

SMS Reminder Guide

Your complete resource for setting up and managing clinic appointment reminders

Key Information

- Cost: \$250 setup + \$12/month + \$0.04/text
 - Setup Time: 1-21 business days for organization approval
 - Requirements:
 - o Clients phone number must be marked as “Mobile” and “Preferred”
 - o SMS feature enabled in Subscription
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Getting Started

Adding SMS to your subscription

1. Navigate to SMS page by going to **Organization Menu > Subscription > Manage Organization add-ons**
2. Toggle on **SMS appointment reminder** and choose **Update Add-ons**

Manage subscriptions / Manage organization add-ons

Dashboard Manage user plans & add-ons **Manage organization add-ons** Past invoices Usage metrics

Organization Add-ons

SMS appointment reminder add-on (\$0.04 per message, \$12.00 monthly service fee, \$250.00 one-time set up fee)

\$ Optional Optional: Set a maximum monthly spending limit ⓘ

⚠ After purchasing, go to the edit organization page to ensure proper set up. [SMS appointment reminder info](#)

Temporarily add-on (\$1.00 per session)

⚠ Once you click **Update Add Ons** your card on file will be charged the \$250 setup fee and the monthly fee. If done mid-month, the monthly fee will be pro-rated.

Setting Up Your Organization

1. Navigate to SMS Settings by going to **Organization Menu > Edit Organization > SMS Settings**
2. Fill out the organization details.

Edit organization

Onboarding steps

Onboarding steps

- 1 **Organization details**
Submit organization details.
- 2 **Register your phone number**
This number will be used to send appointment reminders to your patients.
- 3 **Campaign status**
A campaign is required to send or receive SMS.

Organization details

The first step is to complete your profile in order to submit these details to The Campaign Registry (TCR). To ensure smooth processing, the details you provide must match exactly to those in your business registration documents.

Legal name *

Enter the exact legal name, as registered with the government (W2, W9 or CP 575). Ex: MyPractice LLC rather than MyPractice.

Type of business *

Tax ID (EIN) *

Format: 00-0000000

Website *

This should be your organization's homepage and should closely align with its legal name.

Note: If you are not the owner of the organization, choose *Other* for Job Position and put your title in Job Title section.

 Please be sure to double check that all information is correct. Once you move to the next step you are unable to make changes to this page

3. Select your phone number by choosing from the list available *or* enter in the area code and state to get a more refined list.

Onboarding steps

- 1 Organization details
Submit organization details.
- 2 Register your phone number
This number will be used to send appointment reminders to your patients.
- 3 Campaign status
A campaign is required to send or receive SMS.

Register phone number
The second step is to register a phone number. The phone number that you register will be the one responsible for sending appointment reminders to your patients via SMS.

Area code State

Number	ZIP code	State	
+17248037354	15312	PA	<input type="button" value="Select"/>
+12318036895	49336	MI	<input type="button" value="Select"/>
+17248357148	15637	PA	<input type="button" value="Select"/>

4. Add a call forwarding number (optional).

Onboarding steps

- 1
- 2
- 3

Enter a phone number to receive forwarded voice calls

If someone attempts to make a voice call to the phone number selected for SMS, the call will be forwarded to this designated line.

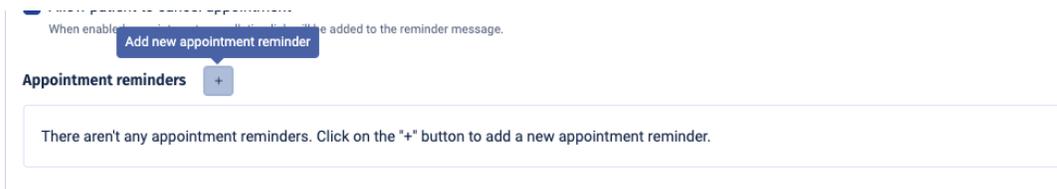
+13233109353 90001

5. Nothing needs to happen for step 3. The campaign approval process takes 1-21 business days. Once approved you will be notified via email and your campaign status will turn green.

