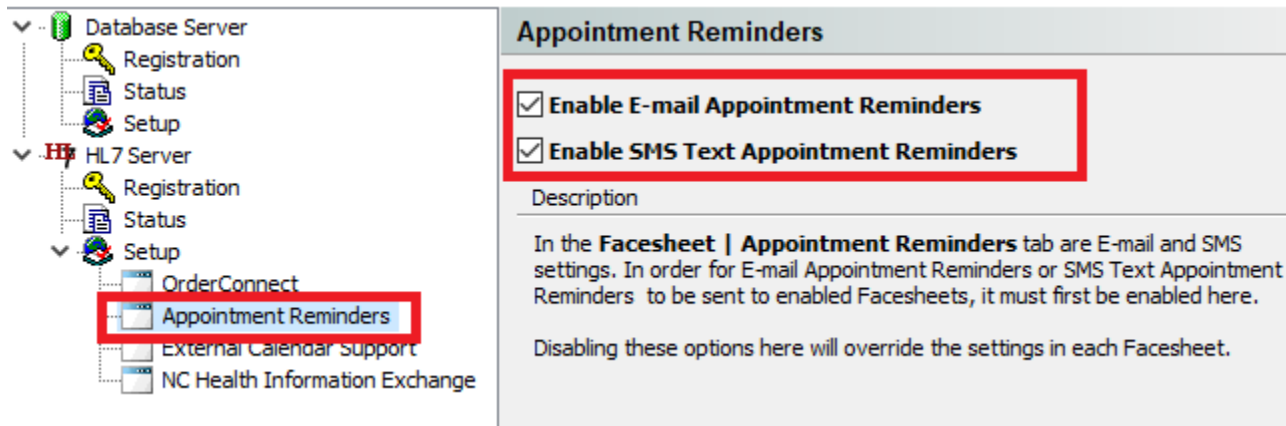


Appointment Reminders in Helper 9.6

Appointment reminders in Helper 9.6 can be configured for e-mail and/or SMS text message following the steps below.

Email reminders are included with Helper for free, however, a small fee applies to Text Message reminders. Please contact myaccount@helper.com to pre-purchase Text Reminders and activate this feature on your account. An active Assurance Plan is required.

- Step 1.** Configure Helper Server Administration to enable Appointment Reminder feature
- a. Open Helper Server Admin (Windows Start menu > Helper Software > Helper Server Administration)
 - b. Select **Appointment Reminders** on the left. Then click on the checkbox beside **Enable E-Mail Appointment Reminders**.



Appointment Reminders

Enable E-mail Appointment Reminders

Enable SMS Text Appointment Reminders

Description

In the **Facesheet | Appointment Reminders** tab are E-mail and SMS settings. In order for E-mail Appointment Reminders or SMS Text Appointment Reminders to be sent to enabled Facesheets, it must first be enabled here.

Disabling these options here will override the settings in each Facesheet.

- Step 2.** Set the number of days reminders will be sent prior to appointments
- a. On the main Helper Screen, click on Setup and select Preferences.



