

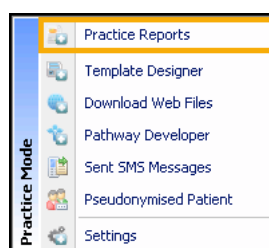
Using Appointment Searches to Send SMS Reminders on a Friday for a Monday

This quick reference guide explains how to set-up an appointment search to send SMS appointment reminders on a Friday for an appointment the following Monday. The benefit is that the patient can, if required, cancel their appointment over the weekend, rather than receiving a text message reminder on a Sunday evening.

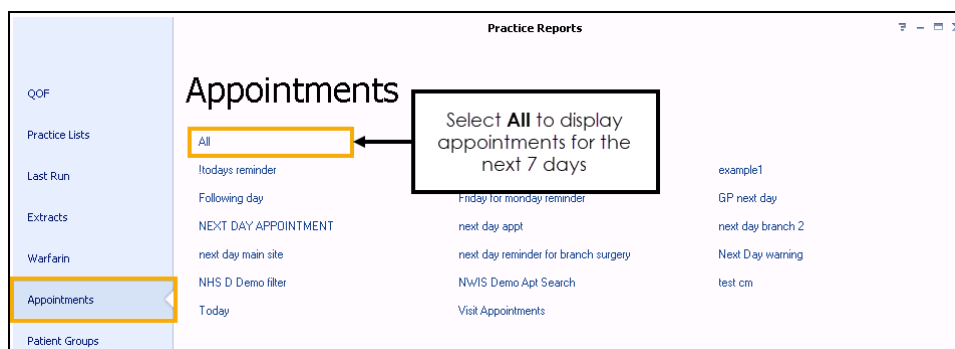
 **Note** - The days are always abbreviated, so Monday must be entered as Mon.

To set up the appointment search:

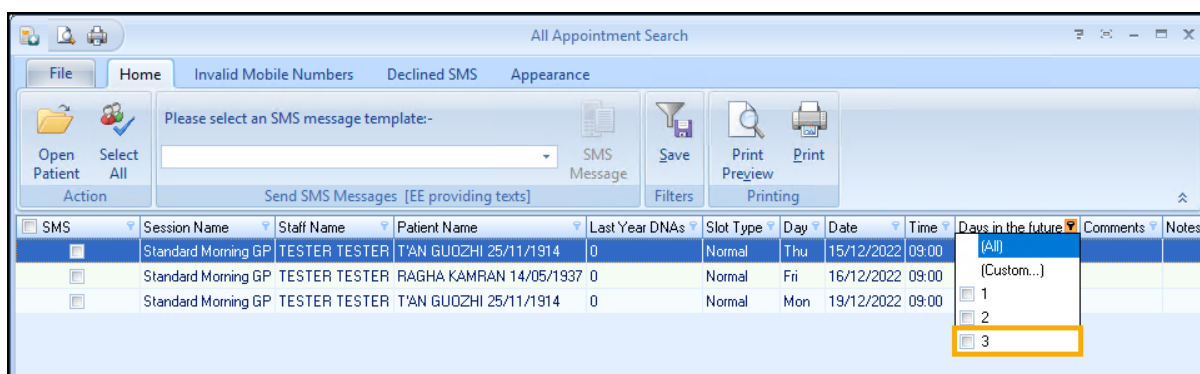
1. From the **Windows Notification Area**, right click **Vision+**  and select **Practice Reports**:




