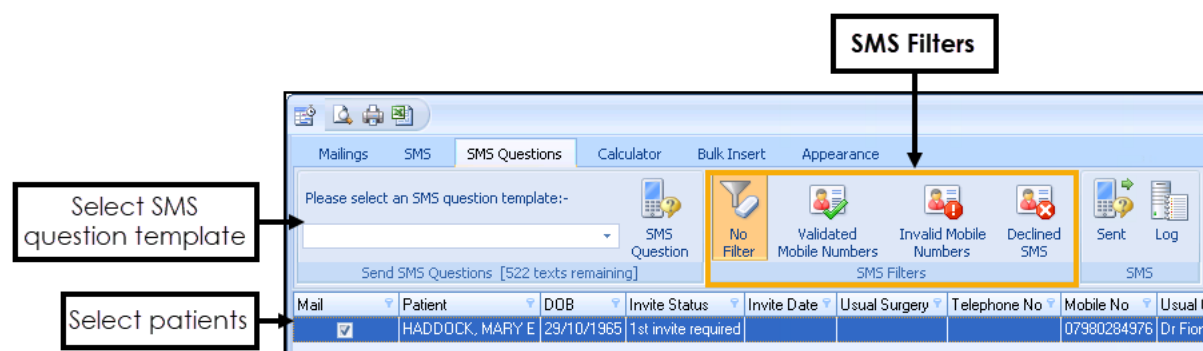# Creating SMS Questionnaire Templates

SMS Questions `SMS Questions` is a two-way text service that the patient can respond to. Each reply is mapped to a Clinical term that will be filed into the patient's record.


For example, if you send an SMS message to a patient asking '*Please assist us in updating your records If you have never smoked, reply 1, If you are an ex-smoker, reply 2, If you are a current smoker, reply 3*'. If the patient replies with an SMS message of 1, the patients record is updated on receipt of the SMS reply with the appropriate clinical term, the comments of the entry contain the text '*patient SMS response*'.

Key Points

- You can send questionnaires to individual patients or groups of patients.

- Questionnaires are part of the bi-directional text messaging service which is an enhancement to the standard one-way text messaging.

- Two-way text messaging must be licensed and activated. To organise this, for practices in Wales, please contact your Health Board, for all other countries, please contact your Account Manager.

- The two-way text messaging service displays a generic mobile number. We, therefore, recommend you include your practice name in the questionnaire template.

- When the patient replies to the text message, the SNOMED CT/Read term automatically records in the patient record along with their response.

- The patient receives a confirmation text message on receipt of their reply.

- Keep the message brief. A long SMS message can cost two texts or more rather than one.

- Text messages should not contain identifiable patient data.

- You can include URL addresses in the text message, however, avoid the message being too long.

- From **Vision+ Practice Reports**, you can view lists of patients to whom you have sent SMS text messages.

- Below is an example of what the patient receives:
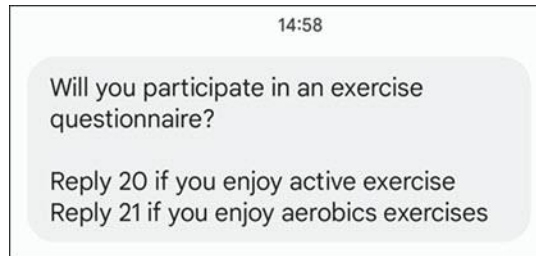
What you need to do...

