



Preparing for My Health Text Messaging (Wales) – User Guide

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Preparing for My Health - Text Messaging (Wales)

Introduction

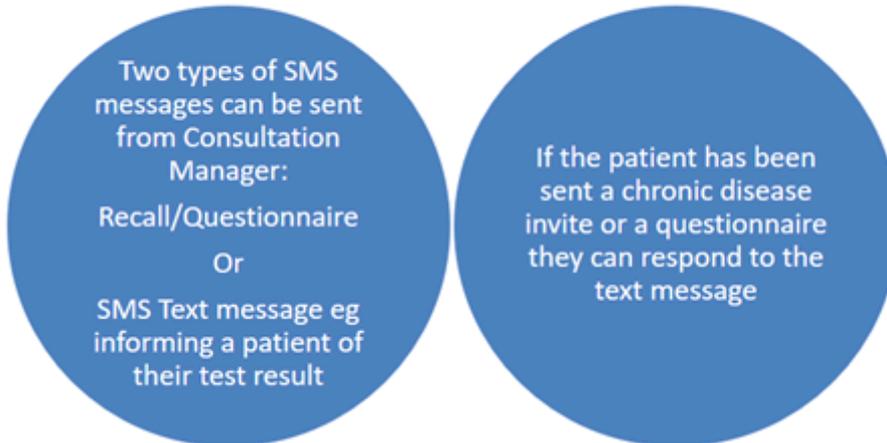
My Health - Text Messaging is a secure messaging service that enables you to send bi-directional health care invitations, questionnaires and appointment reminders to patients by SMS text messages. For more information regarding enabling the service please contact NHS Wales Informatics Service (NWIS).

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 5).

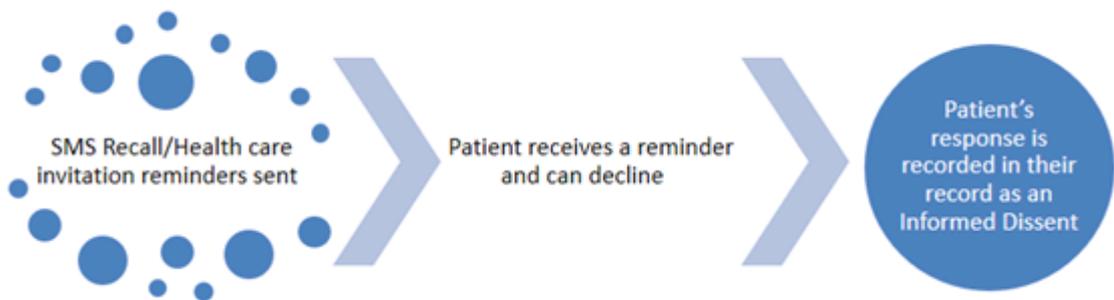
Overview

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

Consultation Manager



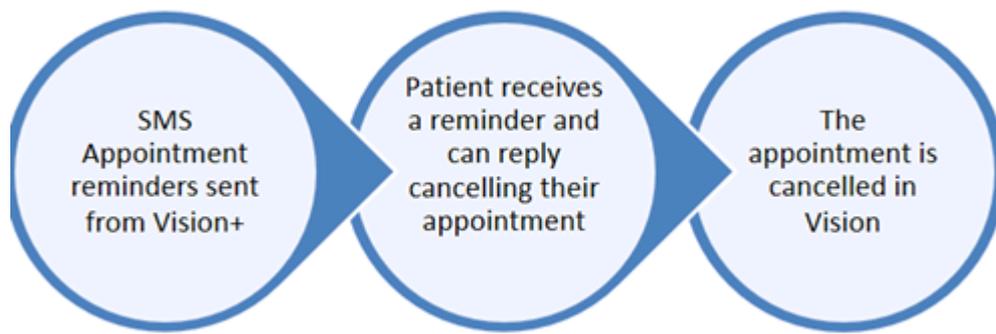
Recalling a group of patients by SMS messages



Questionnaires to a group of patients



Appointment Reminders



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 7).
- **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
 - Have the correct contact type
 - Valid mobile numbers include those containing letters after the number, so you may want to review patients with these numbers using clinical audit
 - 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 numberSee [Recording Mobile Numbers](#) (page 9).
- **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 Mobile Numbers \(SMS Validation Audit\)](#).

