



My Health – Text Messaging User Guide (Wales)

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Vision+ SMS Text Messaging

Introduction

My Health - Text Messaging is a secure messaging service that enables you to send bi-directional health care invitations, questionnaires and appointment reminders to patients by SMS text messages. For more information regarding the service please contact NHS Wales Informatics Service (NWIS).

If you intend to make use of this exciting software, we recommend that you identify and process patients with invalid mobile numbers or patients who do not want to be sent a text message by your practice. See [What do I need to do before using My Health - Text Messaging?](#) (page 4).

What this Guide covers

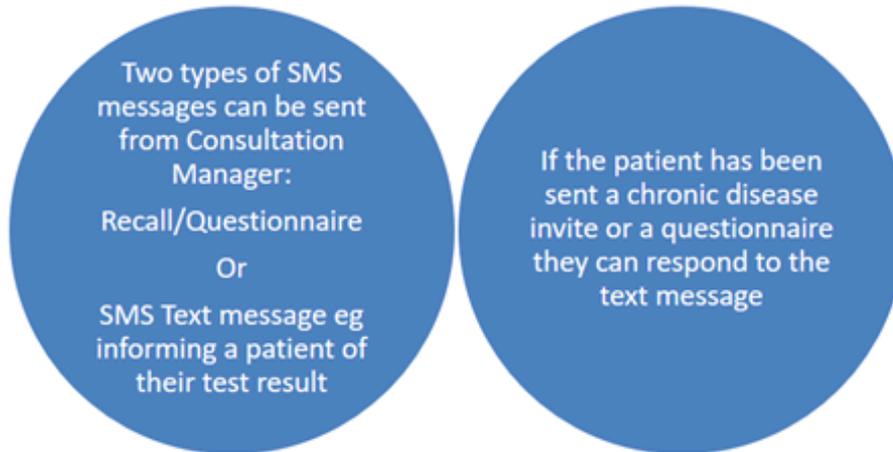
This user guide explains how to implement and manage the My Health - Text Messaging SMS Recall system, Questionnaires and Appointment reminders. It covers the following:

- An overview of Vision+ SMS Text Messaging - See [Overview](#) (page 2).
- What you need to do before implementing Vision+ SMS text messaging - See [Monitoring and Recording Mobile Numbers](#) (page 66) and [Managing Invalid Mobile Numbers \(SMS Validation Audit\)](#) (page 73).
- Patient Consent - See [Patient Consent - My Health Text Messaging](#) (page 5).
- Vision+ Settings for My Health -Text Messaging. See [SMS Settings in Vision+](#) (page 8).
- Creating a Message Template. See [Creating SMS Message Templates](#) (page 11).
- Sending Recall text messages. See [Sending Recall Text Messages](#) (page 33).
- Sending Appointment reminders from Practice Reports. See [Sending Appointment Reminder Text Messages](#) (page 43).
- Sending Questionnaires via SMS. See [Sending Appointment Reminder Text Messages](#) (page 43).
- Sending an SMS text message to a single patient. See [Sending an SMS Message from Consultation Manager](#) (page 30).

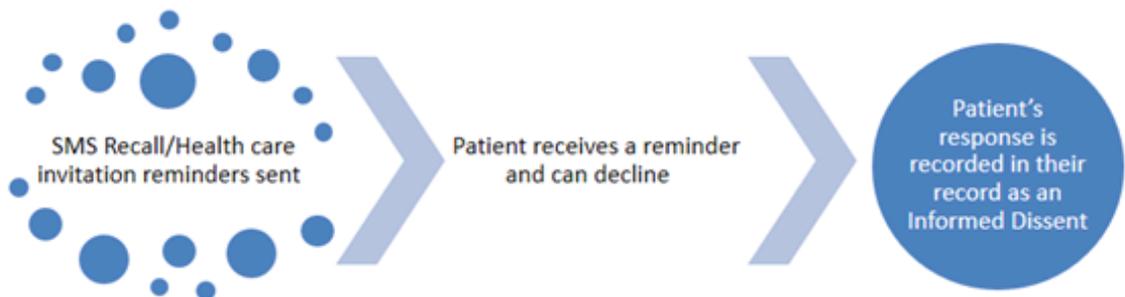
Overview

The **My Health - Text** two-way text messaging system provides the following functionality and benefits to your practice and patients:

Consultation Manager



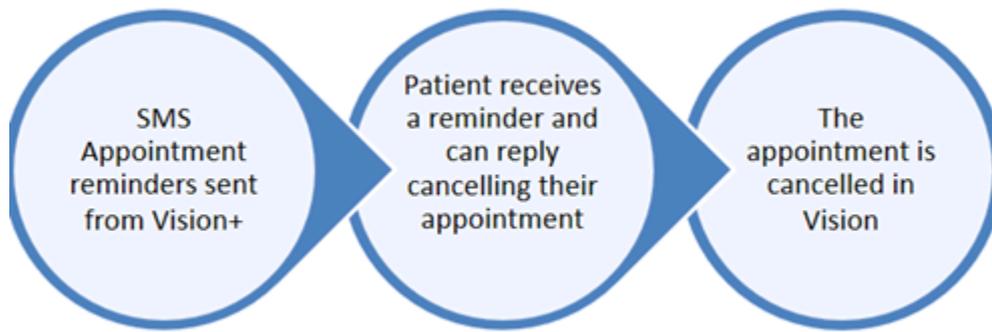
Recalling a group of patients by SMS messages



Questionnaires to a group of patients



Appointment Reminders



Benefits of bi-directional SMS messaging

Consultation Manager

- You can send personalised SMS message to individual patients eg informing them of a test result or reminding them to collect a prescription.
- From the patient record you can send SMS recall invites.

Recall/Healthcare Invitations

- You can target a group of patients to send invitations by SMS text messaging. This will help save time and money on postage and enables direct contact with patients who need to be seen.
- You can customise and configure your message templates to suit your patient and practice requirements.
- A patient's invitation status can be updated when a text message is sent enabling you to monitor recalls.
- Patients can decline an invite via SMS and their response is recorded in their record.

Questionnaires

- You can send questionnaires via SMS that patients can reply to. This will save admin time and money.
- Each reply is mapped to a Read code that is filed in the patient's record. This assists in keeping your patient data up to date.

Appointment Reminders

- You can send secure automated appointment reminders to patients who have appointments within the next seven days. This will help reduce DNA's and phone calls to the practice about appointment times.
- You can create a saved search and schedule your appointment reminders so that they automatically run overnight.
- You can customise the list of patients whose appointments are due and filter by a variety of options.
- You can target specific patients eg those patients who consistently do not attend their appointment.

- Patients can cancel their appointment by SMS, with no practice intervention and a reduction in your DNA rate.

Audit

- Details of recall SMS communications are automatically recorded in the patient's journal for audit purposes and form part of the patient's medical record. This does not apply to appointment reminders.
- Patients who have opted out from receiving text messages on their registered mobile phone are excluded from receiving text messages and are easily identified in reports.

What do I need to do before using My Health - Text Messaging?

Before adopting the My Health - Text Messaging service you must consider the following:

- **Patient consent** - Implied consent is assumed for all patients with a mobile number recorded, however, you can opt a patient out by entering the Read code **9NdQ.00 - Declined consent for short message service text messaging** in the patient's journal. For practices who want to use explicit consent model for SMS, the method advised is to dissent all patients using the appropriate Read code via bulk add in Patient Groups. You can then record consent on a patient by patient basis to opt them back in. See [Patient Consent - My Health Text Messaging](#) (page 5).
- **Recording Mobile Numbers** - It is imperative that you have up-to-date patient mobile numbers. This should be part of your practice's day to day activities when a patient contacts or attends the surgery. Mobile numbers can be easily updated in Appointments, Consultation Manager and Registration screens. You must make sure that mobile numbers are:
 - Up to date
 - Recorded in a valid format
 - Have the correct contact type
 - In the correct order - If the patient has multiple mobile numbers, the first number is used for SMS
 - Are ideally under Contacts for patients rather than recorded under family address. If recorded under address, the mobile number is still used for SMS messaging but this may be a family rather than patient number
 See [Recording Mobile Numbers](#) (page 66).
- **Searching for Invalid Mobile Numbers** - Patients whose mobile numbers are recorded incorrectly will not be sent SMS messages. We have therefore created a Clinical Audit for SMS Validation as part of the In Practice Systems (v2) audits to help you identify patients who do not have a valid mobile number recorded. This also looks for patients with no mobile number recorded so they can be targeted. See [Managing Invalid Mobile Numbers](#) (page 73).

📌 **Note** - If you still have invalid mobile numbers when you start using the SMS software, they are listed when sending SMS messages and can be easily processed.

Patient Consent - My Health Text Messaging

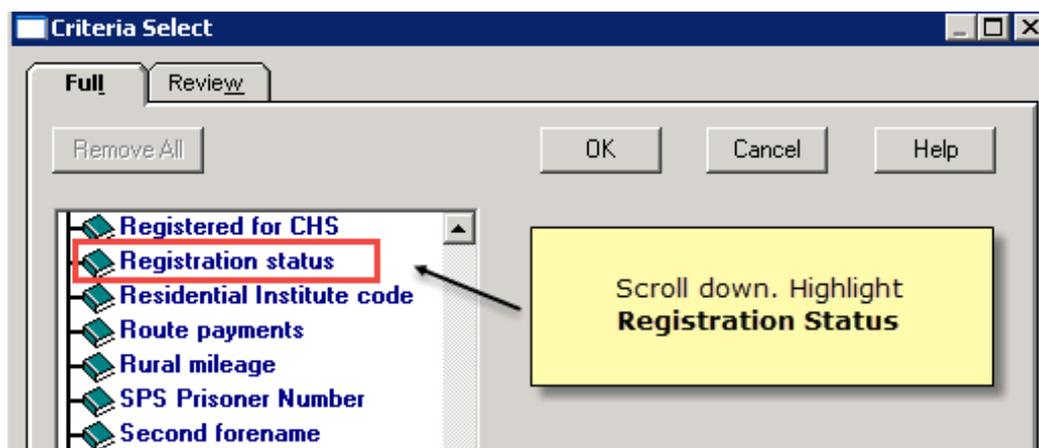
Patient consent for receiving SMS text messages on their registered mobile is implied, however, if a patient does not want to receive practice text messages you must record the Read code **9NdQ.00 - Declined consent for short message service text messaging** in the patient's journal and they will not receive SMS messages from your practice.

For practices who want to use explicit consent for SMS, the method advised is to dissent all patients using the Read code **9NdQ.00 - Declined consent for short message service text messaging** via Bulk History Add in Patient Groups. You can then record consent on a patient by patient basis to opt them back in.

Searching for Patients to Bulk History Add the Dissent Read code

First, you need to search for all patients who are Permanent and Applied in Searches and Reports and save the patients as a group. To do this:

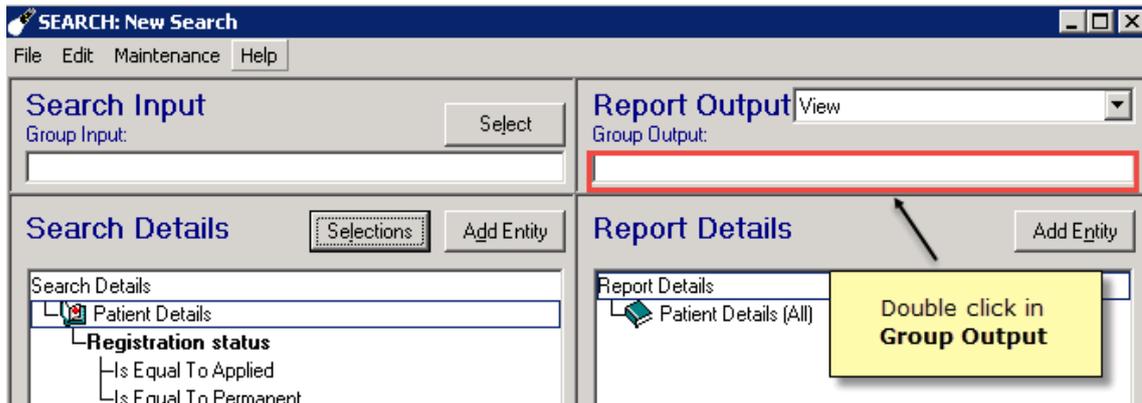
1. From the Vision front screen, select **Reporting - Searches and Reports**.
2. Select **Reports - New Ad-hoc Search** (or click ).
3. The **Search Criteria** screen displays. Highlight **Patient Details**  and click **Selections** .
4. The **Criteria Select** screen displays.



Registration Status

5. Scroll down and click **Registration Status**  - click **Add New** , then highlight **Applied** and **Permanent**.
6. Click **OK** to save the changes.

7. Double click in **Group Output** on the right hand side of screen under Report Output.



Group Output

8. Give your search a **Group Name** and a **Group Description** (keep a note of the name as you will need it later), then click **OK**.
9. Click **Run** to run the search.
10. Patient names display on the screen and are saved as a group, click **OK** to close the view.
11. Click **Close**, to exit the search screen. In this instance we are not going to save the search so at the prompt 'Are you sure you want to exit with unsaved criteria. Continue?' click **Yes**.

Bulk History Add the Dissent Read code

To bulk add the Read code **9NdQ.00 - Declined consent for short message service text messaging**:

1. From the Vision front screen, select **Reporting - Patient Groups**.



Training Tip - You can sort groups by date.

2. Highlight the group (as created above) and click **Hx**, then confirm you have the correct group.

Name	Description	Count	Date	Generate History for ALL
ALL PAT	All Applied And Permanent Patients	5364	12/01/2015 11:50.19	No
ASTDIAB	Asthma And Diabetic	250	21/12/2015 14:50.43	No
NATALIE	Quins		1/12/2015 15:07.02	No
1119	Flu No		9/11/2015 09:34.51	No

Bulk Add - Patient Groups

- 3.** In the **Read Term for Characteristic** box, type the Read code **#9NdQ.00** and press return.

History - Add

Event Date: 12 January 2016

Clinician: Doctor, Dr Locum

Private

In Practice

Read Term for Characteristic: #9NdQ.00 Declined consent for short message service text messa

Comment:

Type of: Admin

Priority:

End Date:

OK

Cancel

Type the Read code #9NdQ.00 - Declined consent for short message service text messaging

Bulk Read code Add

- 4.** Click **OK** and you see a count of patient records as they are updated.

 **Note** - If a patient opts out then decides to opt back in you can record the Read code **9NdP.00 - Consent given for communication by SMS text messaging**. The last recorded Read code is used when checking if the patient has declined or not.

 **Note** - For patients who are not included in the group eg any new patients joining the practice, you need to have a process in place for recording their consent status.

Ordering SMS Text Messages

To review your SMS text message allowance or enquire about purchasing additional SMS text messages:

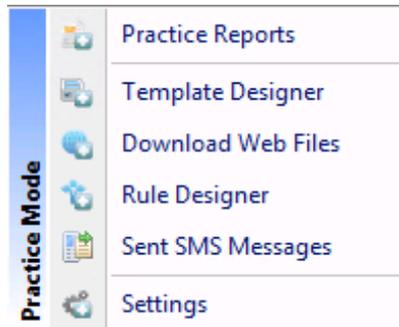
- Please contact NHS Wales Informatics Service (NWIS) for further information on your annual SMS allowance.
- To enquire about purchasing additional SMS text messages, please visit the vStore at <http://hive.visionhealth.co.uk> or you can call the sales team on 020 7501 7440.

SMS Settings in Vision+

Before starting to use My Health SMS, you can customise the following system-wide text messaging settings to suit your practice:

To change the SMS Options in **Vision+ Configuration and Settings**:

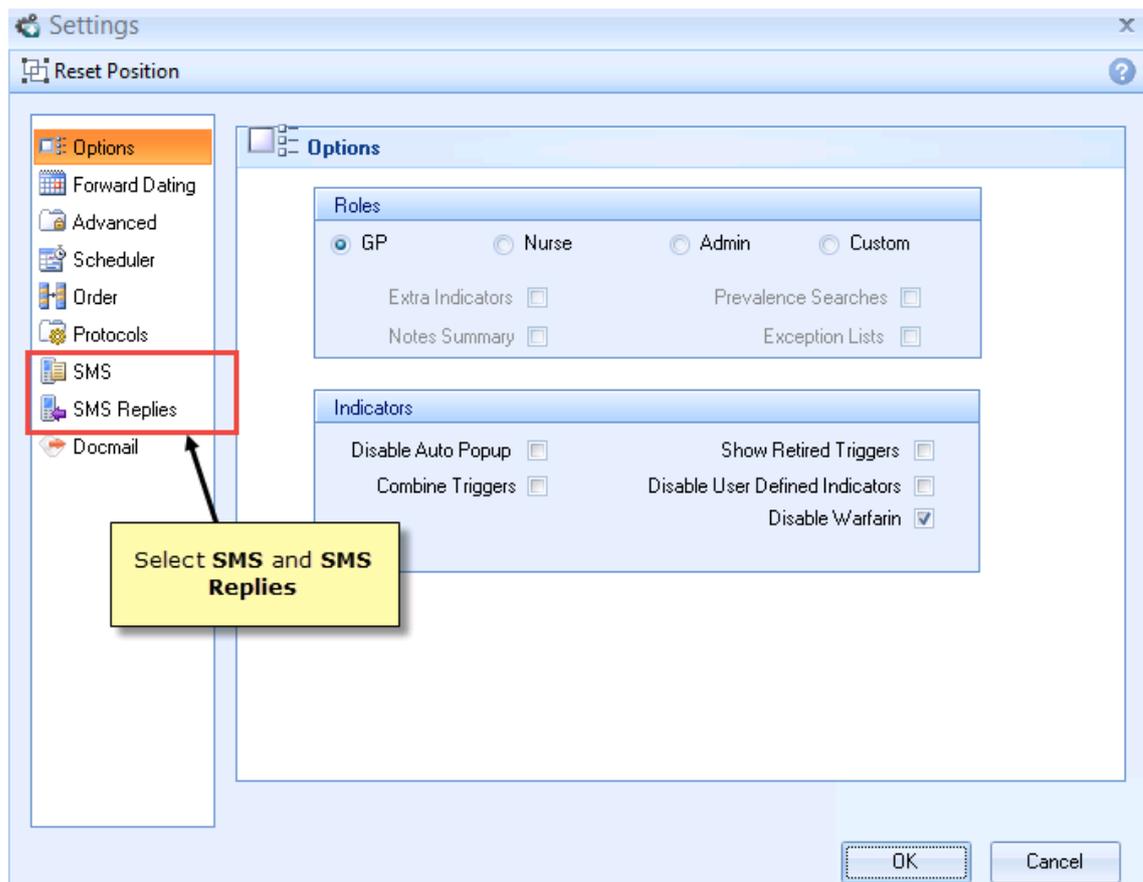
1. Login to Vision as usual.
2. From the Windows Notification Area, right click on the Vision+ button  and select **Settings**.



Accessing the Vision+ Settings Screen

Note - To access the Vision+ Setting screen, you must not have a patient selected in Consultation Manager.

3. The **Settings** screen is displayed.



Settings screen

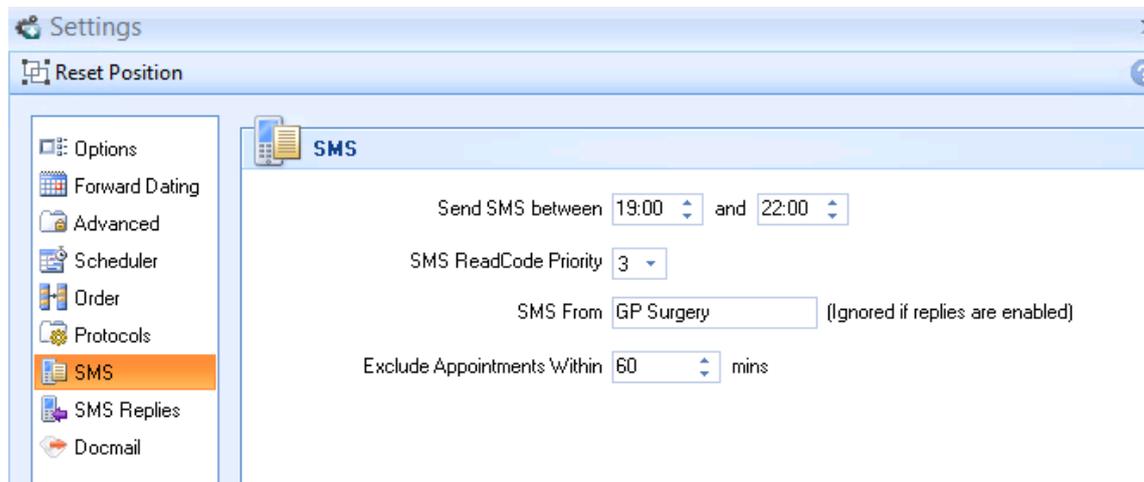
4. Click **SMS** and **SMS Replies**. For more information see:

- **SMS Tab** (page 9)
- **SMS Replies Tab** (page 10)

5. Click **OK** to save any changes you make.

SMS Tab

The SMS tab is used to configure outgoing SMS messages. Below are the options available:



SMS tab

- **Send SMS between** - You can send automated appointment text message reminders. The text reminders are sent between the practice defined transmission times entered here.
- **SMS Read Code Priority** - When an SMS message is sent to a patient for a recall (Read codes are not added for appointment text messages), the Read code **9N3G.00 SMS Text Message Sent To Patient** is recorded in the patient's journal. If required, change the SMS Read code priority default by selecting the priority number from the drop down list. The default priority is 3.
- **SMS From** - When text messages are sent, the text in this box displays as the message sender on the patient's phone. We recommend that you enter **NHS_NoReply** so that the patient knows where the SMS has come from. This also tells the patients they cannot reply to these automated SMS messages. You can, however, enter your practice name if required. Due to network constraints, there is an 11 character limit on this entry.
 - **Ignored if replies are enabled** - For text messages that require a response from the patient the **SMS From** details are ignored.
- **Exclude Appointments Within** - This option refers to appointment reminders only and enables you to stop reminders being sent to appointments due within the time defined here.

Click **OK** to save your practice-wide settings.

SMS Replies Tab

Practices licensed for SMS messaging in Vision+ can configure incoming SMS messages from the **SMS Replies** tab.

The screenshot shows the 'Settings' window with the 'SMS Replies' tab selected. The left sidebar contains a list of settings categories: Options, Forward Dating, Advanced, Scheduler, Order, Protocols, SMS, SMS Replies (highlighted), and Docmail. The main area displays the following configuration options:

- Cancel Appointment Detail: To cancel your appointment reply
- Cancel Appointment Reason: CANCELLED BY SMS TEXT
- Informed Dissent Detail: To stop further invitations for this service, 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 invitations for this service has been received
- Answer Saved Message: Your answer has been received successfully

Buttons for 'OK' and 'Cancel' are located at the bottom right of the window.

SMS Replies

Configure the following options in **SMS Replies**:

- **Cancel Appointment Detail** - Set the free text of the cancel appointment message that your patient receives eg *'To cancel appointment reply'* (the digit is a uniquely generated number, when your patient answers with said digit it links to the appointment and cancels it).
- **Cancel Appointment Reason** - Select a cancellation reason that populates the audit trail of the appointment when your patient cancels their appointment. (Consider creating a new cancellation reason in **Appointments - Maintenance - Cancel reason**).

The screenshot shows the 'Maintenance' menu with the following options:

- Maintenance Help
- System Constants
- Support
- Label Definition
- Book Owners
- Booking Information
- Cancel Reasons
- Status Bar
- Show Views Toolbars

Appointments

- **Informed Dissent Detail** - A global message contained in SMS to patients offering the option to stop receiving invitation for call/recall. (The Informed Dissent merge field viewed in the template is replaced in the SMS to the patient by a response code unique to the patient. They start at 1 -9 then A etc).
- **Send Confirmation Messages** - Tick box to enable a confirmation message to be sent out for all responses received for appointment cancellations, informed dissent and questionnaires.
- **Appointment Cancelled Message** - Create the free text confirmation message to a patient that their appointment has been cancelled successfully.
- **Appointment Cancelled Too Late Message** - Every 15 minutes Vision+ checks any cancellation requests, comparing the current time against the appointment time. If the appointment time is after the current time, it is automatically "too late" and will send the too late response message recorded in here.
- **Informed Dissent Saved Message** - A global message contained in the SMS reply to patients confirming their response to stop invitation messages for call/recall invites has been received successfully.
- **Answer Saved Message** - This is a global message contained in the SMS reply to patients confirming their response to an SMS question has been received successfully.

Click **OK** to save your practice wide settings.

Creating SMS Message Templates

Before you can send My Health - Text messages, you need to create SMS message templates which contain the required content for your recall, questionnaire and appointment reminder text messages.

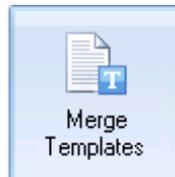
This section explains how to setup the different templates:

- **SMS Templates for recall/health care invitation** - see [Creating a Recall/Healthcare Invite SMS Message Template](#) (page 12)
- **SMS Templates declining a QOF recall/healthcare invitation** - see [Creating a Recall/Healthcare Invite SMS Message Template](#) (page 12)
- **SMS Templates for Appointment Reminders** - see [Creating an Appointment Reminder SMS Message Template](#) (page 23)
- **SMS Questionnaires** - see [Creating a Questionnaire SMS Template](#) (page 20)

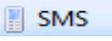
Creating a Recall/Healthcare Invite SMS Message Template

To set up an SMS template for use with QOF and Non-QOF related Vision+ Templates and Groups. From the Windows Notification Area:

1. Right click on Vision+ and click **Practice Reports**.



2. Select **Merge Templates**.

3. Click the  **SMS** button to create a new SMS template.

4. The **New SMS Template** screen is displayed.

A screenshot of a software dialog box titled 'New SMS Template'. The dialog has a light blue header with a close button (X) on the right. Below the header is a toolbar with an 'Add Mail Merge Field' button and a question mark icon. A yellow callout box with a black border points to the 'Add Mail Merge Field' button, containing the text 'Add a mail merge field'. The main area of the dialog contains a 'Name' field with the text 'DIABETES RECALL (QOF)'. Below the name field is a large text area containing the message: 'Your annual diabetic check is now due. Please use the online booking service or call 01454 454454 to make an appointment.' A yellow callout box with a black border points to this text area, containing the text 'Name and Description'. At the bottom of the dialog, there is a status bar that says 'Number of characters: 122' and two buttons: 'OK' and 'Cancel'.