To enable your patient to be able to reply to a Questionnaire sent via SMS you need to configure the following from **Vision+** .
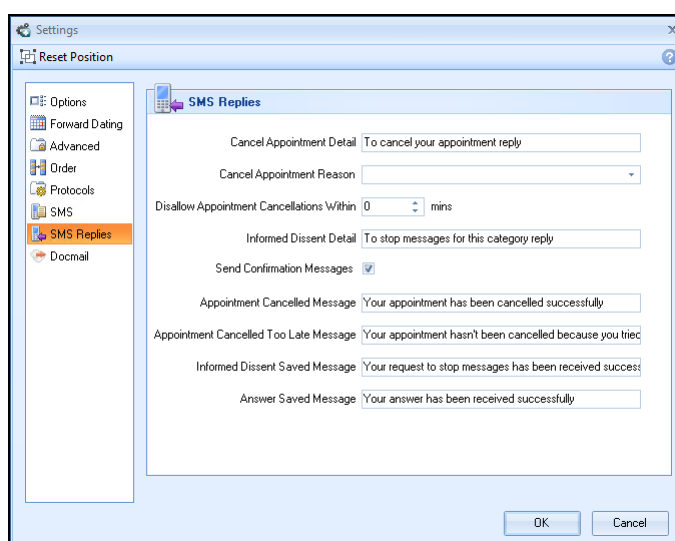
- **Step 1 - Configure SMS Settings for Reply to Questionnaire** on page **3**
- **Step 2 - Add New SMS Template for Questionnaire** on page **4**

Configure SMS Settings for Reply to Questionnaire

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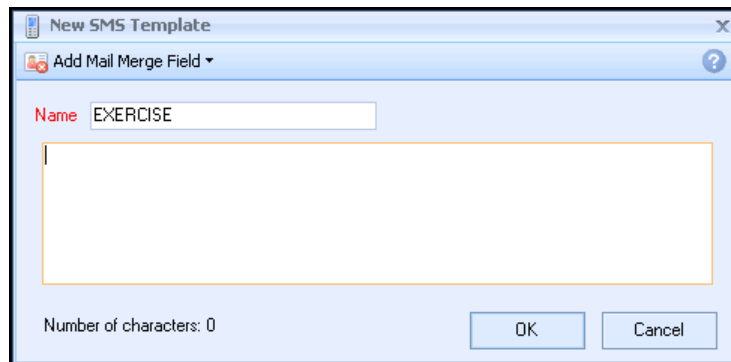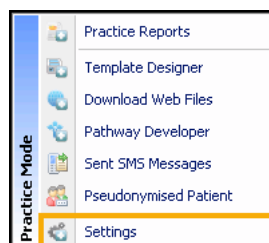

2. Select **SMS Replies**:

3. Add practice messages into **Answer Saved Message**. This is a global message contained in the SMS reply to patients confirming their response to a question SMS has been received successfully.

4. Ensure **Send Confirmation Messages** is ticked (if you wish to reply to your patient that their reply has been processed successfully).

5. Select **OK** and close **Setting**.

Add New SMS Template for Questionnaire

1. From the **Windows Notification Area**, right click **Vision+** ➕ and select **Practice Reports**:
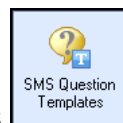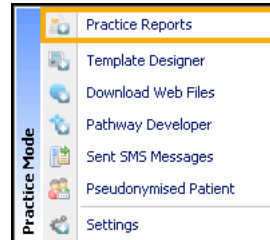
2. Select **SMS Question Templates** .

3. Select **SMS** 📱 SMS .

4. The **New SMS Template** screen displays, enter the **Name** of the new SMS template for example '*Exercise*':
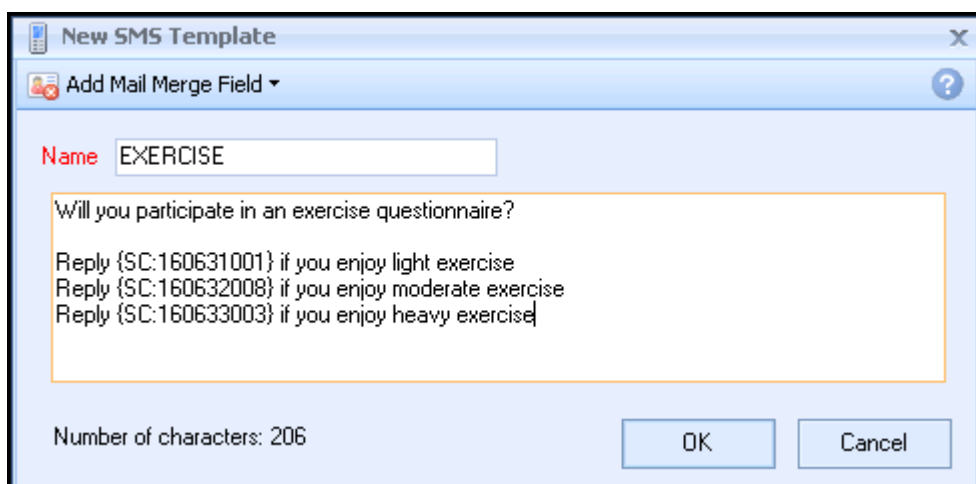

5. Enter the global message you want your patients to receive, for example "Will you take part in an Exercise Questionnaire?".