 **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

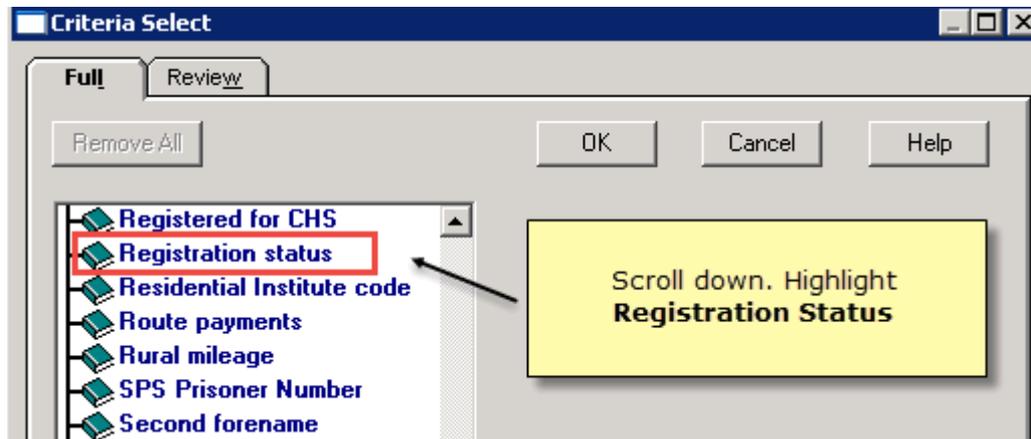
Patient consent for receiving SMS text messages on their registered mobile is implied, however, if a patient does not want to receive practice text messages you must record the Read code **9NdQ.00 - Declined consent for short message service text messaging** in the patient's journal and they will not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

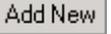
Searching for Patients to Bulk History Add the Dissent Read code

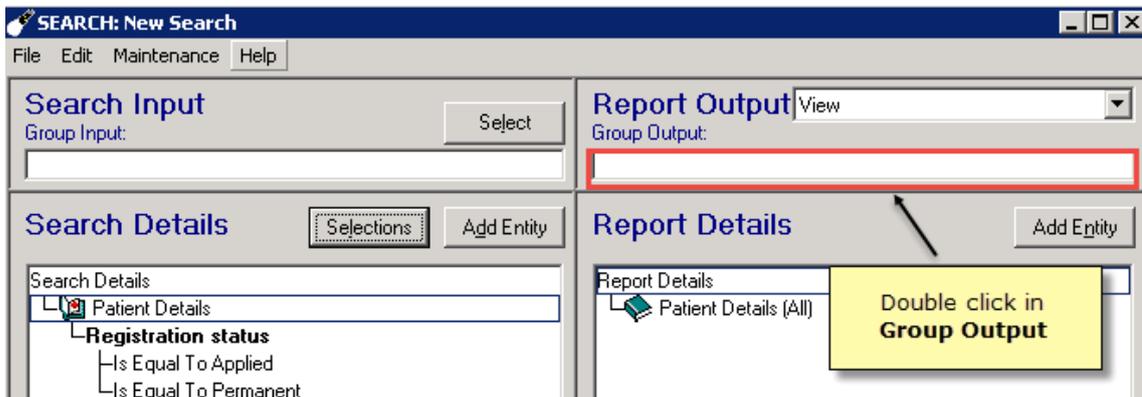
First, you need to search for all patients who are Permanent and Applied in Searches and Reports and save the patients as a group. To do this:

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

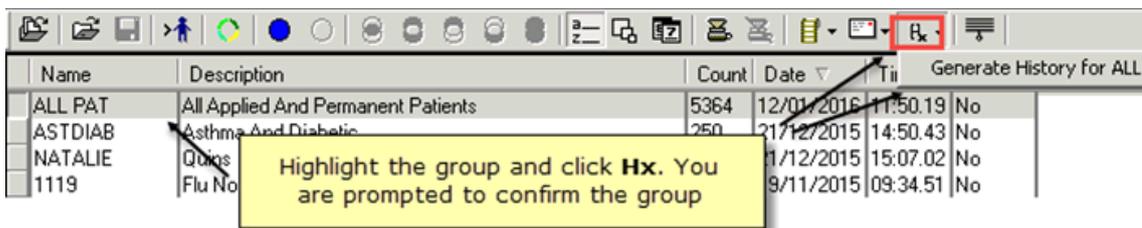
To bulk add the Read code **9NdQ.00 - Declined consent for short message service text messaging**:

- 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.



