

# How to: Configure Rules for Reminders

## What is Reminders?

Reminders is an appointment reminder solution that practices can personalize to easily engage with patients. It allows practices to include automated appointment reminders as part of the strategy for patient engagement.

This two-way messaging solution allows your practice to remind patients about upcoming appointments via text messages, phone calls, or email, and it allows patients to respond by confirming or cancelling the appointment directly from the message.

Review the full suite of Reminders training at [\[insert link\]](#):

- Reminders Overview
- How to: Configure Rules for Reminders
- How to: Create Reminders Script Templates
- How to: Use Scheduling Configurations to Customize Reminders
- How to: Use the Reminders Dashboard
- How to: Go Live with Reminders

## What is Rules?

The first step to configuring Reminders is setting up Reminders Rules. Use Rules to personalize your messages to patients about their appointments.

## What can I use Rules to do?

Use Rules to determine:

- How you want to deliver reminders (text messages, emails, or phone calls)
- How many times you want to remind your patients
- How often do you want to send reminders

## What do I need to do first?

Before you begin setting up Rules, take the following items into consideration:

Before you begin

### Consider your patient population

The demographics of your patient population can affect your decisions. For example, if you primarily treat older patients, they may appreciate receiving reminders via phone calls. Or, you may need to consider reminders delivered in multiple languages.

The flexibility built into Rules lets you design reminders based on your practice needs.

### Think about these questions

Take the time to answer these questions before starting:

1. Will you remind patients with texts, emails, or phone calls?

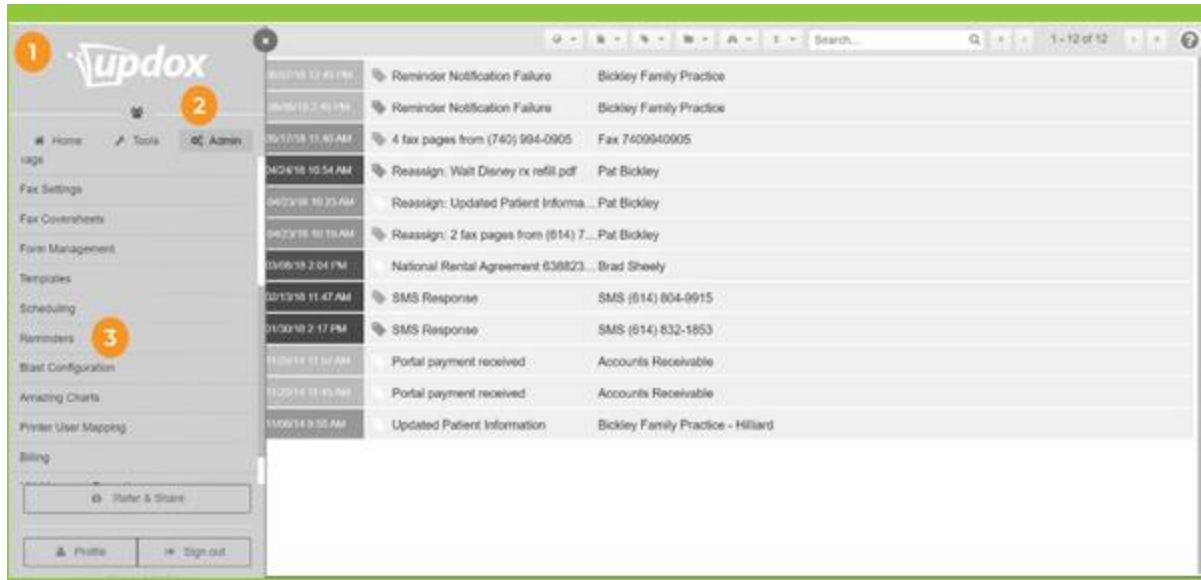
NOTE: If you choose texts, make sure you have cell phone numbers for your patients.

