

# Automated Appointment Reminders

Last Modified on 05/03/2024 9:34 am EDT



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## Overview of Automated Appointment Reminders

Reminding a patient of their upcoming appointment is one of the most crucial success factors for a medical practice. Our Automated Appointment Reminder integration ensures that this reminder takes place with no work needed by your staff. Our solution will deliver a reminder to your patient's in the way that both you and the patient prefer - be that by phone, email, or text.

### **This integration will:**

1. Allow patients to select their preferred reminder method via the Intelligent Intake
2. Allow a practice to setup business rules on when reminders are delivered to patients
3. Automatically send out phone calls, text messages, and emails to patients
4. Allow patients to electronically confirm or cancel appointments
5. Automatically update the appointment status in the iScheduler

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## Setup the Automated Appointment Reminder Integration

### Sign-Up

The first step is to sign-up for Automated Appointment Reminders: <https://isalushealthcare.com/services/>

### Configure Reminder Rules with Inphonite

Once you sign-up, you will be contacted by our Appointment Reminder partner, Inphonite. They will work with you to configure the solution. They will help customize the message, determine dates and times of reminders, etc...

### Configure Reminder Rules with iSalus

Once you have setup the rules with Inphonite, the next step is to configure our application.

### Products

In order to have a product activated, the practice must request this from iSalus by contacting our support team.

The support team will need to activate the following product:

- Global Call Reminders

## Roles

The following screens need to be assigned to administrators:

- Practice - Global Call Reminders > Setup > Call Reminder Setup

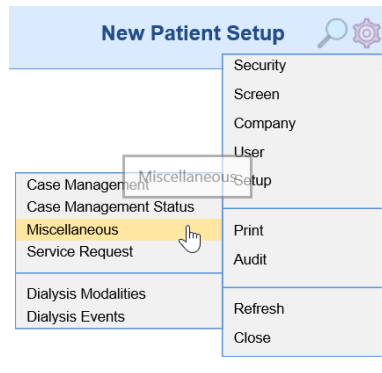
The following screens need to be assigned to users that should update individual patient preferences:

- Practice - General > Setup > Patient Portal Miscellaneous

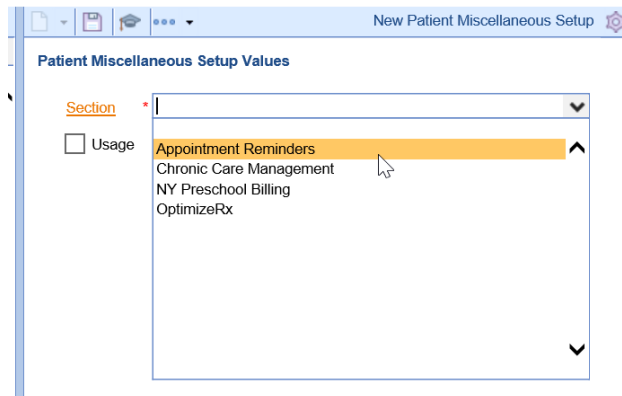
## Screen

The following screen must be added to the Miscellaneous portal:

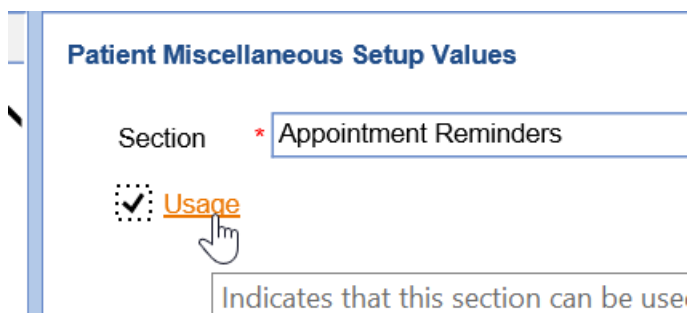
1. Navigate to **Setup > Patients**
2. Click the **Gear** icon
3. Select **Setup > Miscellaneous**



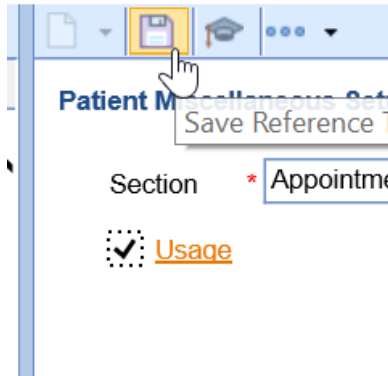
4. Select **Appointment Reminders** from the Section dropdown