New SMS Template

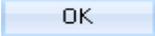
You need to complete as follows:

- **Name** - Type a name so that you can distinguish your template type in the Merge Templates screen. The patient does not see this text when they receive the SMS message.

- **Description** - Add the text content. This will be what is included in the SMS message to your patient(s). You have 160 characters available. A warning displays if you exceed the maximum number of characters.
- **Add Mail Merge Field** - The following merge fields are available:
 - Notes Kept At
 - Title
 - Surname
 - Forename
 - DOB
 - Informed Dissent

Advice for text message content:

- Keep the message brief.
- Text messages should not contain patient identifiable data.

5. Click  **OK** to save the message.

6. This is added to the Merge Templates list and can be used again for any future SMS messages of the same type.

7. Click  to close the Merge Templates screen.



Important - If you have added a SMS template for use with non-QOF Vision+ templates eg Practice lists that you have downloaded from **Download Web Files**, you must now attach the SMS template to the non-QOF Vision+ template - see [Attaching a Recall SMS Template to Non-QOF Templates](#) (page 14). You do not need to do this for QOF related SMS templates or Groups as this is done automatically.

Attaching a Template to a Practice List

For Vision+ templates/reports downloaded from Download Web Files (eg Seasonal Flu Vaccination Programme, DMARDS Outcomes Manager) before you can select an SMS template, you must attach the required SMS template to the relevant Vision+ protocol. This process is the same as attaching letter templates. You do not need to do this for any QOF protocols.

1. From the Practice Reports menu, select **Practice Lists** and click the **Attach Merge Template** button.

Practice Lists

All

Search for practice lists

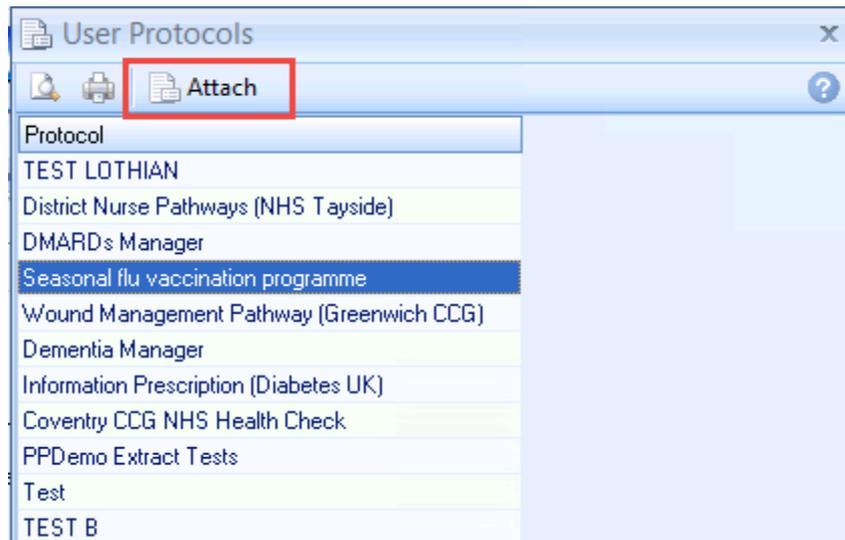
- Alcohol Brief Intervention (NHS Lothian)
- Anticoagulation Manager
- Blood-glucose-lowering therapy
- Central Reports payment testing
- Childhood immunisations
- COPD Care (Lothian Respiratory MCN)
- Coventry CCG NHS Health Check
- District Nurse Pathways (NHS Tayside)
- DMARDS Manager
- Drug Misuse and BBV (NHS Lothian)
- Familial Hypercholesterolaemia
- Immunisations
- Information Pre

Attach Merge Template

Attach your mail/SMS merge templates to downloaded protocols to manage patient invite statuses.

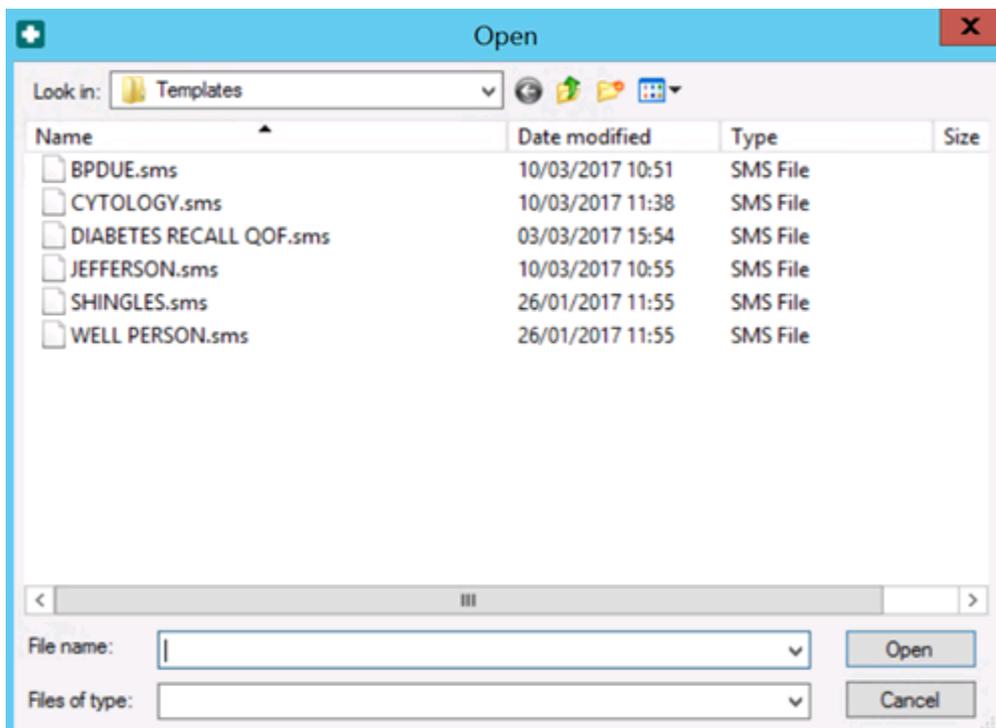
Home - Attach

2. Next, select the Vision+ template you wish to apply the SMS template to and click  **Attach**.



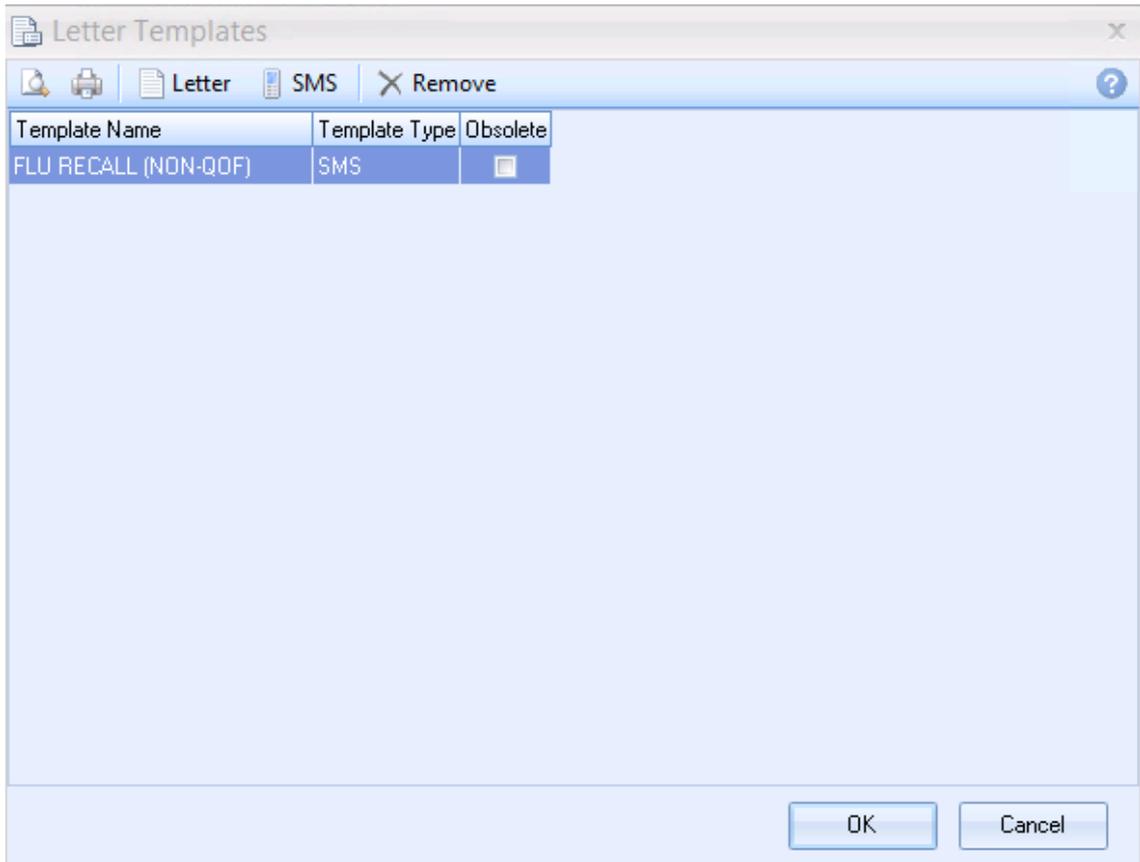
Select Vision+ Template and Choose Attach

3. The **Letter Templates** screen is displayed. Click on the  **SMS** button.
4. Choose the SMS template you wish to use and click **Open**.



Choose SMS Template

5. The SMS template is now added to the Letter Templates screen for the selected Vision+ template.



Letter Template with SMS Template Added

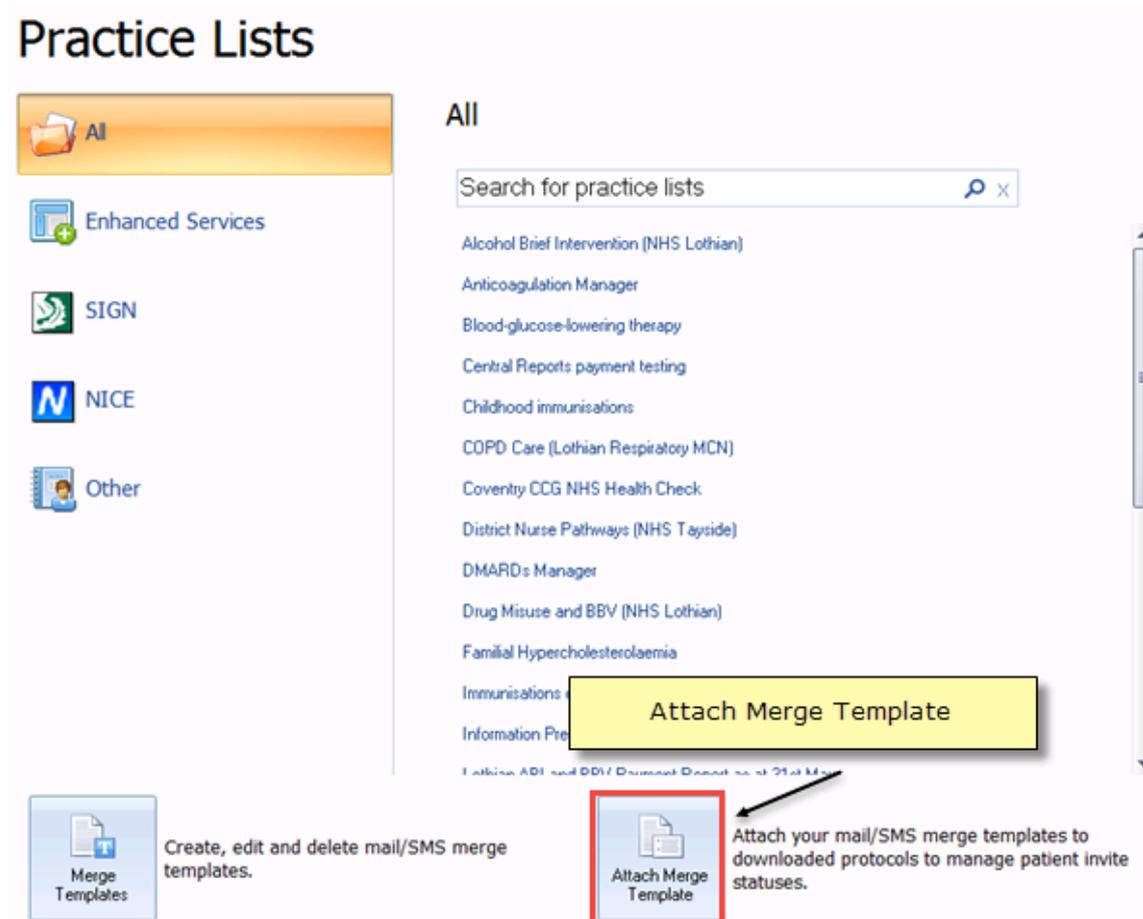
6. Click **OK** to close. You can now select the SMS template when sending an SMS Message.

Note - You must do this for each new SMS template you create and each new/updated non-QOF Vision+ template.

Making Attached Templates Obsolete

1. From the **Practice Lists** menu, click the **Attach Merge Template** button.

Practice Lists



Search for practice lists

- Alcohol Brief Intervention (NHS Lothian)
- Anticoagulation Manager
- Blood-glucose-lowering therapy
- Central Reports payment testing
- Childhood immunisations
- COPD Care (Lothian Respiratory MCN)
- Coventry CCG NHS Health Check
- District Nurse Pathways (NHS Tayside)
- DMARDs Manager
- Drug Misuse and BBV (NHS Lothian)
- Familial Hypercholesterolaemia
- Immunisations
- Information Pres

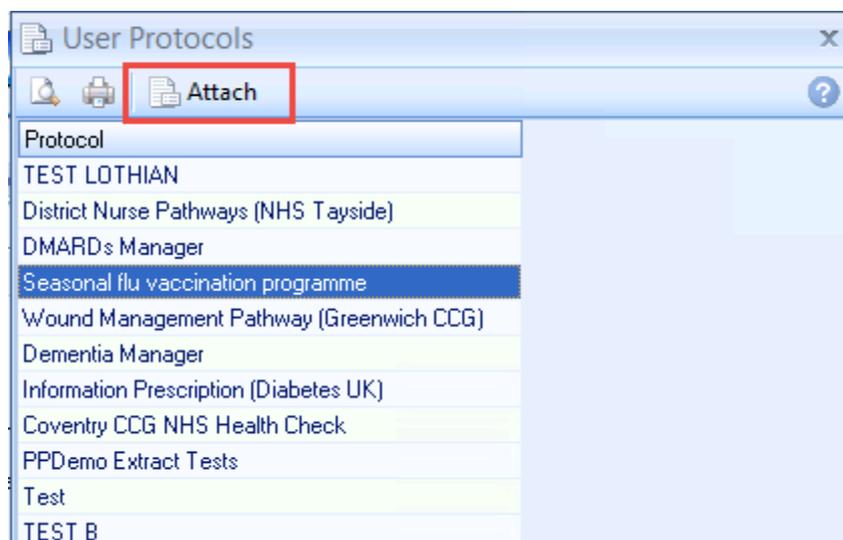
Attach Merge Template

Attach Merge Template

Attach your mail/SMS merge templates to downloaded protocols to manage patient invite statuses.

Home - Attach

2. Next, select the Vision+ template for which the SMS template is to be made obsolete and click  **Attach**.



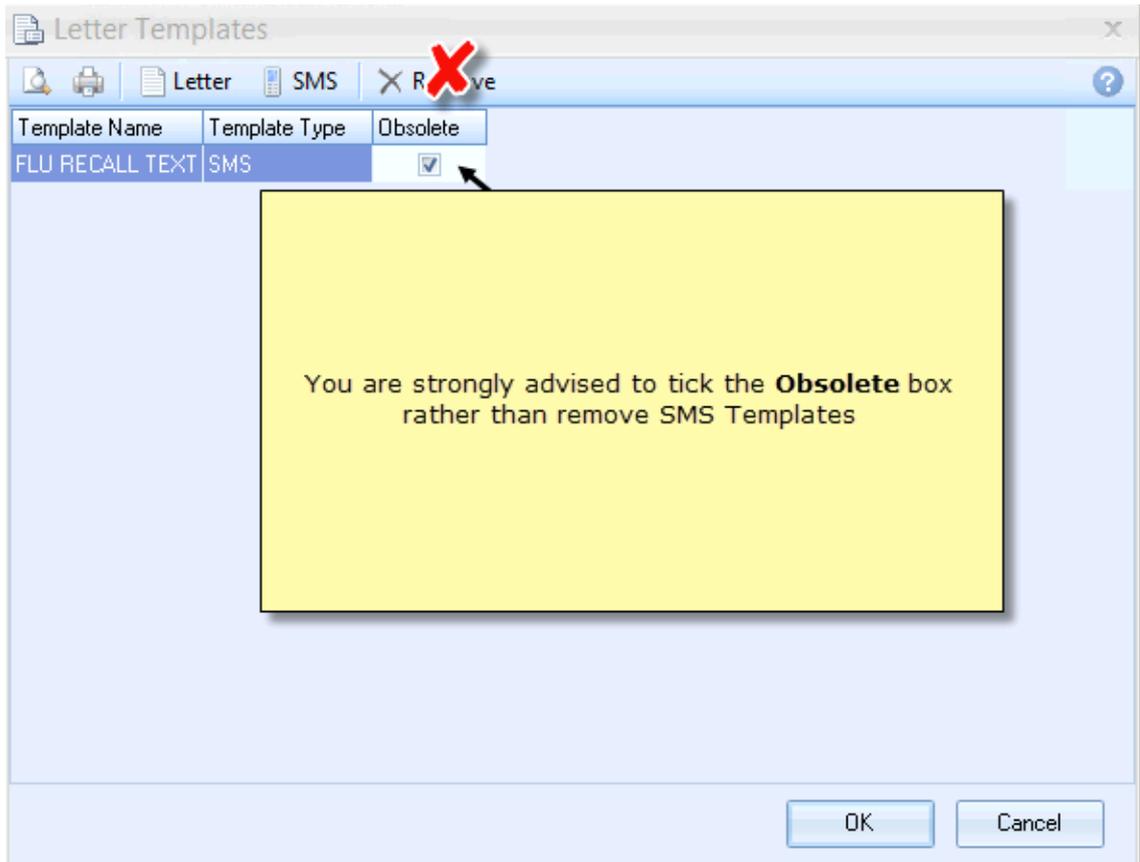
User Protocols

Attach

Protocol
TEST LOTHIAN
District Nurse Pathways (NHS Tayside)
DMARDs Manager
Seasonal flu vaccination programme
Wound Management Pathway (Greenwich CCG)
Dementia Manager
Information Prescription (Diabetes UK)
Coventry CCG NHS Health Check
PPDemo Extract Tests
Test
TEST B

Select Vision+ Template and Choose Attach

- 3.** The **Letter Templates** screen is displayed. Find the template you wish to make obsolete and tick the **Obsolete** box.



Obsolete

- 4.** Click **OK** to save.

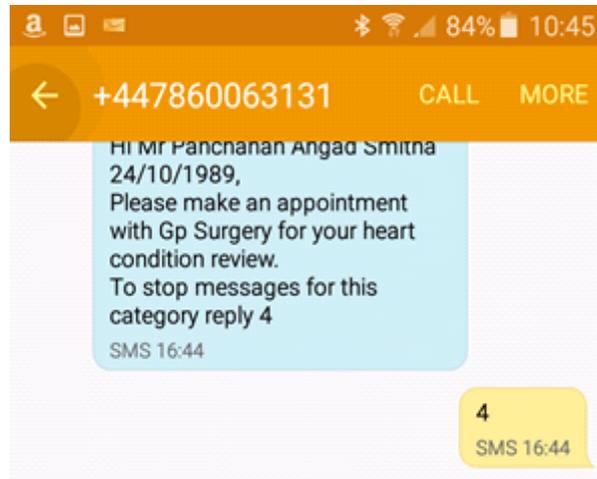
Please note the following:

- The selected SMS template is now not available for use with the selected Vision+ template.
- This template is still listed in the Merge Template screen for you to use elsewhere.
- You can now attach another SMS template(s) if required.
- You can remove the tick from the Obsolete box to reattach the SMS template to the non-QOF Vision+ template.

Creating a Chronic Disease Invitation Decline SMS Template

When generating SMS invitations for your patients from **QOF** in Vision+ **Reporting**, the text of the SMS message template can be configured in Vision+ Settings so that the patient can reply. An example of this is: 'To stop messages for this category reply 4'.

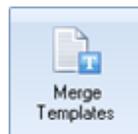
If the patient does not wish to be invited again for this disease area they can send a reply SMS back with 4.



Example

To create your SMS Template:

- 1.** Right click on Vision + and click **Practice Reports**.



- 2.** Select **Merge Templates**

- 3.** Click the **SMS** button to create a new SMS template.

- 4.** From the **Add Mail Merge Field** - select **Informed Dissent**.



Vision+ - Practice Reports - Merge Templates - Edit

🟡 **Note** - The Informed Dissent Merge field brings across the global practice message you have set in **Settings - SMS Replies - Informed Dissent Details**. Within the merge field is the specific Informed Dissent Read code for the disease area you send the invite from.

For example, if the SMS message is sent from QOF Diabetes merge indicator then the Read code 9h42 is associated with the informed dissent merge field. If your patient replies to confirm no more invites, then 9h42 is filed into the clinical record.

Your patient is then automatically excepted from QOF reporting for this disease area.

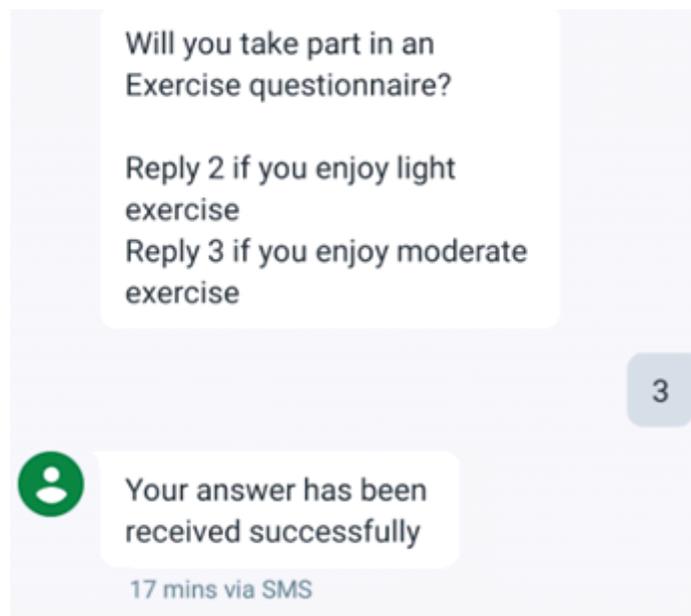
Creating a Questionnaire SMS Template

From SMS templates in Vision+ **Reporting**, an SMS message template can be configured to ask your patient a question that they can reply to. Each reply is mapped to a Read code that is 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'

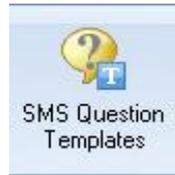
If the patient replies with an SMS message of 1: the patients record is updated on receipt of the SMS reply with the Read code 1371, the comments of the entry contain the text "patient SMS response".



Example

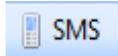
To create an SMS Questionnaire:

- 1.** From the Windows Notification Area. Right click on Vision+ and click **Practice Reports**.



2. Select **SMS Question Templates**

3. Select **SMS**



4. 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. Click **Add Mail Merge Field** where you have additional merge fields of:

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

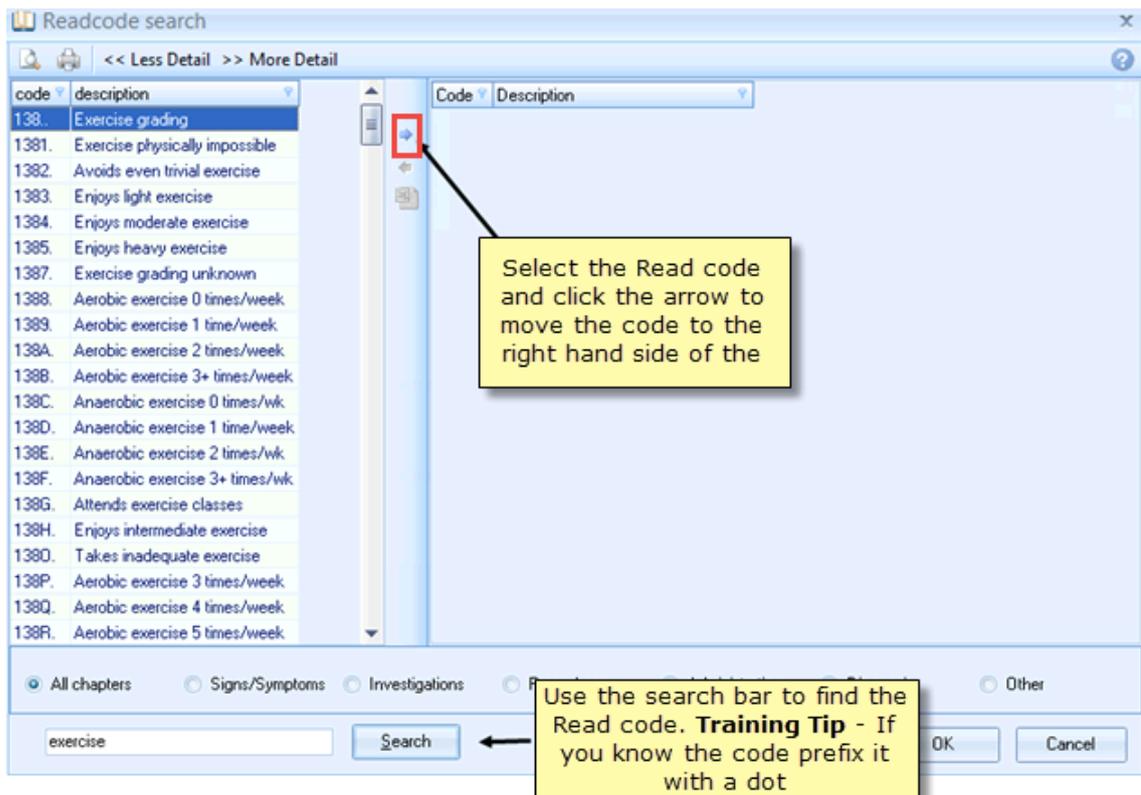
7. Select **Answer** - a Read code search box displays.

