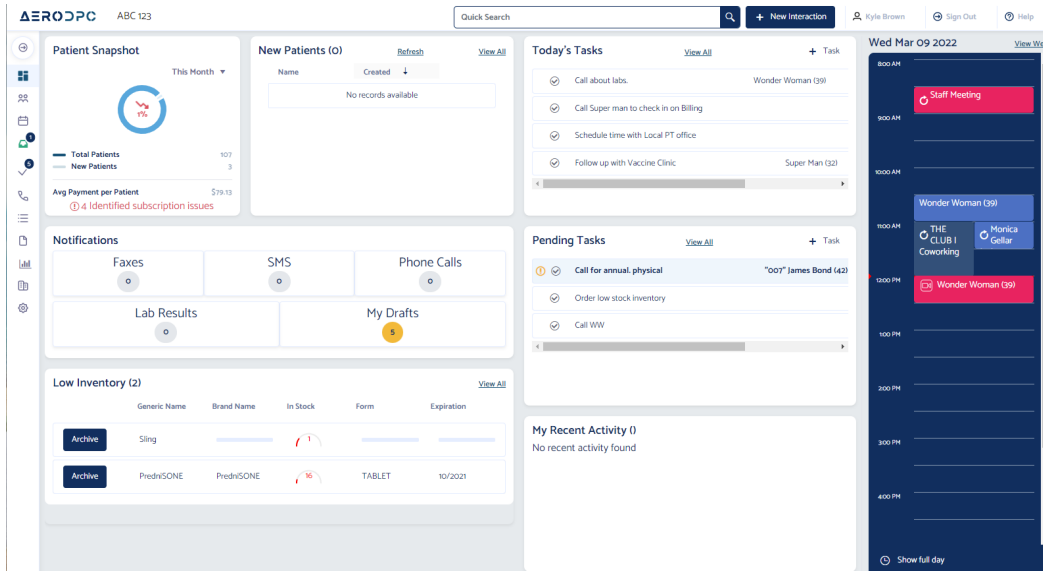
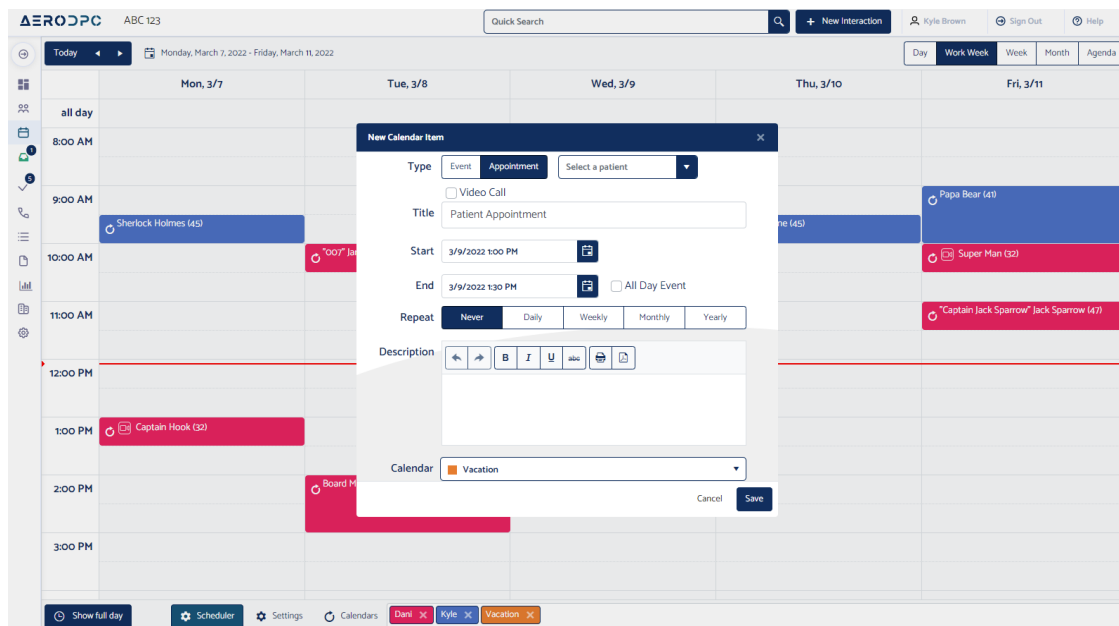


Set Auto Appointment Reminders

1. Send automatic appointment reminders to your patients. You can customize how many and when they are sent. Let's walk through it. Start on the dashboard and navigate to the calendar.



