

# Creating and Using Reminder Profiles

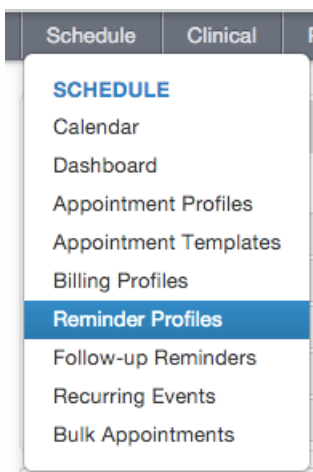
07/08/2024 8:02 pm EDT

A reminder profile is a preset list of reminders you can choose from to alert your patients of their upcoming appointments. Reminder profiles are easy to set up and provide an efficient way to remind your patients via email, text, and phone calls.

Creating patient reminders is easy but it requires two separate steps. Creating the reminder profile and then applying the reminder profile to the appointment.

## Creating Reminder Profiles

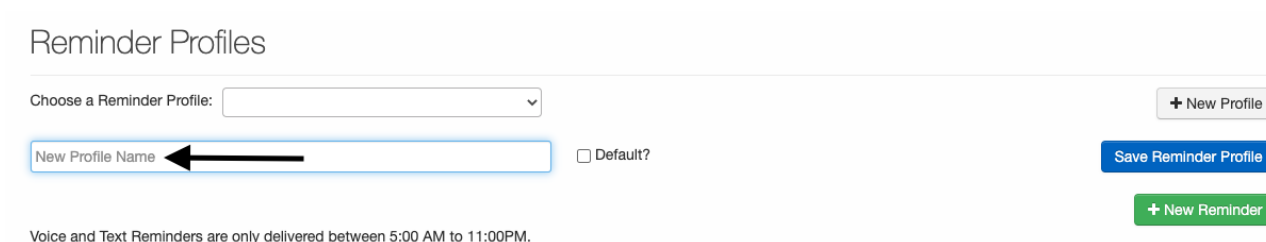
1. Hover over the **Schedule** tab and click **Reminder Profiles**.



2. To create a new profile from scratch, click the grey **+New Profile** button.



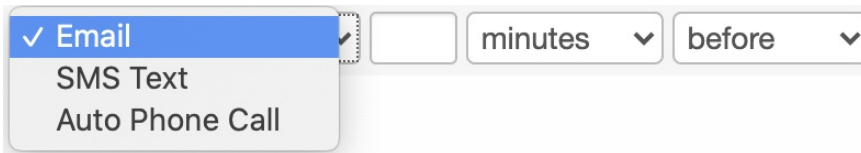
3. Enter a name in the **New Profile Name** box.



4. To add new reminders click the green **+New Reminder** button.



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



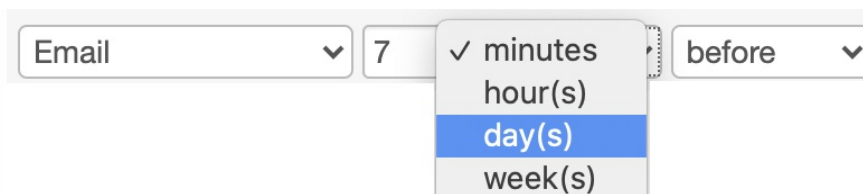
A dropdown menu is open, showing three options: "Email" (selected with a checkmark), "SMS Text", and "Auto Phone Call". To the right of the menu, there is a text input field containing "7", a unit dropdown menu set to "minutes", and a timing dropdown menu set to "before".

6. Enter a number in the field between the reminder type and unit of time drop-down menus. This number will determine when the reminder goes out in relation to the rest of the settings.



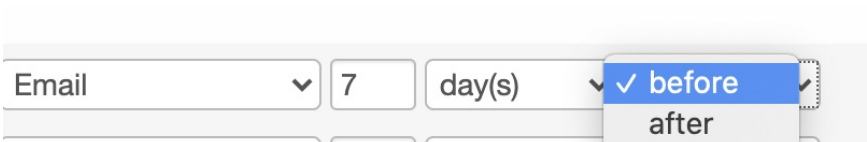
The form shows "Email" selected in the dropdown, the number "7" entered in the text field (which is highlighted with a red box), "day(s)" selected in the unit dropdown, and "before" selected in the timing dropdown.

7. Select a unit of time from the dropdown. This will determine when the reminder goes out in relation to the reminder selected.