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

9. Highlight the Read code you want from the list and click **Insert**  to move the Read code into the right hand side.

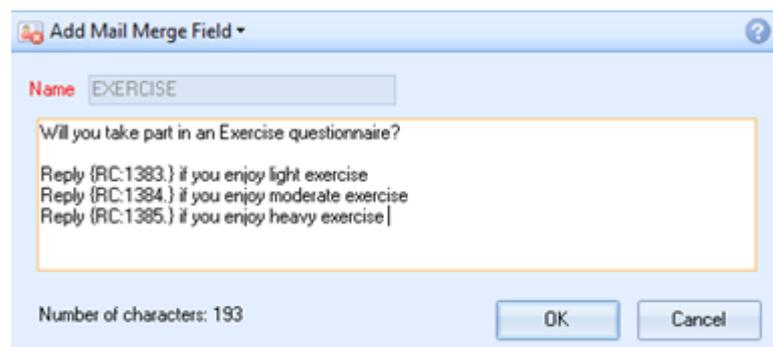
10. Click **OK**.

11. Continue with steps 7 - 10 until you have created your questions.



Vision+ - Practice Reports - SMS Question Template - Answer Merge Field - Read code selection

Your SMS Question template should look something like this:



Vision+ - Practice Reports - SMS Question Template Example

Edit or Delete Letter/SMS Templates

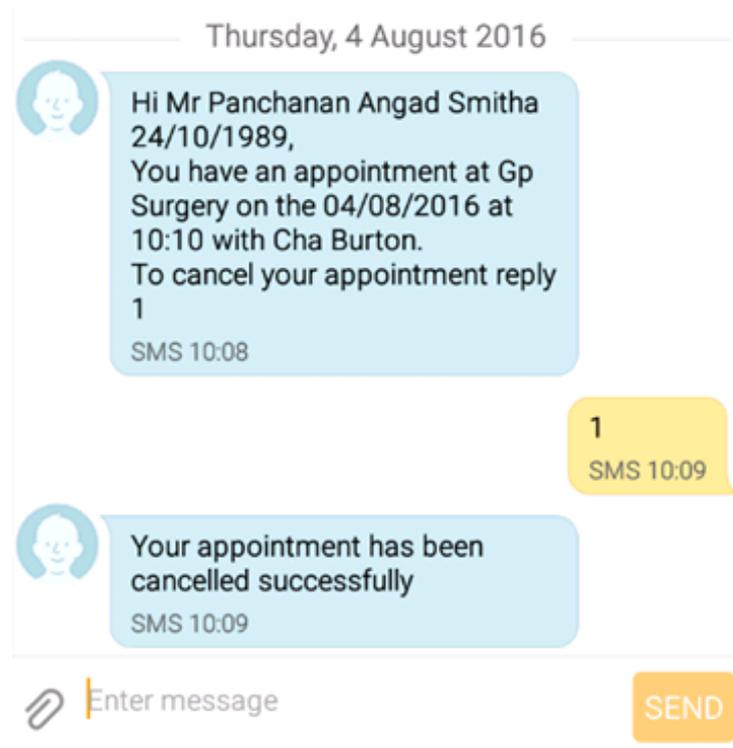
To edit the content or format an existing template, or delete a template that you no longer require:

- 1.** On the Letter Templates screen, highlight the template you want to delete or change.
- 2.** Do one of the following:
 - To edit the selected template, click the **Edit** button ().

- To delete the selected template, click the **Delete** button ().

Creating an Appointment Reminder SMS Message Template

Before sending Patients an appointment reminder you must create an Appointment SMS Message Template.



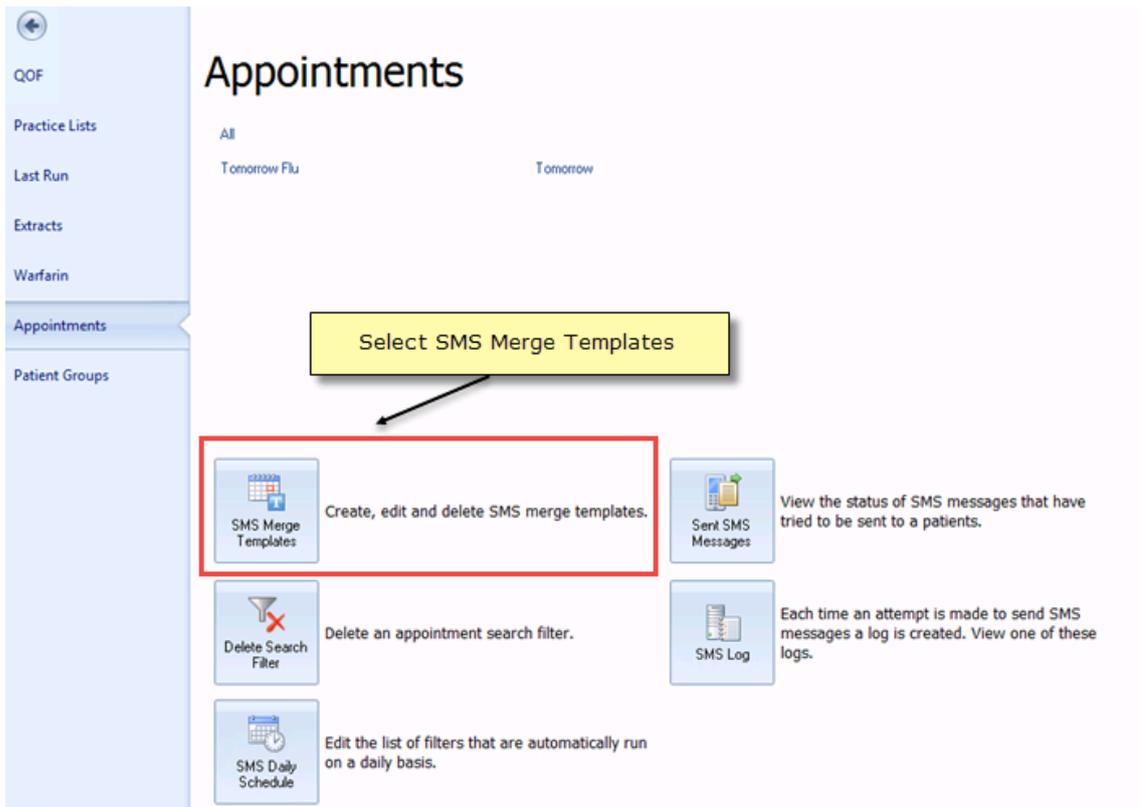
Example

- From the Practice Reports screen, select **Appointments**.



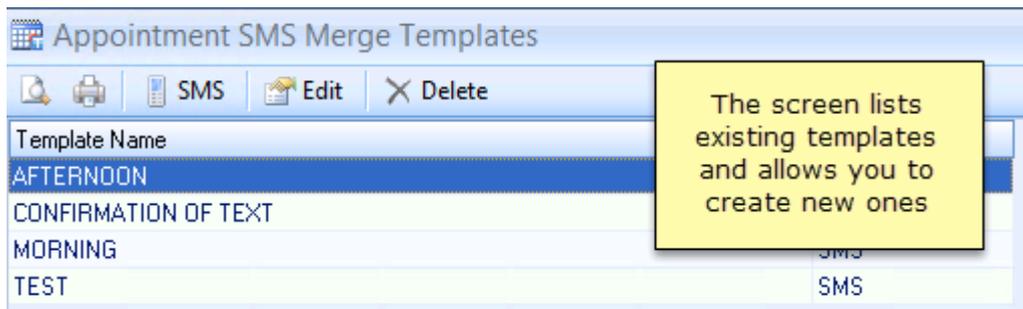
Appointments

2. The Appointments screen is displayed. Select **SMS Merge Templates**.



Appointments screen - Merge Templates

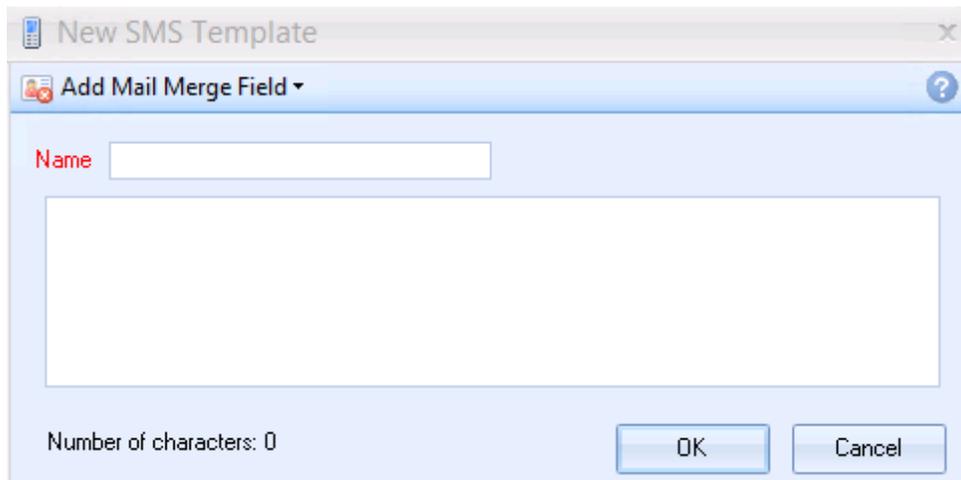
3. This screen lists existing templates for editing and allows you to add new appointment SMS templates.



Appointment Templates Screen

4. Click the **SMS** button to create a new SMS template.

5. The **New SMS Template** screen is displayed.



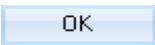
New SMS Appointment Template

You need to complete as follows:

- **Name** - Type a name so that you can distinguish your template type in the Merge Templates screen. The patient does not see this when they receive the text message.
- **Description** - Add the text content. This will be what is included in the SMS message to your patient(s). You can include merge fields in your message by selecting **Add Mail Merge Field**, the options are:
 - Date
 - Time
 - Staff Name
 - Notes Kept At
 - Title
 - Surname
 - Forename
 - DOB
 - Cancel Appointment

Advice for text message content:

- Keep the message brief.
- Text messages should not contain patient identifiable data.
- If you have not added this in the SMS settings (see [SMS Settings in Vision+](#) (page 8)), it is advised that the message content contains instructions that the patient cannot reply to the text message.

6. Click  **OK** to save the message.

7. This is added to the Appointment Templates list and can be used again for any future SMS messages of the same type.

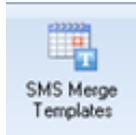
8. Click  to close the Appointment Templates screen.

9. You can now create more templates and send SMS appointment messages based on these.

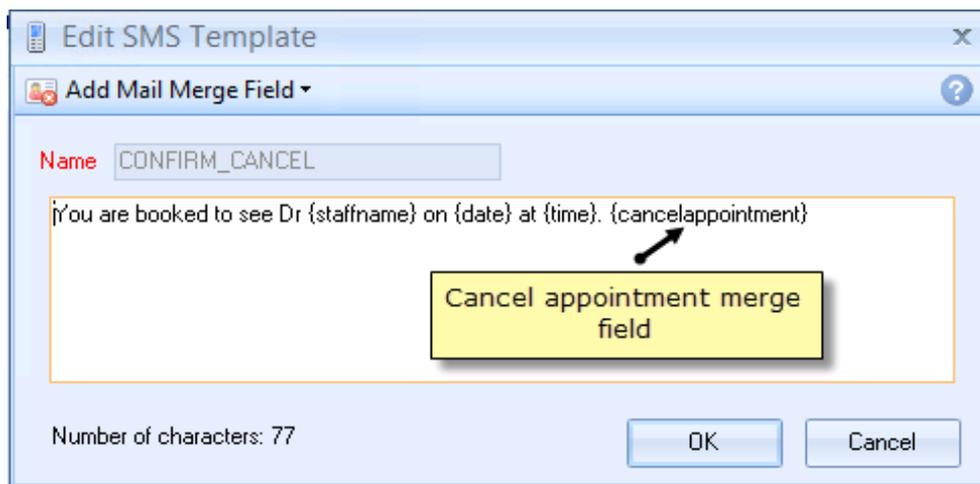
Creating an Appointment Cancellation Reminder Template for Today

If you need to contact your patients for appointments on the current day, for example when a clinic needs to be cancelled at short notice, you can send your patient an SMS. To do this:

From **Vision+ - Practice Reports** select **Appointments**.



1. Click on **SMS Merge Template**.
2. Click on **SMS**.
3. Create a Name for example 'Today'.



Example SMS Cancellation Template

4. Add in the text of your message, and consider the merge fields available in **Add Mail Merge Field**, which are:
 - Date
 - Time
 - Staff Name
 - Notes Kept At (to identify the branch where the appointment is, or where the patient should make the appointment)
 - Title
 - Surname
 - Forename
 - DOB
 - Cancel Appointment
5. Insert the Cancel Appointment merge field.

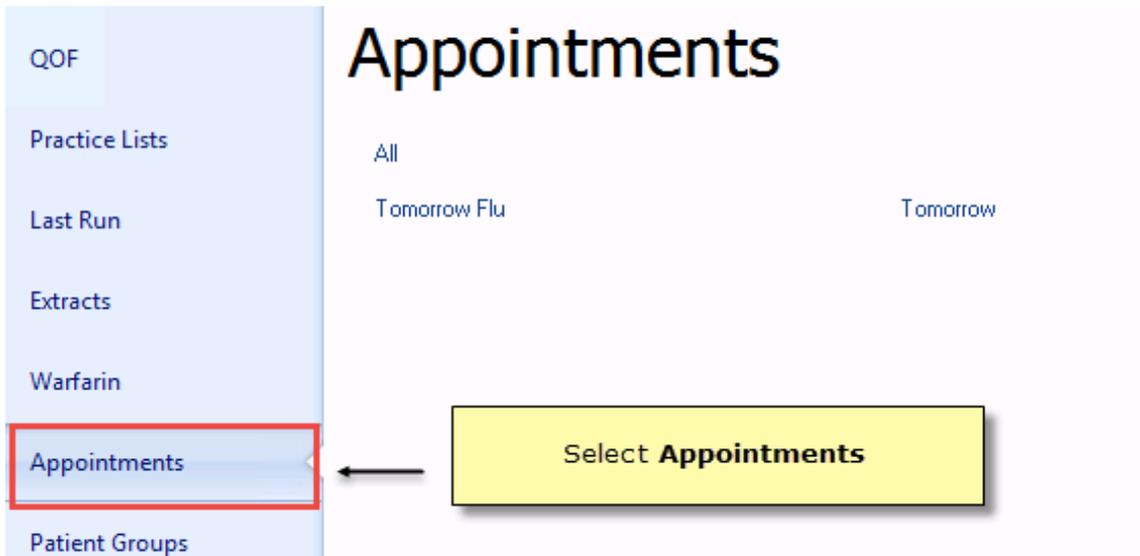
Note - The text for the cancel appointment merge field is configured in **Vision+ Settings**.

6. Click **OK**.

Editing Appointment SMS Templates

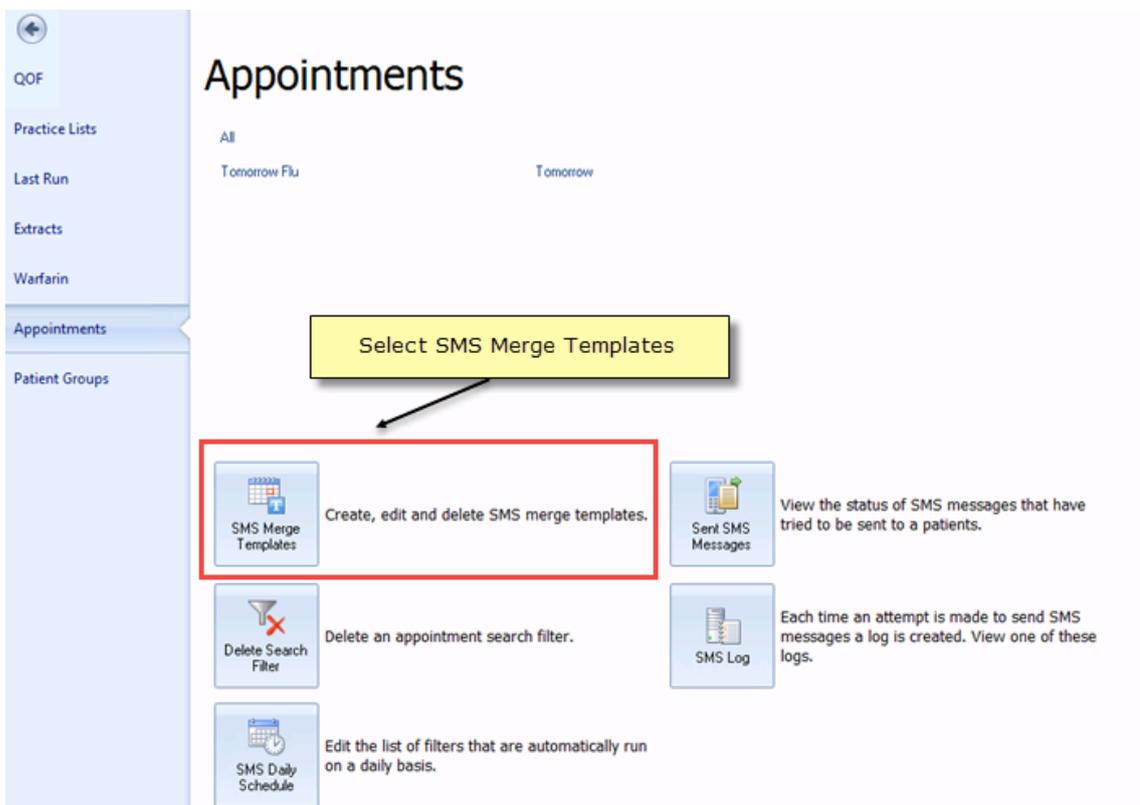
To update an Appointment SMS Template:

1. From the Practice Reports screen, select **Appointments**.

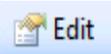


Appointment Tab

2. The Appointment screen is displayed - click **SMS Merge Templates**.



Appointments Screen - Merge Template

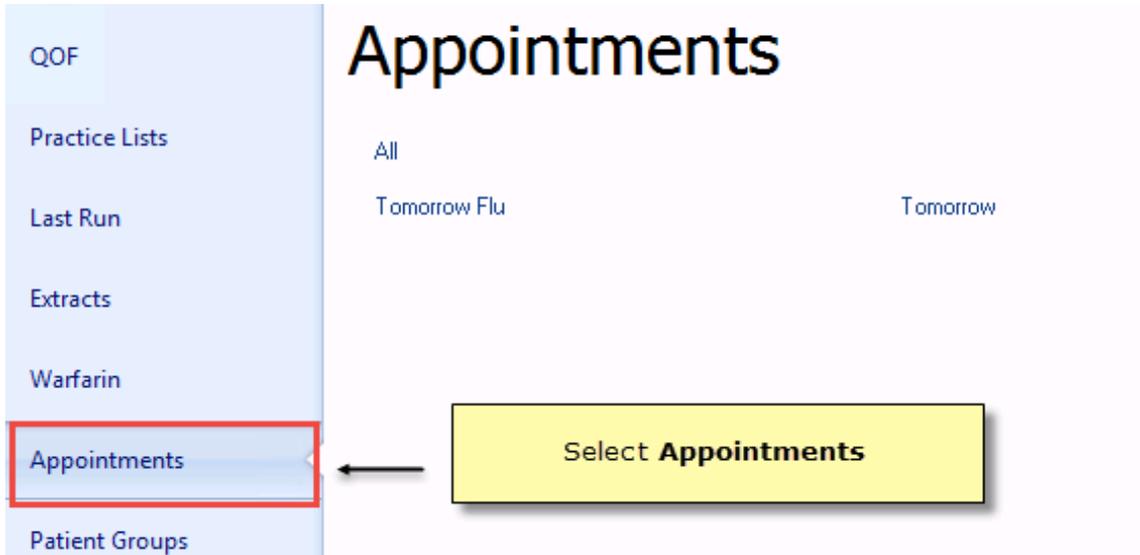
3. Select the template you wish to change and click  **Edit**.

4. Make the required changes and click **OK** to save. You cannot change the Template Name box.

Deleting Appointment SMS Templates

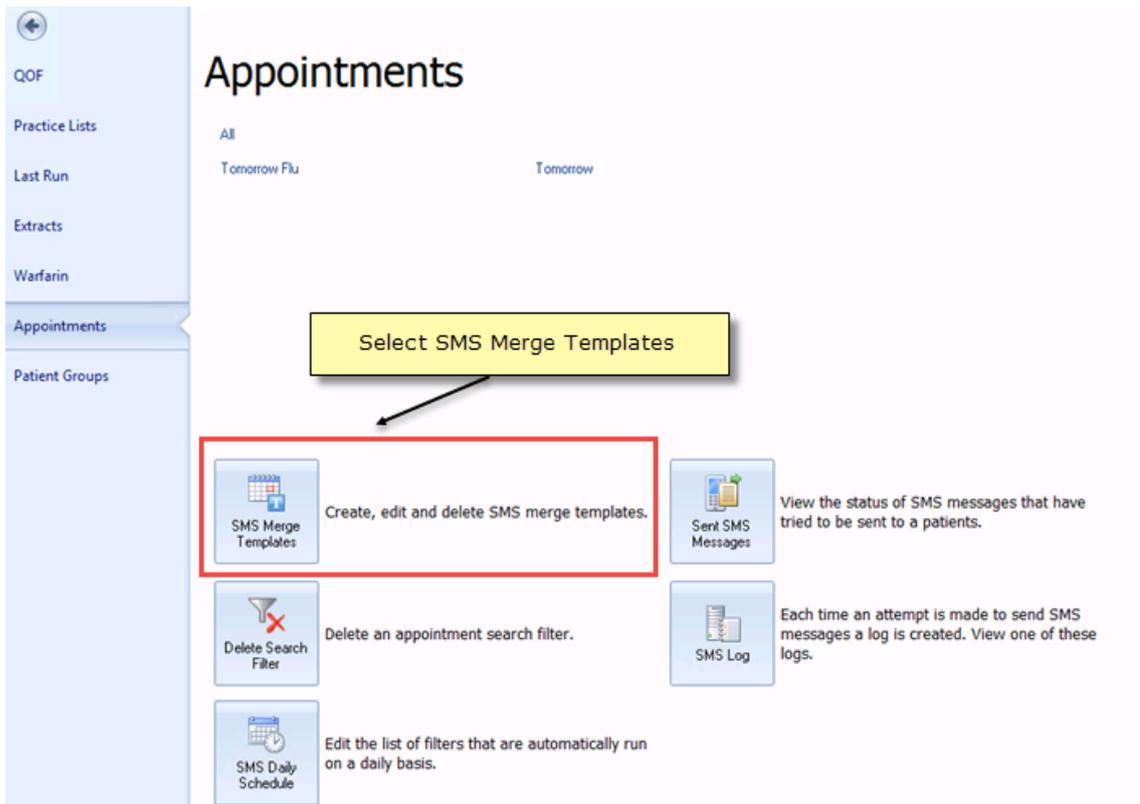
To delete an Appointment SMS Template:

1. From the Practice Reports screen, select **Appointments**.

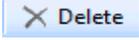


Appointments

2. The Appointment screen is displayed - select **SMS Merge Templates**.



SMS Merge Templates

- 3.** Select the template you wish to remove and click  **Delete.**
 - 4.** Click **Yes** to confirm deletion and the template is removed from the Appointments template list.
-

 **Note** - You cannot delete Appointment templates that are part of a Daily Schedule. You will see the message '*You can't delete this template as it is being used within a daily schedule*'. You will need to amend or delete your Daily Schedule first - See [Automating Appointment SMS Reminders](#) (page 56).

Sending SMS Messages to Patients

Vision+ two-way messaging provides an effective way to communicate to your patients. The following explains the different options available:

- **Sending SMS messages to individual Patients from Consultation Manager** - See [Sending an SMS Message from Consultation Manager](#) (page 30).
- **Recall/healthcare invitations to a group of patients** - See [Sending Recall Text Messages](#) (page 33)
- **Questionnaires to patients** - See [Questionnaires via SMS](#) (page 41)
- **Appointment reminders** - See [Sending Appointment Reminder Text Messages](#) (page 43)

Sending an SMS Message from Consultation Manager

In addition to sending SMS text messages to groups of patients, or to remind the patient of an appointment you can also send patients a text message from Consultation Manager. This is particularly helpful if you want to send a patient questionnaire, inform a patient of a test result or advise that they need to collect a prescription.

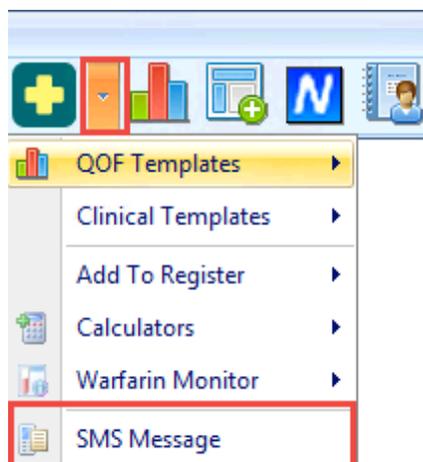
The following options are available when sending SMS Messages to individual patients:

- **Sending an SMS message to an individual patient** - see [Sending an SMS message to an individual patient](#) (page 30)
- **Sending a SMS message via the mail merge option on the alert window** - see SMS Recall/Questionnaire from Consultation Manager

Sending an SMS message to an individual patient

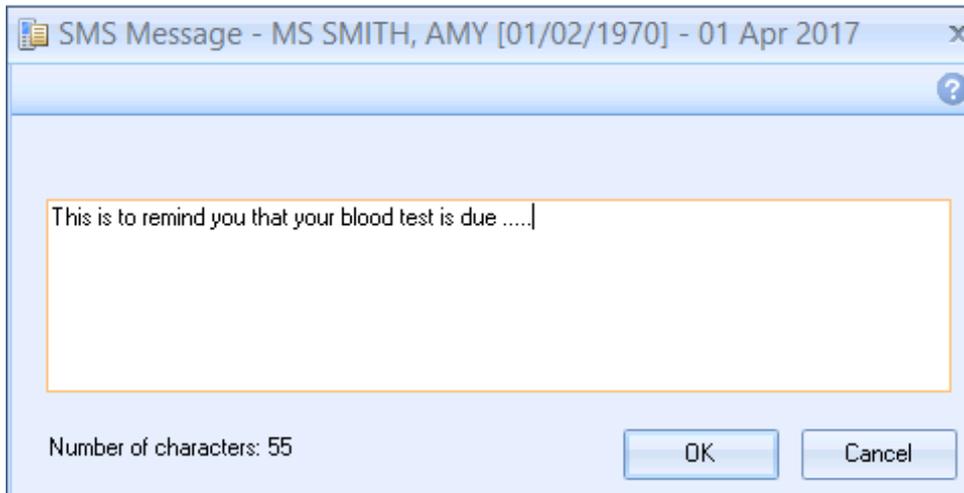
To send an SMS text message to a patient:

- 1.** In **Consultation Manager**, select your patient.
- 2.** From the Vision  Floating Toolbar, select **SMS Message**.



