

Set Up Follow-up Reminders

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A follow-up reminder prompts patients to schedule appointments on a date you recommend. These reminders can be set up in advance and customized to effectively encourage patients to book their appointments at the appropriate time.

Set up a follow-up reminder

1. Select **Schedule > Follow-up Reminders** to open the **Follow-Up Reminder Settings** page.
2. Select **New Reminder**.

3. Select the type of reminder from the dropdown. DrChrono offers one-way email, text, and phone calls.

 Text reminders can only be sent to phone numbers based in the US and its territories, such as American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands.

4. Enter a number, select a time unit from the dropdown, and select **before** or **after** to schedule when the reminder will be sent.

In the example below, an email will be sent seven days before the appointment.

5. To set more reminders, select **New Reminder** and follow the same steps.

6. Select **Update Reminders**.



To learn how to add text to an email or text appointment reminder, refer to [Add Text to Email and Text Appointment Reminders](#).

Best practices

Follow-up reminders use a 6:00 PM anchor time (based on the provider's time zone) on the follow-up date, and reminder processing occurs hourly to ensure scheduled messages are properly sent.

- Schedule follow-up reminders using hours rather than minutes to ensure consistent delivery.
- Use the "before" setting when configuring follow-up reminders for optimal results.

Reminder timing and frequency

Reminders of the same type can only be sent 12 hours apart.

Quiet hours (text messages and phone calls)

- **Allowed:** 5:00 AM - 9:00 PM (provider's timezone)
- **Blocked:** 9:00 PM - 5:00 AM (provider's timezone)
- No time restrictions for emails

Schedule a follow-up reminder from the appointment

1. Select **Schedule > Calendar**.
2. Select an appointment to open the **Schedule Appointment** window.
3. On the **Appointment** tab, below the appointment details, select the **Arrange a Follow-up Reminder** checkbox.
4. Select a follow-up date using the date picker tool.
5. Enter a follow-up reason.
6. Select **Save**.

Schedule Appointment ✕

Appointment
Billing
Eligibility
Vitals
Growthcharts
Flags
Log Comm.
Revisions
Custom Data
MU Helper

Type Appointment Video Visit ? Walk-in Transition of Care Referral

Recurring Edit: Edit this appointment only Edit all future appointments

Onpatient Status: Not Enabled-Invite
WARNING: This patient is pre-populated sample data.
Patient Statement Balance: \$450.00 [Generate Statement](#)

Patient: ↓ + ✎ 🔄

Reason:

Scheduled: Time ↕ PDT

Duration: minutes Allow overlapping

Notes:

Consent Forms:

Office:

Profile:

Eligibility Profile:

Exam:

Color:

Status:

[View All Appointments](#)

Recurring Appointment A scheduled appointment cannot be converted to a recurring series.

Repeats weekly on Monday starting 02/23/2026

Weekdays: Sun Mon Tue Wed Thu Fri Sat Select all Select None

Recurs Every: week(s)

First Appointment:

Last Appointment: Never Ends

Arrange a Follow-up Reminder

Patient will be reminded to make a follow up appointment around this date.

Reminders are calculated from 6:00 PM on the follow-up date. For example, a reminder set to "1 hour before" will be sent at 5:00 PM.

Follow Up Date:

Reason:

e.g.: 6 month checkup

View Active Reminders:

Delete
Save & Close
Save
Cancel

Schedule a follow-up reminder from the patient's chart

1. Select **Demographics** from the patient chart sidebar.
2. From the Demographics tab, scroll down to **Medical Management & Notes**.
3. Select **Edit** to open the **Edit Medical Management & Notes** side panel.
4. Select a follow-up date using the date picker tool.
5. Enter a follow-up reason.
6. Select **Save**.

Edit Medical Management & Notes



Medical Management

Follow-up Date ?

06/01/2026



Follow-up Reason ?

1 month follow-up

Default Appointment Profile

Search...



Consent Signature

Consent On File



EPSDT Service

Children



EPSDT Referral Condition

Search...



Payment Profile ?

Cash



Patient Copay

\$

Medication History Consent

- Yes, patient has given consent to obtain medication history.
 No, patient has not given consent to obtain medication history.
 Unknown.

Receive Clinical Summary

- Patient receives clinical summary by default.
 Patient declined to receive clinical summary.

Record Sync Consent ?

Consent Not Given

Insurance Accept Assignment ?

Cancel

Save