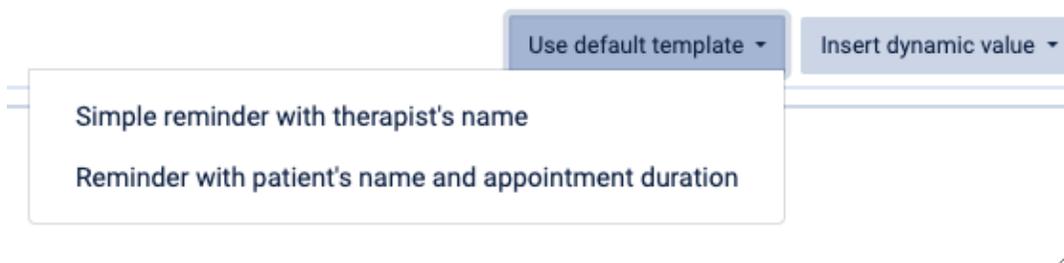
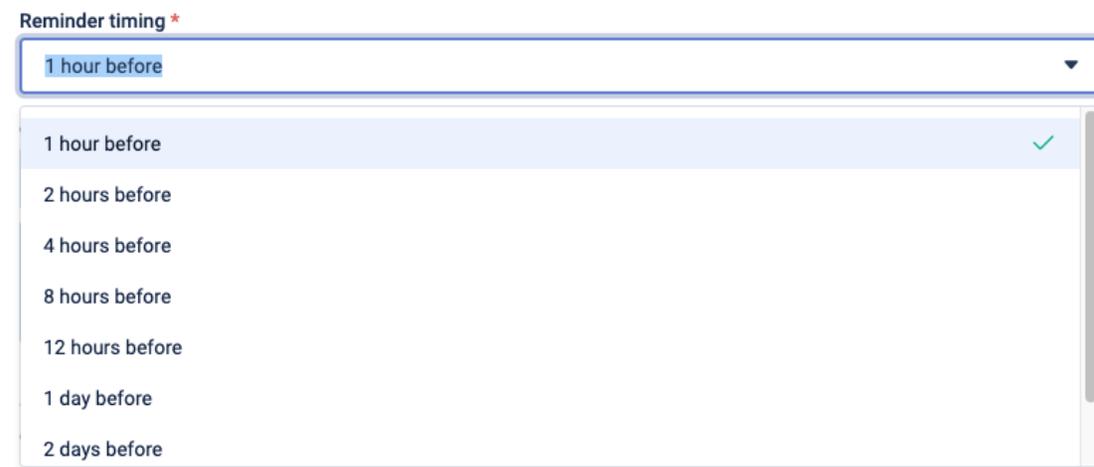
Reminder Settings

Note: While waiting for the approval you can start setting up reminder settings

1. On the Appointment Reminder Settings tab click **Enable Appointment Reminder Settings**
2. By default, **Confirm** and **Cancel** are enabled.
3. To add a new reminder, click the + icon



4. Start by choosing a time for the reminder and selecting a default template or typing your own message.



5. You are able to add a **Dynamic Value** which allows the system to replace items in the curly brackets with the appropriate name, date and duration.

Customize reminder message *

Write Preview Use default template ▾ Insert dynamic value ▾

Hi! This is a reminder for your upcoming session on {date_time} with {therapist_name}.

Date and time
Duration
Therapist's name

Message will always include the option to opt-out. If the appointment is for teletherapy, the link will be included automatically. Additionally, appointment confirmation and cancellation links will be provided if your organization has enabled them in the settings.

Be sure not to accidentally delete a bracket when editing or the smart feature will not work.