The form shows "Email" selected, the number "7" in the text field, and the unit dropdown menu open. The options in the dropdown are "minutes", "hour(s)", "day(s)" (selected with a blue highlight), and "week(s)". The timing dropdown is set to "before".

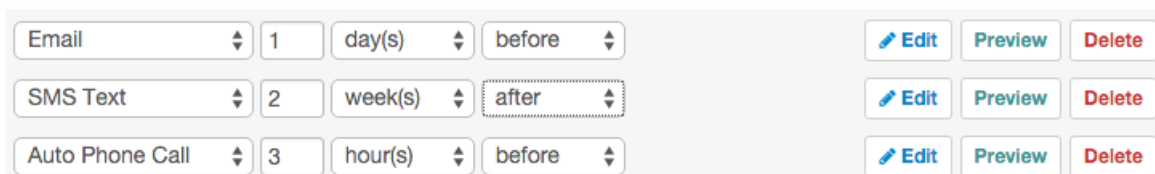
8. Select when you would like the reminder to go out in relation to the date selected, either before or after.



The form shows "Email" selected, the number "7" in the text field, "day(s)" selected in the unit dropdown, and the timing dropdown menu open. The options in the dropdown are "before" (selected with a blue highlight) and "after".

In the example above, an email will go out 7 days before the scheduled appointment.

9. You can add multiple reminders by clicking the green **+New Reminder** button until you have all the reminders you want for one profile.



A list of three reminders is shown. Each row contains a dropdown for the reminder type, a text field for the number, a dropdown for the unit, and a dropdown for the timing. To the right of each row are three buttons: "Edit" (with a pencil icon), "Preview", and "Delete".

Email	1	day(s)	before	Edit	Preview	Delete
SMS Text	2	week(s)	after	Edit	Preview	Delete
Auto Phone Call	3	hour(s)	before	Edit	Preview	Delete

10. Once you're done, click the blue **Save Reminder Profile** button.

[Save Reminder Profile](#)

Below are examples of standard text, email, and voice reminders.

**Note:** DrChrono only supports SMS text reminders to US-based numbers and US territories.

## Reminder for Appointment with Springfield General Practice Inbox x



reminders@drchrono.com  
to me ▾

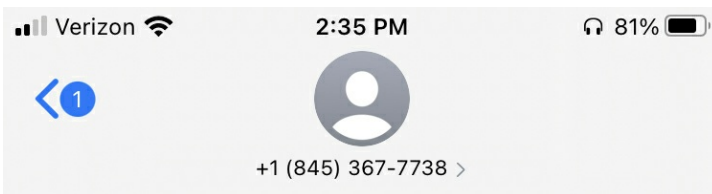
Mon, Apr 12, 1:15 PM ☆ ↶ ⋮

Dear Jenny Harris,

You have an upcoming appointment with Springfield General Practice on Monday, April 12, 2021 at 1:30:00 PM Eastern Daylight Time.

Please follow this link to your appointment: [https://drchrono.com/appointment\\_reminder/e9d494fa-2dc9-4929-a1cb-f0842f314a90](https://drchrono.com/appointment_reminder/e9d494fa-2dc9-4929-a1cb-f0842f314a90)

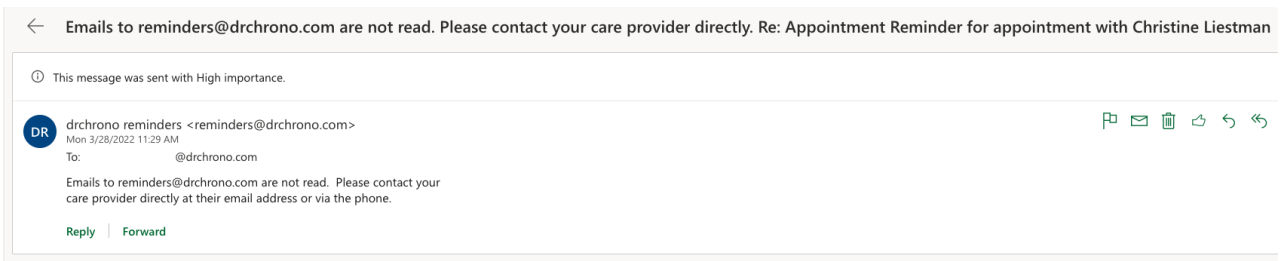
Regards,  
Springfield General Practice



Text Message  
Today 7:50 AM

You have an appointment with Family Practice on September 29, 2021 at 8:00:00 AM EDT. If you need to reschedule, please call [443-555-5555](tel:443-555-5555)