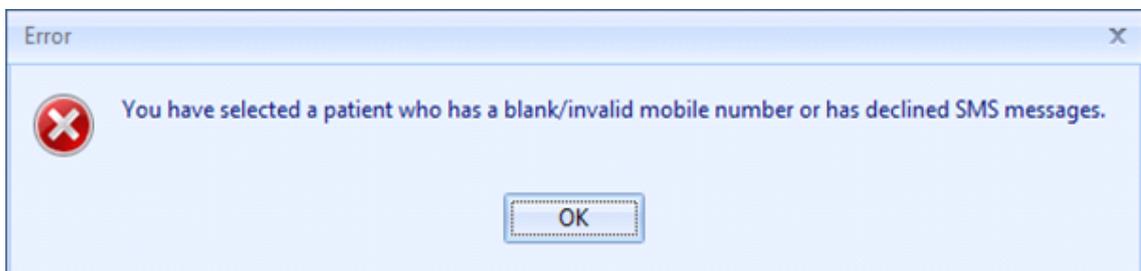
SMS Message

3. Type your message in the **SMS message template** screen.



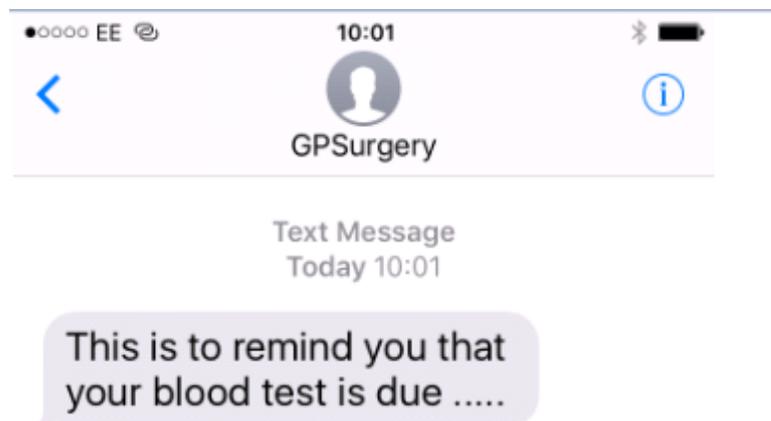
SMS Messages

If the patient has a blank, invalid or has declined SMS messages you see the following prompt:



SMS Error message

The patient sees the following message:



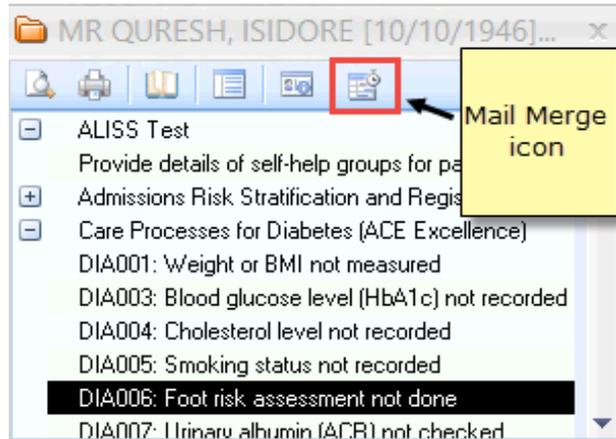
Patient Message

 **Note** - The Read code **9N3G - SMS text message sent to patient** is recorded in the patient record.

SMS Recall/Questionnaire from Consultation Manager

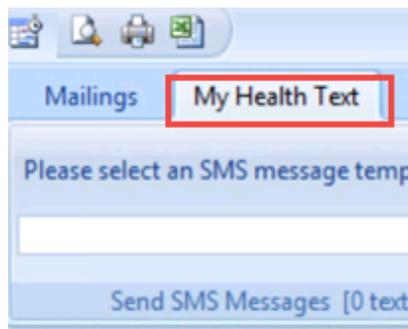
You can SMS a patient within Consultation Manager from the Mail Merge icon. It is the same as recalling a group of patients but has the benefit of allowing you to target individual patients'.

1. From Consultation Manager, select your patient and highlight a line on the alert window.

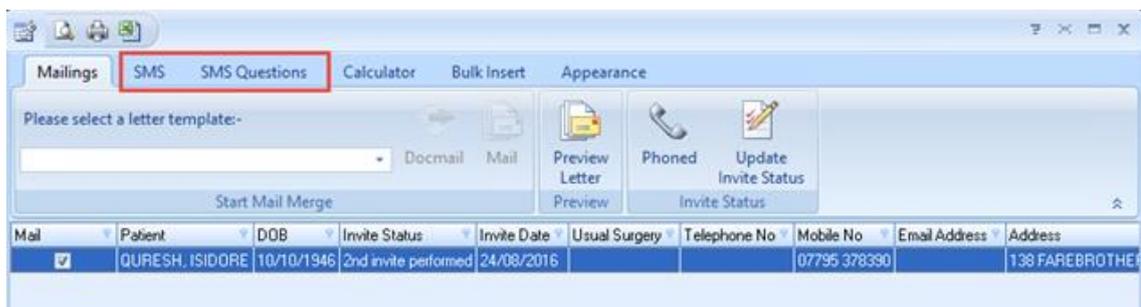


Consultation manager - Vision+ - Mail Merge

2. Clicking on **Mail Merge** opens the mailings screen. You can click on My Health Text/SMS or SMS Question from here and utilise the same way as Practice Reports. See Recalling Patients by SMS Messaging and [Questionnaires via SMS](#) (page 41).



Mailings

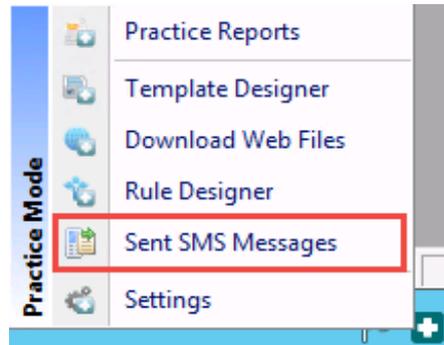


Vision+ - Consultation Manager - Mail Merge - Mailings

Note - The setup of **SMS** and **SMS Question** templates must be done in **Settings** and **Practice Reports**.

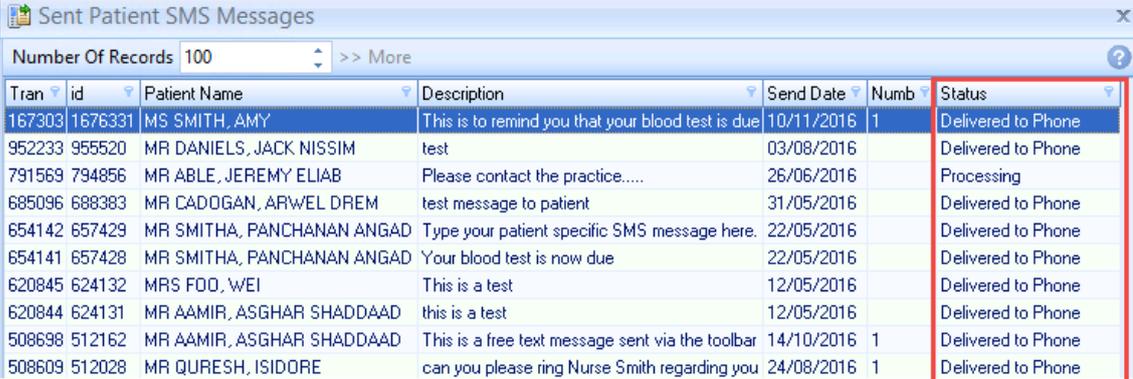
Viewing Sent Messages

All SMS messaging sent to your patient, and the responses you receive are viewable within Vision+. To access this auditable information, Right click on Vision+  in the Windows Notification area and select **Sent SMS Messages**.



Sent SMS Messages

The *Sent SMS Messages* screen displays in denominations of 100 and shows all messages sent to your patients from Consultation Manager, along with the status of the message.

A screenshot of the 'Sent Patient SMS Messages' window. The window title is 'Sent Patient SMS Messages'. Below the title bar, there is a 'Number Of Records' dropdown set to '100' and a '>> More' link. The main area contains a table with the following columns: 'Tran id', 'Patient Name', 'Description', 'Send Date', 'Numb', and 'Status'. The 'Status' column is highlighted with a red rectangular box. The table contains 10 rows of data.

Tran id	Patient Name	Description	Send Date	Numb	Status
167303 1676331	MS SMITH, AMY	This is to remind you that your blood test is due	10/11/2016	1	Delivered to Phone
952233 955520	MR DANIELS, JACK NISSIM	test	03/08/2016		Delivered to Phone
791569 794856	MR ABLE, JEREMY ELIAB	Please contact the practice.....	26/06/2016		Processing
685096 688383	MR CADOGAN, ARWEL DREM	test message to patient	31/05/2016		Delivered to Phone
654142 657429	MR SMITHA, PANCHANAN ANGAD	Type your patient specific SMS message here.	22/05/2016		Delivered to Phone
654141 657428	MR SMITHA, PANCHANAN ANGAD	Your blood test is now due	22/05/2016		Delivered to Phone
620845 624132	MRS FOO, WEI	This is a test	12/05/2016		Delivered to Phone
620844 624131	MR AAMIR, ASGHAR SHADDAAD	this is a test	12/05/2016		Delivered to Phone
508698 512162	MR AAMIR, ASGHAR SHADDAAD	This is a free text message sent via the toolbar	14/10/2016	1	Delivered to Phone
508609 512028	MR QURESH, ISIDORE	can you please ring Nurse Smith regarding you	24/08/2016	1	Delivered to Phone

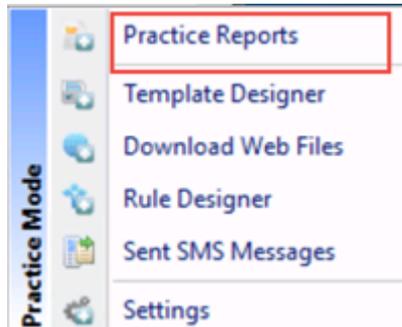
Sent SMS Messages

Sending Recall Text Messages

You can send a recall SMS text message to a group of patients using specific reports in **Vision+ Practice Reports**. This is particularly useful when recalling patients for specific QOF or Enhanced areas.

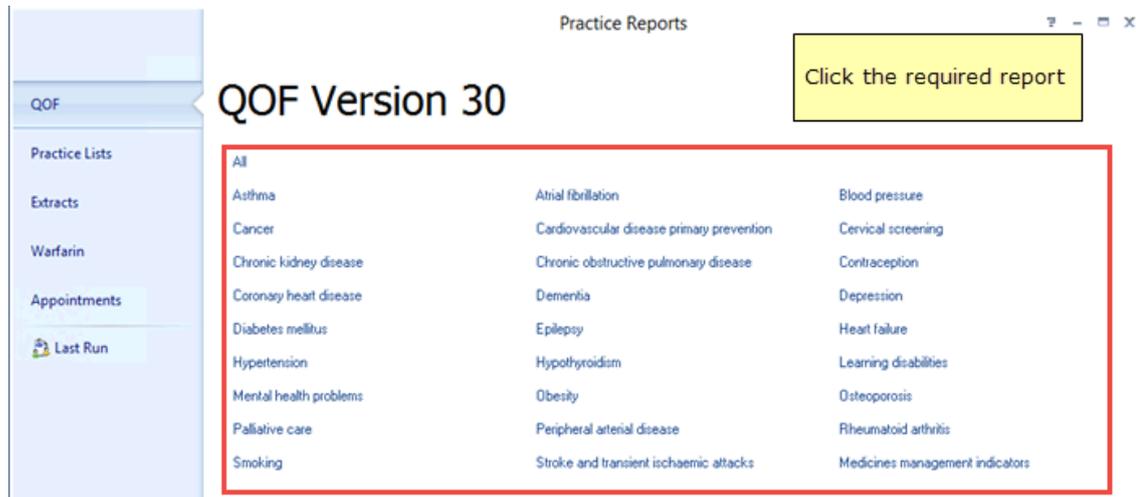
To access the Practice Reports module:

1. Login to Vision as usual.
2. From the Windows Notification Area, right click on the Vision+ button  and select **Practice Reports**.



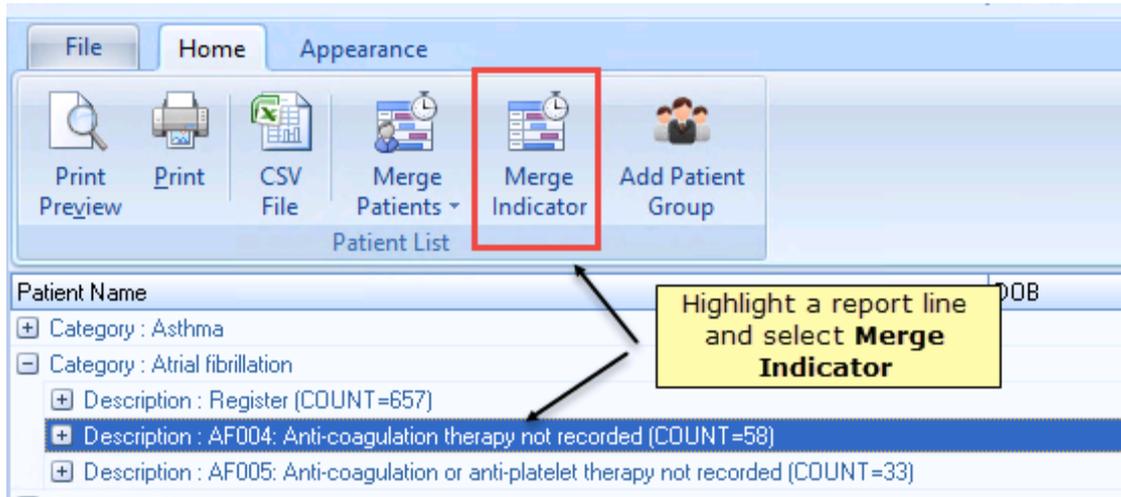
Accessing Vision+ Practice Reports

3. The Practice Reports module opens by default on the QOF page but you can choose any report. Click on the required report to run it.



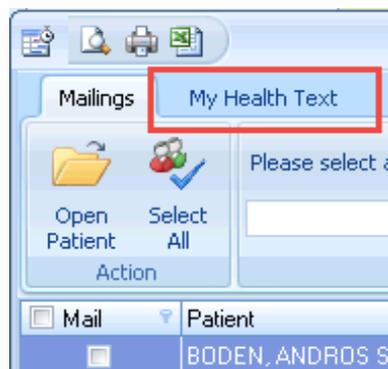
Practice Reports

4. When the report is complete, it appears on a new tab. Highlight a cohort line of patients that you want to send a text message to and choose **Merge Indicator**.

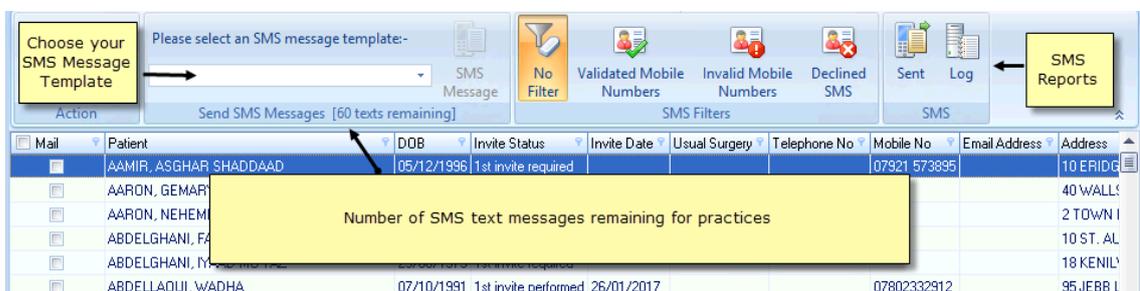


Practice Reports - Merge Indicator

5. The Mailings screen displays, click **My Health Text**.



Practice Reports - Mailing Screen



SMS Merge Screen

- **Open Patient** - Allows you to open the highlighted patient in Consultation Manager.
- **Select All** - Selects all patients in the displayed list with valid mobile numbers. You can deselect as required.
- **Please select an SMS messages template** - Allows you to select your predefined template (ie the content of the text message). See [Creating an SMS Message Template](#) (page 12).

📌 **Remember** - You have different SMS templates available for QOF and non-QOF Vision+ templates. If you cannot see a template you have created when sending an SMS, it may be that you have not attached it to a non-QOF template which means it is not available for SMS messages using QOF reports (see [Attaching an SMS Template to Non-QOF Templates](#) (page 14)) or it is for use with QOF Vision+ templates only.

- **Send SMS Messages (nn Texts Remaining)** - Tells you 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.
- **SMS Message** - Attempts to send the SMS message to the patients selected in the list.
- **SMS Filters:**



- **No Filter** - This option is selected by default and displays all patients within the cohort group. Patients with no mobile number, an invalid mobile number or who has opted out of the SMS text messaging service are displayed in the no filter list but they cannot be selected.



- **Validated Mobile Numbers** - Selecting Validated Mobile numbers re-displays the patient list and only shows those patients with a valid mobile number.



- **Invalid Mobile Numbers** - Selecting the Invalid Mobile Numbers icon re-displays the patient list and shows those patients who have an invalid first mobile number. From here you can open



Consultation Manager via the **Open Patient** button and update their number, print the list or export it to Excel. See the Vision+ on-screen help for more information on how to work with patient target lists.



- **Declined SMS** - If you select the Declined SMS icon you see a list of patients who have opted out of SMS text messaging. From here you can print the list or export it to Excel. For more information refer to the Vision+ on-screen help.

- **SMS Reports**



- **Sent** - If you select the Sent icon you can view 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 Log file shows information about a Sent message, it is designed to be used in conjunction with the Sent file.

Training Tip - You can use the column headings to filter and sort the report list ie if you want to display patients with mobile numbers at the top of the list, click on the mobile number column heading.

6. Select **Validated Mobile Numbers** from the menu and tick the box against the patients you want to recall or choose **Select All**.

Note - If No filter is displayed and you click Select All, patients with an *invalid mobile number* (page 66) or dissent recorded are not selected and cannot be manually selected for sending SMS. For such patients, the Mobile No column displays either "invalid" or "declined" before the patient mobile number and you can choose open patient to update their mobile number if required.



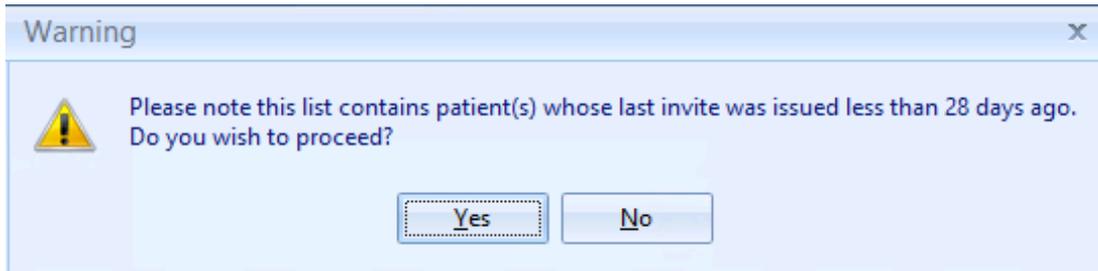
Practice Reports - Selecting Patients to send the SMS messages to



7. Click the **SMS Message** icon to send the messages to the selected patients.

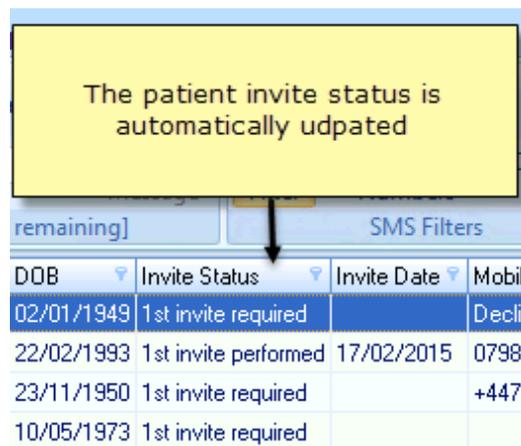
Note - You cannot send text messages unless your SMS account is in credit. The status bar above the patient list shows how many SMS messages remain. If you have selected more patients than the balance in your account, this option will be unavailable. You must either de-select patients down to the account balance, or purchase more SMS messages.

When sending an SMS, if the patient has already received an appointment or recall invite in the last 28 days, the following message is displayed.



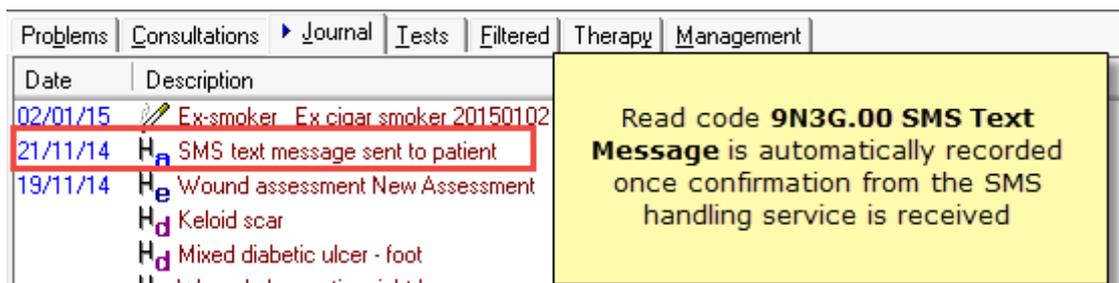
Last Invite Less Than 28 Days

8. Click **Yes** to continue.
9. The invite status is automatically updated in patient reports (shown in the **Invite Status** column).



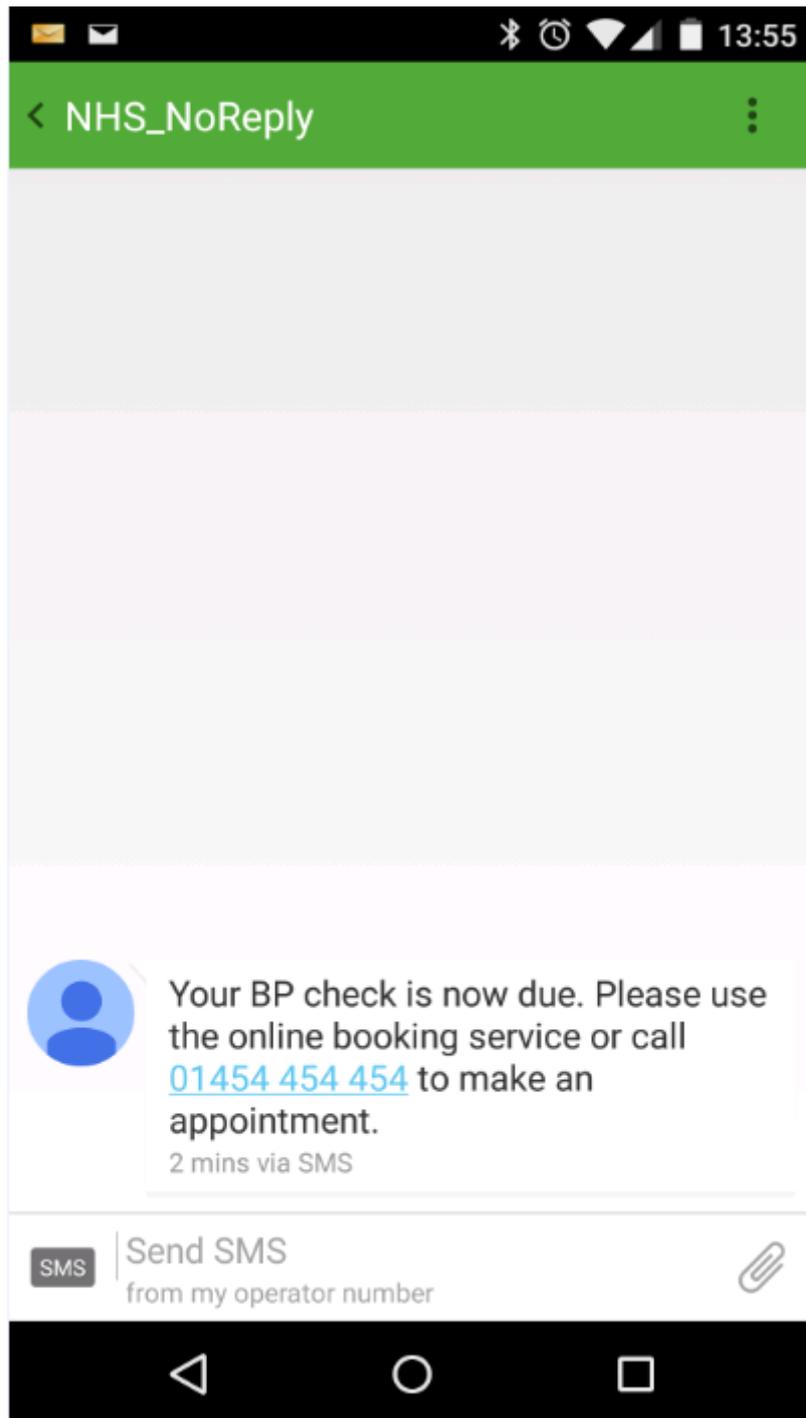
Invite Status in Reports Updated

10. A Read code of **9N3G. SMS Text Message Sent to Patient** is automatically recorded in the patient's journal, along with the details of the text message, once Vision+ has had confirmation from the SMS handling service that the message has been sent. If sending an SMS text message to a patient on a QOF register using a QOF Template an appropriate invite code is also recorded in the patient's journal. **If the message has failed to be delivered, nothing is recorded in the patient record and the invite status is reverted back to the previous status.**



SMS Sent Read Code

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



Example SMS Text Message Received by a Patient

Please note the following

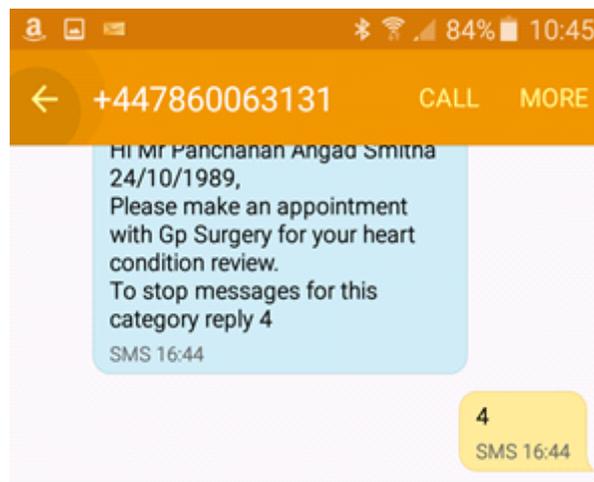
- Where patients share the same mobile number and are within the same group for SMS invitations, only one SMS message is sent and charged for, but both patient records are updated with the **9N3G. SMS Text Message Sent to Patient** Read code.
- Patients who receive SMS text messages whilst abroad are not charged

Declining a Chronic Disease Invitation via SMS

When generating SMS invitations for your patients from **QOF** in Vision+ **Reporting**, the text of the SMS message template can be configured in Vision+ Settings so that the patient can reply. An example of this is: 'To stop messages for this category reply 4'.