2. Double click the time slot you want to schedule. This opens up the New Calendar item window.



3. Click Appointment and select the patient's name.

The screenshot shows the 'New Calendar Item' form. The 'Type' is set to 'Appointment'. A dropdown menu is open, showing a list of patient names with their IDs in parentheses: Wonder Woman (39), Ron Weasley (23), "Kyle Brown" External 1125 (29), Derek Brownie (6), John Watson (46), Kyle Brown (31), "Will" Fresh Prince (42), Bruce Wayne (45), "Captain Jack Sparrow" Jack Sparrow (47), and Alivia Brown (28). The 'Repeat' is set to 'Never'. The 'Start' and 'End' times are 3/9/2022 1:00 PM and 3/9/2022 1:30 PM respectively. The 'Calendar' is set to 'Vacation'. There are 'Cancel' and 'Save' buttons at the bottom right.

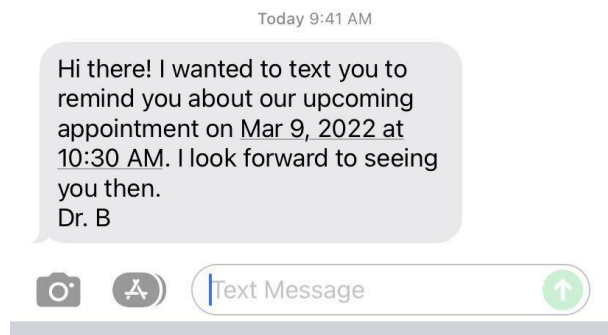
4. You will now see the default reminder. This first reminder is set to send an SMS 24 hours before the appointment time. You can switch this to email or change the timing.

The screenshot shows the 'New Calendar Item' form with the patient name 'Wonder Woman (39)' selected. The 'Reminders' section is highlighted with a red box, showing 'SMS' as the notification method, '24' hours, and 'before' the appointment. There is a trash icon and a '+ Reminder' button next to the settings. The 'Repeat' is set to 'Never'. The 'Start' and 'End' times are 3/9/2022 1:00 PM and 3/9/2022 1:30 PM respectively. The 'Calendar' is set to 'Dani'. There are 'Cancel' and 'Save' buttons at the bottom right.

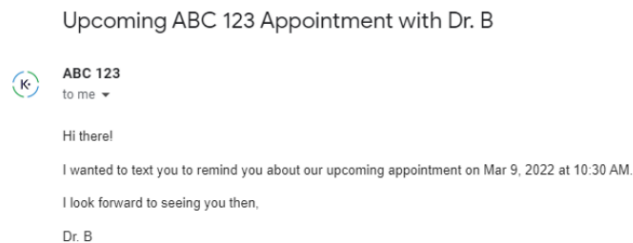
5. You can add additional reminders by clicking the “+ Reminder” button. You can add up to 4 reminders.

The screenshot shows the 'New Calendar Item' form. The 'Reminders' section is highlighted with a red box, showing two reminders: one for SMS (24 hours before) and one for EMAIL (48 hours before). A red circle highlights the '+ Reminder' button. The form includes fields for Type (Appointment), Title (Patient Appointment), Start (3/9/2022 1:00 PM), End (3/9/2022 1:30 PM), Repeat (Never), and Description. The calendar is set to 'Dani'.

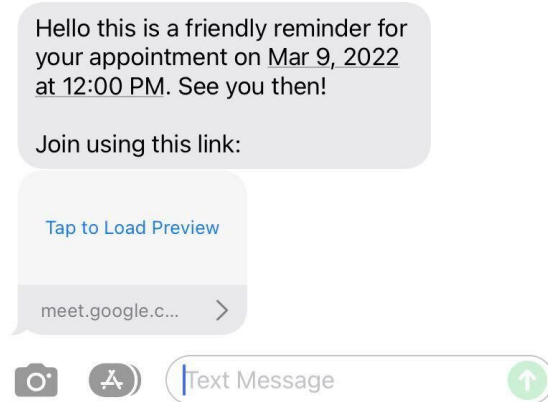
6. Once you are happy with your setup, click “Save.” The messages your patient receives are completely customizable in Settings (see below). Here are example messages this patient received.



