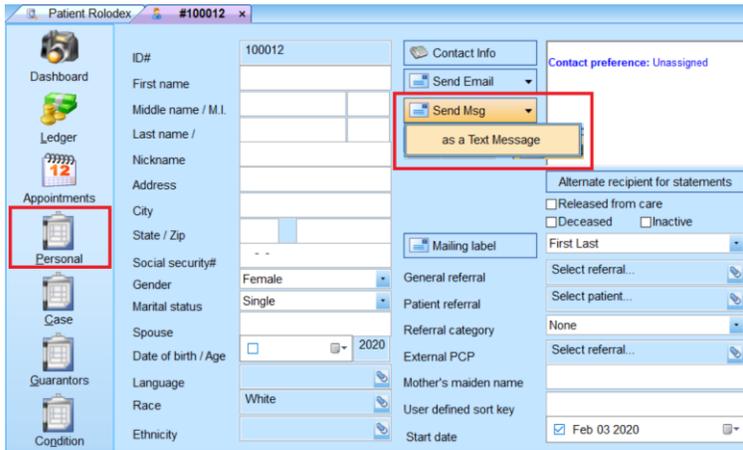# How can I send generic text messages to a patient outside the appointment scheduler?

From any patient's **Personal** tab, simply use the **Send Msg** button:

To send text messages to groups of patients, you can use **Advanced Method #2** discussed below.

How can I send text messages to patients to remind them of an upcoming appointment?

Individual Appointments

- Right-click the patient's appointment within the scheduler.
- If the options is available, a check mark will appear next to Send text message
- Select the option to view a mini-editor with default text.
- Use as-is or change the text.
- Press **OK** to send.
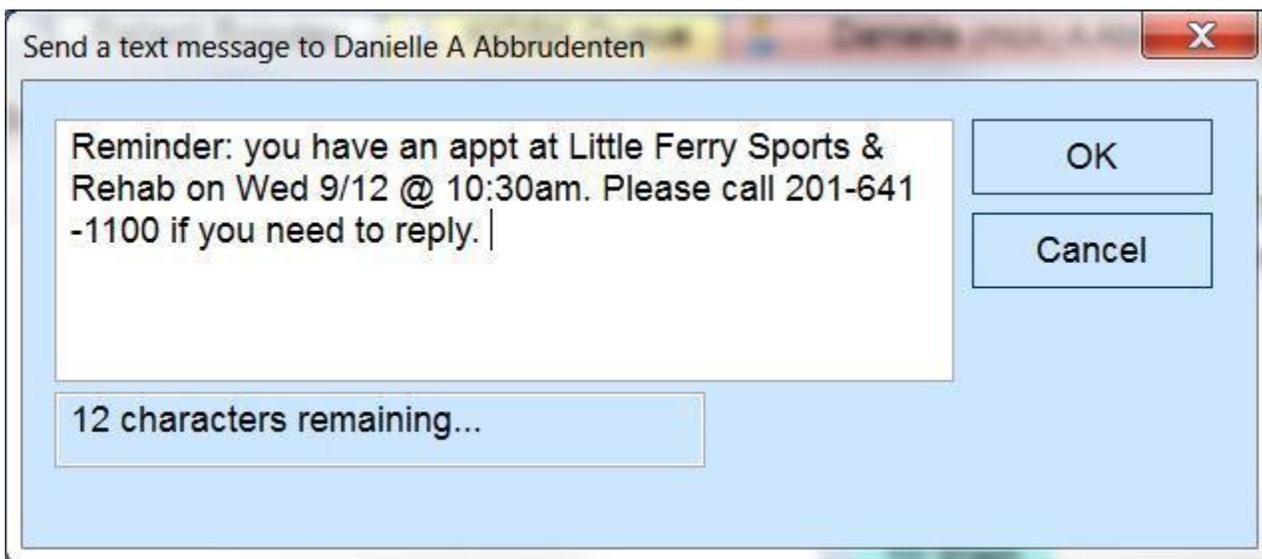
Multiple Appointments / Multiple Patients

Basic method: From the scheduler tab...

1. Within the **Appointments** tab, select the **Print / Export** tab.
2. Select your date and/or time range.
3. Scheduled appointments is checked by default.
4. Select Send basic text messages to patients who can receive them in the **Other options** check list.
5. Press **Print/Process** to all patients who fit the selected criteria.

Advanced method #1: Appointment Recall feature...

Set specific advance timing features separately for each appointment as it's created for a customized reminder date.

1. This feature should be partially automated within the configuration for a standard recall date.
2. Set the **Recall** date for each appointment as it's created.
3. Routinely (e.g. daily/weekly), access the **Appointment Recall** report from the **Reports** menu.
4. Change the **Report objective** to Send form letters (via portal / email / text).
5. Check Send as text message to patient's cell phone within the **Email/text options** list.
6. Enter a subject (e.g. "Your Appointment") as the **Email/text subject**.
7. Under **Selected template**, select Use Portal / Email / Text only (in priority order).
8. Press the **Browse** button to select a previously created form letter (text merge) file template.
9. Select a provider.
10. Add any related filters.
11. Select **Create/Process** to begin the process.

Advanced method #2: Form Letters:

1. Access the **Form Letters/Text Merge** report from the **Reports** menu.
2. Press the **Browse** button to select a previously created form letter (text merge) file template.
3. Check Send as text message to patient's cell phone within the **Portal/Email/text options** check list.
4. Enter a subject (e.g. "Your Appointment") as the **Email/Text subject**.
5. Change the dropdown list to: Use Portal / Email / Text only (in priority order).
6. Add any related filters.
7. Select **Create Report** to begin the process.