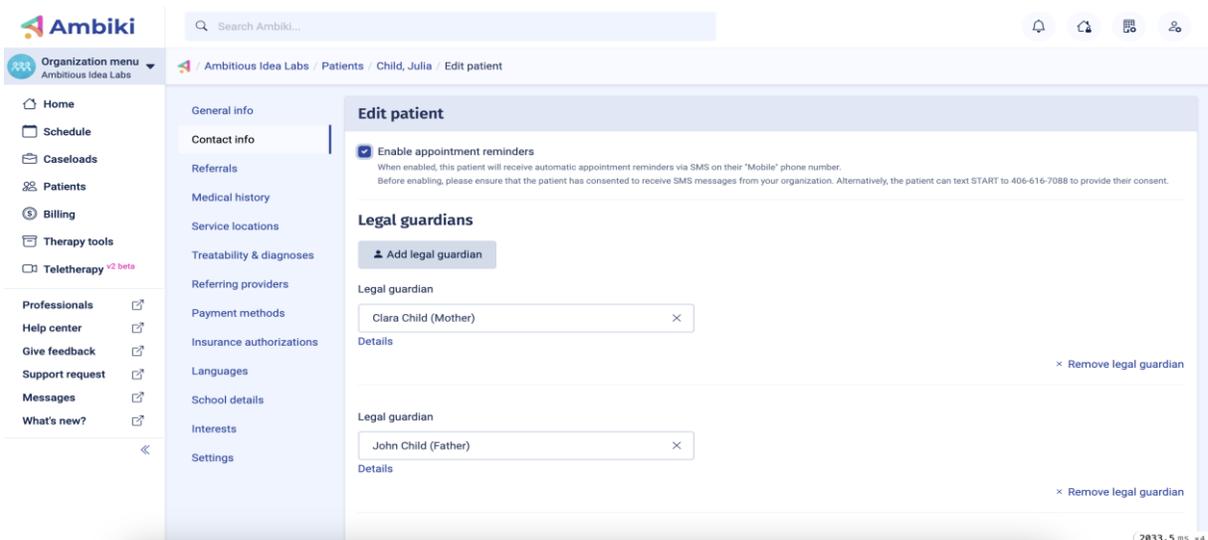
Note: If you have the Teletherapy Add-On with Ambiki then the Teletherapy link will automatically be added to the text.

How Reminders Are Sent

User Profile

Note: All clients are opted out of SMS by default to allow clinics time to communicate to clients giving an option to opt in to SMS Reminders

1. To enroll a client in SMS edit their profile and click **Contact Info**. There you will find a box to check mark



Note: Alternatively, clients can text “Start” to the number you purchased to opt in (check mark the box). They can also text “Stop” to that number to opt out (uncheck box).

2. To receive the text the client’s phone numbers must also be marked as “Mobile” and “Preferred”

Phone numbers

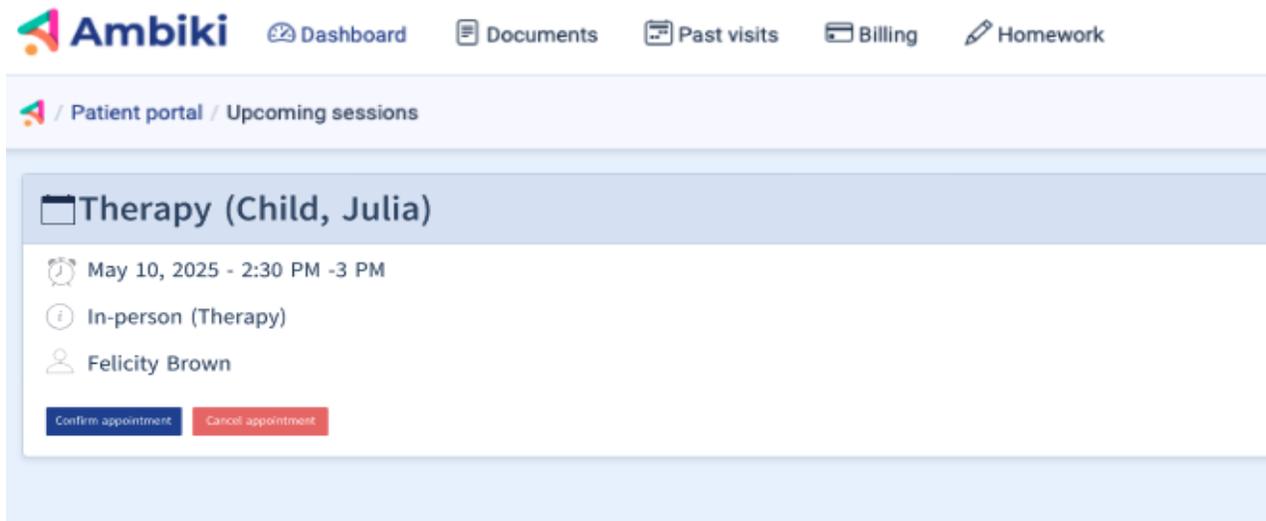
Type *	Number *	Owner's name	Relationship with contact
<input type="text" value="Mobile"/>	<input type="text" value="562-555-5545"/> <small>Format xxx-xxx-xxxx</small>	<input type="text" value="e.g. John Doe"/>	<input type="text" value="e.g. Teacher, Mother, etc."/>
<input checked="" type="checkbox"/> Preferred			<input type="button" value="Remove number"/>