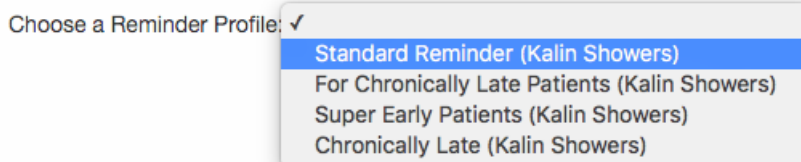
**Note:** Reminders are delivered from [reminders@drchrono.com](mailto:reminders@drchrono.com). This email address can not be customized or changed. If a patient replies to a reminder email they will receive the response below.



**Additional Note:** United States federal law prohibits sending text messages with content related to cannabis and cannabis products like CBD.

### Editing Existing Reminder Profiles & Reminders

1. Select the reminder profile you would like to edit from the drop-down menu.



2. This will pull up all the reminders associated with the profile. You can edit a reminder, preview a reminder, or delete a reminder entirely.

3. Make the changes you need and click **Save Reminder Profile**.

## Adding Additional Messaging to Email and Text Reminders

You can add additional information to text and email reminders.

1. Click **Edit** next to the email and/or text message reminder.
2. Enter the text you would like to add to the email message in the text box.

Standard Reminder  Default? Save Reminder Profile

Auto Phone Call 3 day(s) before Edit Preview Delete

SMS Text 2 day(s) before Edit Preview Delete

Looking forward to seeing you. ?

Email 1 day(s) before Edit Preview Delete

Looking forward to seeing you.

+ New Reminder

Voice and Text Reminders are only delivered between 5:00 AM to 11:00PM.

3. Click **Preview** to see what the message will look like.

**Email:** Text will be inserted between the end of the message and the closing of an email

### Email Message Preview

#### Subject: Reminder for Appointment with Nick Riviera

Dear Jenny Harris,

You have an upcoming appointment with Nick Riviera on Wednesday, September 30, 2020 at 9:20:00 AM Eastern Standard Time.

Please follow this link to your appointment: <http://app.drchrono.com/demo-url/>

Looking forward to seeing you.

Regards,  
Nick Riviera

Close

**Text Message:** With a text message, additional text will be added to the end of the message.

### SMS Text Message Preview

You have an appointment with Nick Riviera on September 30, 2020 at 9:20:00 AM EST. If you need to reschedule, please call 443-555-5555. Looking forward to seeing you.

Close

**Phone Reminders:** You can't change or edit the phone reminder that is sent out. If you send out a phone reminder,

here is the message that will be played for the customer:

*This is an automated appointment reminder from "Provider's Name". You have an appointment with "Provider's Name" on "Day, Month, Date, Time". If you need to reschedule your appointment please call "Office Number". Please press 1 to confirm this appointment. Please press 2 if you are not a patient of "Provider's Name". Please press 3 if you would like to be directly connected to the office of "Provider's Name".*

## Applying Reminder Profiles

There are two ways to apply reminder profiles: by default and at the appointment level.

### Applying Reminder Profiles by Default

You also have the option to set a reminder profile as **Default**. If this option is applied, reminders associated with that profile will be sent out to all patients without any other action needed.

Check the **Default?** box and click **Save Reminder Profile**.

Standard Reminder  Default?

Auto Phone Call 3 day(s) before

SMS Text 2 day(s) before

Email 1 day(s) before

Don't forget your insurance card.

Save Reminder Profile

Edit Preview Delete

Edit Preview Delete

Edit Preview Delete

### Applying Reminder Profiles at the Appointment Level

1. Go to your schedule by clicking **Schedule > Calendar**.

Schedule Clinical Pa

**SCHEDULING TOOLS**

Calendar

Availability Search

Appointments Dashboard

Dashboard

Appointment Profiles

Appointment Templates

Billing Profiles

Reminder Profiles

Follow-up Reminders

Recurring Events

Bulk Appointments

Appointment Recovery

2. Open an existing appointment or schedule a new one.

- Select the **Appointment** tab.
- Click the **View Active Reminders** checkbox.

- Select a profile from the **Choose a Reminder Profile** dropdown menu.
- Click **Save & Close** or **Save**.

