

# Creating SMS Questionnaire Templates

**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 exsmoker, 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:

14:58 Will you participate in an exercise questionnaire? Reply 20 if you enjoy active exercise Reply 21 if you enjoy aerobics exercises

#### 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:

Difference Contract	SMS Replies
Forward Dating Advanced  Protocols	Cancel Appointment Detail To cancel your appointment reply Cancel Appointment Reason
🔝 SMS <mark>ka</mark> SMS Replies 😁 Docmail	Informed Dissent Detail To stop messages for this category reply Send Confirmation Messages 📝
	Appointment Cancelled Message Your appointment has been cancelled successfully Appointment Cancelled Too Late Message Your appointment hasn't been cancelled because you tried
	Informed Dissent Saved Message Your request to stop messages has been received success Answer Saved Message Your answer has been received successfully

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

New SMS Template						
🔙 Add Mail Merge Field 🔻						
Name	EXERCISE	]				
I						
Numb	er of characters: 0	OK Cancel				

- 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:

🛄 Code search					Х
🛕 🌐 << Less Detail >> M	Nore Detail Data Entry Subset	Primary Care Subset	Active Only	Partial Match	0
code     Image: description       160631001     Enjoys light exercise (       408580007     Physical activity targe	♥ finding) t light exercise (finding)	Code 9 Des 160631001 Enio	cription iys light exercise	♀ (finding)	
Select the code from the left hand side and then select the arrow to move to the right hand side					
	Search for the c	ode			
C Library reference sets	TRUD clinical reference se	ets o Terms	(	🔿 Hierarchy	
light exercise	<u>S</u> earch			OK	Cancel

- 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:

New SMS Template					
🜆 Add Mail Merge Field 🔻	0				
Name EXERCISE Will you participate in an exercise questionnaire? Reply {SC:160631001} if you enjoy light exercise Reply {SC:160632008} if you enjoy moderate exercise Reply {SC:160633003} if you enjoy heavy exercise					
Number of characters: 206	OK Cancel				

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