

Early Reminders

Last Modified on 11/08/2022 2:27 pm EST

Summary

Early Reminder is a notification of an upcoming patient appointment. Access the notification by going to [Settings>Message Settings>Early Reminders](#).

Note: It is not a request for confirmation of the appointment.

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.

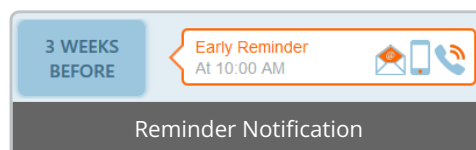
For example, many dentists will schedule a return hygiene appointment up to 6 months in advance.

The *Early Reminder* allows patients to check their calendar for conflicts and comfortably reschedule if needed. Finding that your patient needs to reschedule a day or two before the appointment day can create a schedule vacancy and loss of revenue.

Multiple *Early Reminder* notifications may be set up by the practice.

Some practices find 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.

An enabled *Early Reminder* notification is always sent to a patient regardless of confirmation status. You can recognize them in the [Timeline view](#) by their orange color.



Enable 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:

Early Reminder

Enter Early Reminder Name

To enable an Early Reminder notification follow the steps below:

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

Email ☒ ON

SMS ☒ ON

Voice ☒ ON

Delivery Method Toggles

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

Enabled ☒ YES

Enable 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 as well to the voice reminder for this notification.

Send out:

3 Weeks

Before Appointment

Email/SMS Time

Send at:

10:00 AM

Send out/at

4. Providers: The provider associated with a patient's appointment must be present. If a provider used for appointment scheduling is not present in the drop down menu, try refreshing providers, return and refresh the notification, and enable the desired provider. [Settings > General Settings > Refresh PMS Data.](#)

All Providers Selected

Provider Selection Field

5. Appointment Types: The appointment type associated with a patient's appointment must be present. If an appointment type used for an appointment is not present in the drop down menu, try refreshing appointment types, return and refresh the notification, and enable the the desired appointment type. [Settings > General Settings > Refresh PMS Data.](#)

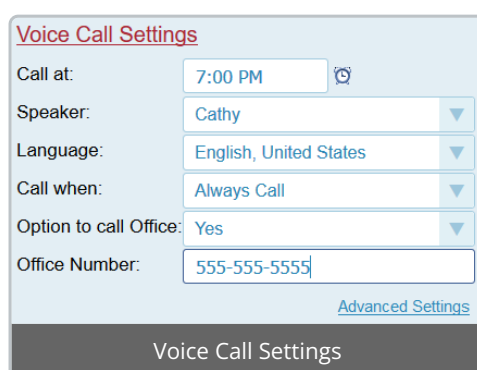
All Appointment Types Selected

Appointment Type Selection Field

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

- **Call at:** Set the time of day to make the call

- **Speaker:** 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.
- **Language:** English is always default. You may choose Spanish, Mexico for a voice message in Spanish if Alice is chosen as Speaker
- **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



Voice Call Settings

Call at: 7:00 PM

Speaker: Cathy

Language: English, United States

Call when: Always Call

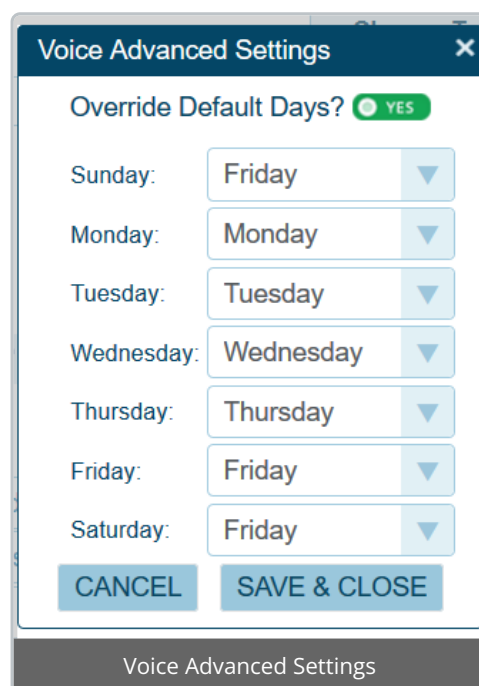
Option to call Office: Yes

Office Number: 555-555-5555

[Advanced Settings](#)

Voice Call Settings

- **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 you you prefer the reminder to be sent.



Voice Advanced Settings

Override Default Days? ☒ YES

Sunday: Friday

Monday: Monday

Tuesday: Tuesday

Wednesday: Wednesday

Thursday: Thursday

Friday: Friday

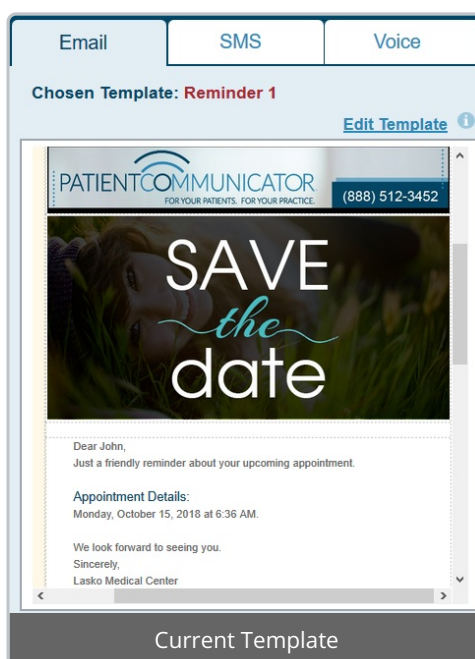
Saturday: Friday

CANCEL SAVE & CLOSE

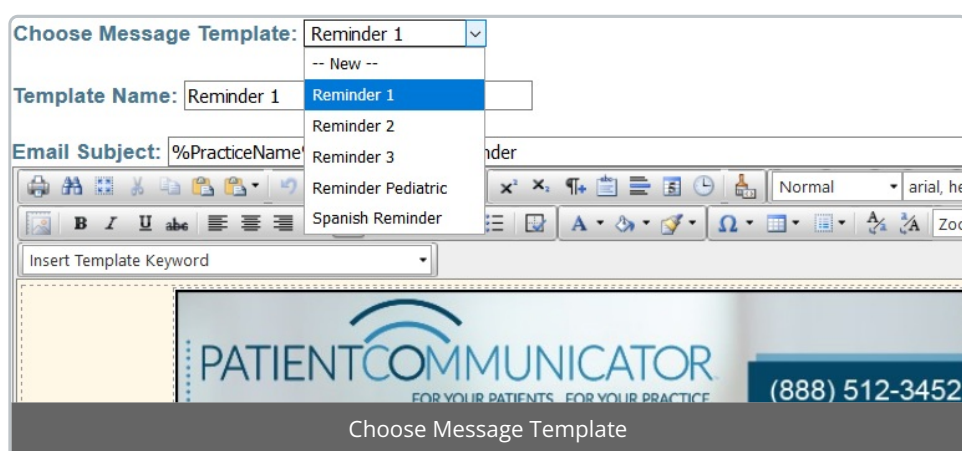
Voice Advanced Settings

7. Templates: Each notification will preload with a default template when the message delivery method is turned on.

- 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 1-7 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](#).

<End of Article>