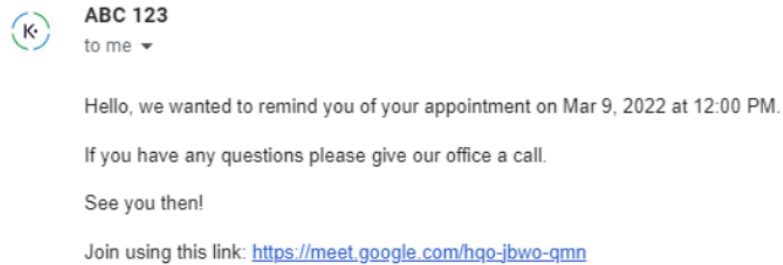
Email:



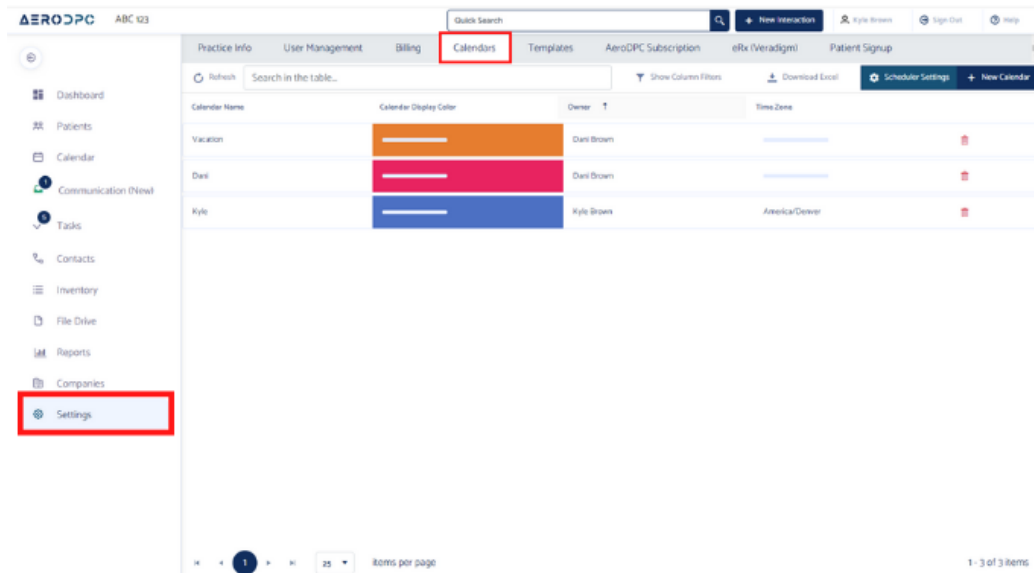
7. If you have scheduled a Video Call, the video meeting link will be included in the reminder text. See examples below:



Email:



10. Let's customize! To modify the messages that are sent in the reminders let's navigate to the Settings page on the Calendars tab.



11. Click on the calendar you would like to update. You will see the following.

< Back Delete

Dani

Calendar Settings

Owner: Calendar Name *:

Default Timezone: Calendar Display Color:

Appointment Reminder Settings

Text Message Body:

What number should the reminder text come from?:

Email Subject:

To insert the appointment date and time into the message body use the following keys:

{{appointment time}}

{{appointment date}}

Example Message Body:

Hello, this is Direct Health. Just a friendly reminder, you have an appointment on {{appointment date}} at {{appointment time}}. See you then!

If the appointment has a video call, this line will be added to the end of your message:
"Join using this link: <https://meet.google.com/unique-meeting-id>"

12. There are some examples on the right hand side, but feel free to make these say anything you want! You can add {{appointment time}} and {{appointment date}} to pull in the details for the different patients. Click "Save" when you are done editing. You are all set up.

Appointment Reminder Settings


Text Message Body:

What number should the reminder text come from?:

Email Subject:

Hi there!
I wanted to text you to remind you about our upcoming appointment on {{appointment date}} at {{appointment time}}.
I look forward to seeing you then,
Dr. B

13. After a patient has been sent the reminder texts/emails you will see in the calendar event the green check boxes. These indicate they were sent. Well done!

Edit Appointment  ✕

Type Event Appointment Wonder Woman (3... ▼


Reminders


EMAIL ▼	24	hours ▼	before	<input checked="" type="checkbox"/>
SMS ▼	24	hours ▼	before	<input checked="" type="checkbox"/>

+ Reminder

Video Call

Title

Start 

End  All Day Event

Repeat Never Daily Weekly Monthly Yearly

Description

Calendar ▼