5. Click the **Usage** checkbox



6. Click **Save**



7. The Appointment Reminders section should now be accessible in the Patient Setup screen under the Miscellaneous tab.

Disability  Non-disabled  Prescriber with disability

**Appointment Reminders**

Reminder Type	Consent	Reminder Value				
Phone Calls	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Home	<input type="radio"/> Work	<input type="radio"/> Other	<input type="radio"/> Override	<input type="text"/>
Text Messages	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Home	<input type="radio"/> Work	<input type="radio"/> Other	<input type="radio"/> Override	<input type="text"/>
Email	<input type="checkbox"/>	<input checked="" type="radio"/> Patient	<input type="radio"/> Override			<input type="text"/>

**OptimizeRx**

OptimizeRx Type	Consent	OptimizeRx Value				
Text Messages	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Home	<input type="radio"/> Work	<input type="radio"/> Other	<input type="radio"/> Override	<input type="text"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Patient	<input type="radio"/> Override			<input type="text"/>

## Company Settings

The following company settings can be configured:

- Company Setting: Automated Reminder Text Consent
- Company Setting: Automated Reminder Phone Consent
- Company Setting: Automated Reminder Email Consent

Pro Tip: Want to apply these new settings to all EXISTING patients? Ask iSalus to update this for you.

## Call Reminder Rules Setup

The Automated Appointment Reminder integration allows you to configure exactly what types of appointments receive reminder, how many days in advance reminders are sent, and more.

1. Navigate to **Setup > Call Reminder**
2. Update the settings viewed on the screen to meet your desired preferences

3. Click **Save**

### Screen Options

- **Pull Status:** This is the list of appointment statuses that new reminders should be created for on a nightly basis.
- **Pull Days:** This will dictate how many days in advance of an appointment a patient receives a reminder. If you worked with Inphonite to configure your rules to contact the patient multiple times, this should line up with their very first reminder.
- **Only Weekdays:** This will indicate that patients should only be contacted on weekdays. Therefore, no reminder file will be created on the weekends.
- **Update Status:** This indicates that patient responses can update the appointment status for a patient. The application supports two types of patient initiated response:
  - *Confirmed:* If a patient confirms an appointment via the reminder, the appointment status will be set to Confirmed.
  - *Cancelled:* If a patient cancels an appointment via the reminder, the appointment status will be set to Cancelled. This can be turned off via Inphonite so that patients do not have this option.
- **Contact Status:** When a reminder is sent, the system will update the appointment status to the selected status. Many practices will create a status like "Reminder Sent" to indicate that the reminder was sent but has not yet been responded to.
- **Resources:** This will allow a practice to control which resources have appointment reminders delivered.
  - *Resource Specific:* If this box is checked, you must determine which resources we should create a reminder for. If deselected, all patients on that resource's schedule will have a reminder generated (unless other rules dictate that they should not).
- **Locations:** This will allow a practice to control which service location have appointment reminders delivered.
  - *Location Specific:* If this box is checked, you must determine which locations we should create a reminder for. If deselected, all patients scheduled at that location will have a reminder generated (unless other rules dictate that they should not).
- **Type (Appointment Type):** This will allow a practice to control which appointment types have appointment reminders delivered.
  - *Type Specific:* If this box is checked, you must determine which appointment types we should create a reminder for. If deselected, all patients schedule with that appointment type will have a reminder generated (unless other rules dictate that they should not).

## Using the Automated Appointment Reminder Integration

Once the Automated Appointment Reminder Integration has been configured for your practice, you will be able to start setting up patient's reminder preferences and adding patients to the schedule in the iScheduler. Once the patient is on the schedule, the automated process takes over and patients will receive reminders based on your pre-configured rules.

## Set a patients Appointment Reminder Preference

Appointment Reminder preferences can be set in three different ways:

### Option 1 - Intelligent Intake:

If your practice uses the Intelligent Intake feature, patient's may set these preferences themselves as part of your intake process.

### Option 2 - Set on New Patient Creation:

If your practice has configured the necessary Company Settings, reminder preferences for a patient may be saved automatically after the patient is created.