If the patient does not wish to be invited again for this disease area they can send a reply SMS back with 4.

A dissent Read code specific to the disease area is automatically generated and filed into the patients clinical record - the comments box of the dissented Read code entry contains the text "SMS response from patient".



SMS Chronic Disease Invitation Response

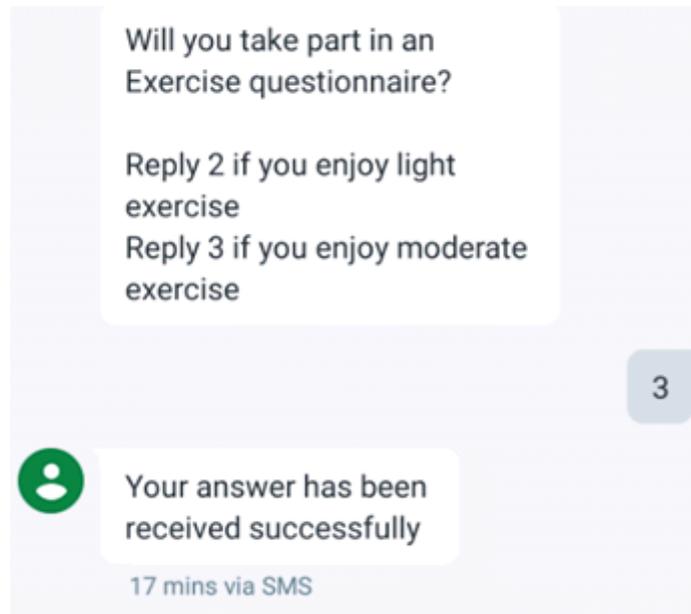
What you need to do...

Sending a text message to a patient which allows them to decline an appointment is the same as recalling a patient. The only difference is that you must include an option in the SMS template enabling the patient to decline. If the patient declines an invitation a QOF Informed Dissent Read code is recorded in the patient's record. Below explains what you must check before sending an SMS Text message enabling the patient to decline:

- Configure Vision+ settings - see [SMS Replies Tab](#) (page **Error! Bookmark not defined.**)
- Create or update a chronic disease invitation decline template - see [Creating a Chronic Disease Invitation Decline SMS Template](#) (page 19)
- Recall your patients by SMS messaging - see [Sending Recall Text Messages](#) (page 33)

Questionnaires via SMS

From Vision+ **Reporting**, an SMS message template can be configured to ask your patient a question that they can reply to. Each reply is mapped to a Read code that will be filed into the patient's record.



Example

What you need to do...

To send your patient a questionnaire and enable them to respond you must first create a template that allows the patient to reply. This template is sent to the patient and their response is automatically Read coded in their record. Below are the steps required:

- Create a SMS Questionnaire - see [Creating a Questionnaire SMS Template](#) (page 20)
- Recall your patients by SMS messaging - see [Sending Patients Questionnaires](#) (page 42)
- Sending a questionnaire to an individual patient - see [SMS Recall/Questionnaire from Consultation Manager](#) (page 32)

Sending Patients Questionnaires

You can send a recall SMS text message to a group of patients using specific reports in **Vision+ Practice Reports**. This is particularly useful when recalling patients for specific QOF, Enhanced areas or a group you have imported via Patient Groups.

1. The Practice Reports module opens by default on the QOF page but you can choose any report or Group from the Report menu.

QOF Version 32 [Scotland]

SMS Recall/health care invitations can be sent to QOF, Practice Lists or Patient Groups

Contract Manager: Using Contract Manager you can view your point's totals, track aspirations, plan monthly workloads, compare year-on-year performance, show your practice prevalence and provide you with financial information.

High Value Patients: High Value Patients are a list of the top 25 patients with outstanding indicators that have a corresponding high points/financial value.

Merge Templates: Create, edit and delete mail/SMS merge templates.

SMS Question Templates: Create, edit and delete SMS question templates.

Practice Reports

2. Click on the required to report to run it, or select a patient group.
3. When the report is complete, it appears on a new tab. Highlight a cohort line of patients that you want to send a text message to and choose **Merge Indicator** or **Merge Category**.

File Home Appearance

Print Preview Print CSV File Merge Indicator Category Analysis Add Patient Group

Patient List

Patient Name

Category : Hypertension

Description : Register (COUNT=1446)

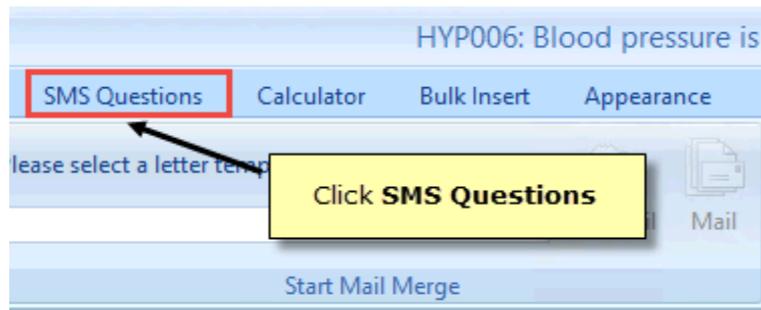
Description : HYP006: Blood pressure is not 150/90 or less (COUNT=1446)

DOB

Highlight a report line and choose Merge Indicator

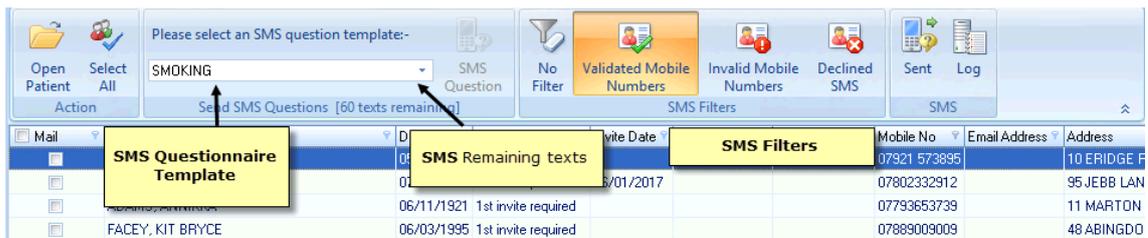
Practice Reports - Merge Indicator

4. From the Mailings screen, click **SMS Questions**.



SMS Questions

5. The SMS Questions screen displays.



SMS Questions Overview

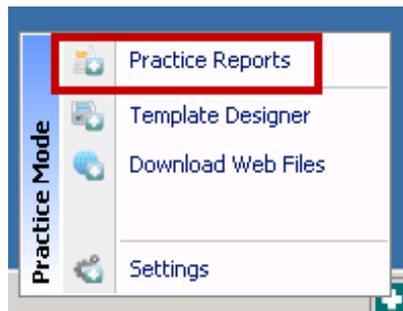
The options available on the **SMS Questions** screen are the same as those on the **SMS Message** **SMS** tab - for more information see [Sending Recall Text Messages](#) (page 33).

Sending Appointment Reminder Text Messages

You can send an appointment reminder SMS text message to a group of patients using specific Appointment reports in **Vision+ Practice Reports**. This process can either be automated so that a text message is sent daily between the practice defined transmission times - See [Automating Appointment SMS Reminders](#) (page 56). Or you can send instant reminders to patients using the Appointment Search option - See - [Selecting the Appointment Search to Send Instant Reminders](#) (page 46).

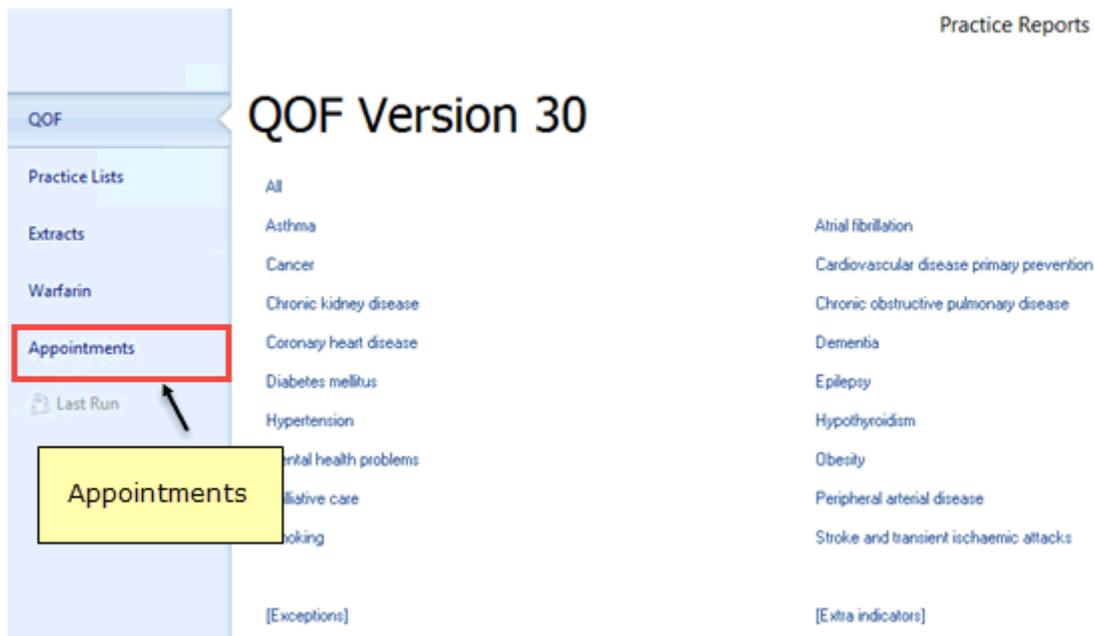
To view the Appointment Reports screen and send Appointment SMS reminders:

1. Login to Vision as usual.
2. From the Windows Notification Area, right click on the Vision+ button  and select **Practice Reports**.



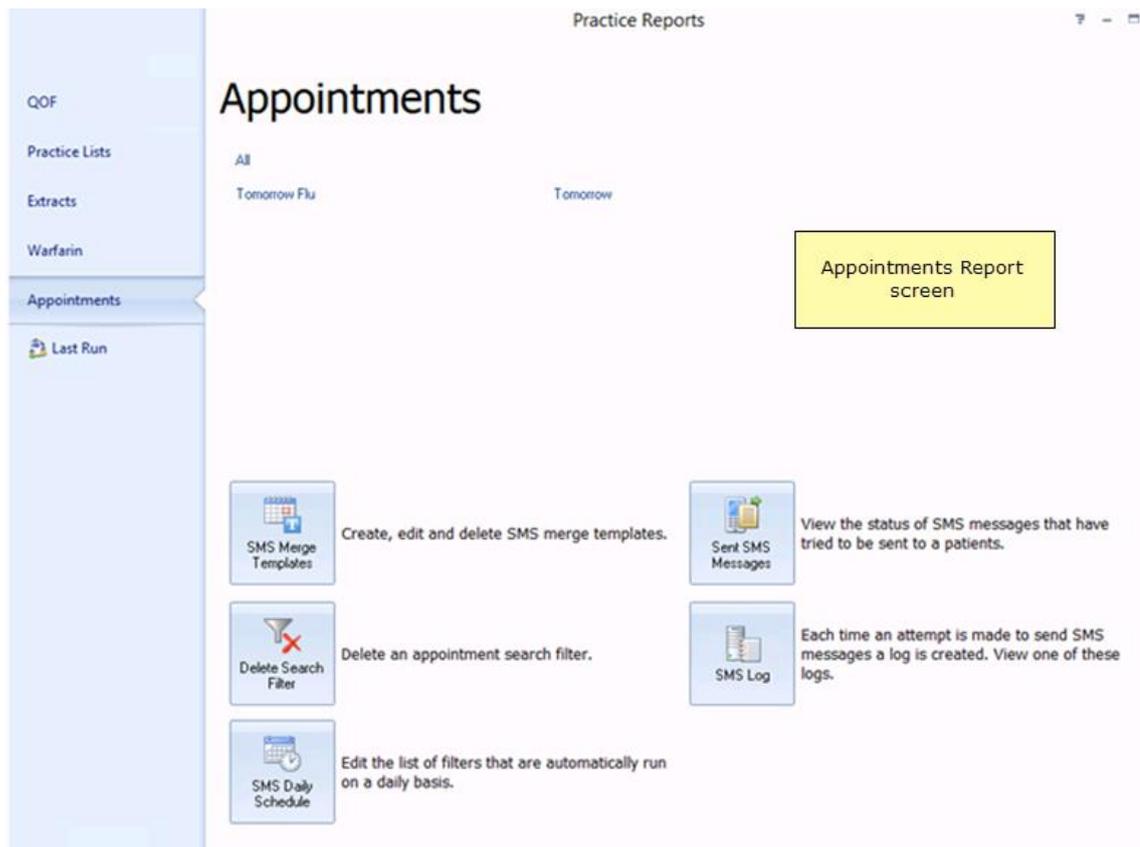
Accessing Vision+ Practice Reports

3. The Vision+ **Practice Reports** module opens by default on the QOF page, select **Appointments**.



Appointments Reports

4. The **Appointments Reports** screen is displayed.



Appointment Screen

The following options are available:

- **Appointment Searches** - The Appointment search screen displays patients with appointments in the next 7 days, however, you can customise this list to view different criteria or save searches for future use. See [Selecting the Appointment Search to Send Instant SMS Reminders](#) or [Automating Appointment SMS Reminders](#) (page 56)
- **SMS Merge Templates** - Merge Templates is where you create your SMS Message Templates - See [Creating an Appointment Reminder SMS Message Template](#) (page 23)
- **Delete Search Filter** - Saved searches can be easily deleted using the Delete Filter option - See [Deleting Appointment Searches](#) (page 54)
- **SMS Daily Schedule** - To setup an automated appointment reminders use Daily Schedule - [Deleting a Daily Schedule](#) (page 57)
- **Sent SMS Messages and Report Logs** - To view reports detailing sent messages - See [Sent SMS Text Message Reports](#) (page 63)

Selecting the Appointment Search to Send Instant Reminders

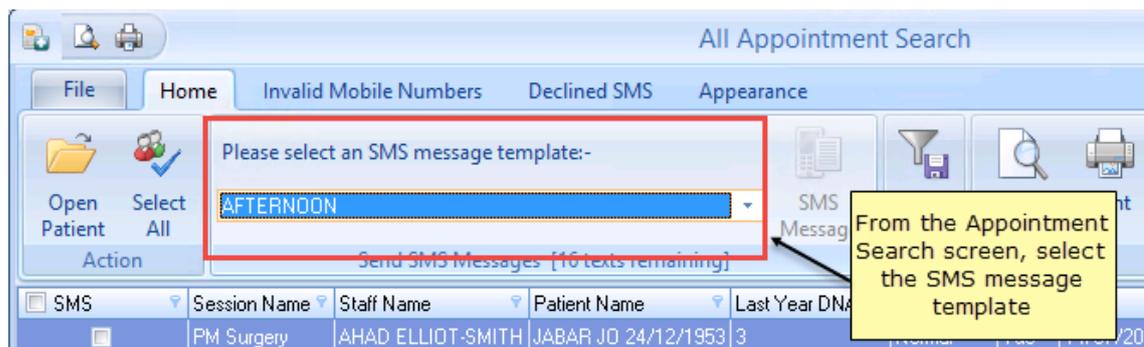
The following explains how to run an Appointment search:

1. From the Appointments display screen, select **All**.



Appointment Search

2. The **Appointments Search** screen is displayed. Patients with appointments for the **next 7 days** are displayed by default and we will use this as a basis to send our SMS. If you want to send SMS messages to patients with specific appointment criteria, you can set up and save custom appointment searches. See [Creating Appointment Searches for SMS](#) (page 50).
3. Next, you must select an SMS template which contains the detail of the SMS message the patient will receive. These should have already been set up. See [Creating an Appointment Reminder SMS Message Template](#) (page 23). Other options are listed below:



Appointment Search - Select Template

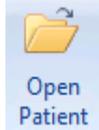
- **Column Headings** - The headings for the generic next day appointment search display the following columns by default:
 - The appointment day, date, time, any notes or comments for the appointment, session name, slot type, date booked and how many days in the future it is booked.
 - Staff name who the appointment is booked with.
 - Patient name, mobile number and number of DNAs in the last year.

You can sort and filter column headings as required ie filter morning surgery only or look at appointments two days in the future. These settings can then be saved as default appointment searches. See [Creating Appointment Searches for SMS](#) (page 50).



Training Tip - It is very important you consider the type of appointments you want to send reminders to. For example, you may use appointments for messages and this information should be excluded from the search.

- **Open Patient** - Allows you to open the highlighted patient in Consultation Manager.
- **Select All** - Selects all patients in the displayed list. You can deselect as required.
- **Please select an SMS messages template** - Allows you to select your predefined template (ie the content of the text message). See [Creating an Appointment Reminder SMS Message Template](#) (page 23).
- **Send SMS Messages (nn Texts Remaining)** - Tells you 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.
- **SMS Message** - Attempts to send the SMS message to the patients selected in the list.
- **Other Tabs:**
 - **Invalid Mobile Numbers** - Selecting the Invalid Mobile Numbers icon re-displays the patient list and shows those patients who have an invalid first mobile number. From here you can open Consultation



Manager via the **Open Patient** button and update their number, print the list or export it to Excel. See the Vision+ on-screen help for more information on how to work with patient target lists.

- **Declined SMS** - If you select the Declined SMS icon you see a list of patients who have opted out of SMS text messaging. From here you can print the list or export it to Excel. For more information refer to the Vision+ on-screen help.

4. Tick the box against the patients you want to send an appointment reminder or



choose **Select All**. Patients with an *invalid mobile number* (page 66) or dissent recorded can be viewed and mobile numbers updated in the respective tabs.



5. Click the **SMS Message** icon to send the messages to the selected patients.

The screenshot shows the 'Appointment Search' window with the 'SMS' tab selected. The interface includes a toolbar with 'Open Patient', 'Select All', and 'SMS Message' buttons. A dropdown menu for 'Please select an SMS message template:-' is set to 'APPOINTMENT INVITE'. Below the toolbar, a status bar indicates 'Send SMS Messages [90 texts remaining]'. A table of appointment slots is visible, with columns for Year DNAs, Slot Type, Day, Date, Time, and Days. A yellow callout box points to the 'Select All' button and the 'SMS Message' button, containing the following text:

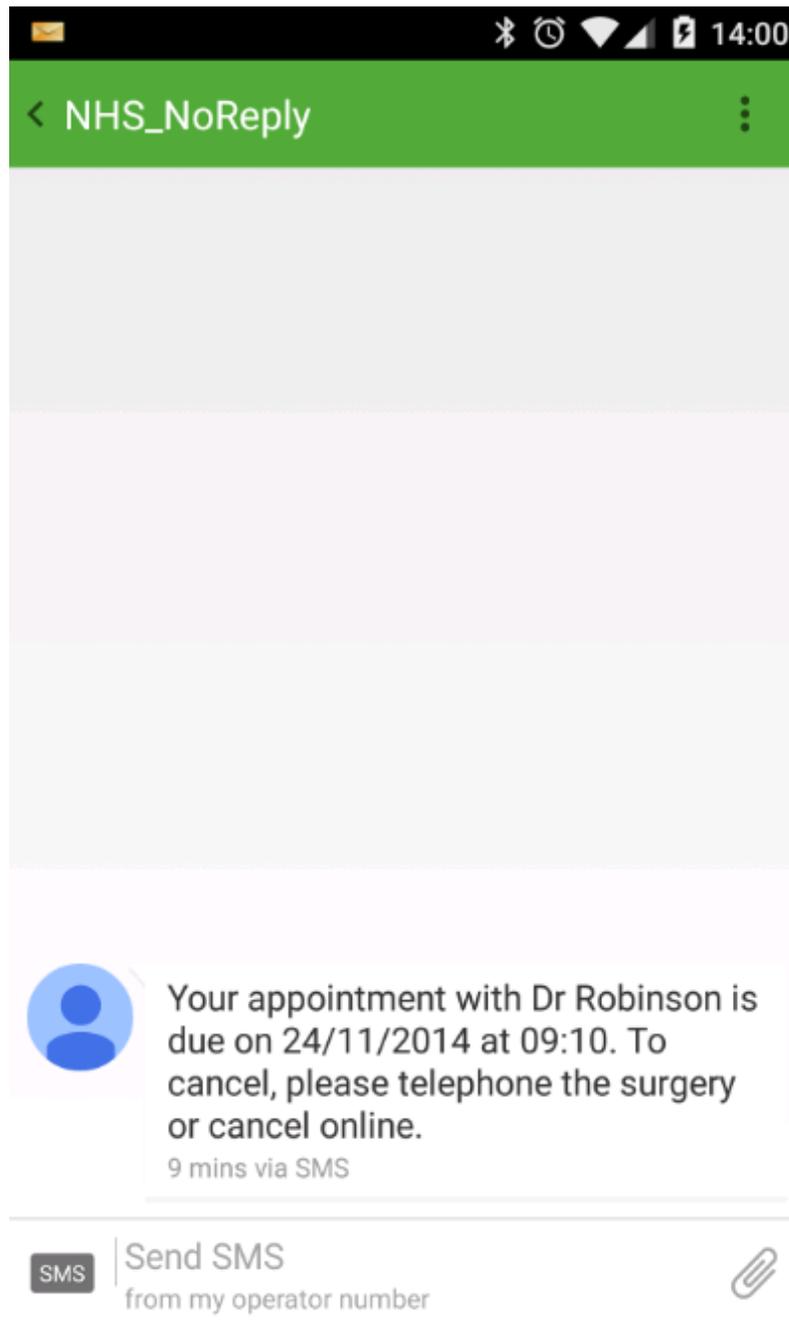
Tick **Select All**, then **SMS Message** to send a text message to the patients in your appointment report. **Note** - Patients who have declined or who have an invalid mobile number are not included in the list and are displayed in the tabs above

Sending and SMS Appointment Reminder

📌 Please note the following:

- 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, this option will be unavailable. You must either de-select patients down to the account balance, or purchase more SMS messages.
- No Read code is added to the patient record when Appointment reminder text messages are sent.
- Patients who receive SMS text messages whilst abroad are not charged.
- Patients with the same mobile number will only receive one message.

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



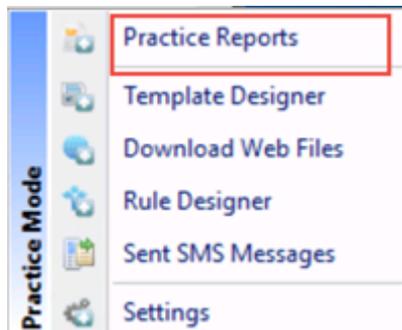
Sample Appointment Reminder Text Message Received by a Patient

To send SMS Text messages to an individual patient, see [Sending an SMS Text Message to a Single Patient](#).

Creating Appointment Searches for SMS

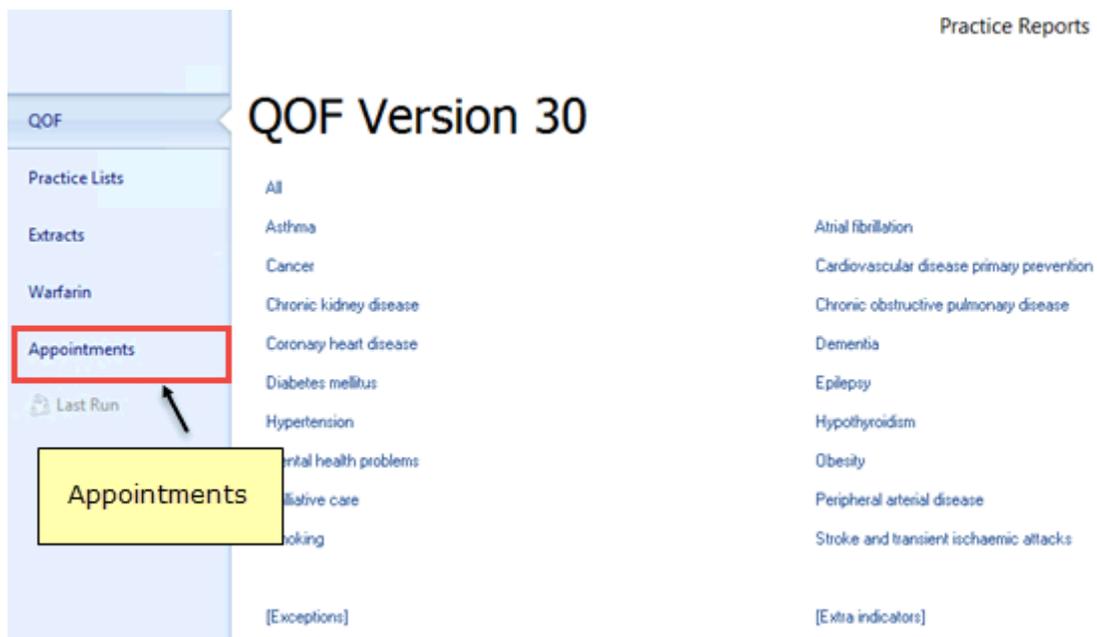
The Appointment Search report displays appointments booked for any slot type and any session for the **next 7 days** by default. You can however set different filters and save these as separate searches which are accessible from the Appointment Reports screen as follows:

1. Login to Vision as usual.
2. From the Windows Notification Area, right click on the Vision+ button  and select **Practice Reports**.



