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.
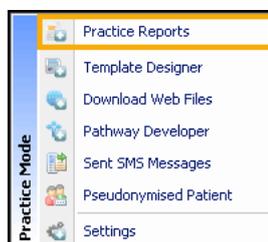
For more information, see the **Vision+** Help Centre http://help.visionhealth.co.uk/Visionplus/Content/Home.htm.
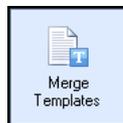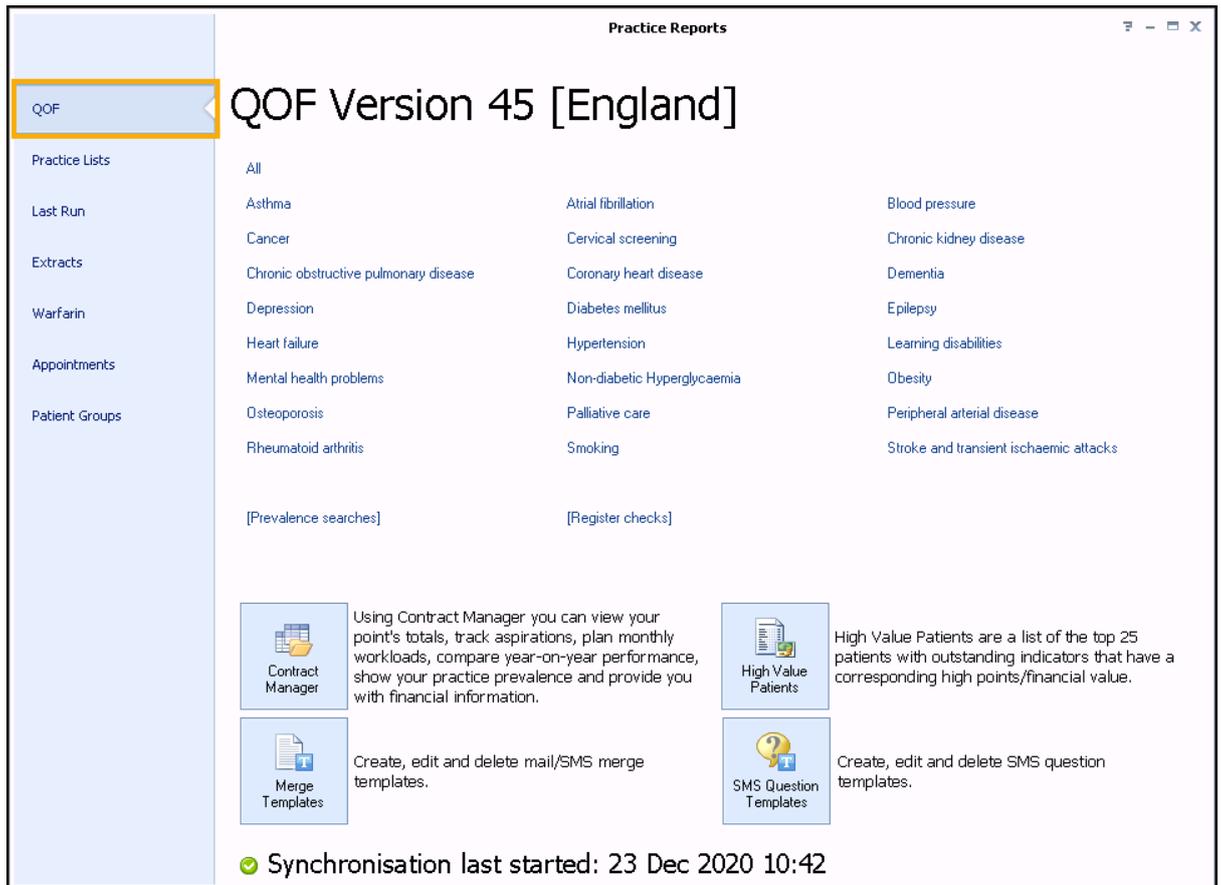
Creating a Recall/Healthcare Invite SMS Message Template

