

Sending SMS Text Messages using Patient Groups

To send a one-way text message to a Patient Group in Vision+:

Note - First you must have a **SMS Template** available, see <u>Creating an SMS Message Template (opens the Vision+ Help</u> <u>Centre)</u> for more information.

1. From the Windows Notification Area, right click Vision+ and select Practice Reports. Practice Reports opens by default on the QOF/QAIF screen, select Patient Groups to display all patient groups:

		Practice Reports	a ⊢ X
QOF	Patient Groups		
Practice Lists	😭 User	User	
Last Run		Search for patient groups	
Extracts		Active Retirete Aced 16 And Over	
Warfarin		Active Patients Aged 16 And Over Who Have Consente	
Appointments		Active Patients Dead Read Code Or No Address	
Appointments		Af001 Register: The Contractor Can Produce A Regis	=
Patient Groups		Alfred Winter	
		All Active Patients	
		All Ages Both Sexes	
		All Applied And Permanent Patients	
		All Grs Added	
		All Patients Between 40-75	
		Amox	
		Anticipatory Care	
		Anticoagulation Manager Register	
		Appontment App Search	
		Ast	
		Ast/Chd/Diab None P1	
		>> 5	ihow More





2. The first fifty groups display, to see more groups select **Show More** Show More at the bottom right hand side of the screen or to view user specific groups select **User**:

		Practice Reports	₹ - ¤ X
QOF	Patient Groups	Search for a patient group by typing part of the group description	
Practice Lists	🏠 User	User	
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Training Tip - You can find a group by typing part of the group description and selecting **Search**. To remove a filter select **X**.

3. Select the **Patient Group** you want to work with and the **Patient Group** screen displays:

	E All	Patients Between 40-75 - 01 Apr 2021	ween 40-75 - 01 Apr 2021				
	File Home Appearance						
Preview, Print or Export the patient group	Print Print CSV Patient Group	tient		*			
	Patient Name	DOB Sex	NHS Number Telephone No	Mobile No E			
Select + or double click to view your patient list	Category : Patient Group AI Patients Between 40-75 Description : All Patients Between 40-75 (COUNT=4607)						

- 4. Select Merge Patient Group.
- 5. The Mailings screen displays, select SMS:

	Select	SMS											
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Mailin	ngs SM3	5 SMS (Questions Ca	culator Bulk In	isert Appe	arance							
	- S	<u>8</u>	Please select a letter template:-										
Open Patien	i Select it All	Random Select				 Mail 	Preview Letter	Phoned	Update nvite Status				
	Action		Start Mail Merge					Invite	Status				*
🔲 Mail	📍 Pati	ent	P DOB 1	Invite Status	Invite Date 🕈	Usual Surgery 🕈	Telephone No	🝸 Mobile No	o 📍 Usual GP	Registered GP 🕈	Email Address		-
	I A,A	A	13/08/200	1			01234567890	Invalid wo 07879078	ork 3945 Dr Tim Roc	sk Dr Fiona Venus	test@test.com		

Training Tip - For bi-directional messaging you must set up a different template and select **SMS Questions**. See <u>Sending</u> <u>Questionnaires via SMS (opens the Vision+ Help Centre)</u> for more information. Vision+

6. The **SMS** screen displays:

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Open patient in Consultation Manager	Open Patient A	lect Random Select	ase select an : Send SM	5MS message temp IS Messages [390	plate:-	SMS Message	No Filter Mobile N	ated Invalid umbers Num SMS Filters	Mobile Decline bers SMS	d Sent I	.og	*
	Mail 📍	Patient 📍	DOB 💎	Invite Status 🛛 📍	Invite Date	Usual Surger	y ♥ Telephone No 01234567890	Mobile No Mobile No	Usual GP 🔗 Dr Tim Rock	Registered GP Dr Fiona Venus	Email Address	
		ABALUNAM, A	03/11/1985					07940834469	Dr Fiona Venus	Dr Fiona Venus	demo@a.com	
	E	ABALUNAM, ABBY	03/04/2001 16/09/2004					07717 668966 07788912762	Dr Jane Mars Dr Jane Mars	Dr Fiona Venus Dr Fiona Venus	caroline.smith@inp	is.co.uk

From here you can:

- Open Patient Select to open the highlighted patient in Consultation Manager.
- **Select All** Select to flag all the patients in the list with valid mobile numbers. You can then deselect as required.
- **Random Select** Randomly selects patients in the list. You can deselect/select as required.
- Please select an SMS messages template Select the predefined template required (the content of the text message).

Note - You have different SMS templates available for QOF/QAIF and non-QOF/QAIF **Vision+** templates. If you cannot see one of your SMS templates, it may be attached to another practice list.

- Send SMS Messages (nn Texts Remaining) Displays how many text messages are available to your practice. If you have selected more patients than the balance in your SMS account, you must either:
 - De-select patients down to the account balance, or
 - Purchase more SMS messages.

Note - For practices that have an EE contract, the send SMS messages is automatically maintained for you and displays the message 'EE providing texts'.



• SMS Filters - Filters the patients by:



• No Filter - Selected by default, all patients within the patient list display. Patients with no mobile number, an invalid mobile number or who have opted out of the SMS text messaging service display in the no filter list but you cannot select them.



• Validated Mobile Numbers Mobile Numbers - Select to display patients with valid mobile number only.



Invalid Mobile Numbers _______ - Select to display patients who have an invalid first mobile number only.



• **Declined SMS** - Select to display patients who have opted out of SMS text messaging.

Training Tip - You can use the column headings to sort the report list, for example, if you want to display patients with mobile numbers at the top of the list, select the mobile number column heading.

7. Place a tick against the patients you want to send a message to or select **Select All**:







8. Select **SMS Message** to send the messages to the selected patients.

Training Tip - If you are not on an EE contract you cannot send text messages unless your SMS account is in credit. The status bar above the patient list shows how many SMS messages remain. If you have selected more patients than the balance in your account, **SMS Message** is unavailable. You must either deselect patients down to the account balance or purchase more SMS messages.

 Once Vision+ receives confirmation from the SMS handling service that the message is sent, a clinical term automatically records to the patient's record:



Important - If the message fails to deliver, no entry is made in the patient record and the invite status reverts back to the previous status.

Here is an example of a recall SMS text message received by a patient:





Please note the following:

- Where patients share the same mobile number and are within the same group for SMS invitations, only one SMS message is sent and charged for, but both patient records update with the clinical term.
- Patients who receive SMS text messages whilst abroad are not charged.
- The following SMS reports are available:



Sent - Select to display a list of patients who have been sent a text message along with details of the message description, date sent and message status.



Log - The SMS Log is for support purposes and displays sent, invalid and declined messages for all sent messages. The file name contains the date and time the SMS messages were sent.