2. How many times do you want to remind patients?
3. How often do you want to send reminders?

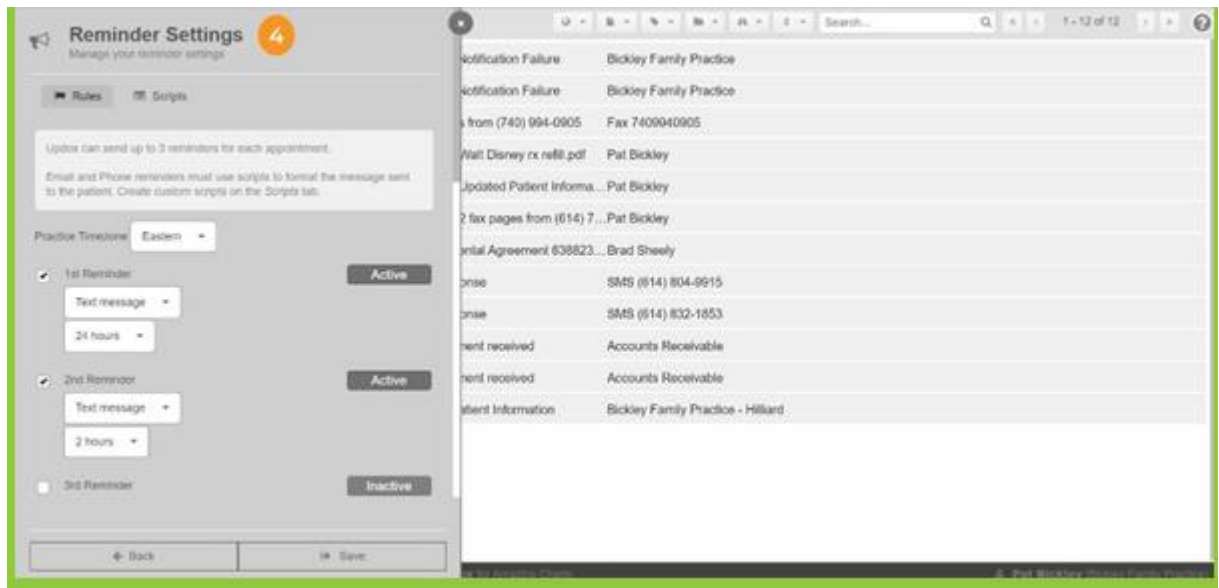
## How do I set up Rules?

Follow these step-by-step instructions:

1. From the Inbox, go to Menu.
2. Select Admin.
3. Select Reminders.



4. You will land on the Rules tab.



- Determine how many reminders to send for each appointment. You can send up to 3 reminders per appointment.

**NOTE:** Leave the check box beside each reminder blank. You will not check those until you are ready to go live. You will notice the reminder is set to “Inactive”.

**Reminder Settings**  
Manage your reminder settings

Rules Scripts

Updox can send up to 3 reminders for each appointment.  
Email and Phone reminders must use scripts to format the message sent to the patient. Create custom scripts on the *Scripts* tab.

Practice Timezone Eastern

1st Reminder **5** Inactive  
Method  
-- None Selected --

2nd Reminder **5** Inactive  
Method  
-- None Selected --

3rd Reminder **5** Inactive

← Back Save

- Select a method from the drop-down menu to use for each reminder:

1. Email
2. Home phone
3. Cell phone
4. Text message

**NOTE:** Methods set here will always be used unless the patient has specified a different preference

## Reminder Settings

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Rules Scripts

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Practice Timezone Eastern

1st Reminder Inactive

Method

Method

Email

Telephone-home Inactive

Telephone-cell

Text message

3rd Reminder Inactive

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7. Determine when to send reminders in relation to the appointment time by choosing an option from the drop-down menu :
  1. 2 hours before the appointment
  2. 4 hours before the appointment

3. 24 hours before the appointment
4. 48 hours before the appointment
5. 1 week before the appointment

## Reminder Settings

Manage your reminder settings

**Rules** Scripts

Updox can send up to 3 reminders for each appointment.

Email and Phone reminders must use scripts to format the message sent to the patient. Create custom scripts on the *Scripts* tab.

Practice Timezone: Eastern

|                          |                     |          |
|--------------------------|---------------------|----------|
| <input type="checkbox"/> | 1st Reminder        | Inactive |
|                          | Method              |          |
|                          | -- None Selected -- |          |
| <input type="checkbox"/> | 2 hours             | Inactive |
|                          | 4 hours             |          |
|                          | 24 hours            |          |
|                          | 48 hours            |          |
| <input type="checkbox"/> | 1 week              | Inactive |

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**Do you want to send additional reminders after patients confirm their appt.?**

8. After a patient confirms their appointment, you can choose to stop sending additional reminders by unchecking the box labeled “Send reminders after confirmation is received”.

The screenshot shows a configuration panel for reminders. At the top, there is a 'Practice Timezone' dropdown menu set to 'Eastern'. Below this are three reminder settings, each with an unchecked checkbox, a 'Method' dropdown menu, and a '-- None Selected --' dropdown menu. To the right of each reminder setting is a dark grey button labeled 'Inactive'. At the bottom of the reminder settings, there is a checked checkbox labeled 'Send reminders after confirmation is received'. An orange circle with the number '8' is overlaid on the right side of this checkbox. Below the reminder settings is a light grey box containing the text: 'Disable weekend reminders (All reminders normally scheduled for weekend delivery will instead be delivered just before blackout start time on Friday)'. The entire interface is set against a light grey background.

**Do you want to avoid interrupting patients' weekends and evenings by setting blackout options?**

9. Check the box next to “Blackout weekends” to only send reminders between Monday and Friday.
  
10. Choose the nightly blackout time when reminders will stop for the evening and choose the morning time when reminders can resume.

