

## Quick Reference Guide - Automating Appointment SMS Reminders

Using **Vision+ Practice Reports** you can send automatic Appointment SMS text reminders. This guide explains how to define which appointments you want to send reminders to and how to save this criteria as a daily schedule so text reminders are automatically sent.



For more information, see the **Vision+** Help Centre

<http://help.visionhealth.co.uk/Visionplus/Content/Home.htm>.

### Key Points

You need to consider the following points before implementing Automatic Appointment Reminders:



Please ensure your searches are setup correctly and you have taken into account appointments that may not be suitable for SMS reminders, for example, Appointment slots used for messages.



There is no limit to the number of daily schedules you can create. Examples include setting up a daily schedule for patients at a branch site as well as patients at the main site. This is easily achieved by setting up different Appointment Searches and Templates. However, consideration is required when creating your searches so patients are not sent multiple appointment reminders for the same appointment time.



The Appointment SMS schedule sends reminders every day so patients with appointments on a Monday are sent a reminder on Sunday if you have a search setup to send reminders for the next day.

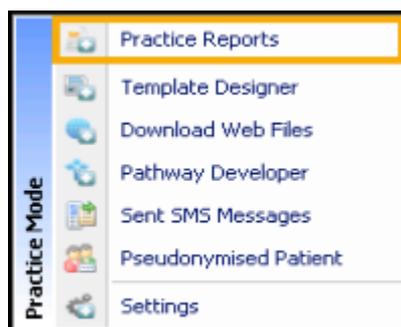


You can setup different Appointment Search Filters that use the same Template.

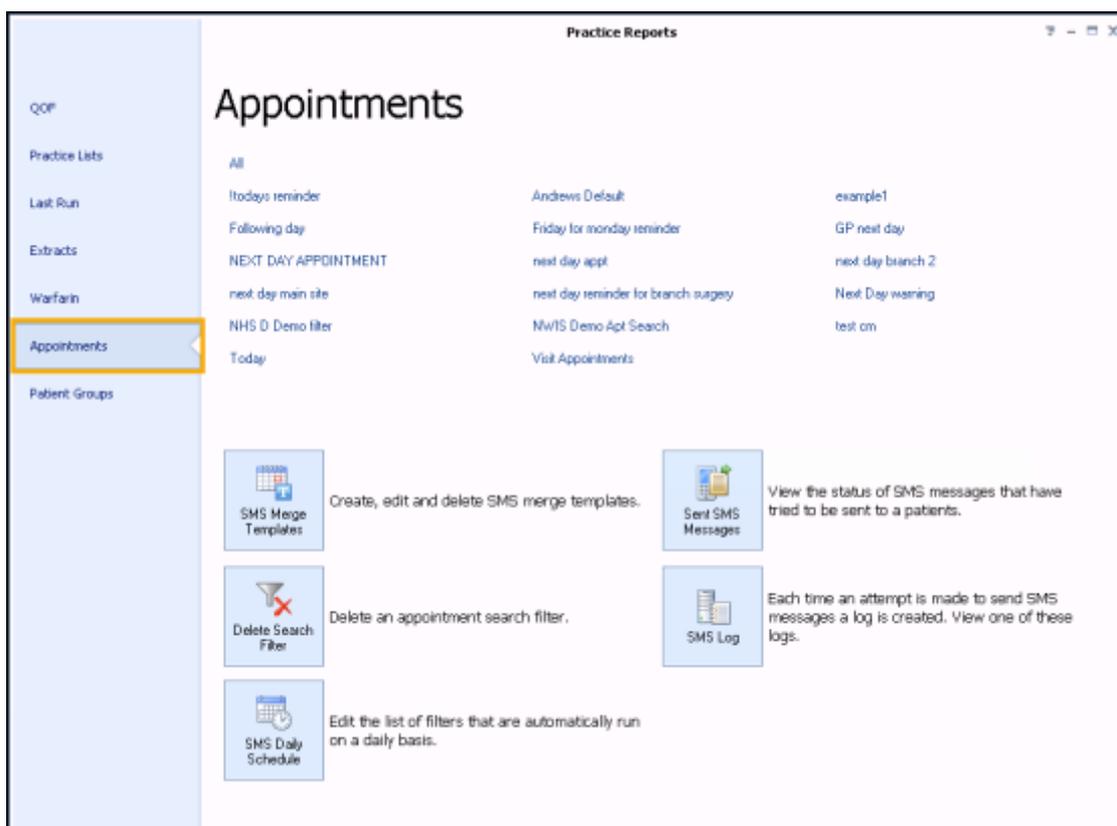
## Creating Appointment Searches for SMS

The Appointment Search report displays appointments booked for any slot type and any session for the next 7 days by default. You can however set different filters and save these as separate searches which are accessible from the **Appointment Reports** screen as follows:

