The Do’s and Don’ts of Appointment Reminders

An Inphonite White Paper
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Introduction

Automated appointment reminders are the norm for most businesses that need to call out to their patients or clients—and for a variety of reasons. They save you time and money and make it easier for all parties involved. No longer do you need to wonder if you are going to see your patients in the morning. Automated messages integrate with your scheduling software and sends calls, emails or texts to all your important appointments. These systems also report back the results letting you know whom confirmed, wants to reschedule or cancel their appointment.

With over 25 years in the business, we have learned there are some avoidable mistakes people make when using automated reminders. Included below are some basic do’s and don’ts to follow when using such a system.

The Do’s

Inform your patients that you are using an automated system.
Make sure they expect the message and know the caller ID or email address the messages will be coming from; most systems allow you to use
your own number as the caller ID. Best practices have taught us that they should add these items to their contacts. Also, when informing them how they will be contacted, request that they *Listen and Reply* to your message. This will give you a concrete result so you can be assured of attendance.

**Train your staff.**
Let the staff know they are not being replaced. Instead, this system is being instituted to make their job easier. Employees will still need to follow up with anyone that requested to reschedule or did not respond. You may also want them to follow up on any result that comes back unclear. Training the staff on not only the system itself, but also what to expect, how to handle your results and what follow-up is needed will be a necessary step toward successful implementation of automation.

**Be clear in your messages.**
It is important that you include the *need-to-knows* for all your calls; the: who, what, where, and when. If they don’t know who the call is for, on a shared phone, the message may be discarded. If they aren’t reminded the basics of what the appointment is for, they may not remember making it. If they can’t find where it is, they may not be able to make it, resulting in a no-show. Without a when, they would not be able to show up on time, and this may also cause them to miss the appointment.

**Make sure your messages do not have too much personal information.**
Make sure you are not saying your patients’ last names or any specifics about what the appointment is for. If a phone or computer is shared among roommates or even family members, you could be giving away personal information that is not meant to be shared. A suggested message may look or sound something like this: “Lisa has a doctor’s appointment with Dr. Jeffries at 4:30pm tomorrow at our Southdale office. Press 1 to confirm, 2 to transfer to an operator and reschedule, or 3 for directions and office hours.”

**Invest time in finding out what the best message is for your patients.**
Every business has different clientele, some have young adults, and others have elderly patients. Also, some people prefer personal messages at night, while others may want day. Choosing the right message for your demographic is a great way to ensure that everyone gets the message. If you have a mix of young and old, many reminder systems are able to have a custom field that will differentiate between those and you can send 19-year-old Molly a text, and 74-year-old Betty a phone call with a volume boost. Most EHRs include a *preferred contact method*, which allow patients the option to choose how they want to be contacted.
Cut your no-show.
Having an appointment reminder system is a great solution to reduce your no-shows. When automated messaging is used with best practices being followed, studies show that no-shows are reduced by as much as 50%. This saves your business money. On average, for every no-show that a practice experiences it will cost around $100, sometimes even more. This means if you have 8 no shows a week without a reminder system, you can reduce that to 4, saving a potential amount of $400 in just one week!

Charge for no-shows.
Institute a policy that each patient is aware of and signs annually reminding them of your no-show policy. Asking even for a small percent of the actual appointment cost is often a deterrent for cancellations and no-shows. You can even further reduce no-shows by having a rule that if they do not show more than two or three times in a row, they will not be rescheduled at all and will need to find alternate care.

Save time and money.
If you are doing your calls manually, daily, chances are that they take you at least 30-60 minutes, if not more. These often boring manual reminders are usually left until the last moment. Your staff may be rushing to get these calls done before they leave for the day and could easily make mistakes. Then, when there are a few people that want to reschedule at that moment, that increases employee time on the phone and could result in overtime paid by you. Additionally, as was mentioned previously, reducing no-shows saves even more money.

The Don’ts

Overpower with too much information.
A lengthy message with a text-to-speech engine can be irritating to a customer. Repeating information that the patient already knows may be especially frustrating. Instead, Inphonite suggests creating separate messages, one for new customers and one for existing customers. That way, people needing driving directions and a reminder to arrive early for paperwork can get one message, and those long-time patients that know the routine, another.

Underestimate the power of a reminder system.
In our busy world, things come and go. It’s hard to find time to make an appointment, much less write down the details and remember to attend. In fact, many people today expect notifications and just wait for a reminder email or text that they know is coming, rather than marking their calendars.

Expect too much.
Even the best automated messaging system may not have 100% accurate results all the time. We admit there may be a few people that
simply don’t want an automated message, and yes, there are those that will flat out lie and say they never got the message. Finally, many things often change in the way systems are set up or run. Always maintain open lines with Technical Support, so that if something needs to change or seems not quite right, you can get things handled in a timely manner.

**Forget to keep your customers informed.**
Many systems are varying degrees of customizable. With some, you are able to record or edit your own messages about hours changing, a change of address, holidays, or even news updates or other revenue building reminders. Keeping your customers, staff or patients informed is key to building any business.

**Give customers the option to cancel.**
If the option to cancel the appointment is too easily available, some may readily take it, especially if they do not feel they need the appointment in the first place. These cancellations in the health industry often occur when, against a doctor’s advice, a patient thinks they do not need the prescribed follow-up appointment. This could ultimately make you lose money. An alternative is giving them an option to reschedule or transfer and speak to someone on your staff.

**Forget to check your messaging results.**
Make sure that it becomes a part of your daily routine to have staff check the results of your messaging campaigns. It is important to review and follow-up with people that didn’t reply, and those that asked for someone to contact them. Knowing what the results on your messaging system mean, will help alleviate confusion internally and make your review and daily follow-up much easier.

**Summary**
The best thing to do is be prepared; prepare your team and your patients. By following these do’s and don’ts, you are following the industry’s best practices and words of advice from a company that has been in the business since the beginning. We are proud to say that we made mistakes and learned from them. Now we are able to share these do’s and don’ts from experience. Our goal is that by reading these lists you will be informed and prepared when you are ready to save time and money in your business!

**Our System - InphoniteVoice**
InphoniteVoice is an automated messaging system offering secure, reliable, low cost, and completely customizable messages for businesses of any industry. You can use InphoniteVoice to automate any of your outgoing calls. Call us now to see how!

To find out more:
[www.inphonite.com](http://www.inphonite.com) or 800-350-7693.