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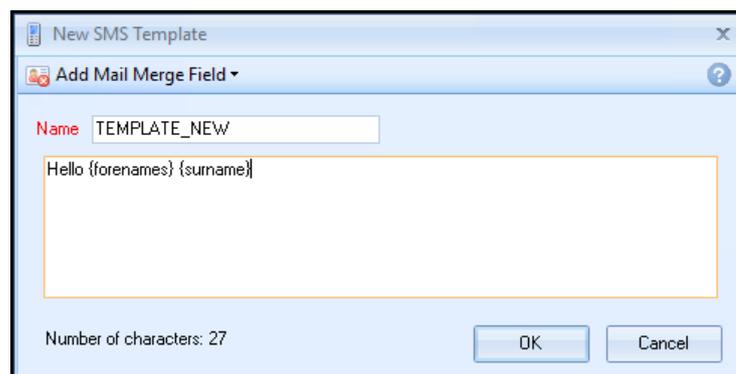
2. **Vision+ Practice Reports** opens by default on the QOF/QAIF page:

3. Select **Merge Templates** .

4. Select **SMS** to create a new SMS template. The **New SMS Template** screen displays:

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.

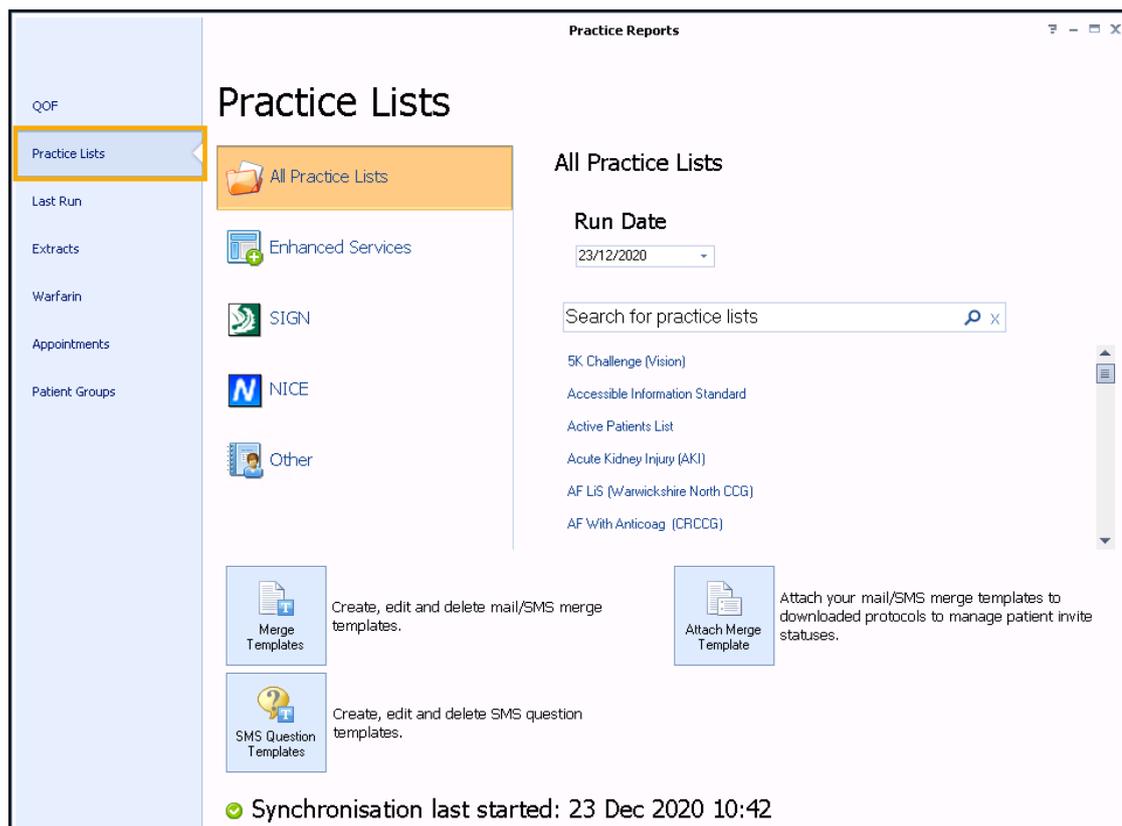6. Select ☒ to close the **Merge Templates** screen.

ⓘ **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 **Attaching a Template to a Practice List** on page **4**. 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.