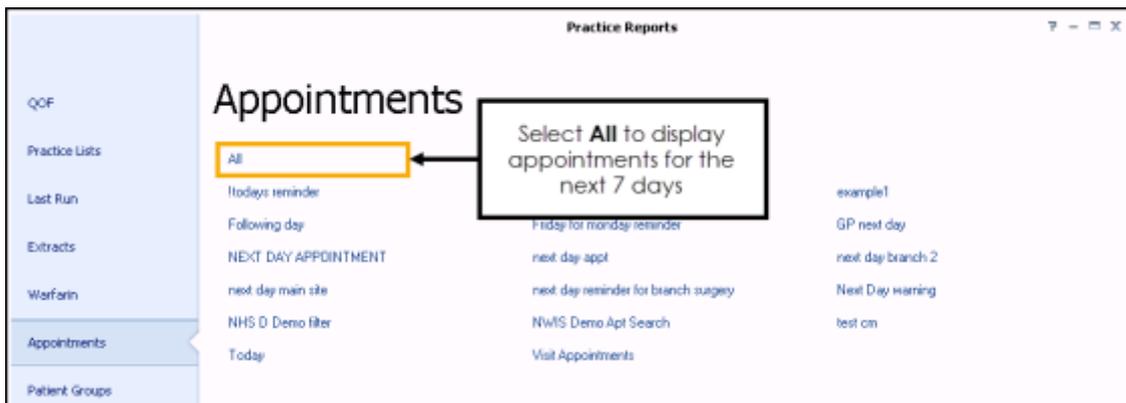
1. From the **Windows Notification Area**, right click **Vision+**  and select **Practice Reports**:



2. **Vision+ Practice Reports** opens by default on the QOF/QAIF page, select **Appointments**.



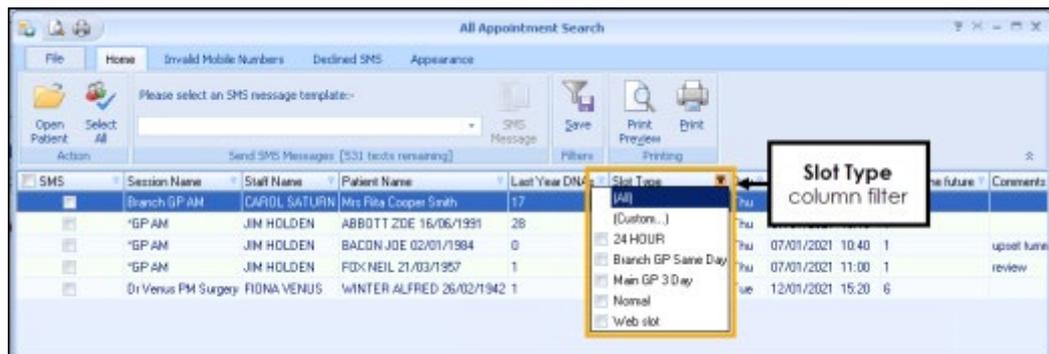
3. The **Appointments** screen displays. Select **All**:



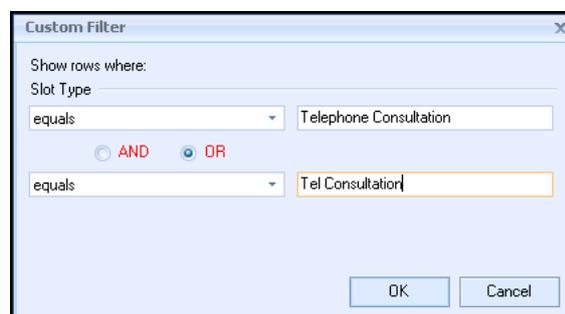
4. The **Appointments Search** screen displays. Patients with appointments for the next **7 days** display by default. You now need to change the filters as required by selecting **Filter**  at the top-right of each column heading. Either select from the existing options or select **Custom** to create your own.

To create your own filter:

a. Select the filter  on the **Slot Type** column:



b. From the slot type list select (**Custom...**) and type in the filter requirements, for example equal to 'Telephone Consultation' or 'Tel Consultation'.



c. Select **OK**.



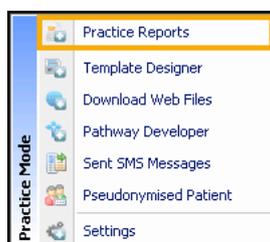
5. Select **Save** and give your search a name. Select **Save** again.

