# 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:

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**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**

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## 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:



Today 12:19 PM

Hi Ariel, Sunshine Acupuncture confirming your requested appt reminders. Enter this code to confirm: 4994 Reply STOP to end messages.

Text Message

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

# My Account

**Ariel Mermaid**
arielm74775@X.com

| Credit | Tokens |
|--------|--------|
| $ 20.00 | 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? <u>Try again</u> .

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

# My Account
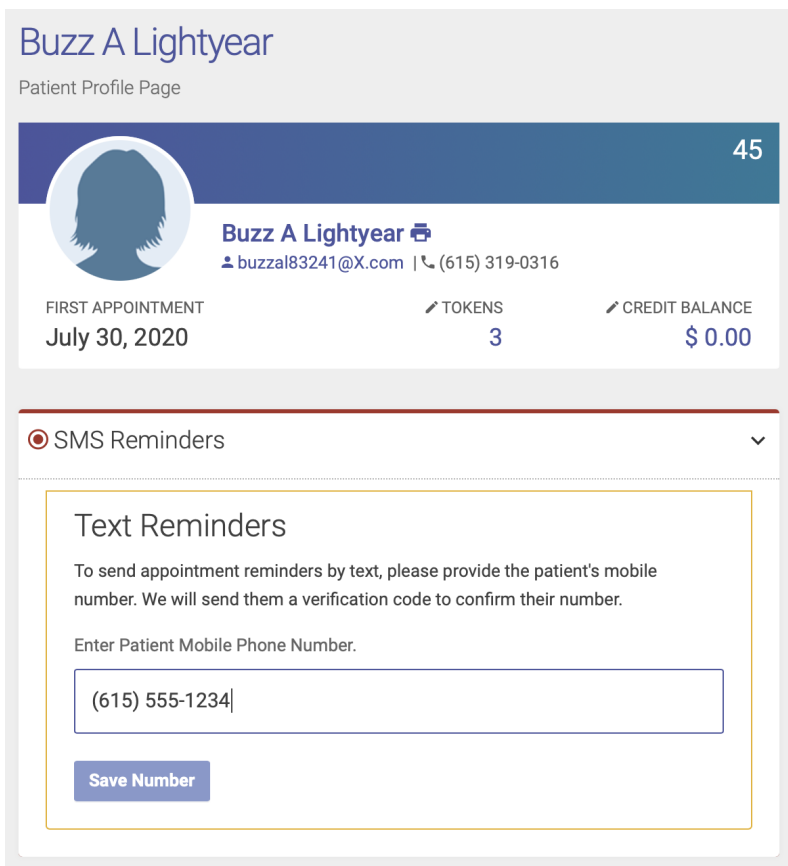
**Ariel Mermaid**
arielm74775@X.com

| Credit | Tokens |
|--------|--------|
| $ 20.00 | 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:



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 | ✏ TOKENS | ✏ CREDIT BALANCE |
|---|---|---|
| July 30, 2020 | 3 | $ 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 | ✏ TOKENS | ✏ CREDIT BALANCE |
|---|---|---|
| July 30, 2020 | 3 | $ 0.00 |

◉ SMS Reminders ⌄

You will now receive text reminders.
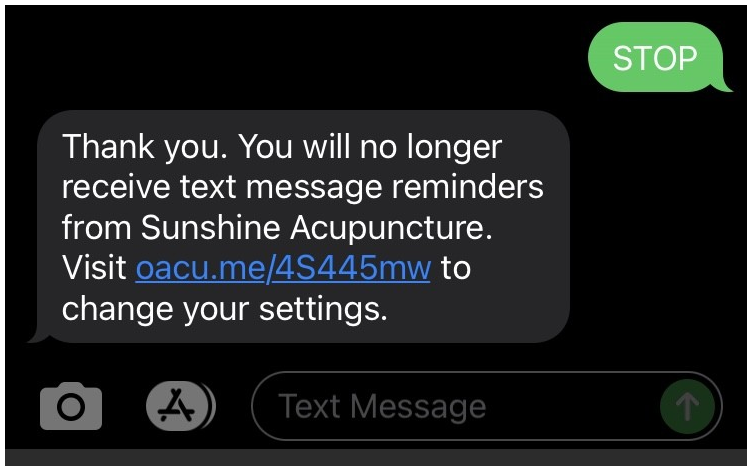
# How your text messages will appear

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:

STOP

Thank you. You will no longer receive text message reminders from Sunshine Acupuncture. Visit oacu.me/4S445mw to change your settings.

Text Message

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