**Schedule Appointment** x

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

Type  Appointment  Video Visit  Walk-in  Transition of Care  Referral

Patient Statement Balance: **\$335.00** [Generate Statement](#) Credit: **\$190.00** **72 past appointments** Primary Insurance: **United HealthCare [87726]**  
 Secondary Insurance: **PAI California Secondary [PAI02]** **Fall Risk:**

Provider: Jane Smith  Supervising: - If different to provider -

Patient: Laurie T. Sample - 12/08/1990  Office: Office 1

Reason:  Profile: -----

Scheduled: 11/21/2022 Time 10:00AM  Exam: Exam 1

Duration: 30 minutes  Allow overlapping Color:

Notes:  Status:

Consent Forms:  HIPAA Data Use Agreement (default)  No Show Policy (default)

0h 2m [View Clinical Note](#)  
[View All Appointments](#)

- Recurring Appointment** A scheduled appointment cannot be converted to a recurring series.
- Arrange a Follow-up Reminder**
- View Active Reminders:**

Choose a Reminder Profile:  **Use Patient's Last Reminders**

- Surgery (Jane Smith)
- Text Reminders Only (Jane Smith)
- Email Only (Jane Smith)
- Standard Reminder (Jane Smith)
- New Patient (Jane Smith)
- Eye Exam (Jane Smith)

[+ New Reminder](#)

Once the reminder profile is selected, you can, if needed, edit the reminders for the scheduled appointment.

### Reminder Profiles on the iPad

When creating appointments from the EHR app and the Check-In app it will automatically apply the last used reminder profile to the appointment. If you don't want any reminders associated with the appointment, please log into the website and remove the reminders from the appointment.

### Notes on Adding Text to Reminder Emails and Text Messages

Standard text reminders are limited to 140 characters. Customizing your text reminders may cause this limit to be exceeded, resulting in multiple text messages toward your monthly limit.

There is no text limit when adding additional text to email reminders. However, the editor for email reminders uses HTML. This means that if you would like to have your custom message rendered on different lines or in multiple paragraphs, you need to use a little bit of code with `<br>`. Otherwise, the message will be delivered in one paragraph.

**Example 1:** No use of `<be>`.

Email [v] 3 day(s) [v] before [v]  
Looking forward to seeing you. Please remember to bring your ID and insurance card. Call the office with any questions.

Dear Jenny Harris,

You have an upcoming appointment with Springfield Med Office Tuesday, August 25, 2020 at 11:30:00 AM Eastern Daylight Time.

Please follow this link to your appointment: [https://drchrono.com/appointment\\_reminder/8fd2399c-2cf2-463a-b983-7b03fae42fda](https://drchrono.com/appointment_reminder/8fd2399c-2cf2-463a-b983-7b03fae42fda)

Looking forward to seeing you. Please remember to bring your ID and insurance card. Call the office with any questions.

**Example 2: Use of <br> for a new line.**

Email [v] 7 day(s) [v] before [v]  
Looking forward to seeing you. <br> Please remember to bring your ID and insurance card. <br> Call the office with any questions.

Dear Jenny Harris,

You have an upcoming appointment with Springfield Med Office Tuesday, August 25, 2020 at 11:30:00 AM Eastern Daylight Time.

Please follow this link to your appointment: [https://drchrono.com/appointment\\_reminder/417f756d-245b-4b83-88a7-3184ce09a451](https://drchrono.com/appointment_reminder/417f756d-245b-4b83-88a7-3184ce09a451)



Looking forward to seeing you.  
Please remember to bring your ID and insurance card.  
Call the office with any questions.

**Example 3: Use of <br> for a new paragraph.**

Email [v] 7 day(s) [v] before [v]  
Looking forward to seeing you. <br><br> Please remember to bring your ID and insurance card. <br><br> Call the office with any questions.

Dear Jenny Harris,

This is a post-appointment reminder for your scheduled appointment with Medical MD Office on Tuesday, August 25, 2020 at 11:30:00 AM Eastern Daylight Time.

Please follow this link to your appointment: [https://drchrono.com/appointment\\_reminder/df869398-690d-4947-b742-5a48c9fc9d58](https://drchrono.com/appointment_reminder/df869398-690d-4947-b742-5a48c9fc9d58)



Looking forward to seeing you.  
Please remember to bring your ID and insurance card.  
Call the office with any questions.