

# 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	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? [Try again](#) .

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

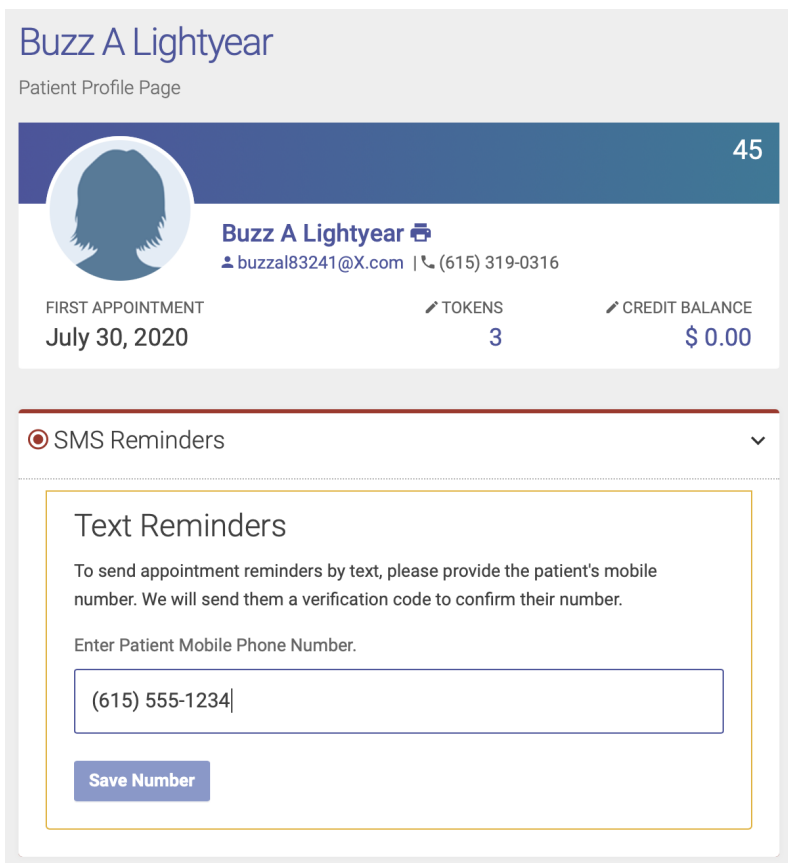
ON

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:



The screenshot shows the 'Patient Profile Page' for 'Buzz A Lightyear'. At the top, there's a header with the name 'Buzz A Lightyear' and 'Patient Profile Page'. Below this is a profile section with a circular placeholder for a photo, the name 'Buzz A Lightyear' with a medical icon, and contact information: 'buzzal83241@X.com' and '(615) 319-0316'. A blue bar on the right of the profile section shows the number '45'. Below the profile section, there are three columns: 'FIRST APPOINTMENT' with the date 'July 30, 2020', 'TOKENS' with the value '3', and 'CREDIT BALANCE' with the value '\$ 0.00'. Below this is a section titled 'SMS Reminders' with a dropdown arrow. Inside this section is a box titled 'Text Reminders' with the text: 'To send appointment reminders by text, please provide the patient's mobile number. We will send them a verification code to confirm their number.' Below this text is a label 'Enter Patient Mobile Phone Number.' and a text input field containing '(615) 555-1234'. At the bottom of the input field is a blue button labeled 'Save Number'.


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:



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