

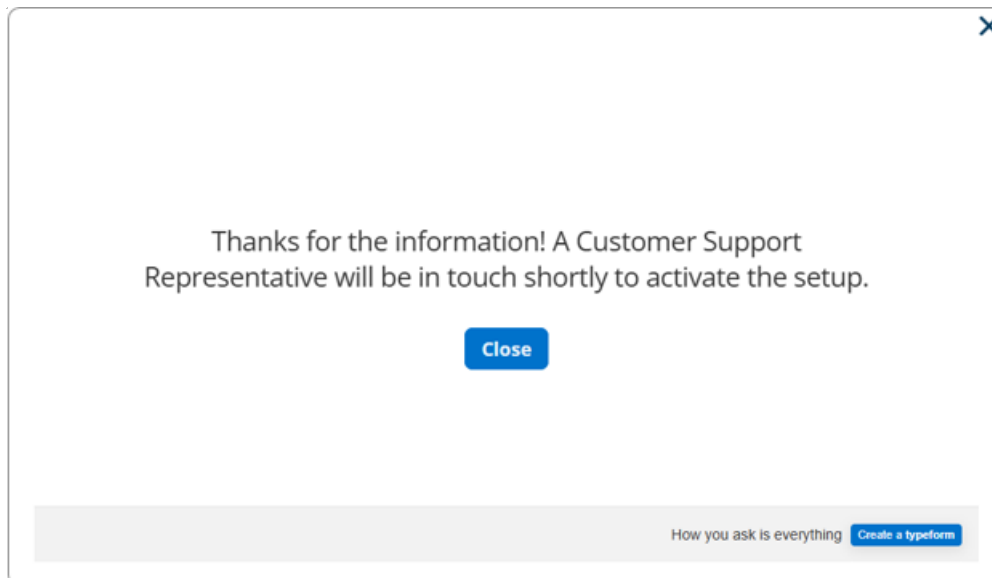
Setup the Automated Appointment Reminder Integration

Last Modified on 08/14/2026 2:32 pm EDT

Sign-Up

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

1. Go to: <https://isalushealthcare.com/services/>
2. Under Appointment Reminders, click **Learn More**
3. Click the **Continue Button** (this will redirect you to the sign up window)
4. Click **Start**
5. Enter your Company Id and click **Ok**
6. Answer all the sign up questions and select all your reminder preferences
7. When finished, click **Submit**



Configure Reminder Rules with iSalus

Once you have signed up for your Automated Appointment Reminders, 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

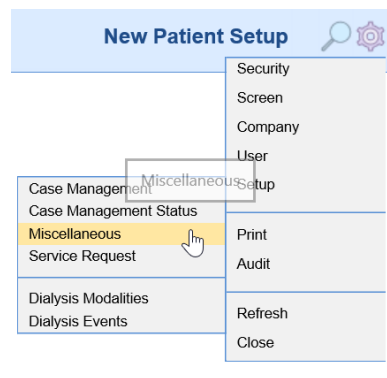
The following screens need to be assigned to users that should update individual patient preferences:

- Practice - General > Setup > Patient Portal Miscellaneous

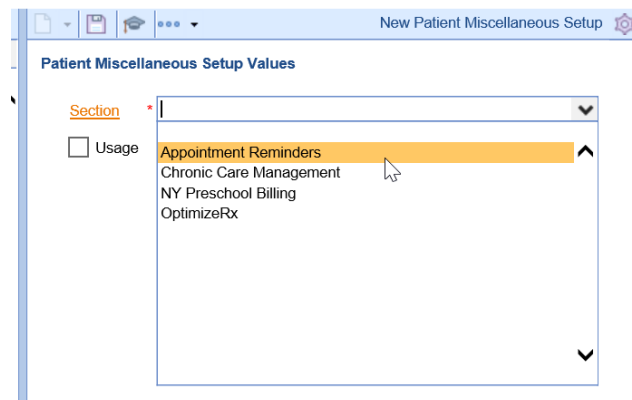
Screen

The following screen must be added to the Miscellaneous portal:

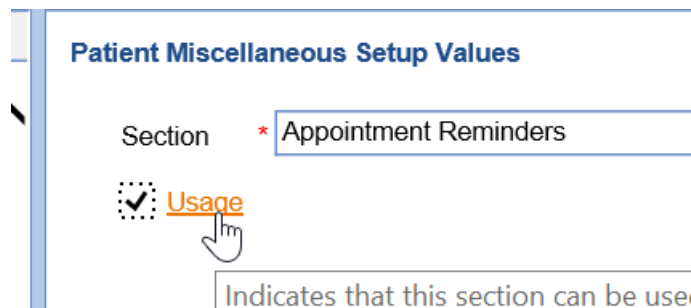
1. Navigate to **Setup > Patients**
2. Click the **Gear** icon
3. Select **Setup > Miscellaneous**



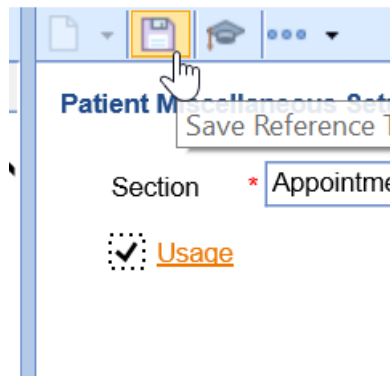
4. Select **Appointment Reminders** from the Section dropdown



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 ☐ Preschooler with disability

Appointment Reminders

Reminder Type	Consent	Reminder Value
Phone Calls	☒	☒ Home ☐ Work ☐ Other ☐ Override
Text Messages	☒	☒ Home ☐ Work ☐ Other ☐ Override
Email	☐	☒ Patient ☐ Override

OptimizeRx

OptimizeRx Type	Consent	OptimizeRx Value
Text Messages	☒	☒ Home ☐ Work ☐ Other ☐ Override
Email	☒	☒ Patient ☐ Override

Summary
Demographics
Insurance
Responsible Party
Emergency Contact
Comments
Case Management
Dialysis
Sliding Fee
Immun. Registry
Patient Extension
Miscellaneous
Referral Tracking

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

Pull Status: 2 Items

Pull Days: 2

Only Weekdays: ☐

Update Status: ☒

Contact Status: Scheduled

☒ Resource Specific

☒ Location Specific

☒ Type Specific

Resource Specific List:

- All
- Personnel**
- Allison Myers, NP-C
- Clarence S. Goldsmith, MD
- Ct
- Eligard
- Ic Tx/spt Change/bcg
- Ivp/cystogram
- Jon T. Quillen, MD
- Jonathan Lincoln, MD
- Katelyn C. Clark, NP-C

Location Specific List:

- All
- AAOE 1
- AAOE 2
- AAOE 3
- AAOE 4
- Atlas HLB Test
- Choice - ASC
- Choice - Main Office
- Choice - North
- Diagnostic Imaging
- Dialysis Location

Type Specific List:

- All
- Advanced Prostate Cancer Clinic
- BCG
- Biopsy
- Bladder Fulgeration
- Bladder Instillation
- Block
- Blood Draw
- Cancer Discussion
- Cath UA
- CIC

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.
- **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.
- **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).