2. Select **Appointments** then choose **All**:

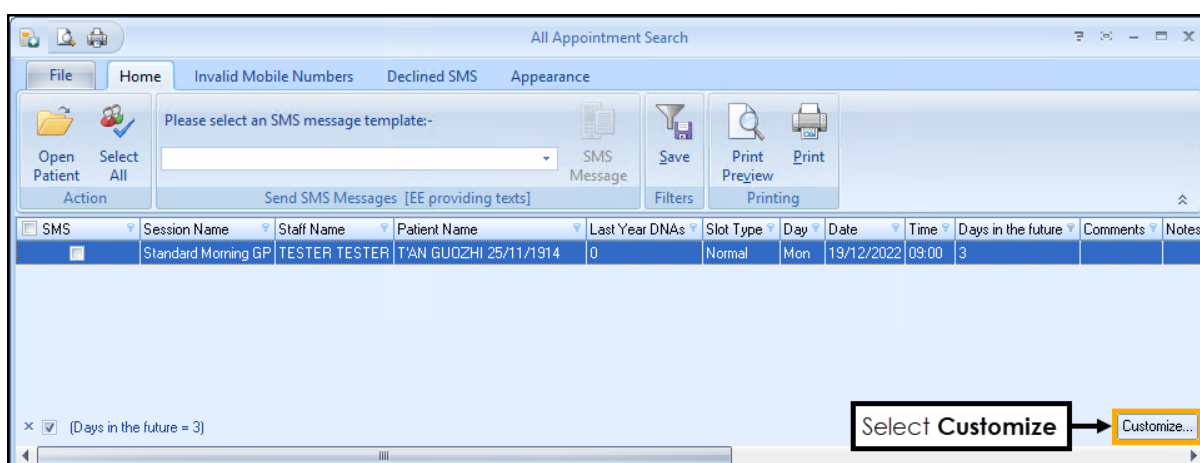


- The **Appointments** screen displays appointments in the next 7 days. Select the **Days in the future** filter and select **3** (for three days in the future):

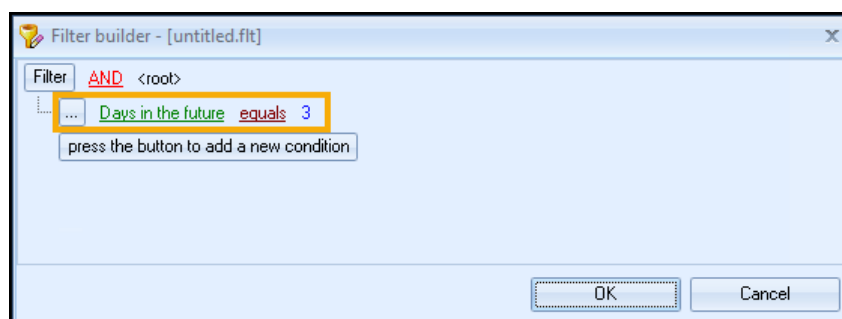


 **Note** - If the option to choose 3 is not available select a different option, as this can be changed later when we customise the search.



- Select **Customise** :



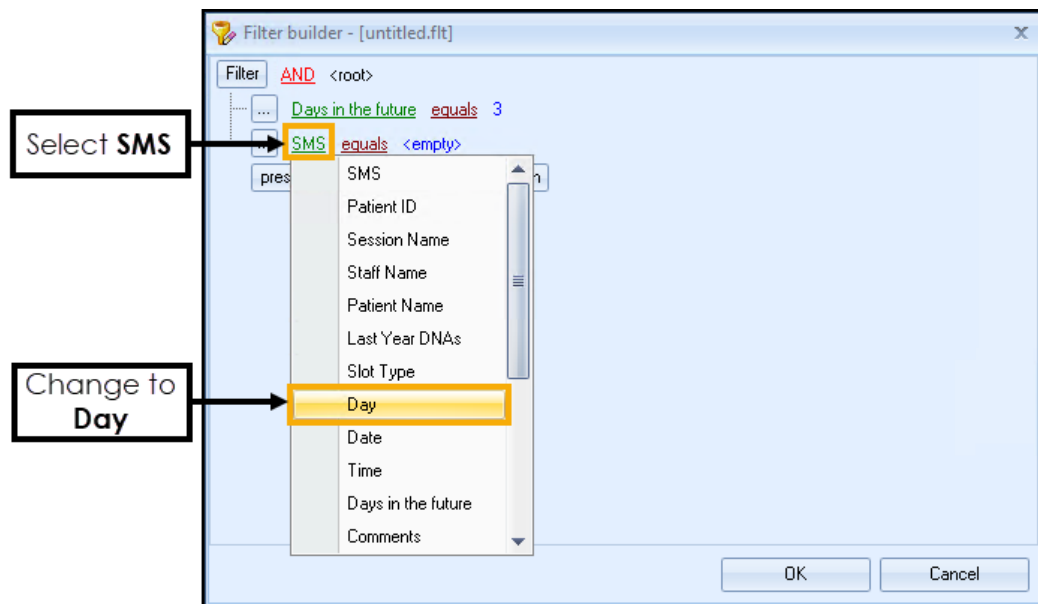
- The **Filter Builder** screen displays and should display **Days in the future equals 3**. If not, type **3**:



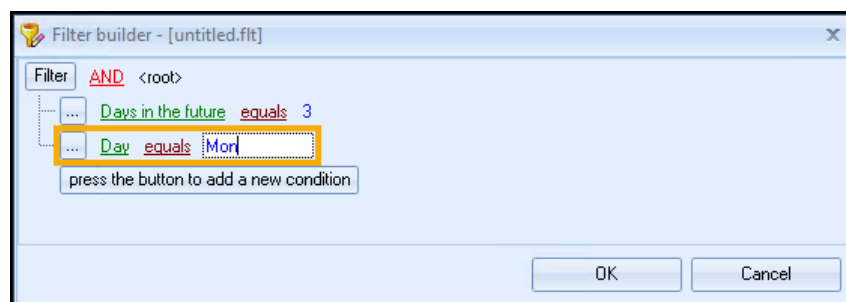
- Select **press the button to add a new condition**.

 **Training Tip** - To remove filters select the three dots  and select **Remove**.

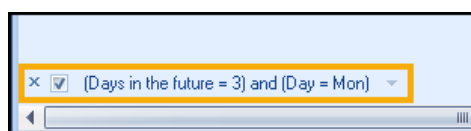
7. The second filter automatically displays as **SMS**, select it and change it to **Day**:



8. Now, change the **like** to **equals** and type **Mon** in the empty box:



9. Select **OK**, the filter conditions display at the bottom of the screen:



10. Select **Save**  from the toolbar and type a meaningful name.

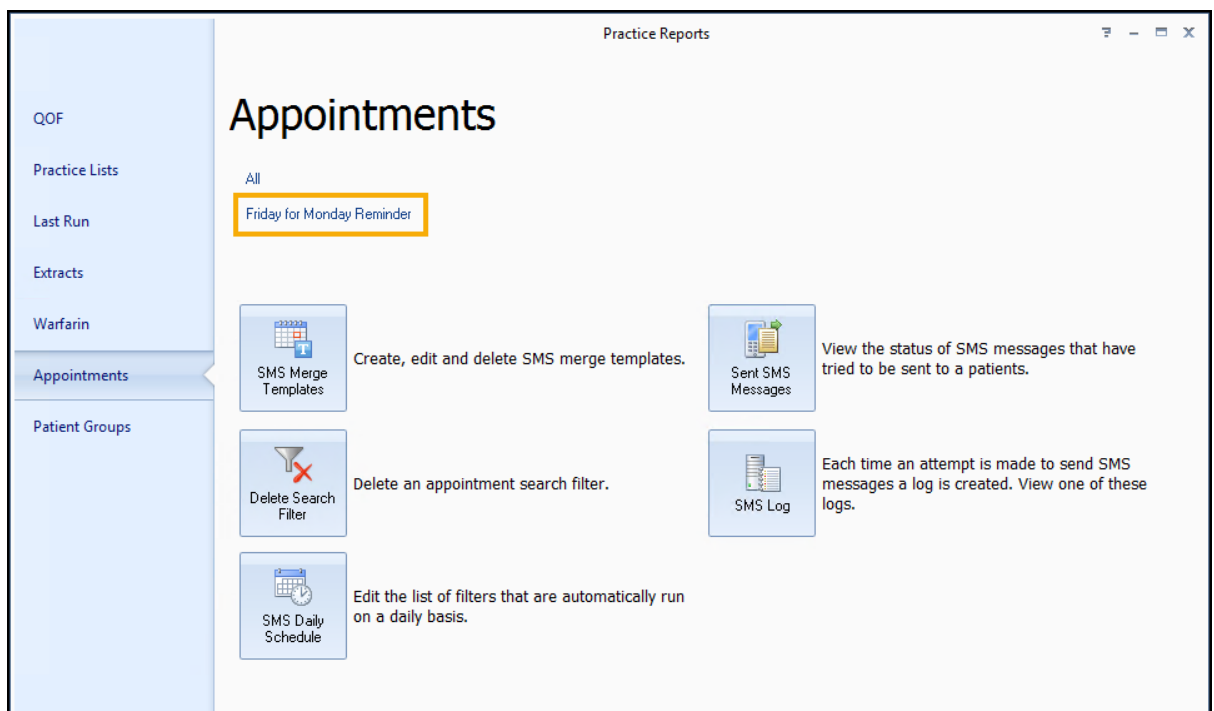
i Important - Additional criteria can be added to the search such as slot type, for example, normal, doctor or session type. It is important to remember that SMS text message reminders should only be sent to valid appointments. Also, remember if searching over a bank holiday weekend, 4 days can be used.

