

# One Step at a Time: Your Checklist for Better Patient Engagement

Creating a strong patient engagement strategy takes time. It begins with identifying your practice's specific needs, setting tangible goals, and building your approach one step at a time. To help guide you, here's a practical checklist for selecting an appointment reminder solution that fits your strategy.



1

## Determine if Your Current EHR/EMR Supports Reminders

- Check if your existing system offers built-in appointment reminder tools.
- Evaluate how reminders are configured: Can they be automated by appointment type or provider?

2

## Evaluate Third-Party Reminder Services

- Research dedicated reminder platforms.
- Confirm integration compatibility with your EHR/EMR or practice management software.
- Check for features like 2-way messaging, confirmations, rescheduling, and multilingual support.

3

## Decide Between Manual vs. Automated Systems

- Automated systems save time, reduce human error, and scale easily.
- Manual calls/reminders (done by staff) may be more personal but are labor-intensive and inconsistent.
- Some practices use a hybrid approach—automated for most, manual for high-risk or elderly patients.

4

## Compare Pricing Models

- Flat monthly fees vs. pay-per-message or tiered pricing.
- Evaluate the ROI: How many no-shows would need to be prevented to justify the cost?

5

## Check for Features That Fit Your Workflow

- Ability to send reminders by SMS, email, and/or voice.
- Support for patient responses (e.g., confirm/cancel/reschedule links).
- Dashboard for tracking delivery status and response rates.
- Customization by appointment type, provider, or location.

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## Prioritize HIPAA Compliance and Security

- Ensure the system encrypts all communications.
- Review their data handling, storage, and breach response policies.

Updox makes it easy for practices like yours to adopt patient engagement solutions, allowing you to stay focused on what matters most—caring for your patients.

See how Updox Premium Reminders allows you to fully customize your patient communication, improve patient engagement, and optimize your practice's productivity.

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