

# Text message appointment reminders

Your clinic has the option to send SMS/text message appointment reminders in addition to email reminders. Patients will need to opt in to receive text messages. They can opt in by logging in to the [Patient Portal](#), or you can do it for them via the [Patient Profile Page](#).

This feature does NOT include two way texting. If a patient replies to a reminder text with anything other than STOP, they'll receive a message directing them to call your clinic phone number for further assistance (see below for an example).

## Setting up SMS reminders

To activate the SMS reminders feature and enter your settings, go to your [Settings and Templates](#) page. On the top right hand side you'll see a box for Text Reminders:

Text Reminders

☒ **Send SMS Reminders**

Messages will be sent aprox 24 hours prior to appointments

When to send text message?

24 Hours Before Appointment

Text Reminder Verbiage

Hi [[NAME]]! It's [[CLINIC]] with a reminder of your appointment with [[PRAC]] [[APPTIME]] in [[LOC]]. Call [[LOCPHONE]] to make changes. Reply STOP to end msgs.

Max Characters: 161 / 165

Save Texting Preferences

Key to Verbiage Codes

Complete the following steps to activate SMS reminders:

1. Check the Send SMS Reminders box

2. Select your preference for when text messages are sent - they can be sent either 24 or 48 hours before the appointment.
3. Enter your verbiage for your text message - click the [Key to Verbiage Codes](#) button for options to customize your messages.
4. Click Save Texting Preferences and you're done!

See [this reference for the text code variables](#) you can use or click the [Key to Verbiage Codes](#) button on your admin page.

Next, patients will need to opt in to receive text message reminders. They can opt in by logging in to the [Patient Portal](#), or you can do it for them via the [Patient Profile Page](#).

## How to opt in via Patient Portal

The patient will need to log in to their account and click Your Account in the upper right hand corner:



On the Account page there is a box under their name where they can enter the phone number where they'd like to receive messages:

# My Account



**Ariel Mermaid**  
arielm74775@X.com

Credit	Tokens
\$ 20.00	8

Email Preference

ON

Receive Email Reminders

Text Reminders

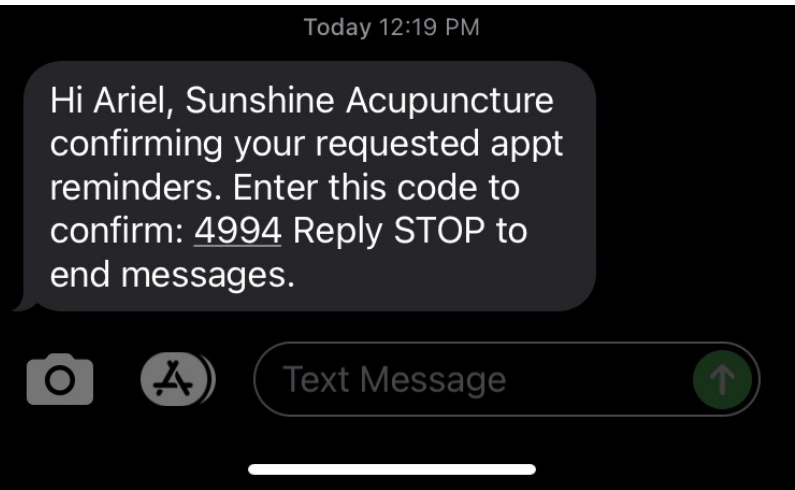
To receive appointment reminders by text, please provide your mobile number. We will send you a verification code to confirm your number.

Enter Your Mobile Phone Number.

Cell Phone with Areacode


Save Number

Once they enter their number they'll get a confirmation code via text message:



They'll need to enter the code to complete the process:

My Account



Ariel Mermaid

arielm74775@X.com

Credit

\$ 20.00

Tokens

8

Email Preference

ON

Receive Email Reminders

Text Reminders

Enter the code you received.

4994


Confirm Code

The code will expire in one hour.

Didn't get the code? [Try again](#) .

