to the right to personalize the message.