**Example:** In this example, reminders will not be delivered to your patients between 8 p.m. and 8 a.m. or on weekends.

**NOTE:** Reminders that would normally be sent during this time will be delivered just prior to the “Nightly blackout start time”. In this example, reminders would be delivered at 7:59



Method ▾

-- None Selected -- ▾

3rd Reminder Inactive

Method ▾

-- None Selected -- ▾

Send reminders after confirmation is received

---

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

Blackout weekends **9**

Nightly blackout start time  **10**

Morning blackout end time

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Enter the telephone number a patient should call regarding appointment questions.


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**Do you want to add a phone number to the reminder message for patients to call the office if they have questions?**

11. Select “Manage Appointment Phone Numbers” and enter the phone number you would like the patient to call.

**NOTE:** If you have multiple locations, each with a different phone number, enter those here.

Enter the telephone number a patient should call regarding appointment questions.

 Manage Appointment Phone Numbers 11

Allow patients to cancel an appointment from the reminder

Allow patients to call the office from the reminder

Selecting this option will disable the sending of multiple reminders to patients with more than one appointment within the specified time frame. Can be used for bundled appointments

Filter out multiple reminders for patients within specified time frame

Same day ▾

Human Voice - Male is only available in English. Spanish Reminders will be read by a Female speaker.

Human Voice

No Preference ▾

**Do you want patients to call your office to cancel or do it directly from the reminder message they receive?**

12. If you want patients to call your office to cancel, uncheck “Allow patients to cancel an appointment from the reminder”.
13. If you want to allow patients to call the office directly from the reminder message, check “Allow patient to call the office from the reminder”.

**NOTE:** For text reminders, the phone number displays as a link.

**NOTE:** The phone number entered under Step 11 is the number that will be used.

Enter the telephone number a patient should call regarding appointment questions.

⚙️ Manage Appointment Phone Numbers

11

Allow patients to cancel an appointment from the reminder

12

Allow patients to call the office from the reminder

13

Selecting this option will disable the sending of multiple reminders to patients with more than one appointment within the specified time frame. Can be used for bundled appointments

Filter out multiple reminders for patients within specified time frame

Same day ▾

Human Voice - Male is only available in English. Spanish Reminders will be read by a Female speaker.

Human Voice

No Preference ▾

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## How do I avoid sending multiple reminder messages for patients with multiple appointments in the same day?

14. Check “Filter out multiple reminders for patients within specified time frame”.
15. Choose how close together the appointments should be before grouping them together.

**Example:** A patient might have an appointment to see the provider, another appointment to for the lab, and a third appointment for an x-ray. If all of these appointments are close to each other, you would want to group them together and only send one reminder.

The screenshot shows a configuration interface for appointment reminders. At the top, there is a text input field for the appointment contact telephone number, containing "(914) 332-5590". Below this are two checked checkboxes: "Allow patients to cancel an appointment from the reminder" and "Allow patients to call the office from the reminder". A callout box labeled "14" points to a checkbox labeled "Filter out multiple reminders for patients within specified time frame", which is also checked. Below this checkbox is a dropdown menu with options: "Same day", "1 hour", "2 hours", "4 hours", and "Same day". A callout box labeled "15" points to the "Same day" option in the dropdown. Below the dropdown is another dropdown menu showing "English (Female)". At the bottom of the screen are two buttons: "Back" and "Save".

What voice will be used in your phone call recording?

16. Select the human voice from the dropdown menu:

1. English Female
2. English Male
3. Spanish (Female only)

**NOTE:** Set the voice as Spanish only if your patient population is largely Spanish speaking. Also, variables you might include in a reminder such as the provider name or a location will be spoken by an English speaking computer voice unless you work with Updox to record all your variables in Spanish.

As a custom option, Updox provides the ability to record reminders in many different languages. Contact [Sales@updox.com](mailto:Sales@updox.com) for more information.

Enter the telephone number a patient should call regarding appointment questions.

Appointment Contact Telephone No.

(914) 332-5590

Allow patients to cancel an appointment from the reminder

Allow patients to call the office from the reminder

Selecting this option will disable the sending of multiple reminders to patients with more than one appointment within the specified time frame. Can be used for bundled appointments

Filter out multiple reminders for patients within specified time frame

Same day ▾

No Preference

English (Female)

English (Male)

Spanish

No Preference **16** ▾

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→ Save

17. To save your Rules settings, select Save at the bottom of the screen.
18. If you aren't ready to go live, make sure you do not check the boxes beside each of your reminders before you select Save.

**NOTE:** Reminders will start sending to your patients immediately when the boxes beside each reminder are checked. The status will remain as "Inactive" until you check those boxes.



## Reminder Settings

Manage your reminder settings

Rules

Scripts

Updox can send up to 3 reminders for each appointment.

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Practice Timezone Eastern

1st Reminder

Inactive

18

Method

-- None Selected --

2nd Reminder

Inactive

18

Method

-- None Selected --

3rd Reminder

Inactive

18

← Back

17

↔ Save