6. The search now displays on your **Appointment Reports** screen.

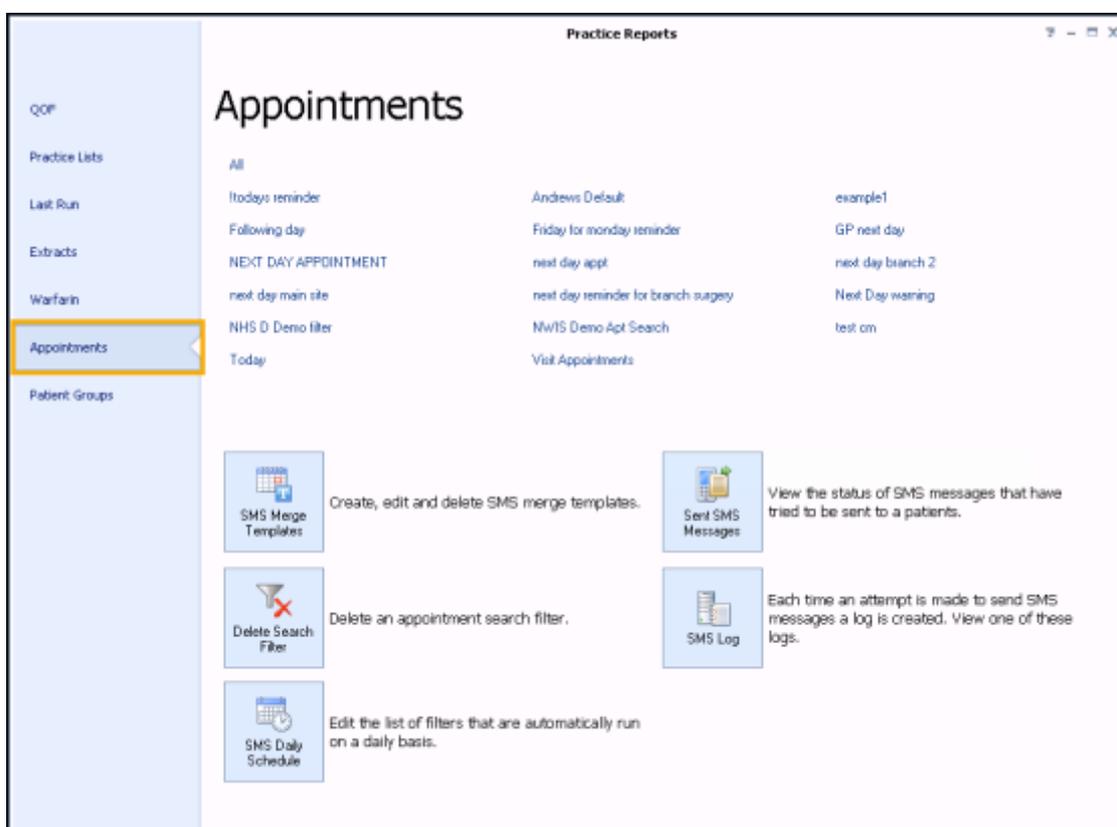
# Automating Appointment SMS Reminders

From the **Appointment** screen you can setup automated daily Appointment SMS reminders. To do this:

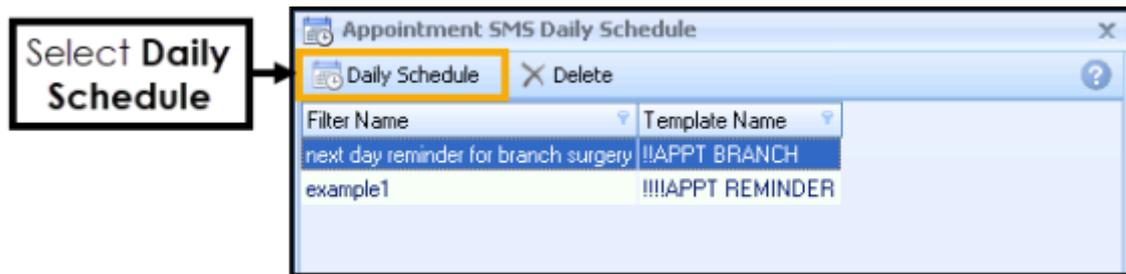
1. From the **Windows Notification Area**, right click **Vision+**  and select **Practice Reports**:



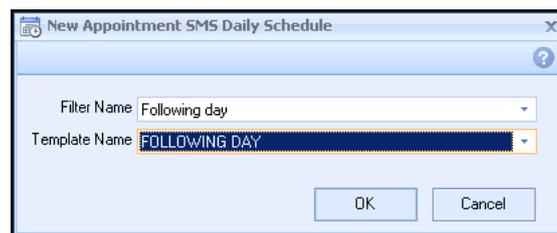
2. The **Vision+ Practice Reports** module opens by default on the QOF/QAIF page, select **Appointments** from main menu.



3. Select **SMS Daily Schedule** .
4. The **Appointment SMS Daily Schedule** screen displays and lists any existing scheduled events:



5. To add a new schedule click **Daily Schedule**.
6. Select your saved Appointment search and Template from the drop-down list.



