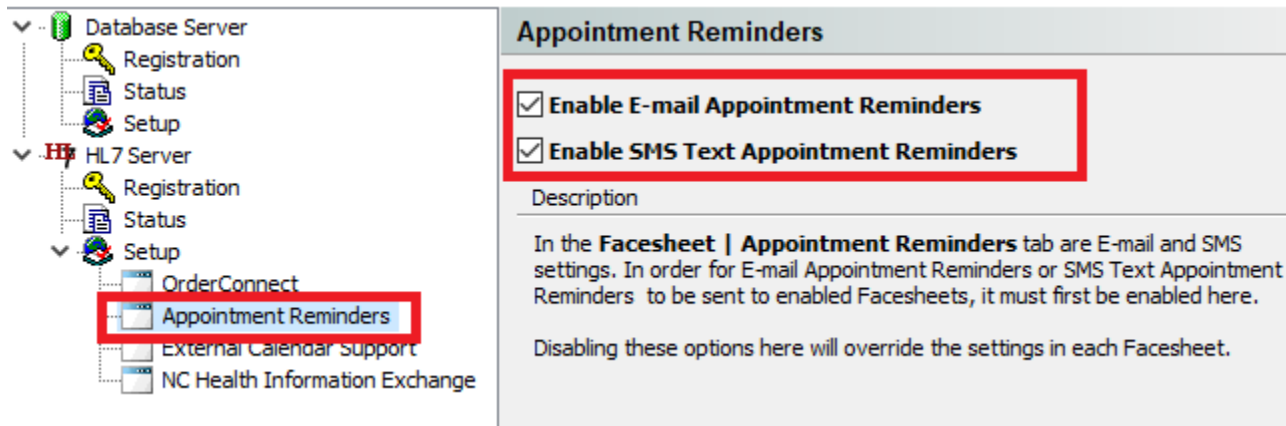# Appointment Reminders in Helper 9.6

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**.

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.

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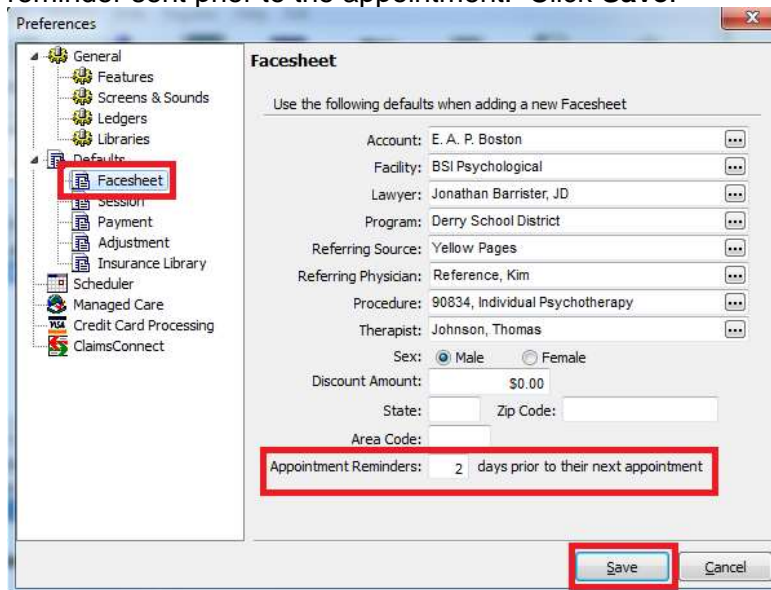
Note: Reminders are automatically sent ahead of the session according to your settings, ONLY if the Helper program is running on your PC (if using Helper on a network, at least the Server needs to be running Helper, workstations may be off).

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**.
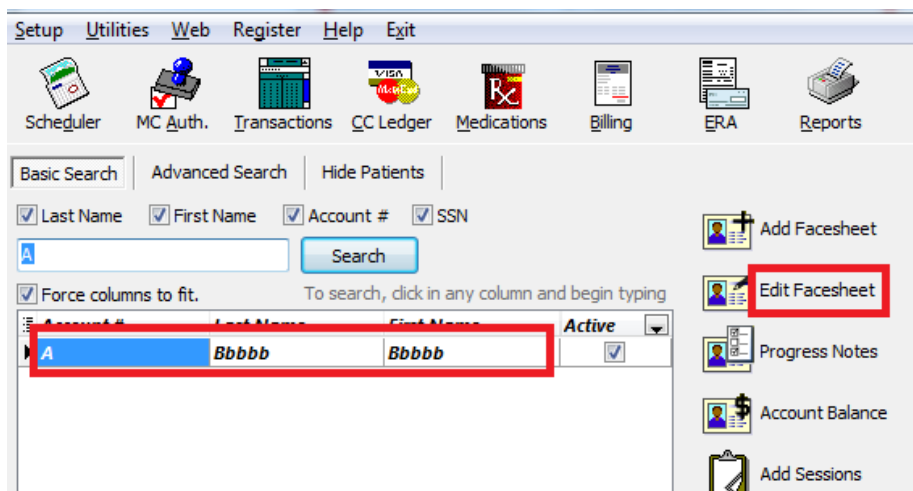
b. Click the tab at the top **Appointment Reminders**. At the bottom of the page, check the checkbox next to **Enable E-mail Reminders** and/or **SMS Text Reminders.** Enter the number of days prior to the appointment to send the reminder. (It will auto-populate with the setting entered in Preferences 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**.

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.

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.
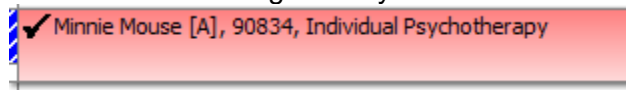
Other Tips & Helpful Information:
- Reminders are automatically sent ahead of the session according to your settings, ONLY if the Helper program is running on your PC (if using Helper on a network, at least the Server needs to be running Helper, workstations may be off).
- Email reminders come from DoNotReply@myscheduler.net
- 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