Accessing Vision+ Practice Reports

3. The Vision+ **Practice Reports** module opens by default on the QOF page, select **Appointments** from the menu.



Appointments

4. The **Appointments** screen is displayed. Select **All**.



Appointment Search

5. The **Appointments Search** screen is displayed with the My Health Text tab selected. Patients with appointments for the next 7 days are displayed by

default. You now need to change the filters as required by selecting the **Filter** button at the top-right of each column heading. Either select from the existing options or select **Custom** to create your own. The following example shows how to exclude telephone consultation session types:

Last Year DNAs	Slot Type	Day	Date
4	(All)	Fri	12/12/20
1	(Custom...)	Fri	12/12/20
2	Normal	Fri	12/12/20
2	Normal	Fri	12/12/20

Click on the filter button on the Slot Type column

Custom Filter

Show rows where:

Slot Type

does not equal Telephone Consultation

AND OR

OK Cancel

From the slot type list choose "does not equal" and type in the text of your Telephone Consultation appointment slot eg Telephone Consultation and click OK.

You can amend the following columns as you prefer:

- Day, date and time of the appointment
- Session type
- Slot type
- Date the appointment was booked
- Number of days ahead
- Staff Name who the appointment is booked with.
- Number of DNAs in the last year



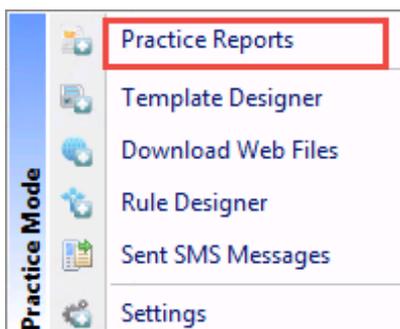
6. You then need click on the **Save** button and give your search a name. Press **Save** again.

7. The search now displays on your Appointment Reports screen.

Viewing Saved Appointment Searches

To view your saved Appointment search:

- 1.** Login to Vision as usual.
- 2.** From the Windows Notification Area, right click on the Vision+ button  and select **Practice Reports**.



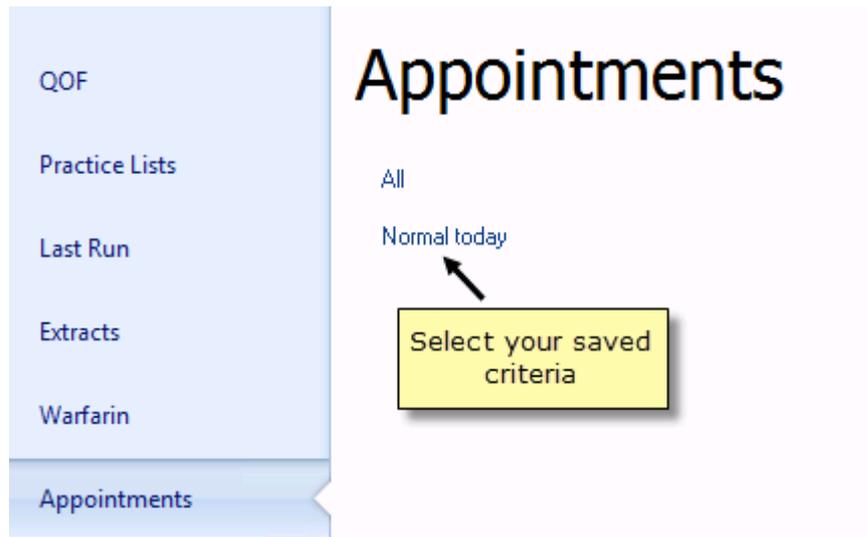
Accessing Vision+ Practice Reports

- 3.** The Vision+ **Practice Reports** module opens by default on the QOF page, select **Appointments**.



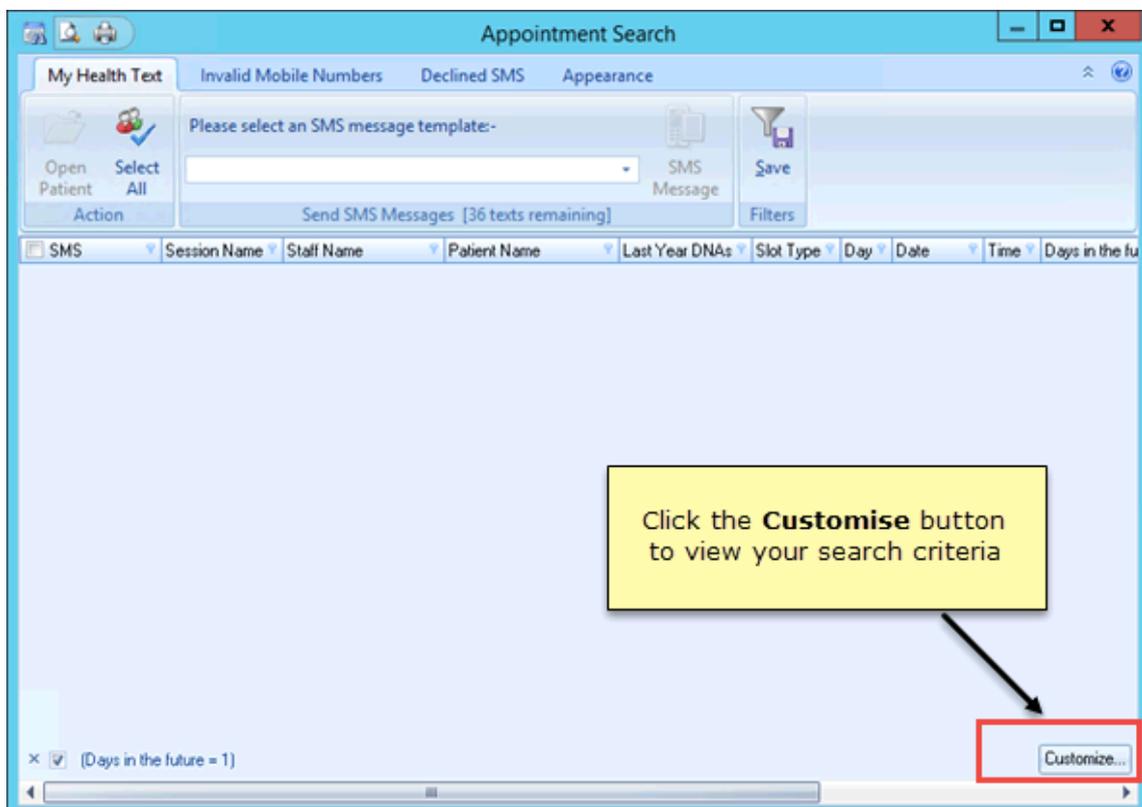
Appointments

4. From the **Appointments display** screen, select your saved appointment search.



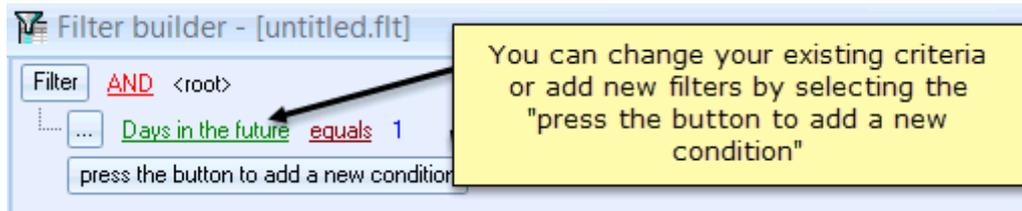
Saved Appointment Search

5. The search screen displays. Click the **Customise** button at the bottom right hand side of the screen.



Appointment Search - Customise

6. Your saved Appointment search criteria are displayed. To change your existing search click on the criteria shown in green or add new parameters by selecting the box .

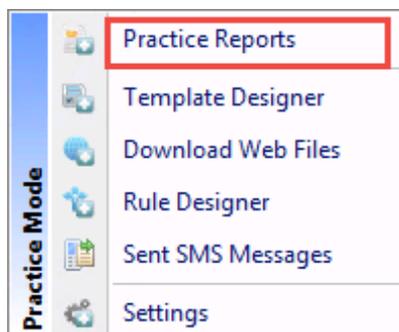


Search criteria

7. Click **OK** if you have changed your criteria or **Cancel** if you have just viewed the search.

Deleting Appointment Searches

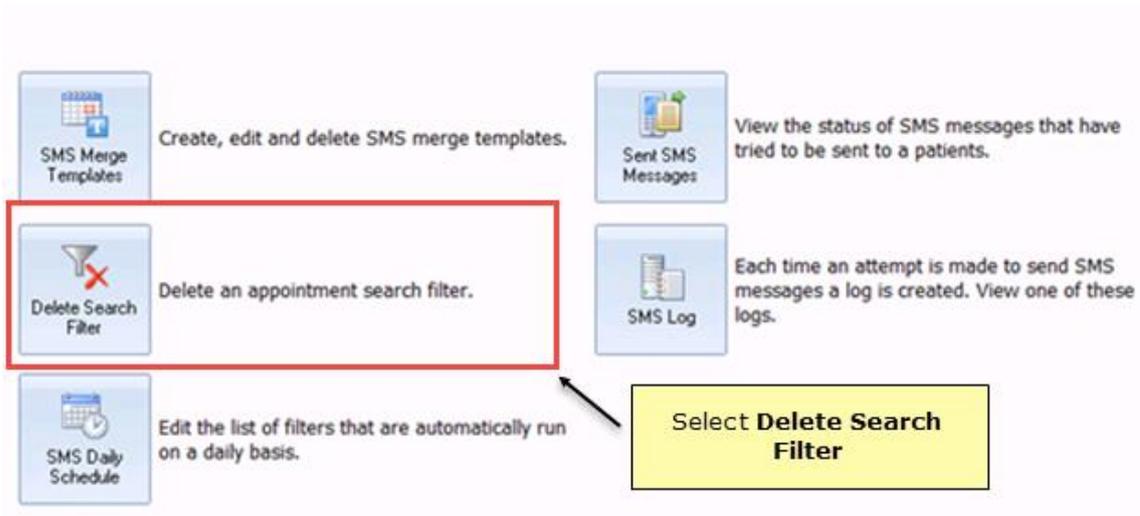
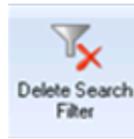
1. Login to Vision as usual.
2. From the Windows Notification Area, right click on the Vision+ button  and select **Practice Reports**.



Accessing Vision+ Practice Reports

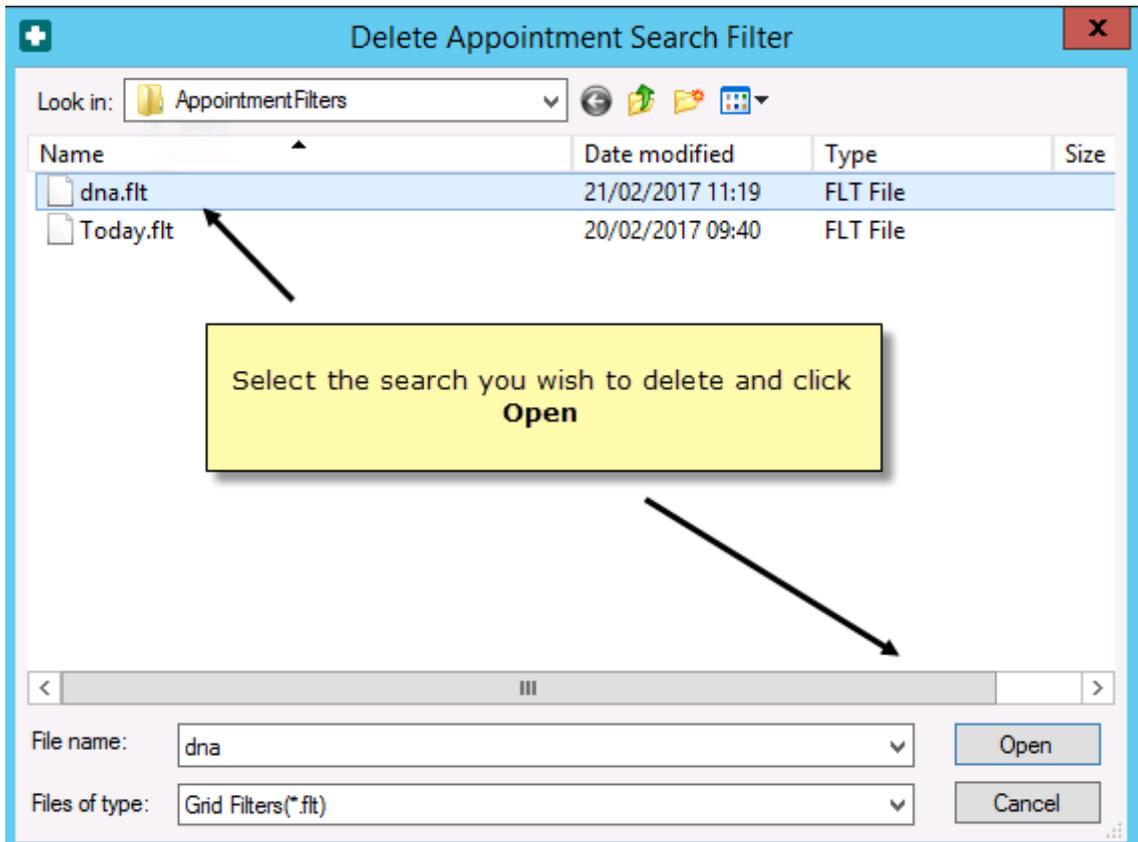
3. The Vision+ **Practice Reports** module opens by default on the QOF page, select **Appointments** from the menu.

4. Click on the **Delete Search Filter** icon.



Delete Search Filter

- 5. All your saved predefined searches are displayed.
- 6. Select the search you wish to delete and click **Open**.



Delete Appointment Search

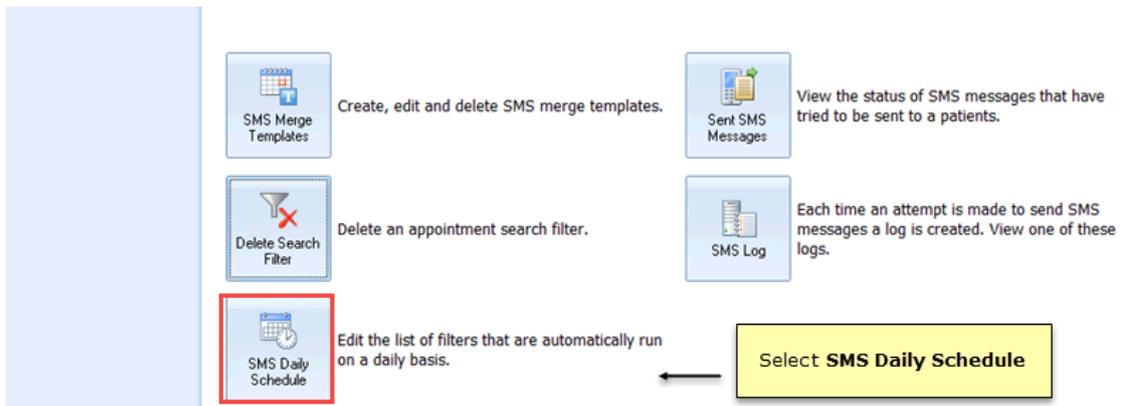
7. Your search is now deleted and removed from the Appointments Search screen.

Note - You cannot delete Appointment searches that are part of a Daily Schedule. You will see the message 'You can't delete this filter as it is being used within a daily schedule'. You will need to amend or delete your Daily Schedule first - See *Automating Appointment SMS Reminders* (page 56).

Automating Appointment SMS Reminders

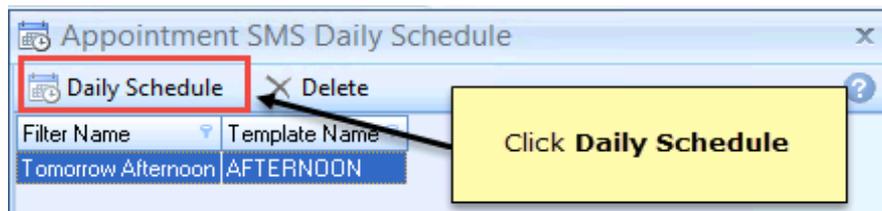
From the **Appointment display** screen you can setup automated daily Appointment SMS reminders. To do this:

1. Select **SMS Daily Schedule**.



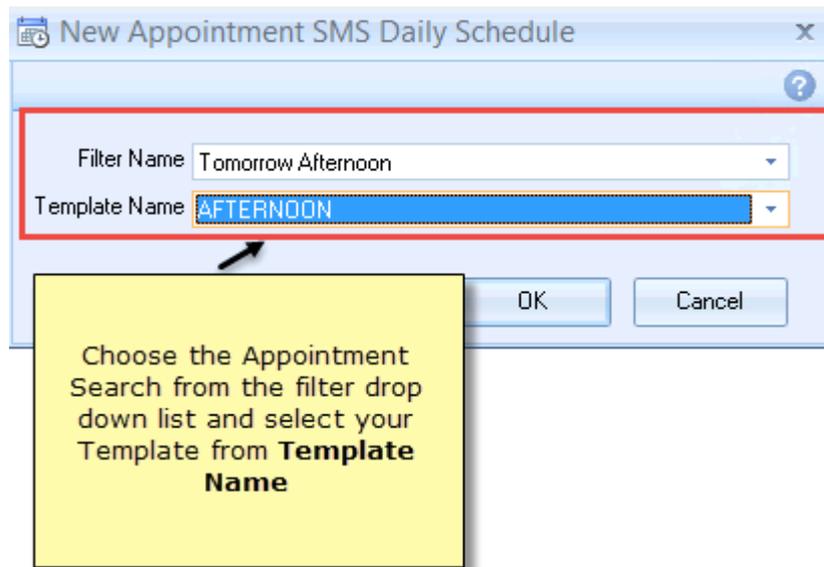
Appointment Screen - Daily Schedule

2. The **Appointment SMS Daily Schedule** screen is displayed and lists any existing scheduled events. To add a new schedule click **Daily Schedule**.



Appointment SMS Daily Schedule

3. Select your saved Appointment Search and Template from the drop down list.



Choose the Appointment Search and Template

The Appointment reminders are automatically sent daily. A start time can be setup in Configurations and Setting so that reminders are sent within 3 hours of this time. See [SMS Tab](#) (page 9).

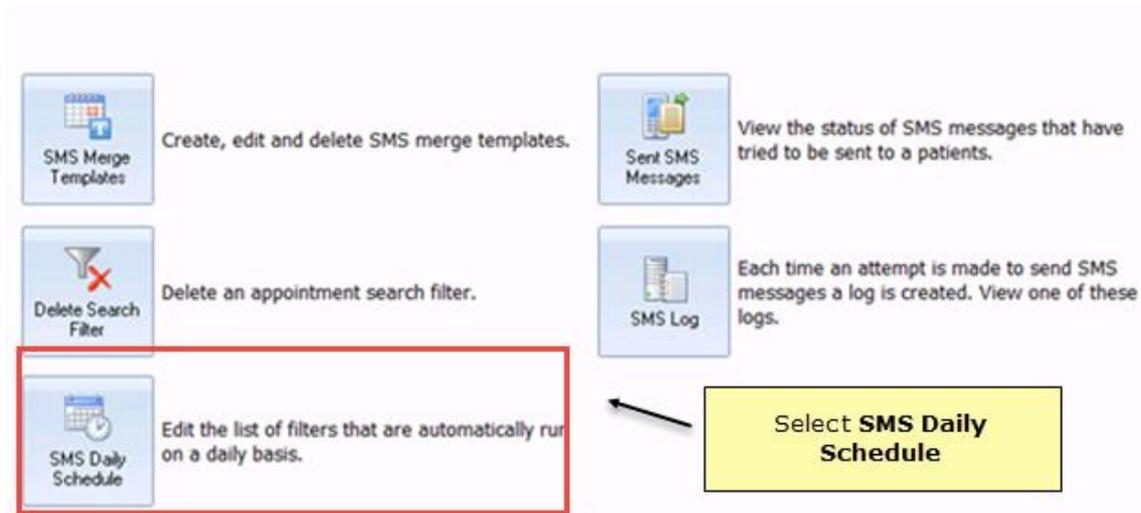
Please note the following:

- Please ensure your searches are setup correctly and you have taken into account appointments that may not be suitable for SMS reminders eg Appointment slots that are used for messages.
- There is no limit to the number of daily schedules you can create. Examples include setting up a daily schedule for patients at a branch site as well as patients at the main site. This is easily achieved by setting up different Appointment Searches and Templates. However, consideration is required when creating your searches so that patients are not sent multiple appointment reminders for the same appointment time.
- The Appointment SMS schedule sends reminders every day so patients with appointments on a Monday will be sent a reminder on Sunday if you have a search setup to send reminders for the next day.
- You can setup different Appointment Search Filters that use the same Template.
- You cannot setup the same Appointment Search Filter and Template twice. You will see a message stating '*Duplicate Daily Schedule Exists*'.

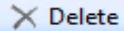
4. Click **OK** and the scheduled search is saved within **Daily Schedules**.

Deleting a Daily Schedule

1. From Vision+ **Practice Reports** click **Appointments** from the menu.
2. Select **SMS Daily Schedule**.



Appointment Screen - Daily Schedule

3. Highlight the Scheduled event and select the **Delete**  icon.
4. Click **Yes** to confirm the deletion and the Daily Schedule is removed.

Appointment Cancellation via SMS

Patients can cancel their appointments from the reminder message sent to them via SMS. The process is as follows:

- The patient will receive an SMS appointment reminder, and can reply to it and cancel their appointment if they cannot attend.
- A message is sent back in the Appointments system by a unique identifier attached to the specific appointment that the reminder was generated for

- A text will be sent back to the patient once the appointment has been cancelled.



SMS Appointment Cancellation Response

What you need to do...

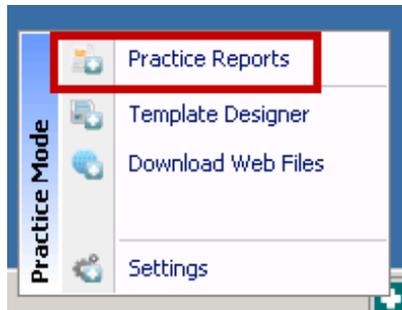
To enable your patient to cancel an appointment via SMS:

- Configure Vision+ settings - see [SMS Settings in Vision+](#) (page 8)
- Create or update your appointment SMS template - see [Creating an Appointment Cancellation Reminder Template for Today](#) (page **Error! Bookmark not defined.**)
- Send appointment reminders - [Sending Appointment Reminder Text Messages](#) (page 43)

Accessing the SMS Text Message Report

To view SMS Text Message reports:

1. Login to Vision as usual.
2. From the Windows Notification Area, right click on the Vision+ button  and select **Practice Reports**.

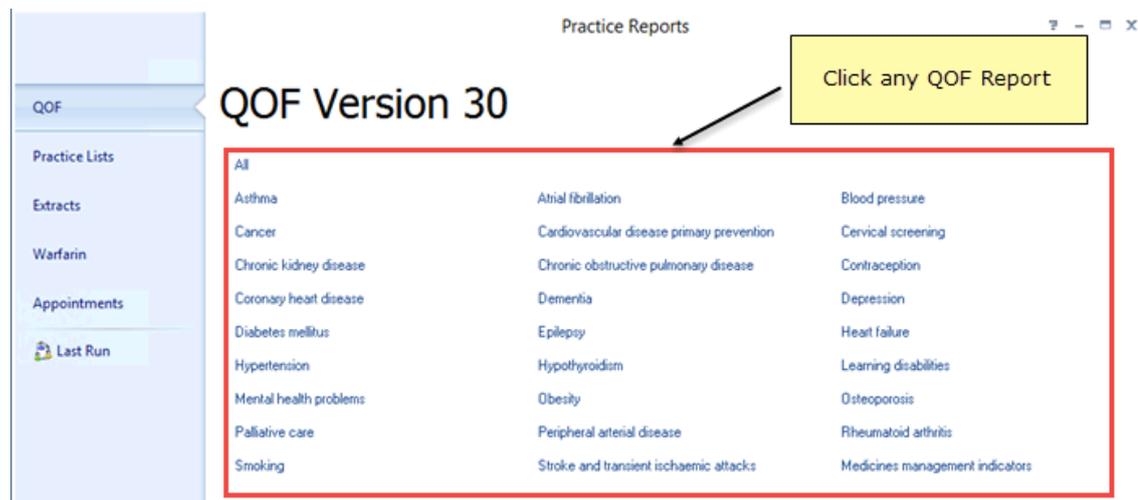


Accessing Vision+ Practice Reports

Recall Text Messages

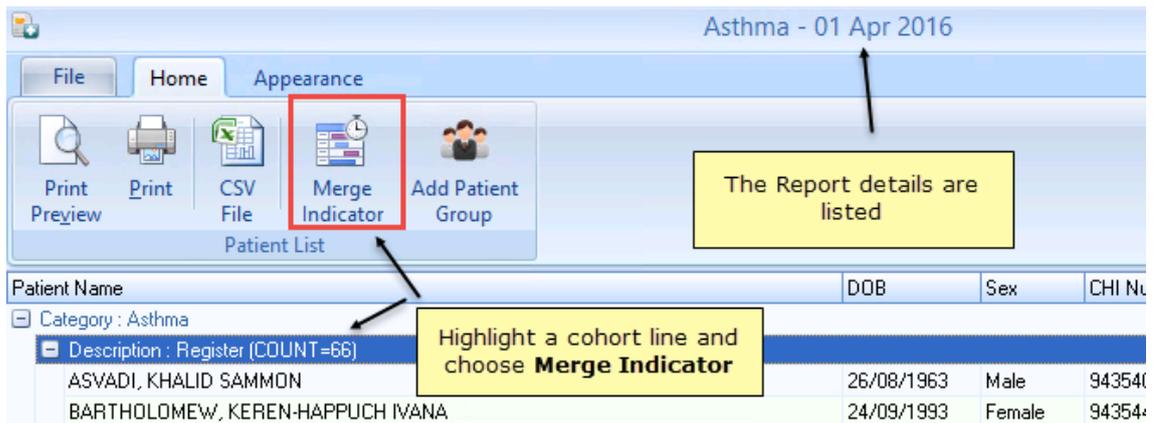
To view sent Recall text messages do the following:

1. The Practice Reports module opens by default on the QOF page. Choose any QOF report (it does not have to be the QOF area you sent patients an SMS text message).