They'll see a confirmation message once they enter the code:

My Account



Ariel Mermaid

arielm74775@X.com

Credit

\$ 20.00

Tokens

8

Email Preference

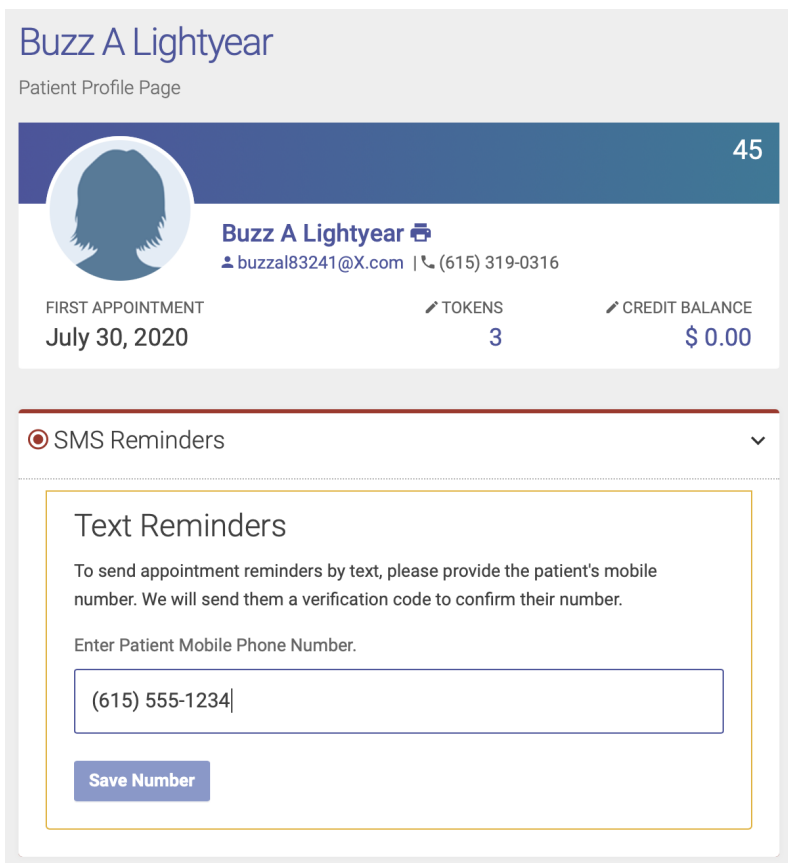
ON

Receive Email Reminders

You will now receive text reminders.

# How to opt in via Admin Portal

You can opt in for the patient via the Admin Portal on their [Patient Profile Page](#). Under their name you'll see a box for SMS reminders. Enter the phone number where they'd like to receive message:



The screenshot shows the 'Patient Profile Page' for 'Buzz A Lightyear'. The page includes a profile picture, age (45), email (buzzal83241@X.com), and phone number ((615) 319-0316). Below this, there are three sections: 'FIRST APPOINTMENT' (July 30, 2020), 'TOKENS' (3), and 'CREDIT BALANCE' (\$0.00). A red-bordered section titled 'SMS Reminders' is expanded, showing a 'Text Reminders' box. This box contains instructions to provide a mobile number for appointment reminders and a verification code. A text input field contains the number '(615) 555-1234', and a 'Save Number' button is at the bottom.


Once they enter their number they'll get a confirmation code at that number via text message:



Enter the code to complete the process:

Buzz A Lightyear

Patient Profile Page



45

Buzz A Lightyear

buzzal83241@X.com | (615) 319-0316

FIRST APPOINTMENT

July 30, 2020

TOKENS

3

CREDIT BALANCE

\$ 0.00

SMS Reminders

Text Reminders

Enter the code you received.

3382

Confirm Code


The code will expire in one hour.

Didn't get the code? Try again .

You'll see a confirmation message once you enter their code:

Buzz A Lightyear

Patient Profile Page



45

Buzz A Lightyear

buzzal83241@X.com | (615) 319-0316

FIRST APPOINTMENT

July 30, 2020

TOKENS

3

CREDIT BALANCE

\$ 0.00

SMS Reminders

You will now receive text reminders.

How your text messages will appear

Example of appointment reminder message (this will vary based on your saved verbiage):



If a patient tries to reply to a text, they'll receive this message listing your clinic's phone number:



When a patient replies STOP to end messages, they'll receive this text:



---

Revision #7

Created Tue, Sep 21, 2021 1:56 PM by [Alexa Hulsey](#)

Updated Fri, Jul 19, 2024 2:52 PM by [Alexa Hulsey](#)