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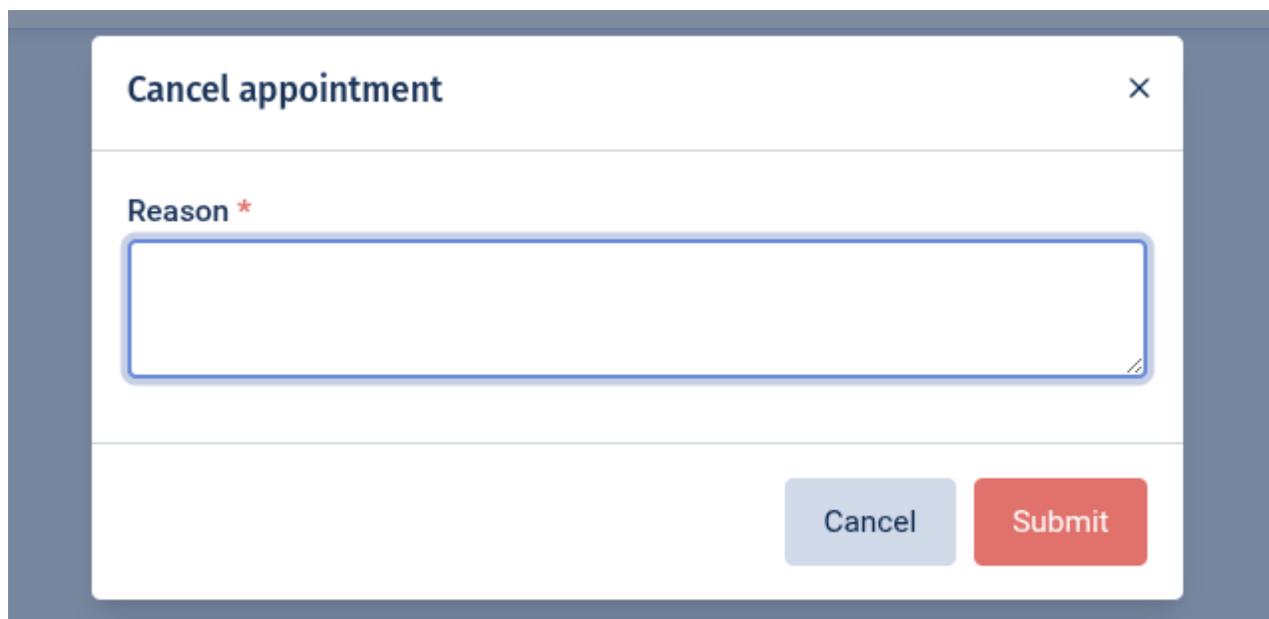
Confirm & Cancel Enabled

⚠ Clients must be signed up to the patient portal for the ability to confirm or cancel an appointment

- When the client receives their reminder message there will be a link for them to click that takes them to their patient portal where they can confirm or cancel.