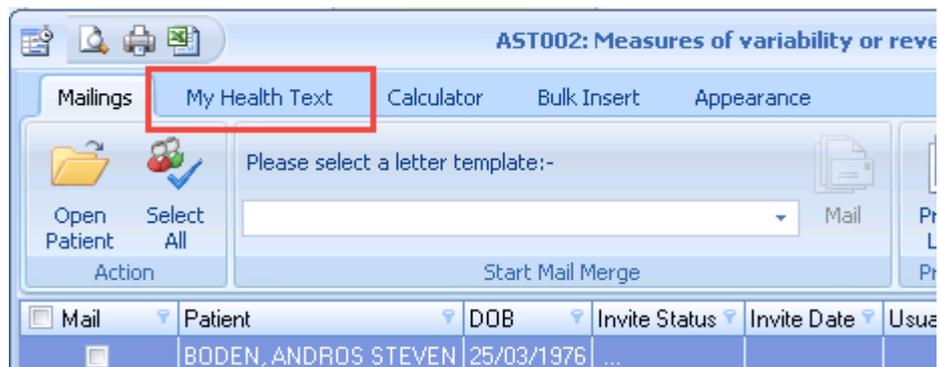
Practice Reports

2. When the report is complete, it appears on a new tab. Highlight any cohort line and choose **Merge Indicator**.



Merge Indicator

3. The Mailing screen appears, click the **My Health Text** tab.



Practice Reports - Mailing Screen

4. Select the **Sent** Report or the **Log** File.



Reports

Sent Messages Report

From the **Sent Patient Merge SMS Messages** screen you can view a list of patients who have been sent a text message along with details of the message, the date the message was sent and a message status. You also see any confirmation responses from the patient, which activates the informed codes specific to the invited disease area.

The default display is 100 in reverse date order but you can change this filter to go as far back as when SMS was enabled.

Send Date	Number Of Texts	Status	SMS Type	Reply Date
03/08/2016	1	Delivered to Phone	Confirmation	
03/08/2016	3	Delivered to Phone	Call/Recall	03/08/2016

Number Of Records: 100 >> More

Displays Call/Recall messages sent by the practice and the confirmation message received from the patient

Sent Text Message Report

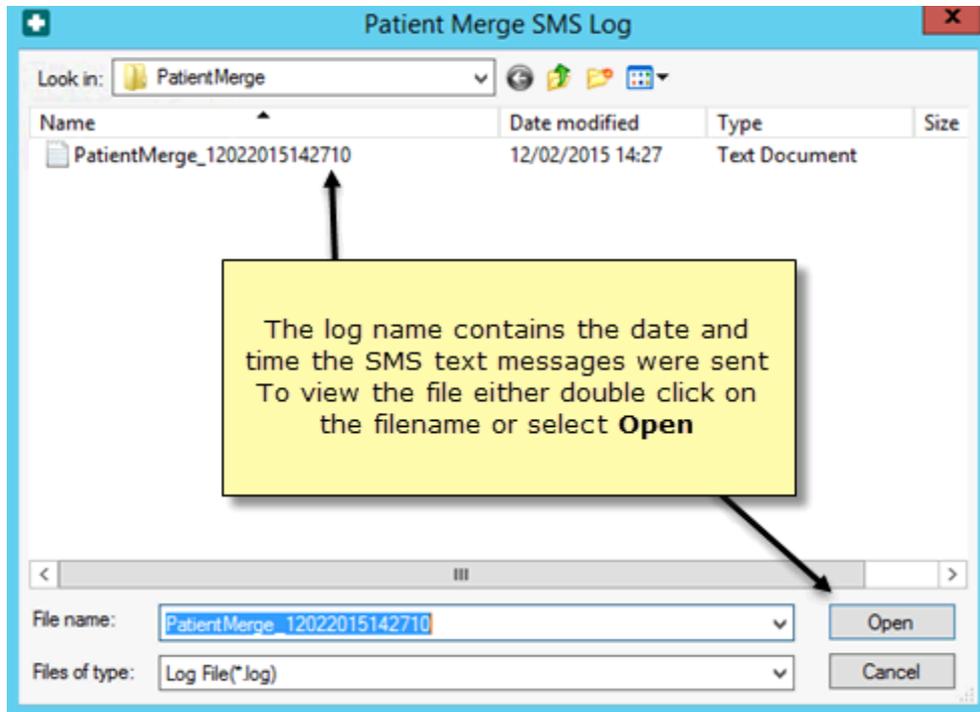
- **Transaction id** - The Transaction id is a unique reference allocated to each text message and can be used to trace the message in the log file below.
- **Patient Name** - This column shows the patient's title, forename and surname.
- **Description** - You can see the text message which will either be the Appointment reminder details or the Recall information (along with the QOF disease if a QOF recall invite was sent).
- **Send Date** - This column shows the date the message was sent.
- **Status** - The status information enables you to see if a message was successfully delivered to the patient or not.
 - **Failed at Operator** indicates that a message was not successfully received by the patient.
 - **Processing** indicates that the message is waiting for a response from your SMS provider.
 - **Delivered to Phone** indicates that the message was delivered to your patient successfully.
- **SMS Type** - The type of SMS message sent.
- **Reply Date** - Any confirmation responses received from the patient.

 **Remember** - You can resize columns or sort the report list.

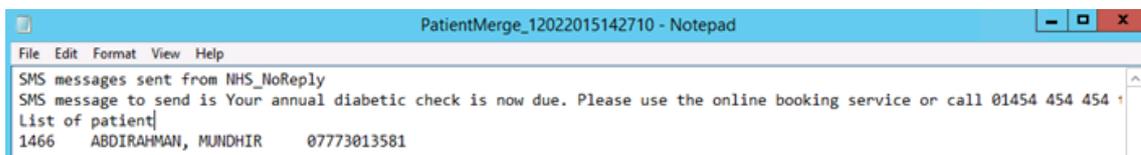
Log Files

The Log button is for support purposes and displays sent, invalid and declined messages for all messages where you have selected Send. The file name contains the date and time the SMS messages were sent. To view the file either double click on the file or select **Open**.

 **Note** - If SMS messages fail Vision+ will retry up to 5 times to resend a scheduled SMS message.



Log File



Text Message File

Appointment Sent SMS Text Message Reports

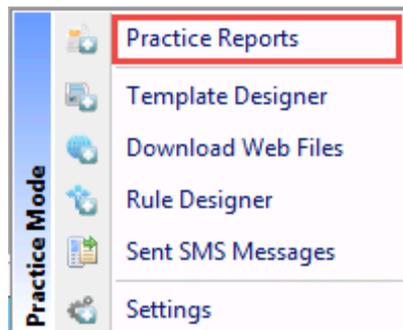
In Vision+ **Practice Reports** you can easily view a list of patients to whom you have sent an Appointment reminder.

- See *Accessing Appointment SMS Text Message Reports* (page 64).

Accessing Appointment SMS Text Message Reports

To view Appointment SMS Text Message reports:

1. Login to Vision as usual.
2. From the Windows Notification Area, right click on the Vision+ button  and select **Practice Reports**.



Accessing Vision+ Practice Reports

3. The Vision + **Practice Reports** module opens by default on the QOF page, select **Appointments** from main menu.



Appointments Tab

4. Select the **Sent SMS Message** report or the **SMS Log** file.

SMS Merge Templates: Create, edit and delete SMS merge templates.
 Delete Search Filter: Delete an appointment search filter.
 SMS Daily Schedule: Edit the list of filters that are automatically run on a daily basis.

Sent SMS Messages: View the status of SMS messages that have tried to be sent to a patients.
SMS Log: Each time an attempt is made to send SMS messages a log is created. View one of these logs.

Select **Sent SMS Messages** or **SMS Log**

Reports

5. The Sent Appointment SMS Messages screen displays. The description column contains the text of the message sent, including "to cancel your appointment reply..." as well as a Reply date column in the patient responds.

Send Date	Number Of Texts	Status	SMS Type	Reply Date
19/08/2016	2	Delivered to Phone	Reminder	
19/08/2016	2	Delivered to Phone	Reminder	19/08/2016
13/01/2016		Delivered to Phone	Reminder	
13/01/2016		Delivered to Phone	Reminder	
13/01/2016		Delivered to Phone	Reminder	
25/11/2015		Failed at Operator		
25/11/2015		Delivered to Phone		
25/11/2015		Failed at Operator		
25/11/2015		Delivered to Phone		
03/09/2015		Delivered to Phone		
03/09/2015		Delivered to Phone		
03/09/2015		Delivered to Phone	Reminder	
02/09/2015		Delivered to Phone	Reminder	
01/09/2015		Delivered to Phone	Reminder	
01/09/2015		Delivered to Phone	Reminder	
01/09/2015		Delivered to Phone	Reminder	
13/07/2015		Failed at Operator	Reminder	
09/07/2015		Delivered to Phone	Reminder	
16/06/2015		Delivered to Phone	Reminder	
16/06/2015		Delivered to Phone	Reminder	
17/06/2015		Delivered to Phone	Reminder	

SMS Appointment reports

Monitoring and Recording Mobile Numbers

Before sending SMS messages you are strongly advised to check that the patient mobile numbers are up-to-date, are in a valid format and that the number does not contain invalid characters. Below is a summary of what is required:

- **Is the mobile number in a valid format?** See [Valid Mobile Number Formats](#) (page 66).
- **Is the mobile number recorded under Contact for patient?** See [Checking a Patient's Personal Contact Mobile Number](#) (page 67).
- **Do you have an up-to-date mobile number for the patient?** See [Checking a Patient's Personal Contact Mobile Number](#) (page 67).
- **If the patient has multiple mobile numbers the first number is used - is this the correct mobile number for the patient?** See [Confirming the First Mobile Number](#) (page 73).
- **Shared Mobile Numbers** - 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 are updated. Patients should be made aware of this as well as the confidentiality implications.



Reminder - In addition to updating, amending or deleting a patient's telephone numbers in Registration and Consultation Manager you can also do this in Appointments and Daybook - look for the



Patient Contact Details icon. See [Checking a Patient's Personal Contact Mobile Number](#) (page 67).

We have created a Clinical Audit for SMS Validation to help you identify mobile number that may need your attention. See [Managing Invalid Mobile Numbers](#) (page 73).

Valid Mobile Number Formats

The following formats are considered as valid mobile numbers for SMS text messaging. All mobile numbers should start with 07 and may contain spaces and be prefixed with the country code. If a mobile number contains letters, these are classified as invalid characters and the patient will not be sent an SMS text message. To find invalid codes see [Managing Invalid Mobile Numbers \(SMS Validation Audit\)](#) (page 73).

Acceptable Formats:

- 0xxxxxxxxx
- 44 xxxxxxxxxxx
- 44xxxxxxxxx
- +44 xxxxxxxxxxx
- +44xxxxxxxxx

- 0xxxx xxxxxx
- 44 xxxx xxxxxx

- 44xxxx xxxxxx
 - +44 xxxx xxxxxx
 - +44xxxx xxxxxx
-
- 0xxxx xxx xxx
 - 44 xxxx xxx xxx
 - 44xxxx xxx xxx
 - +44 xxxx xxx xxx
 - +44xxxx xxx xxx
-
- 0xxx xxx xxxx
 - 44 xxx xxx xxxx
 - 44xxx xxx xxxx
 - +44 xxx xxx xxxx
 - +44xxx xxx xxxx

Checking a Patient's Personal Contact Mobile Number

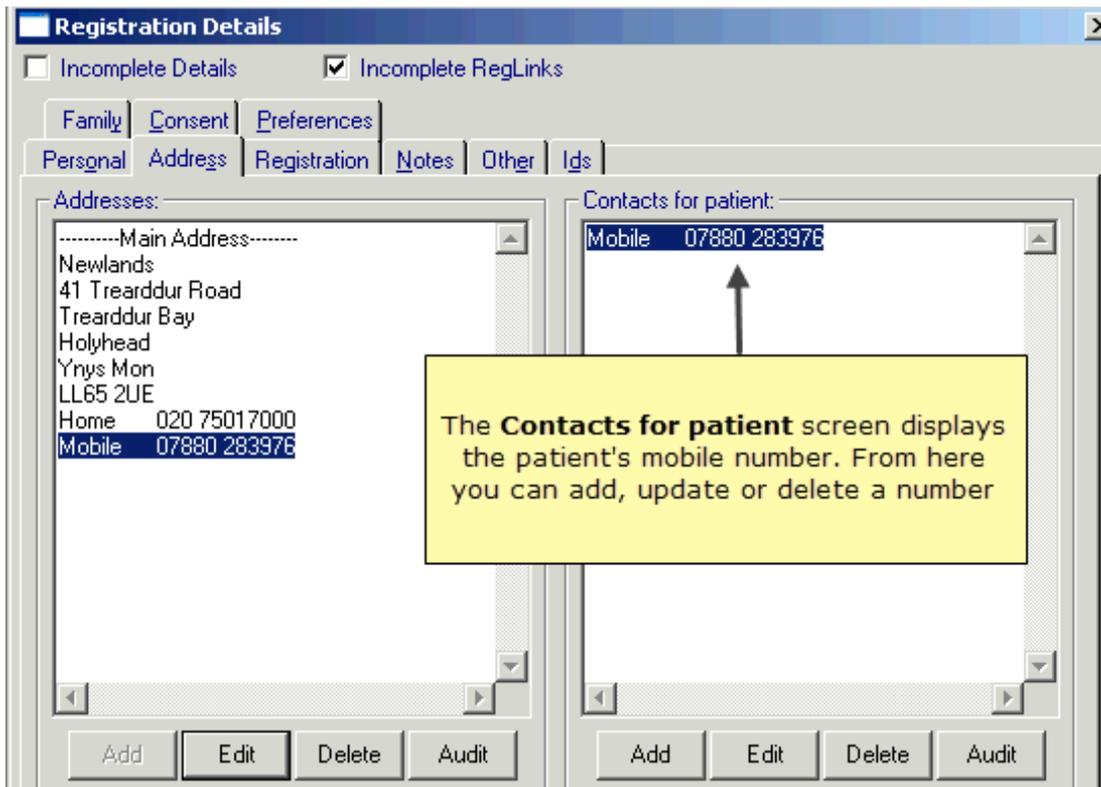
Personal mobile numbers should be added to **Contacts for Patients** in **Registration – Address**. By doing this the number will remain attached to the patient during the Amend Household/Family Transfer process when doing a change of address and the number stays as that patient's personal contact details. The number should also be entered with the type of contact set to Mobile.

 **Note** - Whilst it is not advised to record mobile numbers against the patient address, if you have done this and the patient does not have a mobile number recorded in Contacts for Patient, Vision+ uses this to send SMS messages.

To check that the patient has their mobile number recorded correctly in Vision:

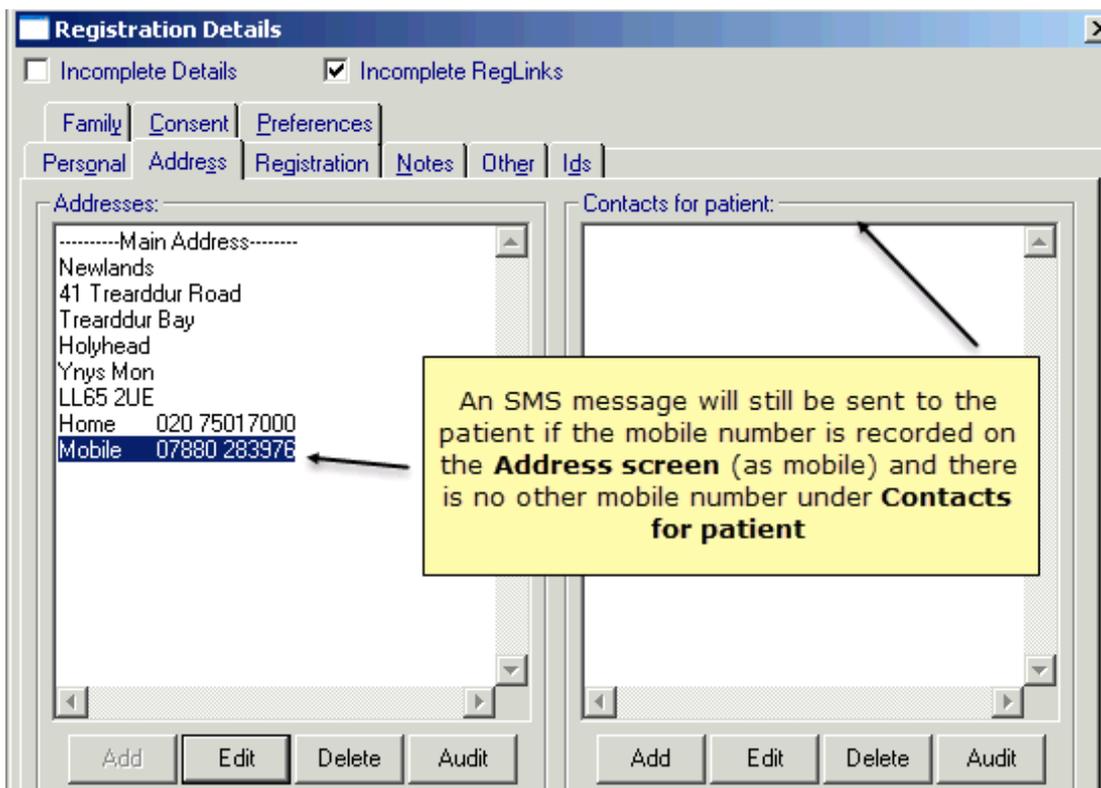
- 1.** Select the patient in Registration and choose the **Address** tab.

2. Look at the **Contacts for Patient** section of the screen.



Contact for Patient

Alternatively, if the patient does not have a mobile number under Contacts for patient, but has a mobile number under Address, this will be used.



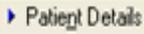
Mobile number under the Address

3. From the Contacts for Patient screen you can add a new mobile number, edit an existing mobile number or delete a mobile number and click **OK** to save.



Training Tip - If you quickly want to tidy up mobile numbers you can **Edit** the number and use **Copy** (Control C) and **Paste** (Control V). However, you are advised to check with the patient first.

Consultation Manager

Alternatively, you can view, add or update mobile numbers for a patient in the patient details tab  or the Patient details icon  in Consultation Manager.



Appointments | Problems | Patient Select | **Patient Details** | Consultations | Journal | Therapy | Links | Guidelines | Filter

Surname: Adam Sex: Male
Forename1: Daniel DOB: 25 Jan 1954
Forename2: Winston HB: Leeds
Previous Surname: Date Applied: 16 Mar 2008
Title:
Registrat
Register
NHS No.
CHI No.:
Notes Kept At:

Patient Details. To amend or delete a Contact Number, highlight the mobile number and choose Edit or Delete. To add a new number choose Add to Patient

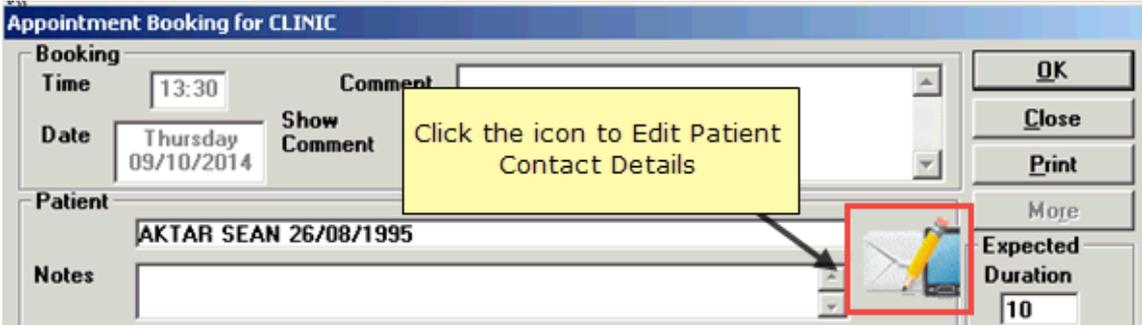
Address: 6 Lyndhurst Road, Leeds, Z99 9ZZ

Phone Number: **Contacts for current address**
Contacts for patient
Mobile 0798123409

Patient Details Consultation Manager

Appointments

You can also add or update mobile numbers in Appointments when adding an appointment for a patient.



Appointment Booking for CLINIC

Booking Time: 13:30
Date: Thursday 09/10/2014
Comment:
Show Comment

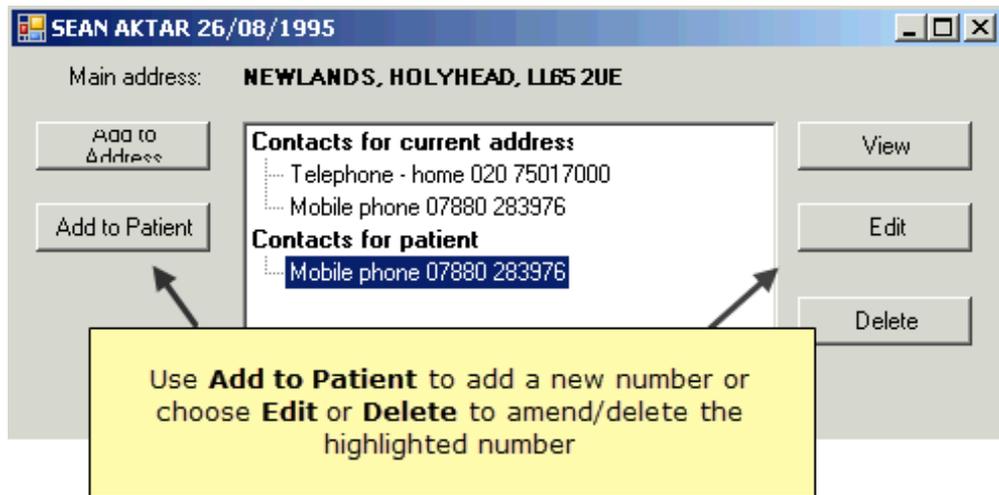
Patient: AKTAR SEAN 26/08/1995

Notes:

Expected Duration: 10

Click the icon to Edit Patient Contact Details

Edit Contact Details in Appointments



Add, Amend or Delete the Mobile number

Daybook

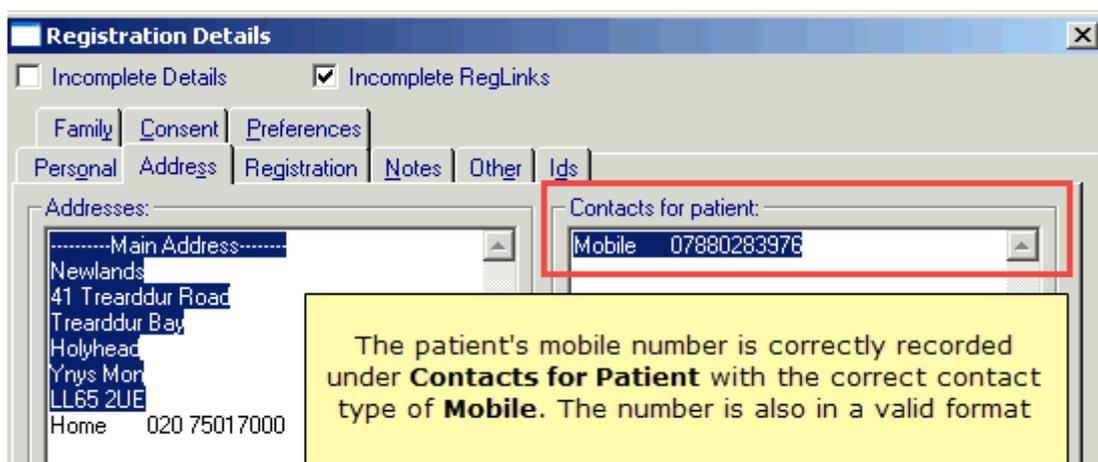
With a task attached to a patient highlighted or from a selected task, select **Edit contact details**.