6. Select **Add Mail Merge Field** where you have additional merge fields of:

   - Notes Kept At
   - Title
   - Surname
   - Forename
   - DOB
   - Answer

7. Select **Answer**, a Clinical term search box displays.

8. If you do not know the Clinical term, then type into the search box at the bottom of the screen and click **Select**.

9. Highlight the Clinical term you want from the list and click **Insert** [→] to move the Clinical term into the right hand side:
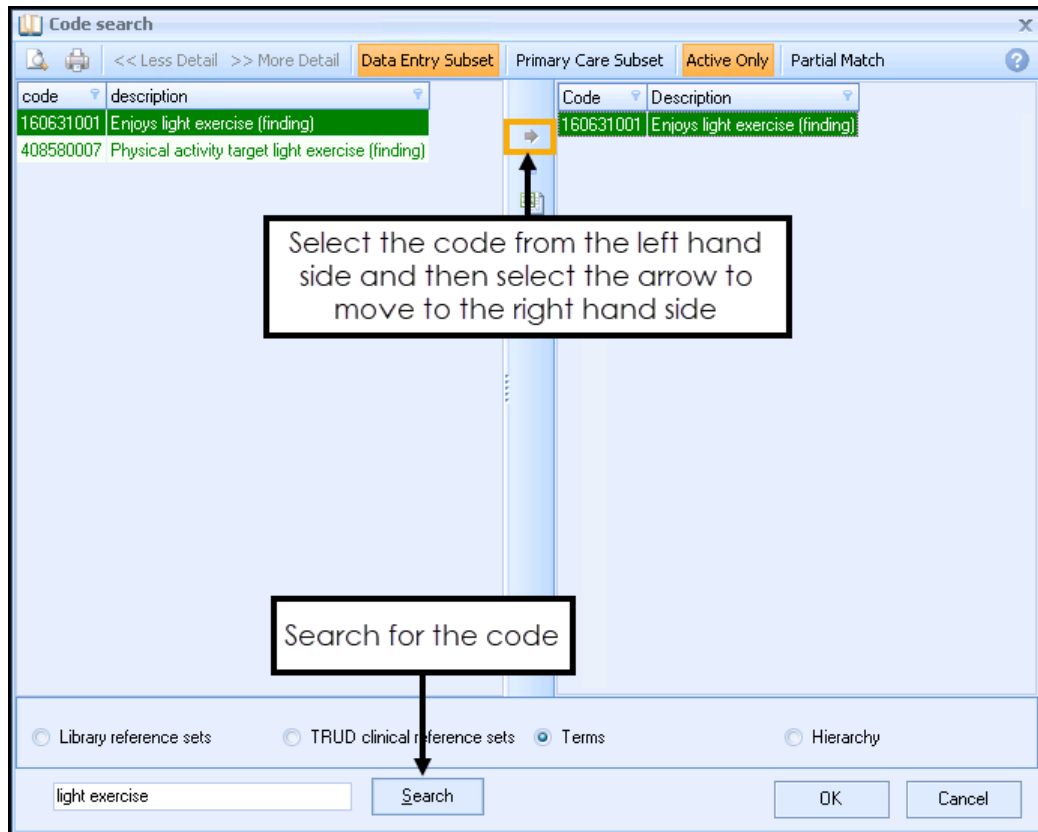
10. Select **OK**.

11. Continue with steps 7 - 10 until you have created all of your questions and answers.

   Your SMS Question template should look something like this:

12. Select **OK** to add your new template to the list.