### Option 3 - Manually Set Patient Preference:

You can manually set the patients reminder preferences by following the below steps:

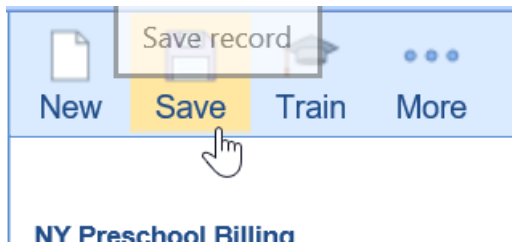
1. Navigate to the **Patient Setup** screen (this can be accessed in many different ways)
2. Select the **Miscellaneous** tab



3. Update the **Appointment Reminder** preferences

Reminder Type	Consent	Reminder Value
Phone Calls	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Home <input type="radio"/> Work <input type="radio"/> Other <input type="radio"/> Override <input type="text"/>
Text Messages	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Home <input type="radio"/> Work <input type="radio"/> Other <input type="radio"/> Override <input type="text"/>
Email	<input type="checkbox"/>	<input checked="" type="radio"/> Patient <input type="radio"/> Override <input type="text"/>

4. Click **Save**



## Automated Appointment Reminder File Generation

On a nightly basis, an appointment reminder file will be generated according to your preferences and delivered to Inphonite.

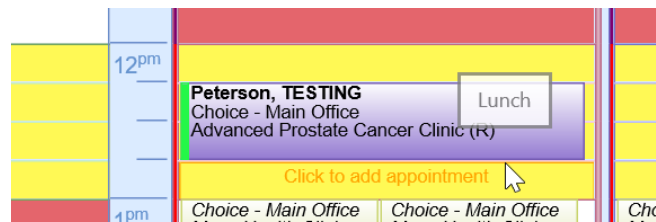
# Automated Appointment Reminders Sent to Patients

Inphonite will deliver reminders via text, email, and phone calls based on the information provided in the reminder file.

## Appointment Status Updated based on Contact

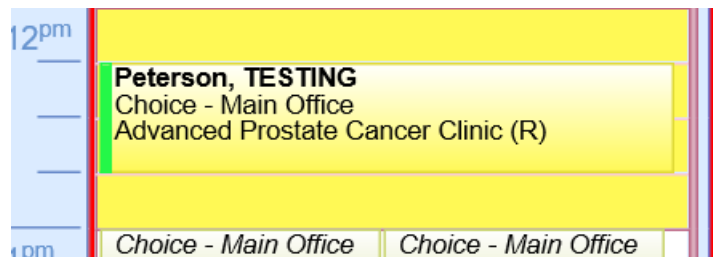
### Contact Status

Once an appointment reminder is sent to a patient, the status of the appointment will be updated based on the 'Contact Status' that was configured.



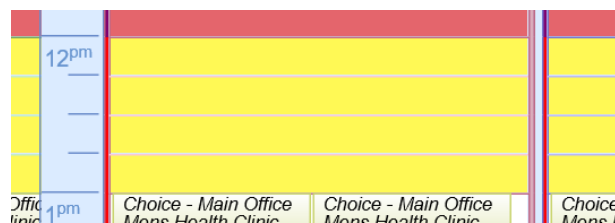
### Confirmed Status

If a patient confirms their appointment via the reminder system, the status will be automatically updated to 'Confirmed'.