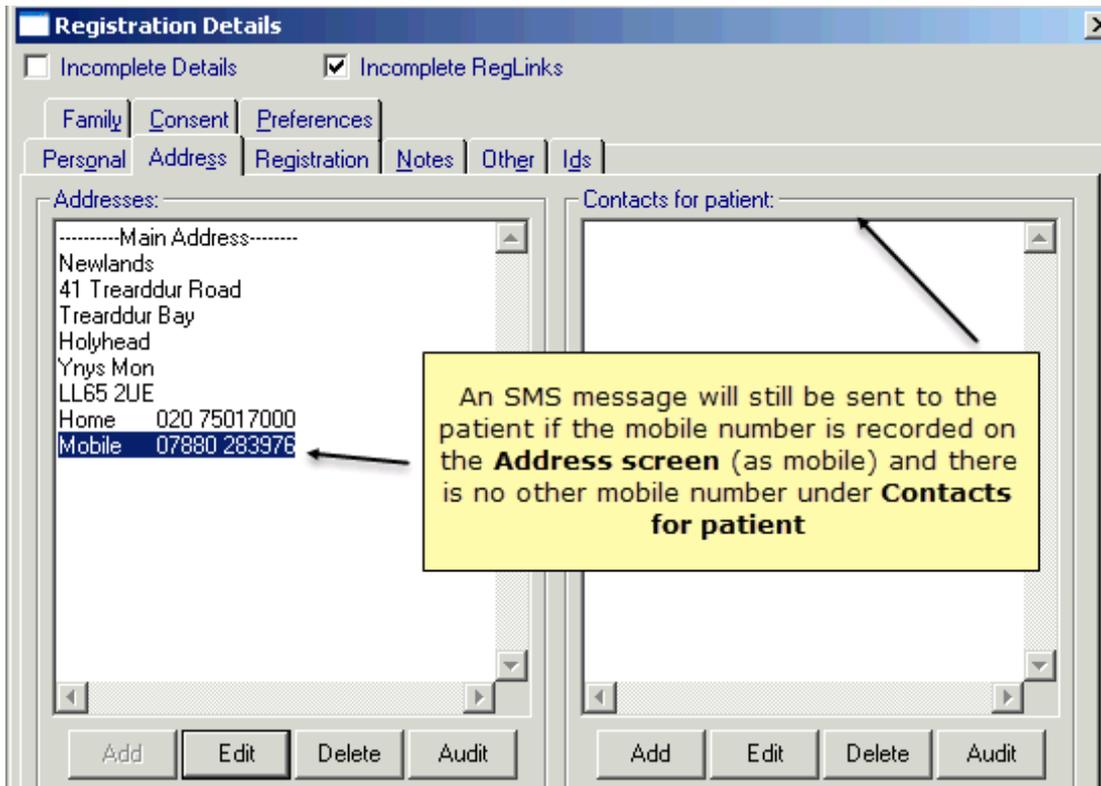
Daybook - Add, Amend or Delete the Mobile Number

Examples of Valid/Correctly Recorded Mobile Numbers

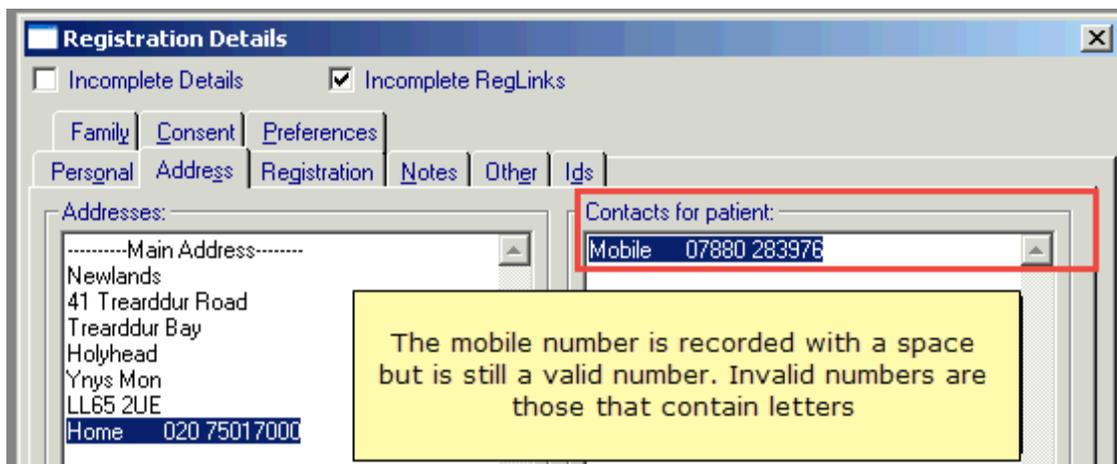
Below are some examples of how mobile numbers should be recorded:



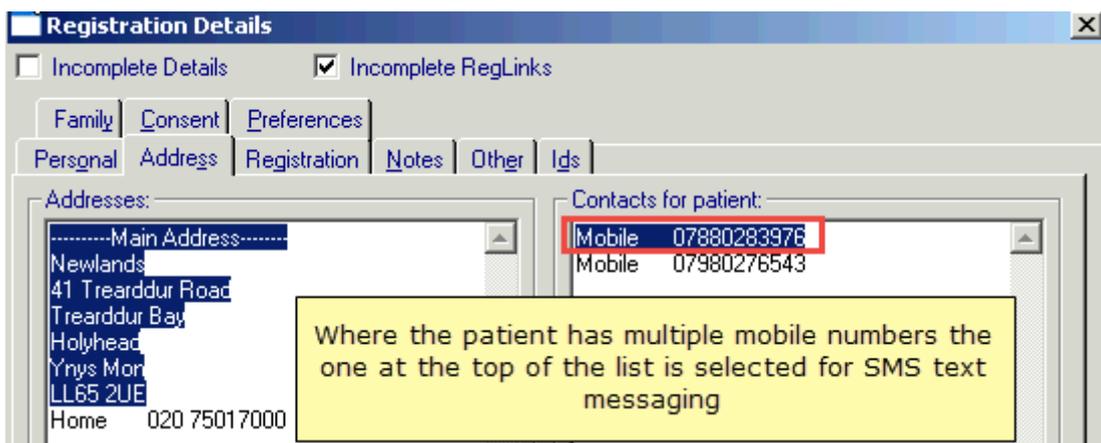
Correctly recorded mobile numbers



Mobile Number under the Address

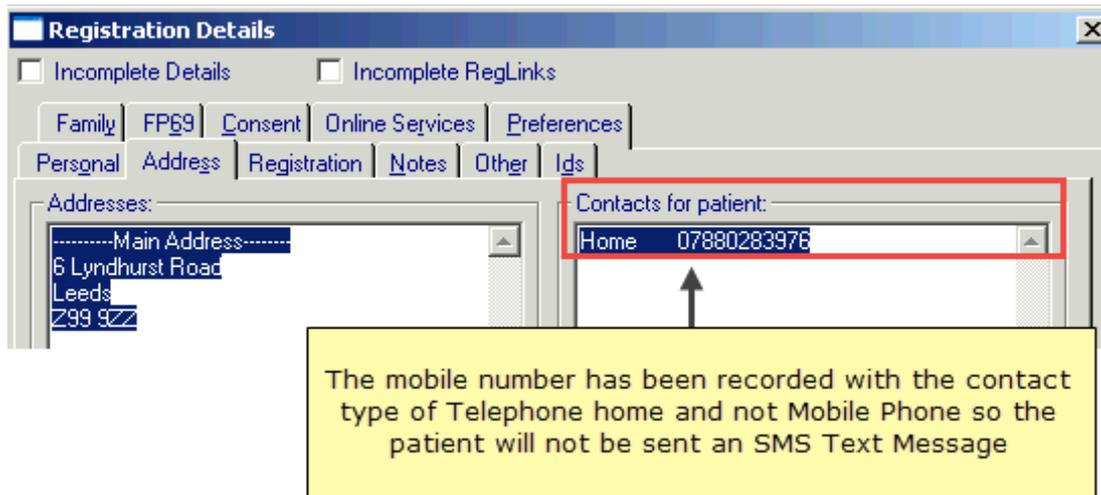


Valid mobile number format

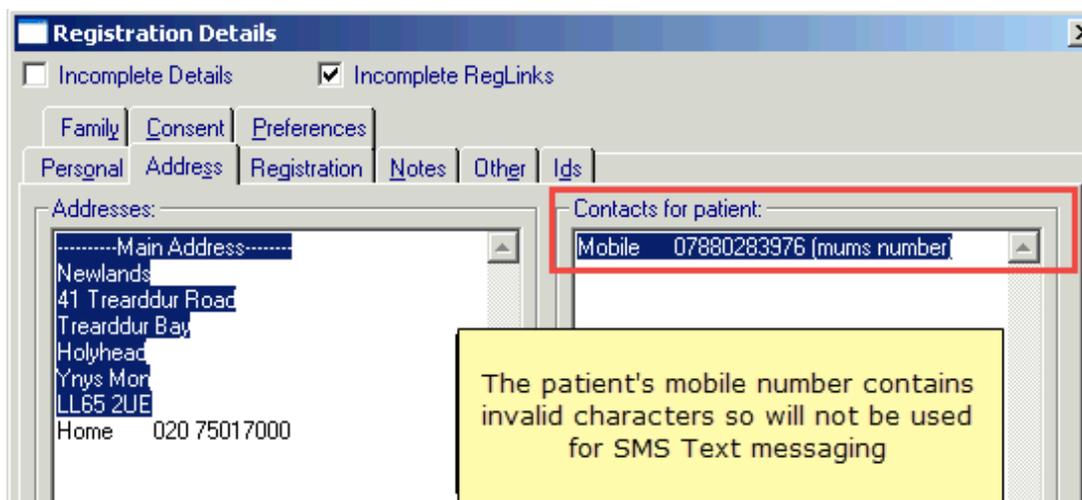


Examples of Invalid/Incorrectly Recorded Mobile Numbers

Below are examples of invalid or incorrectly recorded mobile numbers:



The contact type is set to Telephone Home and not Mobile Phone

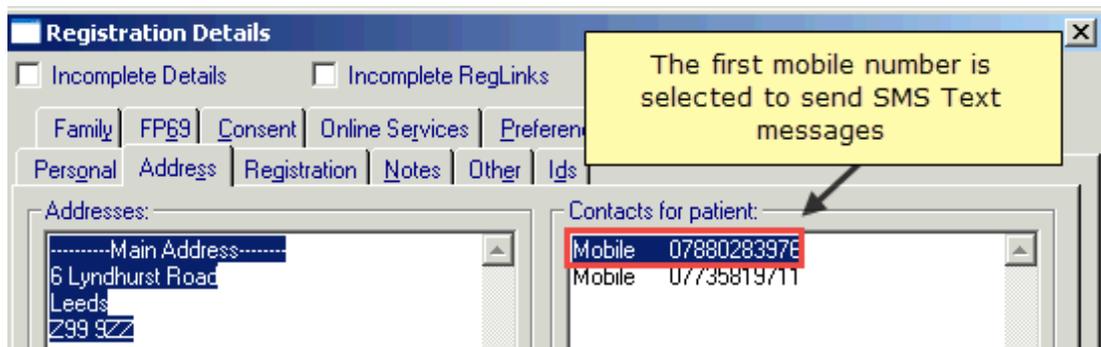


Invalid mobile number format

See also [Valid Mobile Number Formats](#) (page 66), [Examples of Valid/Correctly Recorded Mobile Numbers](#) (page 70) and [Confirming the First Mobile Number](#) (page 73)

Confirming the First Mobile Number

Vision+ will send the SMS text message to the first mobile number listed in Contacts for Patient. Where a patient has multiple mobile numbers, the first one is selected for sending text messages eg the one at the top.



First Mobile Number

Managing Invalid Mobile Numbers (SMS Validation Audit)

Patients with *invalid mobile numbers* (page 72) will not receive text messages. We therefore recommend that you identify patients with such numbers and check/update their contact details.

Note - If you still have invalid mobile numbers when you start using the SMS software, they are listed when sending SMS messages and can be easily processed.

To help with tracking patient mobile number status, we have created a Clinical Audit which is published as part of the In Practice Systems (Daily) audits. Using this audit, you can identify and address patients with invalid mobile numbers and other useful information about mobile numbers. The In Practice Systems (Daily) audits can be downloaded from the *Hive*. <http://hive.visionhealth.co.uk/p/cm/ld/fid=1069> Please note this will replace any existing versions on the In Practice Systems audit.

In Practice Systems (Daily)

Administration

Children New Registration (Version 4, 17/03/2017)

Month of Birth Cohorts (Version 3, 26/07/2017)

SMS Validation (Version 14, 18/08/2017)

9571		Total Practice Population	
	1	0.01%	Patients with a mobile number (begins 07 or other valid format) attached to their address
	41	0.43%	Patients with a mobile number (begins 07 or other valid format) showing as Contact for Patient
	1	0.01%	Patients with a mobile number (begins 07 or other valid format) attached to their address, but has no Contact for Patient
	0	0.00%	Patients with mobile number(s) (begin 07 or other valid format) attached to their address and also Contact for Patient
	2	0.02%	Patients with mobile number(s) (begin 07 or other valid format) under Contact for Patient, but not of type MOBILE
	0	0.00%	Patients with mobile number(s) (begin 07 or other valid format) under Contact for Patient, but containing letters (invalid)
	8317	86.90%	Patients aged =>16 yrs
	8286	99.63%	Patients aged =>16 yrs with NO mobile phone number attached to Contact for Patient
	1254	13.10%	Patients aged <16yrs
	8	0.64%	Patients aged <16yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged <1 yr WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 1 yr WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 2 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 3 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 4 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 5 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 6 yrs WITH mobile phone number attached to Contact for Patient
	2	25.00%	Patients aged 7 yrs WITH mobile phone number attached to Contact for Patient
	2	25.00%	Patients aged 8 yrs WITH mobile phone number attached to Contact for Patient
	3	37.50%	Patients aged 9 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 10 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 11 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 12 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 13 yrs WITH mobile phone number attached to Contact for Patient
	1	12.50%	Patients aged 14 yrs WITH mobile phone number attached to Contact for Patient
	0	0.00%	Patients aged 15 yrs WITH mobile phone number attached to Contact for Patient
	9529	99.56%	Patients with NO valid format mobile number (not attached to their address, and not as Contact For Patient)

SMS Validation Audit

Note - Reminders are not automatically enabled for these audit lines. To activate a reminder, right click on the audit line and select **Activate Reminder**. You can then generate the reminders so they display when a patient is selected. Go to the **Generate** tab and choose **Generate Reminders**.

Audit Line Explanation and what to do...

Patients with a mobile number (begins 07) attached to their address

Shows all patients with a mobile number added to the address entry. Mobile numbers added to the patient address are unique to the patient unless another patient has been registered as a family member against the same address details, in which case the mobile number will also be copied to the family member. If a patient has an address mobile number but no patient mobile number (see specific audit line below), please check that it is suitable to use for text messaging.



Training Tip - You may want to add a reminder to this line and deal with each patient when they visit the surgery. Remember you can also switch on reminders in Appointments if you want to check mobile numbers with patients as you book the patient into Appointments. To do this in Appointments select **Maintenance - System Constants - Reminders** - tick the box **Display all reminders**

Display all reminders . This is a practice wide setting so will display all reminders for anyone accessing Appointments and includes Outstanding Daybook tasks, Clinical Audit and Patient Group reminders.

Patients with a mobile number (begins 07) showing as Contact for Patient

Shows all patients who have a mobile number recorded under Contacts for Patient.

Patients with a mobile number (begins 07) attached to their address, but has no Contact for Patient

Shows all patients who have a mobile number recorded under address but has no number recorded in Contact for Patient. Mobile numbers added to the patient address are unique to the patient unless another patient has been registered as a family member against the same address details, in which case the mobile number may be copied to the family member. If a patient has an address mobile number but no patient mobile number, please check that it is suitable to use for text messaging.

You may want to add a reminder to this line and deal with each patient when they visit the surgery.

Patients with a mobile number(s) (begin 07) attached to their address and also Contact for Patient

Shows all patients with a mobile number recorded under both Address and Contacts for Patient. Depending on your practice protocol, these patient numbers may or may not need updating ie if you have a family mobile in address and personal number in Contact for Patient you might want to leave this as it is, however, if you have an out of date number in patient but a correct one in address, you are advised to update the Contact for Patient number since that is used in preference.

Patients with a mobile number(s) (begin 07) under Contact for Patient, but not of type MOBILE

Shows patients who have a mobile number recorded in Contact for Patient but the type is not mobile. These numbers may have been recorded incorrectly or are other mobile numbers correctly recorded as a non-mobile contact type ie carer. See [Examples of Invalid/Incorrectly Recorded Mobile Numbers](#) (page 72).

Patients with a mobile number (begin 07) under Contact for Patient, but containing letters (invalid)

Shows all patients with a mobile number under in Contact for Patient which are invalid. **Patients in this line will not be sent SMS messages.** You are advised to create a reminder for this line and/or update each patient by opening this group in Consultation Manager and changing the number in Patient Details. See [Consultation Manager on-screen help](#) http://inpshep.co.uk/DLM470/Consultation_Manager/index.htm#19259 and [Examples of Invalid/Incorrectly Recorded Mobile Numbers](#) (page 72).

Patients aged =>16 with NO mobile number attached to Contact for Patient

Shows patients over 16 years of age with no mobile number recorded in Vision (Contact for Patient only). You may want to add a reminder to these patients so this is flagged when they visit your surgery.

Patients aged =>16 with mobile number attached to Contact for Patient

Shows patients over 16 with mobile numbers recorded in Contact for Patient only.

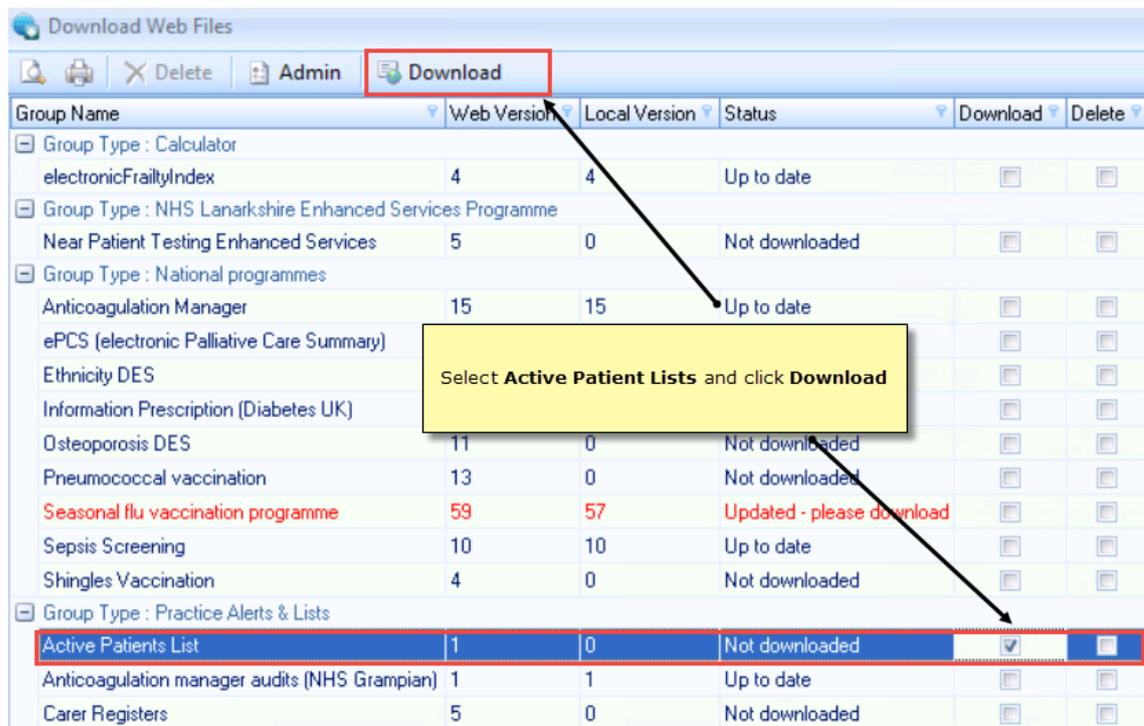
📌 **Remember** - If there are multiple mobile numbers recorded, Vision uses the 1st recorded mobile number for SMS purposes. See [Confirming the First Mobile Number](#) (page 73).

Finding Invalid Mobile Numbers using Vision+ Practice Reports

A Practice report is also available to download which helps identify patients with invalid mobile numbers.

First, you must download the Active Patients Report. To do this:

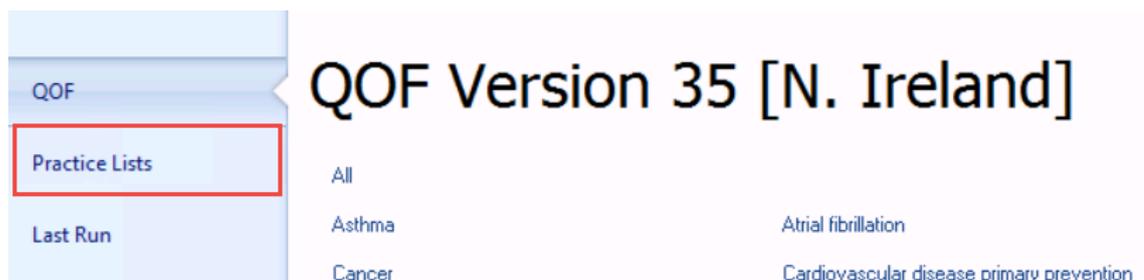
4. From the Windows Notification area, right click on **Vision+**  and select **Download Web Files**.
5. Select **Active Patient Lists** and click **Download**.



Active Patient List

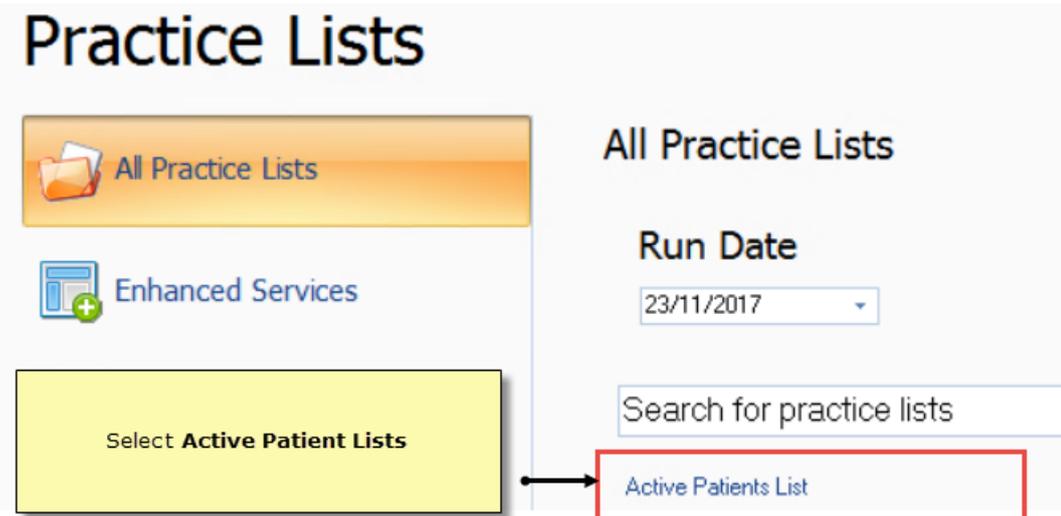
Next, you need to run the **Active Patients List** report, to do this:

6. From the Windows Notification area, right click on **Vision+**  and select **Practice Reports**.
7. Select **Practice Lists**.



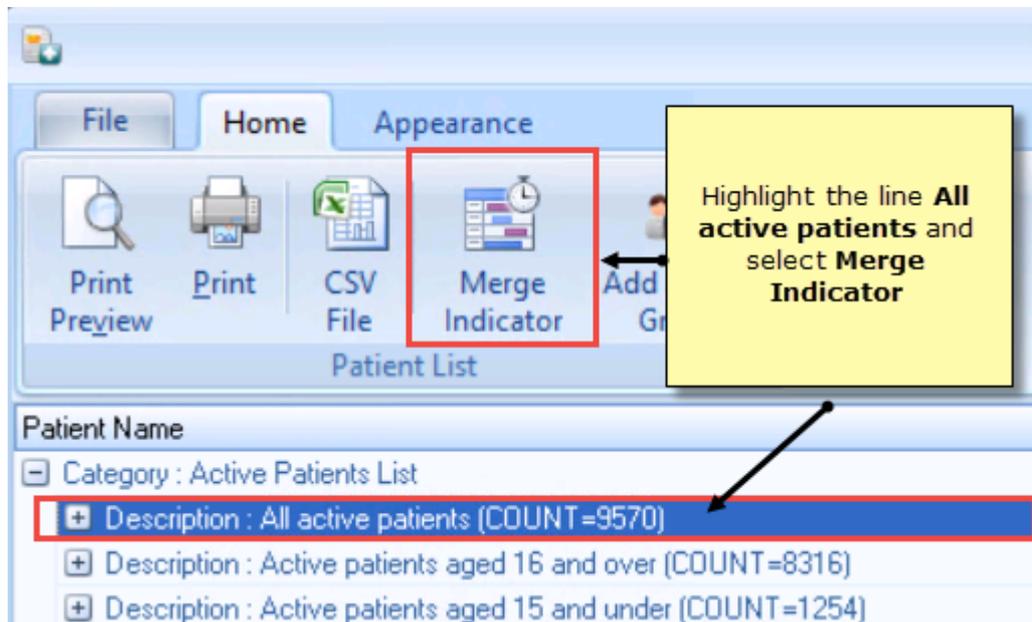
Practice Lists

8. Click **Active Patient Lists** and the report will run.



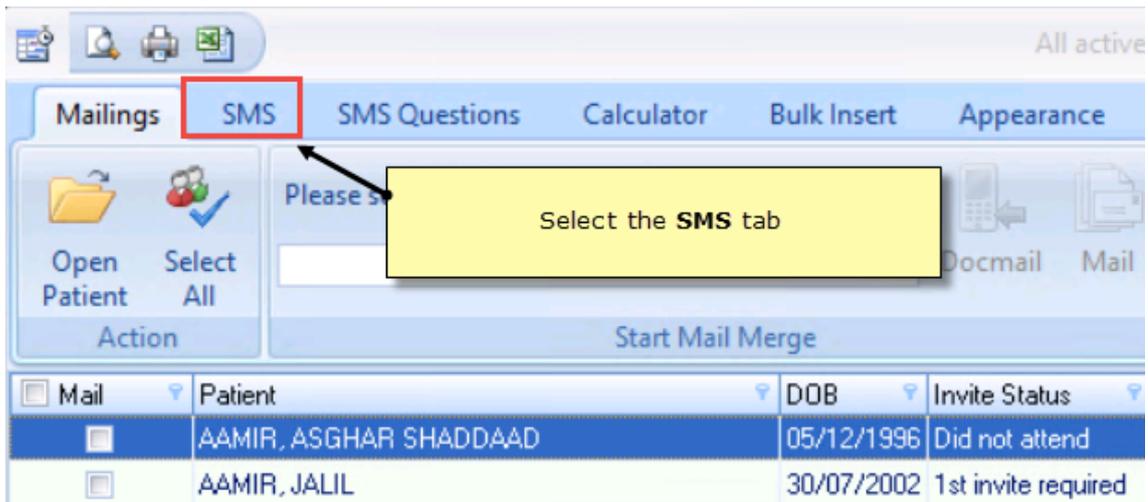
Active Patient lists Report

- Once the report is complete, highlight the line **All active patients** and select **Merge Indicator**.



Merge Indicator

10. All the patients are listed. Select the **SMS** tab.

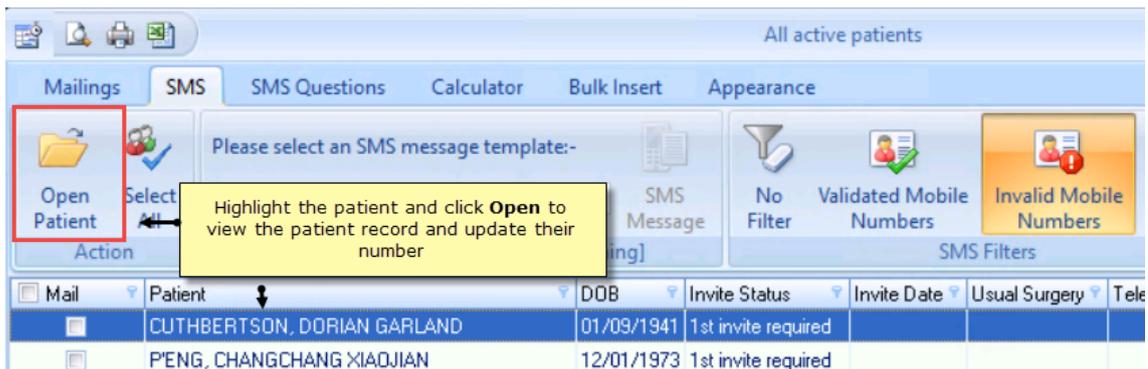


SMS Tab



11. Select **Invalid Mobile Numbers** to view patients with an invalid number

12. You can now, highlight the patient and select Open, to view the patient record and update their mobile number.



Invalid Patient Numbers

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