Helper v9.1.0: Bbbbb Bbbbb

Setup Utilities Web Register Help Exit

Libraries Ctrl+L

Preferences

ClaimsConnect

Multi-User Setup

Change Password

Transactions CC Ledger Medications Billing ERA Reports

Search Hide Patients

Account # SSN

Search

Force columns to fit. To search, click in any column and begin typing

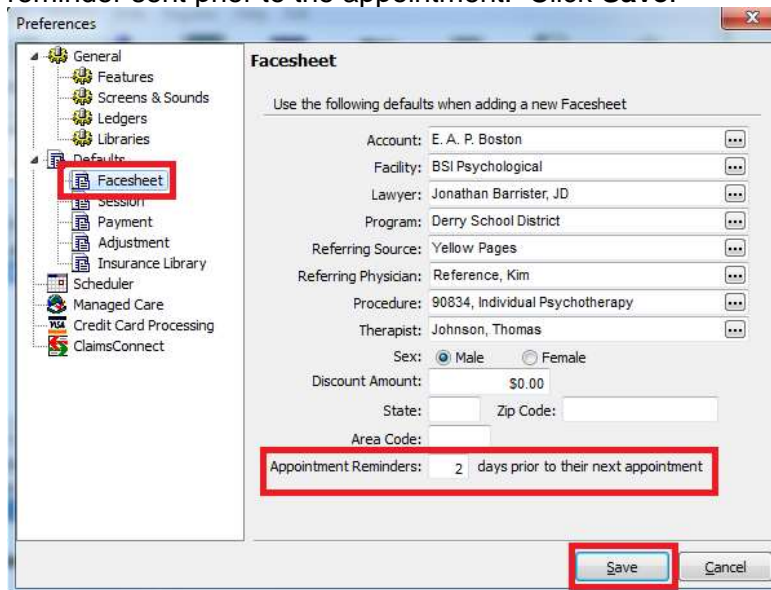
Account #	Last Name	First Name	Active
B	Bbbbb	Bbbbb	<input checked="" type="checkbox"/>

Add Facesheet

Edit Facesheet

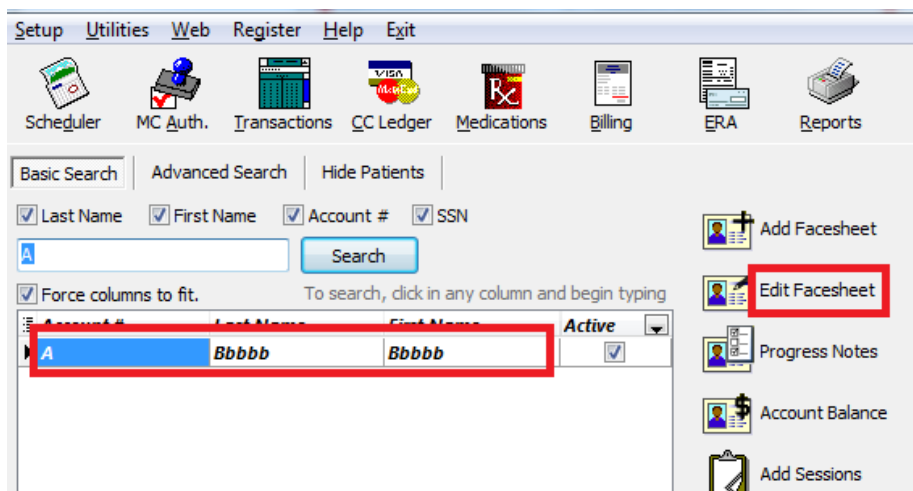
Progress Notes

- b. Click on **Facesheet** on the left. On the bottom right, enter the number of days you'd like the reminder sent prior to the appointment. Click **Save**.



Note: Reminders are automatically sent ahead of the session according to your settings, ONLY if the Helper program is running on your PC (if using Helper on a network, at least the Server needs to be running Helper, workstations may be off).

- Step 3.** Edit the patient Facesheet to add e-mail address and/or phone number for reminders
- a. From the main Helper screen select a Patient and click on **Edit Facesheet**.



- b. Click the tab at the top **Appointment Reminders**. At the bottom of the page, check the checkbox next to **Enable E-mail Reminders** and/or **SMS Text Reminders**. Enter the number of days prior to the appointment to send the reminder. (It will auto-populate with the setting entered in Preferences on step 2, however you may override the number of days for each patient if needed.) Enter the email address and/or phone number to send the reminder(s) and click **Save**.

Patient Information: William Gallagher

Patient Library Links Appointment Reminders

If you want to send appointment reminders by email or SMS text, **PLEASE READ THE FOLLOWING TO THE CONSUMER**

We can send you an appointment reminder by email or SMS text. The appointment reminder will include only the date and time of your appointment and your service provider name. We will not encrypt the messages. Health care information sent by regular e-mail or SMS text could be lost, delayed, intercepted, delivered to the wrong address, or arrive incomplete or corrupted. If you understand these risks and would like to receive an appointment reminder by email or SMS text, I need you to confirm you accept responsibility for these risks, and will not hold us responsible for any event that occurs after we send the message.

By checking a box below that enables E-mail reminders or SMS text reminders, and entering an E-Mail address or Phone number, you acknowledge that you have received consent from the patient.