### Cancelled Status

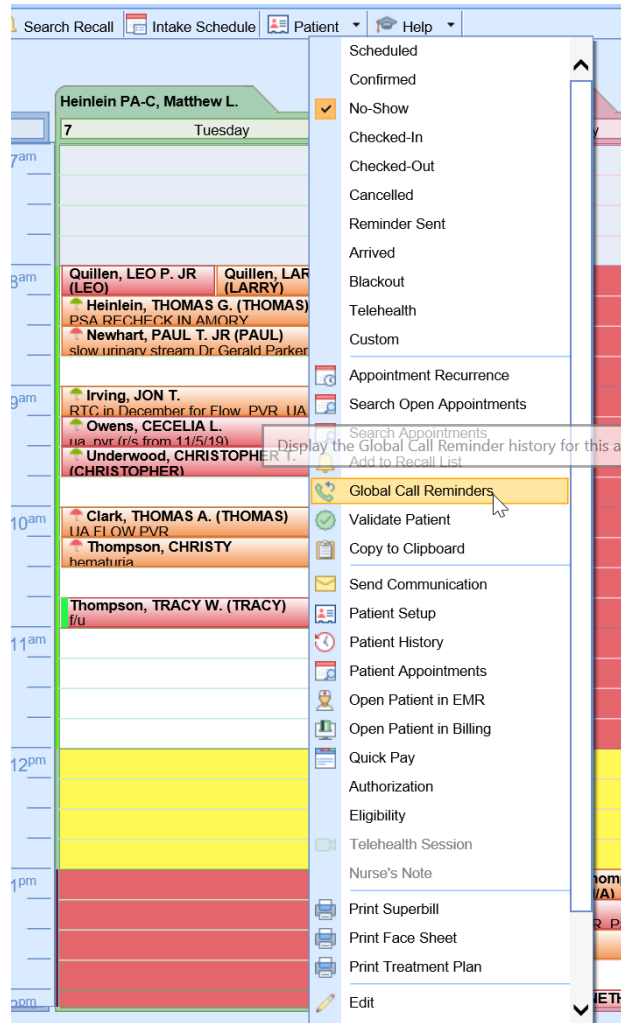
If a patient cancels their appointment via the reminder system, the status will be automatically updated to 'Cancelled'. Based on practice preferences, the appointment may no longer appear on the schedule.



## Detailed Contact Information

Users can see a detailed view of the contact by following the below steps:

1. Right click on the appointment and select **Global Call Reminders**



2. The date, time, method, and results of the reminder will be displayed

Global Call Reminder		
Date	Method	Results
01/05/2020 1:08PM	Phone Call	Message Delivered

## Using the "Rescheduled" Status

The "Rescheduled" status allows a practice to create a new appointment for a patient when they need to move the date/time/location of their appointment. This status also alerts the reminder system and prevents the system from sending out incorrect or outdated appointment information.

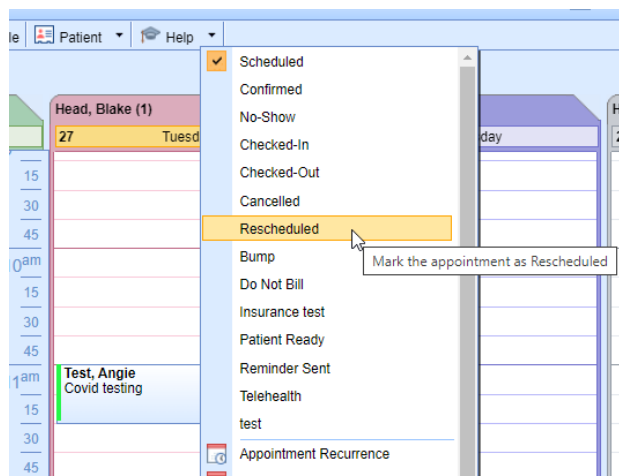


# When should we use the Rescheduled status?

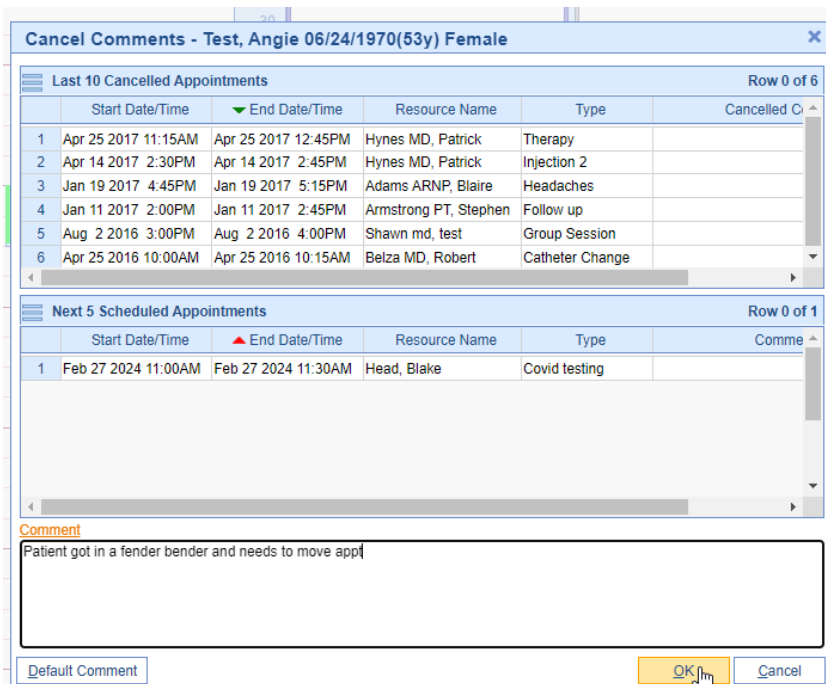
The practice may determine that the rescheduled status should be used when the date, time, location, or resource needs to be changed for the patient's appointment. The practice may also determine that the patient will need to receive an appointment reminder for updated appointment information. The status change will also allow the practice to efficiently manage the patient's appointment history by reviewing past appointments in the "Rescheduled Status."

