

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+ 1 and select Practice Reports:



2. Select Appointments then choose All:

		Practice Reports		₹ - ¤ X
QOF	Appointments		1	
Practice Lists		Select All to display appointments for the		
Last Run	Itodays reminder	next 7 days	example1	
	Following day	Friday for monday reminder	GP next day	
Extracts	NEXT DAY APPOINTMENT	next day appt	next day branch 2	
Warfarin	next day main site	next day reminder for branch surgery	Next Day warning	
	NHS D Demo filter	NWIS Demo Apt Search	test cm	
Appointments	Today	Visit Appointments		
Patient Groups				





3. 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.

4. Select Customise

🔁 🗳						All A	ppointment	Search						7 E -		x
File	Н	ome	Invalid Mo	bile Numbers	Declined SMS	Appeara	ince									
Ê	æ,		Please select an	SMS message te	mplate:-			Y	Q							
Open Patient	Selec	t				•	SMS	<u>S</u> ave	Print	Print						
Ac	tion			Send SMS Messa	ges [EE providing	texts]	message	Filters	Print	ting						*
SMS	· · · · · · · · · · · · · · · · · · ·	Se	ssion Name 💦 🤊	Staff Name	Patient Name		📍 Last Yea	ar DNAs 🕈	Slot Type 🕈	Day 📍	Date 📍	Time	Days in the future	Commer	its 🔻	Notes
]	Sta	andard Morning GF	P TESTER TESTE	R T'AN GUOZHI :	25/11/1914	0		Normal	Mon	19/12/2022	2 09:00	3			
											_					
× 🔽 (D	ays in th	ie fut	ure = 3)								Sele	ect C	Customize	→ [0	ustom	nize
					III.						-					►

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

😵 Filter builder - [untitled.flt]	х
Filter AND <root></root>	

6. 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**:

	😵 Filter builde	er - [untitled.flt]		х
Select SMS	Filter AND	troot> in the future equals 3 equals <empty> SMS Patient ID Session Name Staff Name Patient Name Last Year DNAs</empty>		
Change to Day		Slot Type Day Date Time Days in the future Comments		
		-	OK Cancel	

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

😵 Filter builder - [untitled.flt]	х
Filter AND <root> </root>	
OK Cancel	

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



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

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.

Practice Reports - = x Appointments QOF Practice Lists All Friday for Monday Reminder Last Run Extracts Warfarin T View the status of SMS messages that have Create, edit and delete SMS merge templates. SMS Merge Sent SMS Messages tried to be sent to a patients. Appointments Templates Patient Groups $\mathbb{V}_{\mathbf{x}}$ Each time an attempt is made to send SMS Delete an appointment search filter. messages a log is created. View one of these Delete Search Filter SMS Log logs. 町 Edit the list of filters that are automatically run on a daily basis. SMS Daily Schedule

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:

4.

- Days in the future equals 1
- Day does not equal Mon

Filter builder - [untitled.flt]
Filter AND <root> Image: Second s</root>
OK Cancel
elect OK and Save to provide a search name.
Fraining Tip - To remove filters select the three dots and elect 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.