Creating Appointment Searches for the Rest of the Week

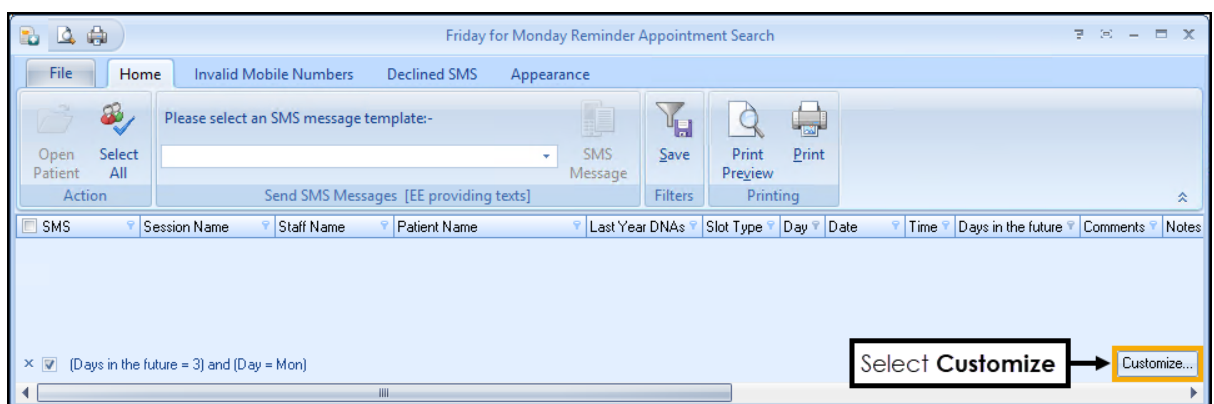
To cover other days in the week, create a second filter for Tuesday, Wednesday, Thursday and Friday appointment reminders. However, the two filters must not overlap. Otherwise, patients receive more than one appointment reminder. For example, the search below runs every day including Sunday. Therefore, the search needs to exclude appointments on a Monday.

To create a second search:

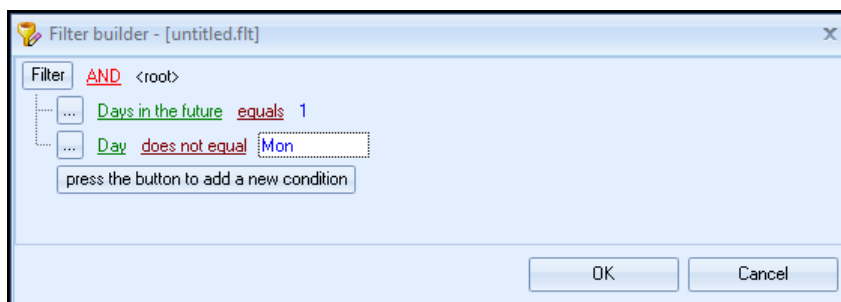
1. From the **Appointments** screen select the search you have just created:





2. Select **Customise** Customize...:




3. Change the filters as below:
- Days in the future equals 1
 - Day does not equal Mon



4. Select **OK** and **Save**  to provide a search name.

 **Training Tip** - To remove filters select the three dots  and select **Remove**.

 **Important** - Additional criteria can be added to the search such as slot type, for example, normal, doctor or session type. It is important to remember that SMS text message reminders should only be sent to valid appointments.