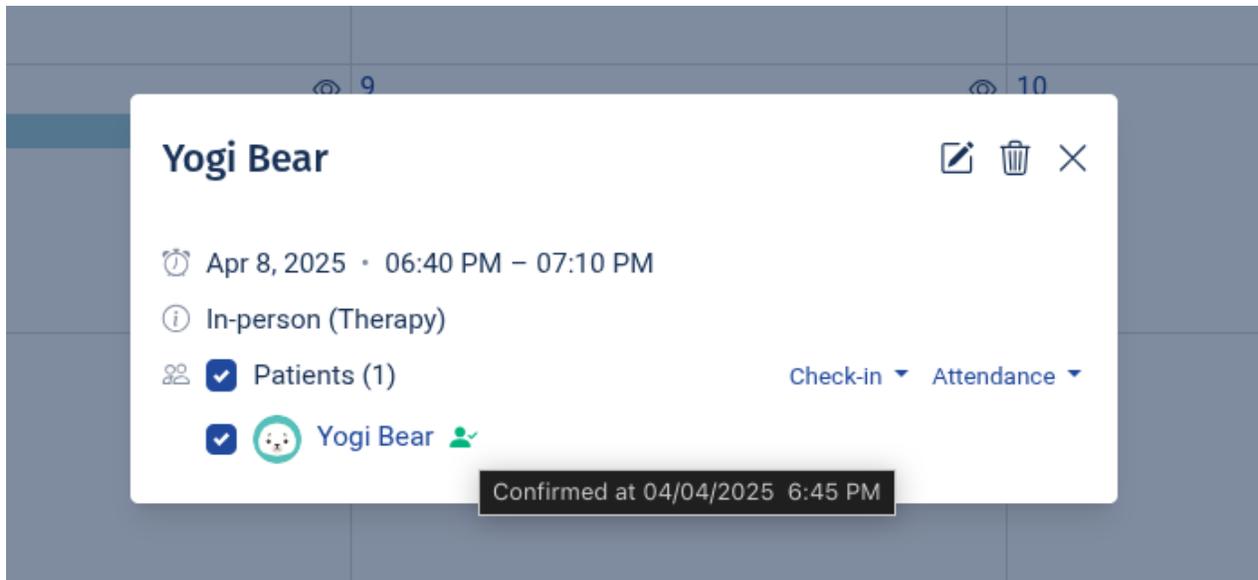


- If they cancel, they **must** enter in a reason why or they can't cancel the appointment.

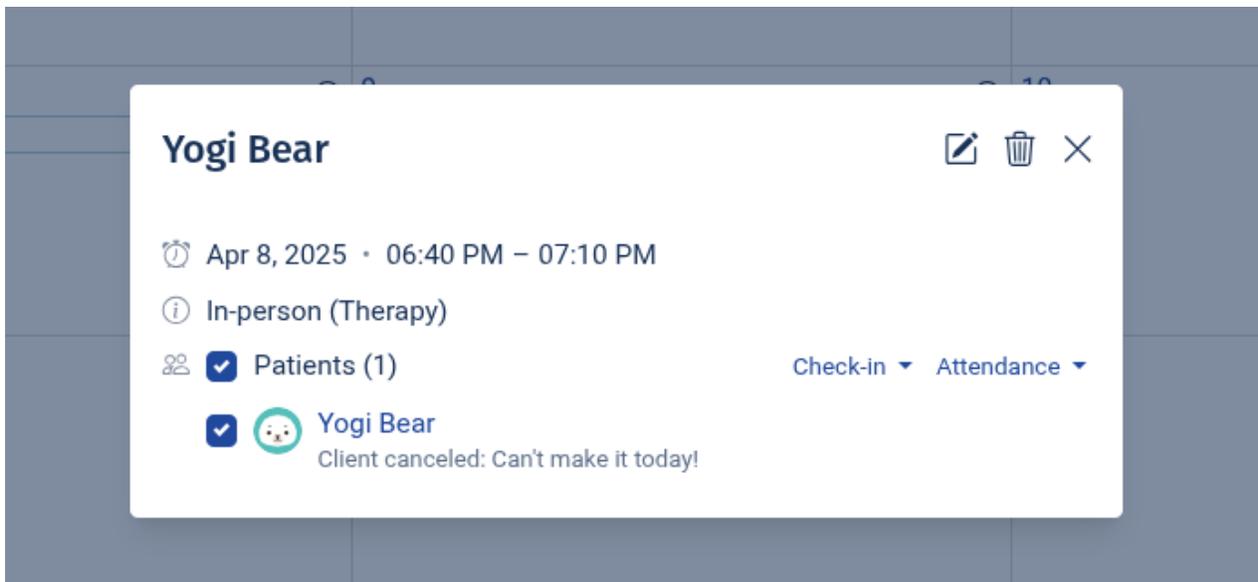


The screenshot shows a modal form titled "Cancel appointment" with a close button (X) in the top right corner. The form contains a label "Reason *" followed by a large, empty text input field. At the bottom right of the form, there are two buttons: "Cancel" (light blue) and "Submit" (red).

- **Confirm** shows a confirmation on the schedule with a green check marked person



- **Cancel** shows the event crossed out with the details of the cancellation



Confirm or Cancel Disabled

- If either (or both) confirm and cancel are disabled, the button for the client to click will disappear.

