/lanage Appointment Reminders

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ıppointment Reminders notify patients of upcoming appointments, reducing the number of no-shows and ıcreasing the productivity and revenue of your office. With this feature, patients are able to verify or canc n appointment by using the keypad on their phone. For maximum convenience, all patient confirmations nd cancellations are automatically synced with your appointments, so front office staff can easily eschedule patients and wait-listed patients are seen quickly, which ensures efficiency.

⚠ CollaborateMD sends the appointment reminder file to our third-party vendor at 1 AM EDT daily. Any changes after this time will not reflect until the next day's file submission.

' you're the Auth Rep, follow the steps below to enable, configure, or disable Appointment Reminders:

1. Select **Account Administration** > **Services**.
2. Click the **button** next to Appointment Reminders.
3. The ***Enable Appointment Reminders*** box allows you to **enable or disable this service**.
4. Configure or view the **General Options** tab:
    1. **Enable Phone Reminder**: Select this option if you want patients to receive phone call reminders.
    2. **Enable Text (SMS) Reminders**: Select this option if you want patients to receive text message reminders.

        ⚠ Text Reminders do not support sending or receiving MMS (Multimedia Message Services). I.e., we do not support pictures, video or audio messages.

    3. **Enable Email Reminders:** Select this option if you want patients to receive email message reminders.
    4. **Days before appointment to send reminder**: Select how many days before the appointment, time, and time zone you want patients to be notified of their upcoming appointment.
    5. **Send reminder for appointments set to status** Select which appointment type(s) you would like phone calls or text messages to be placed for.
    6. **Do not send reminders on Saturday/Sunday**: Check these boxes if you don't want appointment reminders to be delivered on the selected days of the week.
    7. **Allow Patients to Confirm/Cancel appointment from reminder**: Check this box to allow patients

to confirm or cancel their appointment.

1. **If Confirmed, set appointment status to:** Select which status you want the appointment to be changed to in the event that the patient confirms their appointment.

2. **If Cancelled, set appointment status to:** Select which status you want the appointment to b changed to in the event that the patient cancels their appointment.

5. Configure or view the **Phone Options** tab.

    1. **Contact Patient using:** Select which phone number on file for the patient you wish to use. (e.g., Home/Cell/Work Phone).

    > ⚠ If the patient does not have a number in the selected field, the phone reminder will use the first available phone number it finds. Going in order of Home, Work and then Cell.

    2. **If busy or not answered, retry times /wait minutes between calls** Select how many times you would like the system to call the patient back in the event there is no answer. Select how long yo would like the system to wait before making another call.

    3. **Specify the Caller ID Name And Number to be used in the reminder message** Select from the dropdown one of the options below. Note: These options will apply to all Practices under the Customer you're currently logged into.

        1. **Use CMD defaults**: Selecting this option will call the patient from a generic phone number that will replay the reminder if called back.

        2. **Use the name and phone number entered in the Practice section** Selecting this option will send the Practice's name as the Caller ID Name and the Practice's phone number as the Caller ID Number. Note: The Practice information used is dependant on the Practice selected for the Resource associated with the appointment.

        3. **Custom name and number:** Selecting this option will allow you to enter a custom Caller ID Name and Caller ID Number to ensure patients can easily recognize who is calling.

    4. **Customize Practice Recording:** This option will allow you to create voice recordings. Not setting up this option will result in a standard computer generated recording.

    5. **Specify the "appointment with" name to be used in the reminder message** Select the name to b used in the phone reminder message. Note: Selecting the Customize link will allow you to edit th Provider Name. You can record the provider's name, play the recorded name, delete the recording, or re-record.

    6. **Request Sample Reminder**: This option will allow you to receive a sample reminder call simply by entering your phone number.

6. Configure or view the **Text Options** tab.

    1. **Edit the reminder message**: Use the default reminder message or right-click on the message bod to select fields to include in the text reminder message.
       Note: If your message exceeds 160 characters, A long patient name could cause messages longer than 160 characters to be sent, which will incur an extra charge for each reminder.

       > Want to make it even easier for your patients to confirm the appointment? Right-click the message body and select the **[Confirm Link]** option to allow your patients to confirm by simply clicking a link.

    2. **Date Format:** Use the drop-down menu to select the format you would like the data to be displayed in.

    3. **Resend text reminder**: Select how many days before the appointment you would like the system to text the patient until they respond (Confirm, Cancel, or Stop).

        1. Click on the **Customize** link to select the name within the text message.

    4. **Additional Reminder:** Choose the subject and the reminder message to be used if the “send additional reminder before appointment” option is selected.

    5. **Specify hours for sending an SMS Text Opt-In message**: Choose which hours of the day and time zone you would like patients to receive SMS text opt-in messages.

7. Configure or view the **Email Options** tab.

    1. **Send Replies to**: Select which patient email on file you wish to use to send reminders to. (Primary practice email, Custom email, or None).

    2. **Subject**: Select the email subject line to be used in the reminder message.

    3. **Edit the reminder message**: Use the default reminder message or right-click on the message bod to select fields to include in the email reminder message.

       > Want to add a different reminder for different appointment types? Right-click within the message body and Customize Appointment Type Messages. Then add the **Appt Type Message** field to the email reminder.

       > Click the **Reset to Default** link to revert to the default message.

   4. **Date Format**: Choose what date format you would like used in the email reminder message.
   5. **Additional Reminder**: Choose the subject and the reminder message to be used if the "send additional reminder before appointment" option is selected.
8. ***Optional***: Select **Copy Configuration** to copy these settings to another customer account you manage.
   1. Check the box next to the customer account(s) to copy the settings to, then click **Copy**.
9. Click **Save.**