



SMS Messaging Quick Reference Guide

SMS Messaging Prerequisites

The following are the minimum requirements for **Appointments SMS Text Messaging**:

- **Appointments** Release **3.1**.
- For **Vision 3** practices you must be on a minimum release of DLM800.



Important - **SMS Messaging** must be enabled before use with **Appointments**.

Enabling SMS Messaging

Contact your Account Manager to enable **SMS Messaging** and to discuss setting up a messaging service, if required.



Note - Your Health Board or CCG may look after the provision of messages on your behalf, so you may not need to order these yourself.


Please Note

- **Important** - SMS Messaging within **Appointments** are one way non configurable messages only.
- **Note** - If **SMS Messaging** is switched on and an appointment is made, moved or cancelled an SMS Message is automatically sent to the patient.



What do I need to do?

Switching SMS Messaging On

To switch the **SMS Messaging** facility on select the **SMS Counter** so that it is in the **On** position .

Important – This must be done for each member of staff that needs to send SMS messages.

When an appointment is made or updated in any way an SMS Message is sent to the patient.

Sending SMS Messages

Once enabled and switched on, the sending of SMS Messages is automatic when you book, reschedule or cancel an appointment. Providing the patient has a valid mobile phone number, a standard message is sent to the patient. You can view the following in the SMS History screen:





- Appointment changes where the patient does not have a valid mobile phone number.
- Failed messages.
- Any appointment changes while the SMS Messages counter was switched off.



Note – The **SMS History** screen displays the above until it is cleared or the user logs out.

Checking the SMS Counter

The **SMS Counter** displays the number of messages that you have sent since the count was last cleared. The colour of the counter indicates the status of the message(s):

-  **Grey** - No messages sent.
-  **Green** - All messages were sent successfully.
-  **Yellow** - Some messages were sent successfully, some failed, check the history for details.
-  **Red** - All messages have failed, check the history for details.



Important - The **SMS Counter** clears to zero when you log out of **Appointments**.



Viewing SMS History

The **SMS History** screen displays all attempted **SMS Messages**, in time order with latest at the top.

To access the **SMS History** screen:

1. From **Appointments Reception View** select the **SMS Counter** .
2. The **SMS History** screen displays:

SMS History

| | | |
|-------|-----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:00 on 29-Oct-2020 Success: Sent | ALDER, Abby (Ms) NHS: 411 185 9240 Mobile: 07787 111 948 |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:05 on 29-Oct-2020 Failed: No valid mobile phone number found. | BACKHOUSE, Vincent (Mr) NHS: 411 113 9132 Mobile: |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:15 on 29-Oct-2020 Success: Sent | CEDAR, Cillian (Mr) NHS: 411 185 9747 Mobile: 07000 111 111 |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:25 on 29-Oct-2020 Failed: No valid mobile phone number found. | DACRES, Raymond (Mr) NHS: 411 120 8959 Mobile: |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:35 on 29-Oct-2020 Success: Sent | FIR, Flora (Ms) NHS: 411 186 1210 Mobile: 07000 111 111 |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:45 on 29-Oct-2020 Failed: No valid mobile phone number found. | GAFAN, Munawar (Miss) NHS: 411 123 4658 Mobile: |
| 14:05 | Type: Cancellation With Dr Shirley Anderson at 08:55 on 29-Oct-2020 Failed: No valid mobile phone number found. | HEMLOCK, Harriot (Ms) NHS: 411 186 3140 Mobile: |

Hide successful requests

3. From the **SMS History** screen you can:


- Select **Hide successful requests** **Hide successful requests** to hide successful requests, with successful messages hidden, you can clearly see which messages failed and might need action taken.
- Select **Copy to Clipboard** to copy to the Windows clipboard and paste into a document to action as required.
- Select **Print** to print the history list.




Training Tip – You can print to a PDF if required.



- Select **Clear**  to clear all history and reset the **SMS Counter** to zero.

 **Important** - The **SMS Counter** also clears to zero when you log out of **Appointments**.


 For more information on the **SMS History** screen see [SMS History](#).

Clearing the SMS Counter

To clear all history and reset the SMS Counter to zero, from the SMS History screen, select **Clear** .

 **Important** - The **SMS Counter** also clears to zero when you log out of **Appointments**.

Switching SMS Messaging Off

To switch the **SMS Messaging** facility off (per user), select the **SMS Counter** so that it is in the **Off** position .



Note - Any appointment changes display in **SMS History** as 'Failed'.

