

# Sending Intake Forms Automatically on Appointment Reminders

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Appointment reminders enable the office to inform patients about their upcoming appointments, which reduces no-shows and enhances both productivity and revenue. Additionally, the office can automatically send intake forms via email or text, allowing patients to click a link, choose the form, and complete it online for a faster and more efficient collection of patient data.

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

1. Select **Account Administration > Services**.
2. Click the **button** next to **Appointment Reminders**.
3. Depending on your General Options, configure the **Text Options** and/or **Email Options** to include the forms link.
4. To configure for text, click the **Text Options** tab:
  1. **Edit the reminder message:** by right-clicking on the reminder message body (if sending the link on the original first reminder) or right-clicking the additional reminder message body (if sending a separate reminder with the form) and selecting the **[Form Link]** option to allow your patients to select, and fill out the form by simply clicking a link.

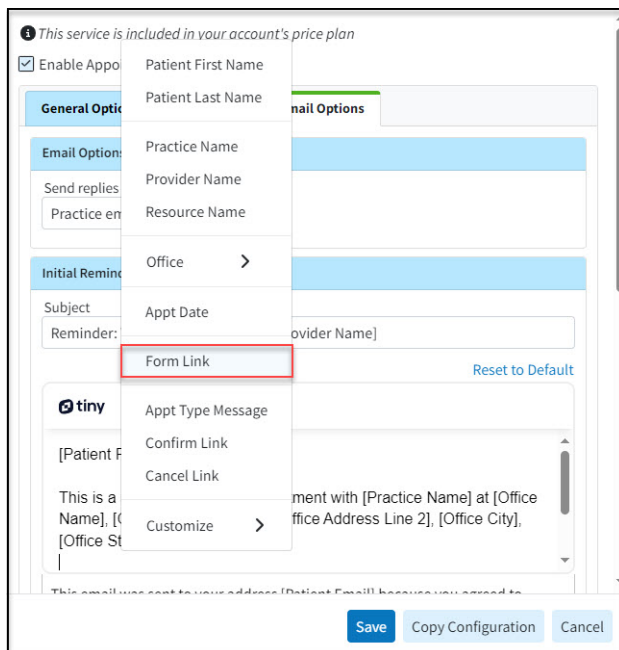
The screenshot displays the 'Appointment Reminders' configuration window. At the top, it states 'This service is included in your account's price plan'. The 'Enable Appointment Reminders' checkbox is checked. The 'General Options' tab is active, showing fields for Patient First Name, Patient Last Name, Practice Name, Provider Name, Resource Name, Office, and Appt Date. The 'Text Options' tab is also visible, showing a 'Form Link' option selected in a dropdown menu. The 'Initial Reminder' section contains a message body with a right-click context menu open, highlighting the 'Form Link' option. The 'Additional Reminder' section is also visible, showing a 'Customize' option. At the bottom, there are 'Save', 'Copy Configuration', and 'Cancel' buttons.


**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.


5. To configure for email, click the **Email Options** tab.

1. **Edit the reminder message** by right-clicking on the reminder message body (if sending the link or the original first reminder) or right-clicking the additional reminder message body (if sending a separate reminder with the form) and selecting the **[Form Link]** option to allow your patients to select, and fill out the form by simply clicking a link.



 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

6. Click **Save**.

 Please reference the [Manage Appointment Reminders Help Article](#) for more information on setting up and configuring appointment reminders.