

Family Message Early Reminder

Last Modified on 11/09/2022 1:06 pm EST

Summary

A *Family Message Early Reminder* is a notification only of upcoming appointments for multiple patients with appointments on the same day. It is not a request for confirmation of the appointments. Go to [Settings>Family Message Settings>Early Reminders](#).

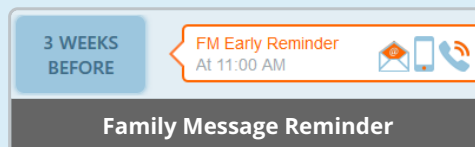
The *default reminder delivery date* is set at 2 or 3 weeks before the appointment (depending on the type of practice) as patient appointments are often scheduled well in advance of the appointment date.

For example, many dentists will schedule a return hygiene appointment up to 6 months in advance.

The *Family Message Early Reminder* allows the guarantor of multiple patients with appointments on the same day to check their calendar for conflicts and comfortably reschedule if needed. Finding that your patients need to reschedule their appointments a day or 2 before their appointment day can oftentimes create schedule vacancies and loss of revenue.

Multiple *Family Early Reminder* notifications may be set up by the practice. Some practices have found that creating a reminder for the day before the appointment in addition to the reminder a few weeks before helps to cut down on no-shows. Others feel a day before reminder is unnecessary. Each practice knows their patients best and balance the need to remind patients of upcoming appointments and overwhelming them with messaging.

An enabled Reminder notification is always sent to a patient regardless of confirmation status. You can recognize them in the Timeline Family Messaging tab view by their orange color.



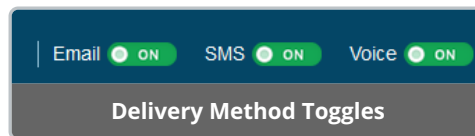
Enable an Early Reminder notification

Note: When creating and enabling an *Early Reminder* notification, all of the following steps must be completed: Not setting or incompletely setting any step below may prevent messages from being delivered to your patients. It is helpful to name the notification for easy identification in the *Timeline* view.

Notification Name:	FM Early Reminder
Notification Name	

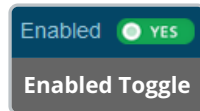
1. Message delivery method: Choose any combination of *Email*, *SMS*, or *Voice* by toggling the buttons to

the **ON** (green) position.



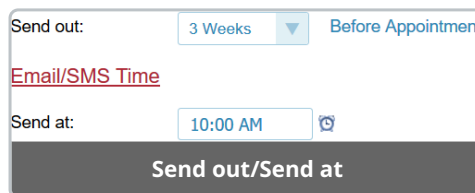
The interface shows three toggle switches: Email, SMS, and Voice. Each switch has a green circle with a white dot in the center, indicating they are all turned 'ON'. Below the switches is a dark grey button labeled 'Delivery Method Toggles'.

2. Enable: Turn on the notification by toggling the button **ON** (green).



The interface shows a toggle switch labeled 'Enabled' with a green circle and a white dot, indicating it is turned 'ON'. Below the switch is a dark grey button labeled 'Enabled Toggle'.

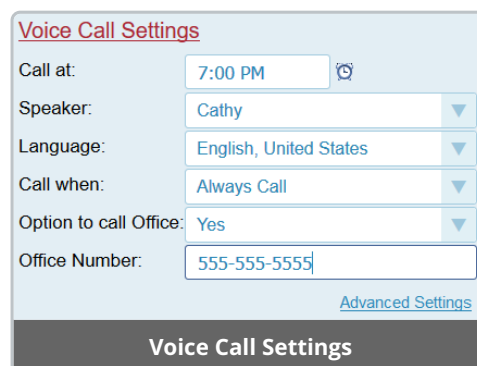
3. Send out/Send at: Select how soon before the appointment date to send the reminder and the time of day to send. Your selection here is applied to the voice reminder for this notification.



The interface has two sections. The first section is labeled 'Send out:' and has a dropdown menu set to '3 Weeks' and a button labeled 'Before Appointment'. The second section is labeled 'Send at:' and has a text input field set to '10:00 AM' and a clock icon. Below these sections is a dark grey button labeled 'Send out/Send at'.

