

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

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:

From the Windows Notification Area, right click Vision+ and Practice Reports:



and select



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

		Practice Repor	rts	,	2 - 1	×
Q0P	Appointments					
Practice Lists	м					
Last Run	Rodays reminder	Andrews Default		example1		
Extracts	Following day	Friday for monday remin	der	GP next day		
L.0. 0.07	NEXT DAY APPOINTMENT	next day appt		next day branch 2		
Warfarin	next day main site	next day reminder for br	anch surgery	Next Day warning		
Annoistments	NHS D Denio filter	NWIS Demo Apt Searc	h	test am		
	Today	Visit Appointments				
Patient Groups						
	SMS Merge Templates	merge templates.	Sent SMS Messages	View the status of SMS messages that have tried to be sent to a patients.	ve	
	Delete Search Filter	h filter.	SMS Log	Each time an attempt is made to send SM messages a log is created. View one of th logs.	5 ese	
	SMS Daly Schedule	automatically run				



- Practice Reports 7 - 5 3 Appointments QOF Select All to display Practice Lists appointments for the next 7 days **Updays** reminde example1 Last Run Following day GP next day Extracts NEXT DAY APPDINTMENT next day appt next day branch 2 next day main site next day reminder for branch surgery Next Day warning Warfarin NHS D Demo filter NWIS Demo Apt Search test on Appointments Today Visit Appointments Patient Groups
- 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'.

Custom Filter			X
Show rows where: Slot Type			
equals		-	Telephone Consultation
O AND	o OR		
equals		-	Tel Consultation
			OK Cancel

- 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.

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60k	Appointments					
Practice Lists	м					
Last Run	Rodayo reminder	Andrews Default		example1		
	Following day	Friday for monday remin	ıder	GP next day		
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	Today	Visit Appointments				
Patient Groups						
	SMS Merge Templates	5 merge templates.	Sent SMS Messages	View the status of SMS messages that have tried to be sent to a patients.		
	Delete Search Filter	ch filter.	SMS Log	Each time an attempt is made to send SMS messages a log is created. View one of these logs.		
	SNS Daly Schedule	e automatically run				



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



Select Daily		Appointment S	MS Daily Sch	edule	X
Schedule	1	Daily Schedule	× Delete	T	9
	_	Filter Name	Y	Template Name	
		next day reminder for b	ranch surgery	IIAPPT BRANCH	
		example1		IIIIAPPT REMINDER	

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

🗟 New Appoin	tment SMS Daily Schedule	X
		0
Filter Name	Following day	-
r emplate rivame		
	OK Cancel	

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:

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Q0#	Appointments						
Practice Lists	м						
Last Run	Rodays terninder	Andrews Default		example1			
	Following day	Friday for monday remin	ıder	GP next day			
Extracts	NEKT DAY APPOINTMENT	next day appt		next day branch 2			
Warfarin	next day main site	next day reminder for b	ranch surgery	Next Day warning			
Annoistments	NHS D Demo filter	NWIS Demo Apt Searc	h	test on			
	Today	Visit Appointments					
Patient Groups							
	SMS Mege Templates	5 merge templates.	Sent SMS Messages	View the status of SMS messages that have tried to be sent to a patients.			
	Delete Search Filter	ich filter.	SMS Log	Each time an attempt is made to send SMS messages a log is created. View one of these logs.			
	SMS Daly Schedule	e automatically run					
2. Select SMS Daily Schedule .							
3. The Appointments SMS Daily Schedule screen displays:							

Appointment SMS Daily Schedule X Delete		edule	Select	Delete	×
Filter Name	Template	e Name 🔹			
next day reminder for branch surgery		IIAPPT E	RANCH		
example1	IIIIAPPT	REMINDER			

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