Sending Intake Forms Automatically on Appointment Reminders

t Modified on 04/08/2024 8:40 am EDT

ppointment reminders enable the office to inform patients about their upcoming appointments, which educes no-shows and enhances both productivity and revenue. Additionally, the office can automatically end intake forms via email or text, allowing patients to click a link, choose the form, and complete it online or 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.

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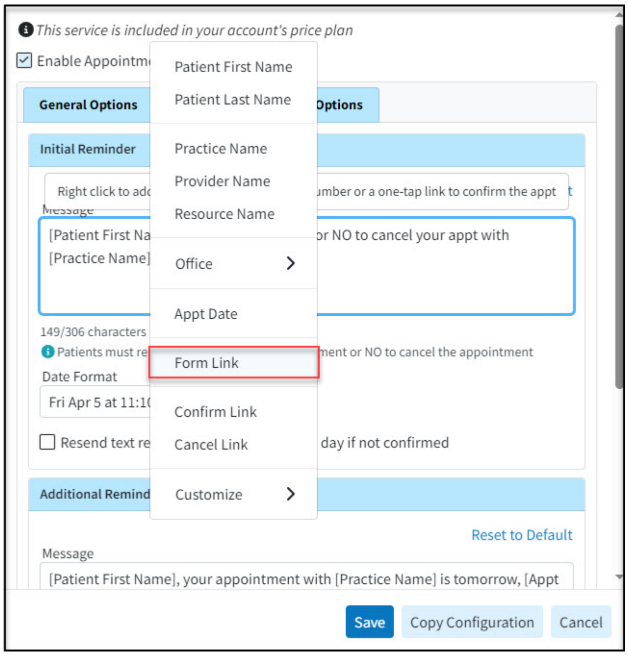
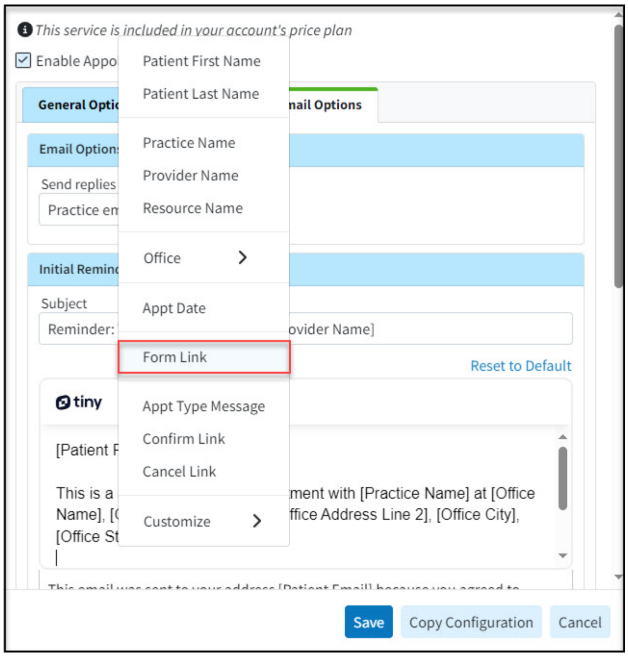
1. Select **Account Administration** > **Services**.
2. Click the **button** next to ***Appointment Reminders***.
3. Depending on your General Options, configure the **Text Options** and/or **Email Options** to include the forms link.
4. To configure for text, click the **Text Options** tab:
    1. **Edit the reminder message**: by right-clicking on the reminder message body (if sending the link o 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.



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.