Enable E-mail Reminders for this patient
 Enable SMS Text Reminders for this patient

Send reminder days prior to their next appointment

Recipient E-mail:

Recipient Mobile Number:

Save

Save & Add

Save & Copy

Cancel

Extra Info

Facsheet
 Patient Info.
 Additional Resp. Parties
 Attachments
Insurance Info
 Claim Info.
 Insurance Co.
Billing Setup
 Defaults
 Billing
 Access Time & Outcomes

You have completed set up for a reminder to be sent to this patient!

Step 4: To add information to the reminder message

- a. **Setup > Libraries > Facilities.** Select the **Facility**, then **Edit** button. Select the **Appointment Reminders** tab

You may use a unique message for each of your Facilities if needed. Type the information to be added in the white box, then click Save.

The example below adds a phone number and instruction to call with any questions.

Facility: BSI Psychological

General Claim Settings Appointment Reminders

If using the Appointment Reminders feature, an email or SMS text is sent with the following format:

Subject: Appointment Reminder
Body:
 You have an upcoming appointment at 12:00 pm on Wednesday January 4th with John Smith PhD.

[Additional text entered below will show up here, below the static content]

Please call 555-555-5555 with any questions!

Save

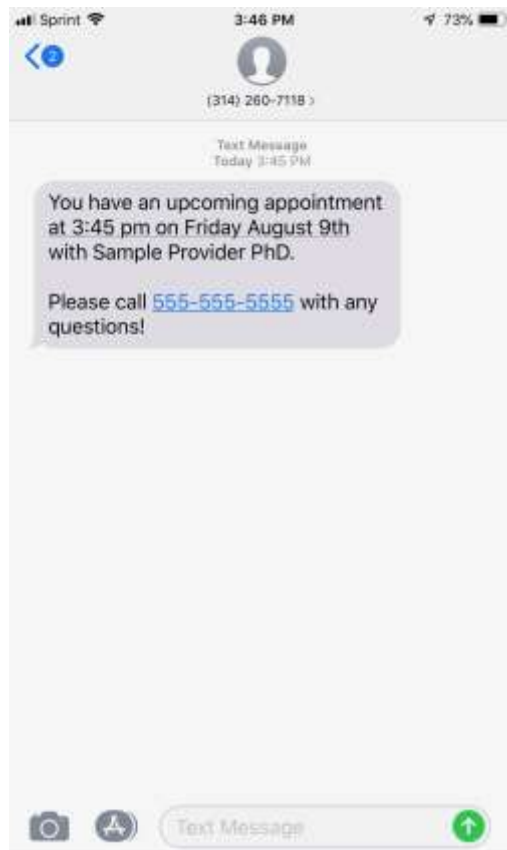
Save & Add

Cancel

Extra Info

Fee Schedule

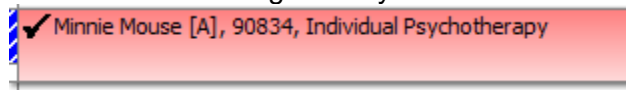
Text Message Example:



Cancelled appointment – Do Not Send Text Reminder:

To prevent appointment reminders from being sent on a cancelled session:

1. On the scheduler, select the session being cancelled (left click one time)
2. Then right click the session, select Edit. This will open the Session screen
3. Update the status and any other applicable fields, then click Save
4. Left click again on the session, then Right click and choose Save.
5. The scheduler will now display the cancelled session with a check mark, indicating it is on the Transaction Ledger ready to be billed.



Other Tips & Helpful Information:

- Reminders are automatically sent ahead of the session according to your settings, ONLY if the Helper program is running on your PC (if using Helper on a network, at least the Server needs to be running Helper, workstations may be off).
- Email reminders come from DoNotReply@myscheduler.net
- Text reminders are sent from a 314-area code phone number which cannot be changed
- One email and/or text reminder is sent per session
- If a new session is scheduled inside of the reminder day preference setting, the reminder will go out right after the session is added to the scheduler (presuming text/email settings are entered in facesheet)
- Replies to emails and text messages are not accepted
- To view Text Reminder logs, in Helper select Utilities > View Audit Log