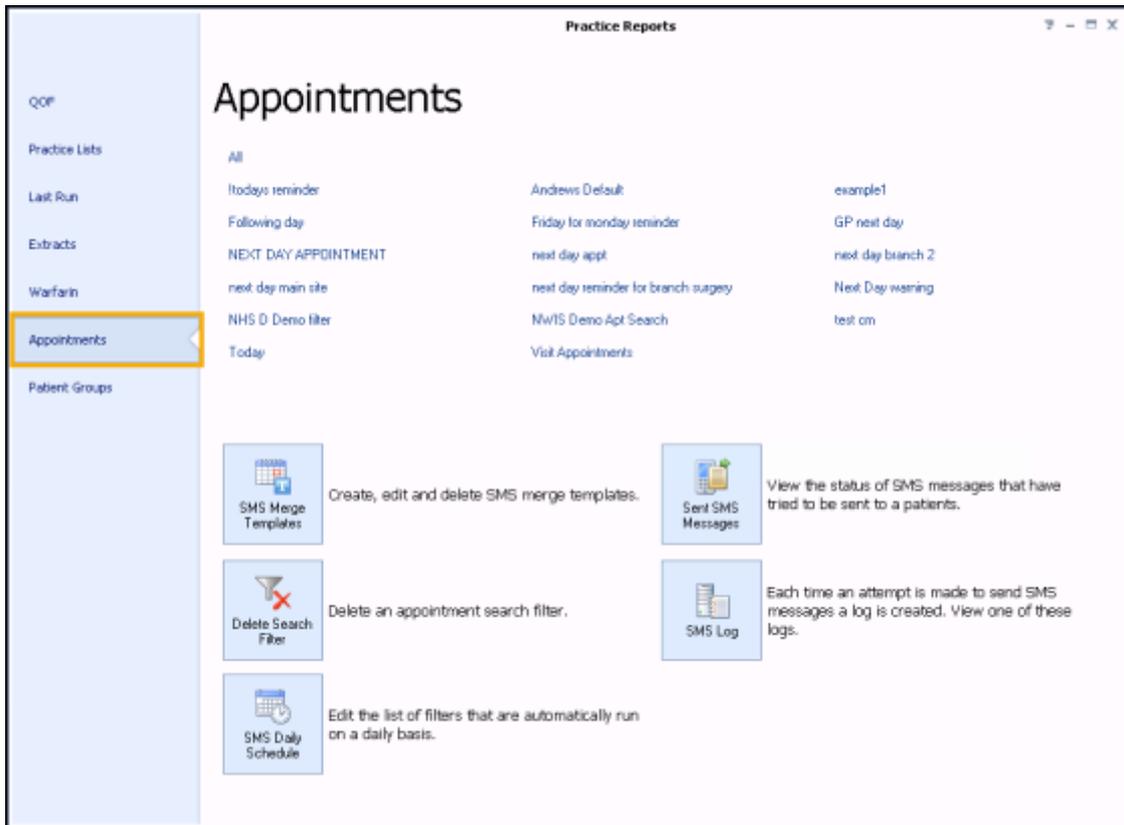
7. Select **OK** and the scheduled search is saved within **Daily Schedules**.

**Please note the following:**

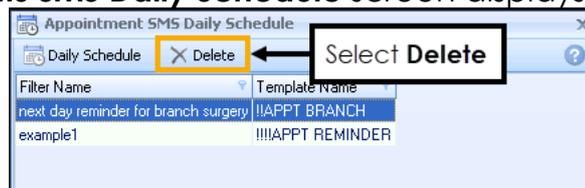
- Please ensure your searches are setup correctly and you have taken into account appointments that may not be suitable for SMS reminders, for example Appointment slots that are used for messages.
- There is no limit to the number of daily schedules you can create. Examples include setting up a daily schedule for patients at a branch site as well as patients at the main site. This is easily achieved by setting up different Appointment Searches and Templates. However, consideration is required when creating your searches so patients are not sent multiple appointment reminders for the same appointment time.
- The Appointment SMS schedule sends reminders every day so patients with appointments on a Monday are sent a reminder on Sunday if you have a search setup to send reminders for the next day.
- You can setup different Appointment Search Filters that use the same Template.
- You cannot setup the same Appointment Search Filter and Template twice. A message displays stating '*Duplicate Daily Schedule Exists*'.

## Deleting a Daily Schedule

1. From **Vision+ Practice Reports** select **Appointments** from the menu:



2. Select **SMS Daily Schedule**.
3. The **Appointments SMS Daily Schedule** screen displays:



4. Highlight the Daily Scheduled event and select **Delete**.
5. Select **Yes** to confirm the deletion and the Daily Schedule is removed.