4. Voice Reminders: A reminder for an upcoming appointment can be made to the patient's home phone. To enable an automated voice call:

- **Call at:** Set the time of day to make the call
- **Speaker:** Select the voice to use. Alice and Conchita allows a Spanish notification
- **Language:** English is always default. You may choose Spanish, Mexico for a voice message in Spanish if Alice is chosen as Speaker. Choosing Spanish, Spain enables Conchita.
- **Call when:** Choose what contact information (or lack of) triggers a call
- **Option to call Office:** Will the patient be able to press a button to call the office telephone
- **Office Number:** Displays what phone number the patient will reach when Option to call Office is enabled



The interface is titled 'Voice Call Settings'. It has several fields: 'Call at:' with a text input set to '7:00 PM' and a clock icon; 'Speaker:' with a dropdown menu set to 'Cathy'; 'Language:' with a dropdown menu set to 'English, United States'; 'Call when:' with a dropdown menu set to 'Always Call'; 'Option to call Office:' with a dropdown menu set to 'Yes'; and 'Office Number:' with a text input set to '555-555-5555'. Below these fields is a link labeled 'Advanced Settings'. At the bottom is a dark grey button labeled 'Voice Call Settings'.

5. Advanced Settings: A practice may decide to send a voice call Reminder on a day other than scheduled. The left column shows the day the reminder is scheduled to be sent, the right column is the day you prefer the reminder to be sent. In the example below, the voice messages scheduled to be sent on Saturday and Sunday will be sent on the Friday before.

Voice Advanced Settings

Override Default Days? ☒ YES

Sunday: Friday ▼

Monday: Monday ▼

Tuesday: Tuesday ▼

Wednesday: Wednesday ▼

Thursday: Thursday ▼

Friday: Friday ▼

Saturday: Friday ▼

CANCEL **SAVE & CLOSE**

Voice Advanced Settings

6. Templates:

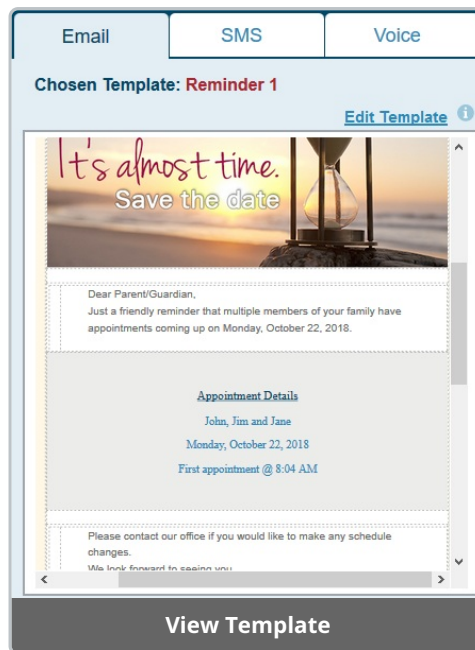
Note: Patient Communicator cautions against editing *Family Message Templates* due to extensive coding of the template for the Family Message ability.

Making template changes may cause failure to properly message patients about upcoming appointments. Do not edit any *Family Message SMS* templates at all.

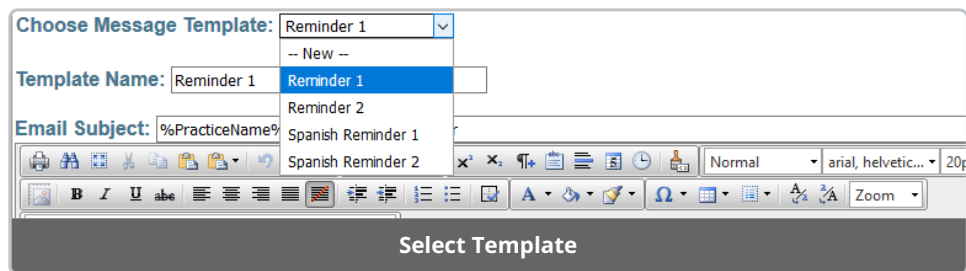
Each notification will preload with a default template when the message delivery method is turned on. Email and Voice templates will have 2 options. *Template names* with 1 will include the names of all patients scheduled that day and the earliest appointment time only. *Template names* with 2 will include every patient with an appointment that day and include the appointment time for each individual patient.

Due to the space limitation of all outbound SMS messages to 160 characters, all *Family Messaging SMS templates* notify the receiver that there are multiple appointments starting at... and will provide the earliest appointment time.

- To view the current enabled template, click the template tab in the notification for enabled delivery method. To change or edit the current template, click **Edit Template**.



To change templates, choose a different template from the drop down menu in the Message Template screen. When done, click **SAVE & CLOSE**



After completing steps 1-6 above, the notification is enabled and will be automated on the next calendar day.

To edit or create new templates, see articles for [Email & SMS Templates](#) or [Voice Templates](#).

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