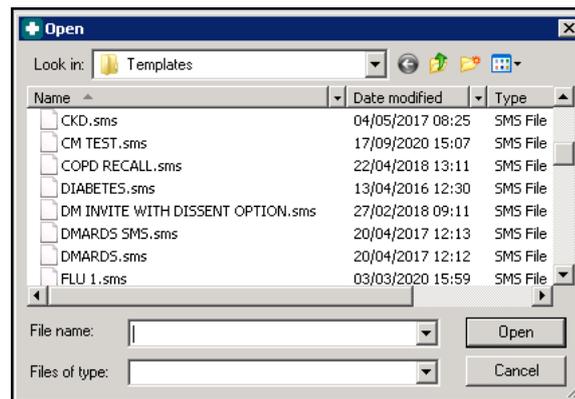1. From **Practice Reports**, select **Practice Lists**:

2. Select **Attach Merge Template** .

3. Next, select the **Vision+** template you wish to apply the SMS template to and select **Attach** [SMS]:
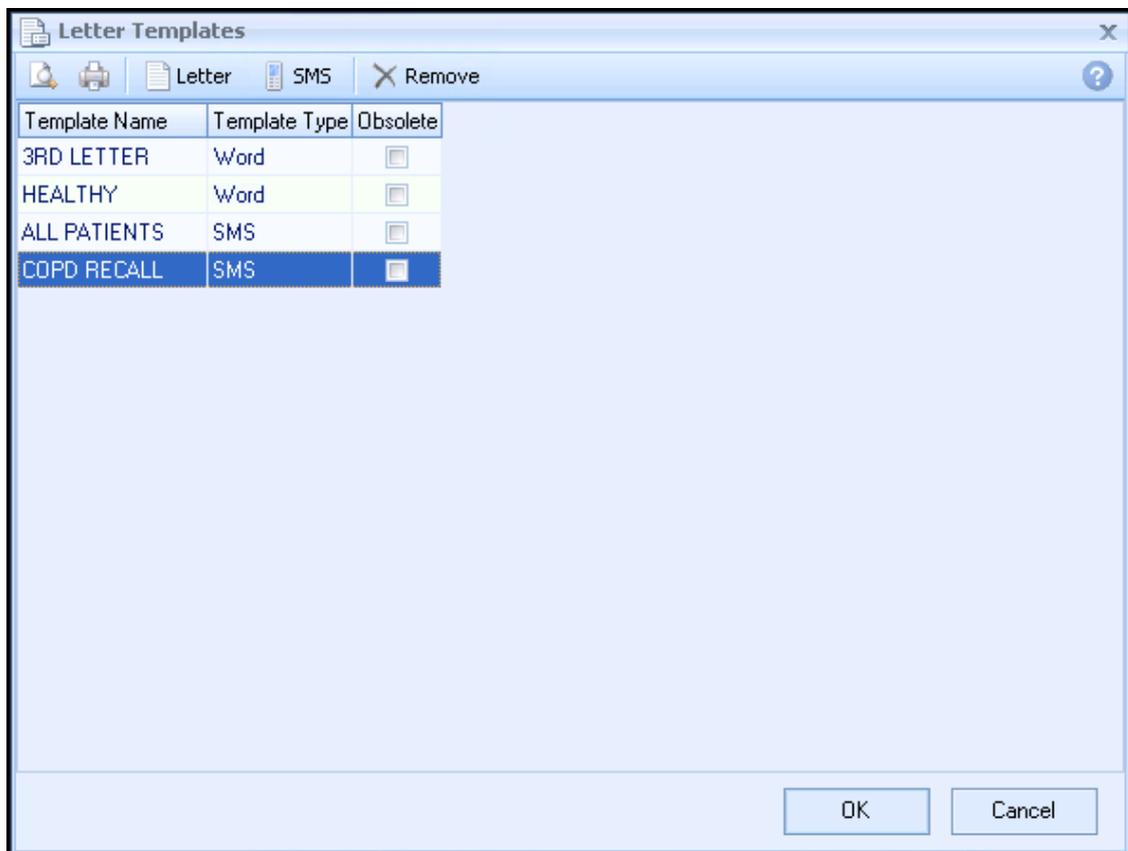

4. The **Letter Templates** screen displays. Select **SMS** [SMS].

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

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

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.