

Quick Reference Guide - Creating SMS Recall Templates

Using **Vision+** you can target groups or individual patients requiring a recall and send invitations by SMS text messaging. Before sending a recall text message, you need to create an SMS Message template that contains your required content. This guide explains how to create and configure your message template to suit your patient and practice requirements.

For more information, see the **Vision+** Help Centre <u>http://help.visionhealth.co.uk/Visionplus/Content/Home.htm</u>.

Creating a Recall/Healthcare Invite SMS Message Template

To set up an SMS template for use with QOF/QAIF and non-QOF related **Vision+** Templates and Groups:

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:





- 3. Select Merge Templates
- 4. Select SMS 15 to create a new SMS template. The New SMS Template screen displays:

Nev	w SMS Template	×
👪 Ad	d Mail Merge Field 🕶	0
Name Hello	TEMPLATE_NEW o (forenames) (surname)	
Num	ber of characters: 27	OK Cancel



Complete as follows:

- **Name** Type a name so that you can distinguish your template type in the Merge Templates screen. The patient does not see this text when they receive the SMS message.
- **Description** Add the text content. This will be what is included in the SMS message to your patient(s). You have 160 characters available. A warning displays if you exceed the maximum number of characters.
- Add Mail Merge Field The following merge fields are available:
 - Notes Kept At
 - Title
 - Surname
 - Forename
 - DOB
 - Informed Dissent

Advice for text message content:

- Keep the message brief.
- Text messages should not contain patient identifiable data.
- 5. Select **OK** to save the message. This is added to the **Merge Templates** list and can be used again for any future SMS messages of the same type.
- 6. Select it to close the **Merge Templates** screen.

Important - If you have added an SMS template for use with non-QOF Vision+ templates, for example, Practice lists that you have downloaded from Download Web Files, you must now attach the SMS template to the non-QOF Vision+ template, see <u>Attaching a Template to a Practice List</u> on page <u>4</u>. You do not need to do this for QOF/QAIF related SMS templates or Groups as this is done automatically.



Attaching a Template to a Practice List

For **Vision+** templates/reports downloaded from **Download Web Files**, for example, Seasonal Flu Vaccination Programme, DMARDS Outcomes Manager, before you can select an SMS template, you must attach the required SMS template to the relevant **Vision+** protocol. This process is the same as attaching letter templates. You do not need to do this for any QOF/QAIF protocols.

		Practice Reports 🛛 🔻 – 🗖 🗴
QOF	Practice Lists	
Practice Lists	All Practice Lists	All Practice Lists
Last Run		Run Date
Extracts	Enhanced Services	23/12/2020 +
Warfarin	SIGN	Search for practice lists 🔎 🗴
Appointments		5K Challenge (Vision)
Patient Groups	NICE	Accessible Information Standard
		Active Patients List
	Other	Acute Kidney Injury (AKI)
		AF LIS (Warwickshire North LLG)
		Ar with A holday (check)
	Merge Templates	il/SMS merge Attach your mail/SMS merge templates to downloaded protocols to manage patient invite statuses.
	Create, edit and delete SM SMS Question Templates.	S question
	Synchronisation last sta	rted: 23 Dec 2020 10:42

1. From Practice Reports, select Practice Lists:

- 2. Select Attach Merge Template
- 3. Next, select the **Vision+** template you wish to apply the SMS template to and select **Attach**

User F	Protocols		X
Q 🖨	🔒 Attach		0
Protocol			
ABI Data E	xtract		
At Risk of F	alls (ACE Plus)		≡
COPD (ACE	E Excellence)		
End of Life	Care - Current F	Patients (ACE Excellence)	
Frail Older F	People (ACE Ex	cellence)	
Heart Failu	re Extract (ACE	Excellence)	
Integrated	Community Sup	port - Mental Health (ACE Foundation)	
Mental Hea	alth Extract (ACR	Evcellence)	

4. The Letter Templates screen displays. Select SMS



5. Choose the SMS template you wish to use and click **Open**:

🕂 Open		×
Look in: 🔒 Templates	- 🕝 🤣 📂	
Name 🔺	- Date modified -	Туре 🔺
CKD.sms	04/05/2017 08:25	SMS File
CM TEST.sms	17/09/2020 15:07	SMS File
COPD RECALL.sms	22/04/2018 13:11	SMS File 🔜
DIABETES.sms	13/04/2016 12:30	SMS File
DM INVITE WITH DISSENT OPTION.sms	27/02/2018 09:11	SMS File
DMARDS SMS.sms	20/04/2017 12:13	SMS File
DMARDS.sms	20/04/2017 12:12	SMS File
FLU 1.sms	03/03/2020 15:59	SMS File 🚬
•		Þ
File name:	_	Open
Files of type:	•	Cancel

6. The SMS template is now added to the Letter Templates screen for the selected Vision+ template:

Letter Templ	ates	
🛕 🏟 🗋 Lei	tter 📳 SMS	× Remove
Template Name	Template Type	Obsolete
3RD LETTER	Word	
HEALTHY	Word	
ALL PATIENTS	SMS	
COPD RECALL	SMS	

7. Select **OK** to close. You can now select the SMS template when sending an SMS Message.

Note - You must do this for each new SMS template you create and each new/updated non-QOF **Vision+** template.