# How to use the Rescheduled status

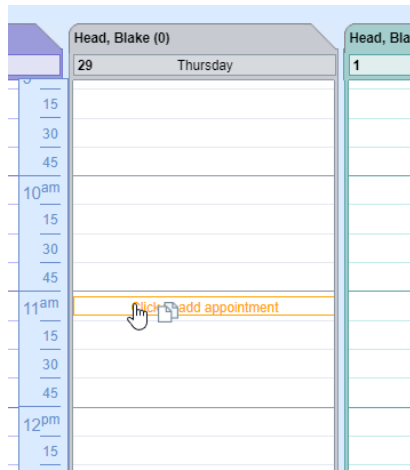
To reschedule an appointment, simply right click over the appointment and choose the "Rescheduled" status from the list of options



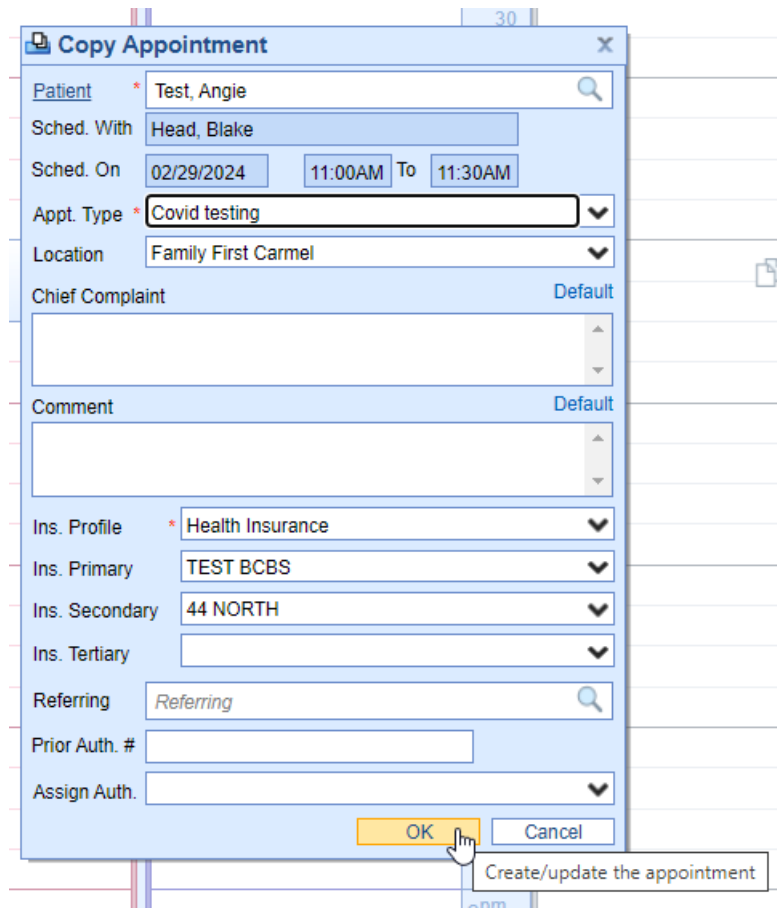
The user will be presented with the Cancel Comments window, where they are able to add any applicable comments for the reason to reschedule. Click OK.



The system will present the user with a trailing "copy" cursor where they are able to create a new appointment, using the original appointment details



Simply click and drop (or right click to assign to a placeholder) to create the newly rescheduled appointment



## How to "hide" rescheduled appointments

If you wish to "hide" or make the rescheduled appointments disappear once they are rescheduled, the Company Setting: Display Rescheduled Appointments on the schedule, should be unchecked

**Company Setting** x

Value

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Checked is Yes/True. Unchecked is No/False

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If this setting is checked the rescheduled appointments will appear on the schedule.