The image shows two screenshots from the Ambiki system. The top screenshot is the 'Edit organization' settings page. It has a header 'Edit organization' with a building icon. Below the header are two tabs: 'Appointment reminder settings' (active) and 'Onboarding steps'. Under 'Appointment reminder settings', there are two checkboxes: 'Allow patient to confirm appointment' (checked) and 'Allow patient to cancel appointment' (unchecked). Each checkbox has a descriptive sentence below it. The bottom screenshot is a patient portal view for 'Therapy (Child, Julia)'. It shows the appointment date 'May 10, 2025 - 2:30 PM -3 PM', the location 'In-person (Therapy)', and the provider 'Felicity Brown'. A 'Confirm appointment' button is visible at the bottom of the appointment card.

Note: You can adjust the wording in your message to provide an alternative way to call or cancel if one or either of these is disabled.

Managing Responses

- All messaging can be found under the client profile's communication log.

Bear, Yogi				Actions
Communication log				View all + Add a communication log
Manually logged				
Date/time	Therapist	Details		
09/14/2023 at 10:21 PM	Kevin Dias	Talked with mom	View	
05/22/2023 at 11:17 PM	Kim Luster	.dfkldkas'f,asdd dffd;lskf;asldk'a, test	View	
05/22/2023 at 11:16 PM	Kim Luster	dk.f,dlskf,kas asdfk'ads;f asd,flkds;f lsd;f,dfda	View	
Automatically logged event reminders (last 10)				
Date/time	Result	Details		
04/04/2025 at 6:42 PM	Delivered (text message)	Hi! This is a reminder for your upcoming session on 03/26/2025 at 1:20 PM wi...	View	
04/04/2025 at 6:41 PM	Delivered (text message)	Hi! This is a reminder for your upcoming session on 03/27/2025 at 2:35 PM wit...	View	
09/05/2024 at 9:38 PM	Delivered (email)	Your therapy event has already started. Please use this link to join the th...	View	
06/05/2024 at 2:01 AM	Delivered (email)	Hi Yogi Bear, Your appointment with your therapist, Kim Luster, is confirme...	View	
06/05/2024 at 1:49 AM	Delivered (email)	Hi Yogi Bear, Your appointment with your therapist, Susan Mason, is confirme...	View	

- Details of the communication can be seen by selecting **View**.

04/04/2025 at 6:43 PM	
Patient	Yogi Bear Educational - Multiple - Multiple
User	-
Method	Text message
Result	Delivered (text message)
Details	Hi! This is a reminder for your upcoming session on 03/26/2025 at 1:20 PM with Abeld Ahmed. To confirm or cancel, visit https://5927-94-201-163-184.ngrok-free.app/s/ng.JtD. To opt-out at any time, reply STOP.
Phone number	555-555-5555
Created at	04/04/2025 at 6:42 PM
Updated at	04/04/2025 at 6:43 PM

Note: Any responses to the reminder text will also be found in the **Communication Log**



Frequently Asked Questions

General Questions

Q: How much does this service cost?

A: The cost is \$250 for the setup fee, \$12/month and \$0.04/text.

Q: Will I be notified via JetStream or on my home dashboard of incoming messages?

A: We currently do not have notifications of incoming messages set up.

Technical Questions

Q: Can I send an appointment reminder to two mobile numbers?

A: You cannot send a reminder to two phone numbers. The reminder will be sent to a number marked “Mobile” and “Preferred”. If there are two it will go to the number most recently marked “Preferred”.

Q: Can a parent send a response to the reminder? If so, where will I see that?

A: Yes, the parent can text a response back to the reminder. Those responses can be found in the communication log.

Q: I have a Teletherapy appointment, but I am not signed up through Ambiki. Do I need to send the link separately?

A: Yes, you will need to send that link separately. Links are only sent if you have purchased the Teletherapy add-on and enabled it for the user.

Q: Can I send a reminder to a parent who is not set up in the parent portal?

A: Yes, you can still send an appointment reminder. The client will just not have the ability to respond since they do not have access to the parent portal.

Customization Questions

Q: We charge cancellation fees; how do I notify the parent to call to cancel? A:

Adjust the wording in the message to include a phone number to call and cancel.

Q: Can I just send one text reminder to a patient?

A: No, sms reminders are scheduled messages that go out according to the events on the schedule.

Q: Can I change the reminder timing after I set it up?

A: Yes, all reminders can be edited or deleted after they have been created.