Bulk Add - Patient Groups

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

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.

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 they are the correct contact type. Below is a summary of what is required:

- **Is the mobile number in a valid format?** See [Valid Mobile Number Formats](#) (page 10).
- **Is the mobile number recorded under Contact for patient?** See [Checking a Patient's Personal Contact Mobile Number](#) (page 11).
- **Do you have an up-to-date mobile number for the patient?** See [Checking a Patient's Personal Contact Mobile Number](#) (page 11).
- **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 18).
- **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 11).

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

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 trailing letters, these are classified as valid so may need checking - see Managing Invalid Mobile Numbers (SMS Validation Audit).



Note - Invalid numbers are those mobile numbers that include characters before or within the number for example: **a 0777 111 1111, 447a77 111 1111, a +44777 111 1111.**

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

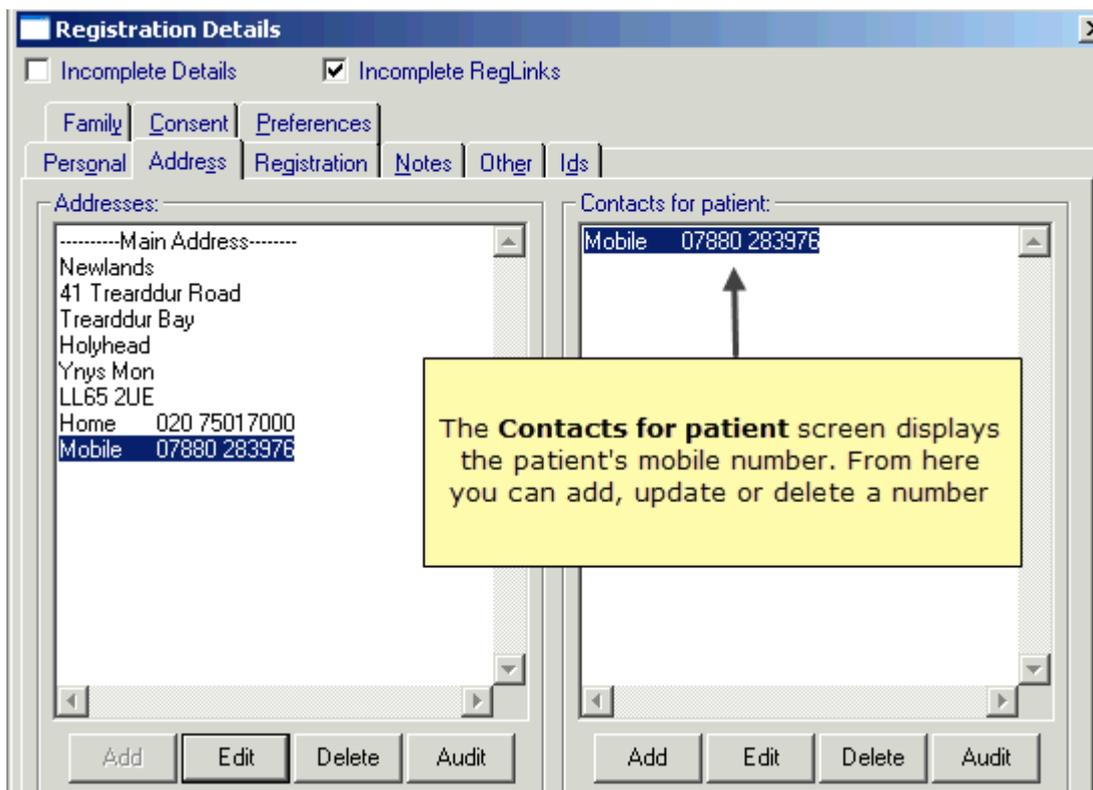
Checking a Patient's Personal Contact Mobile Number

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.

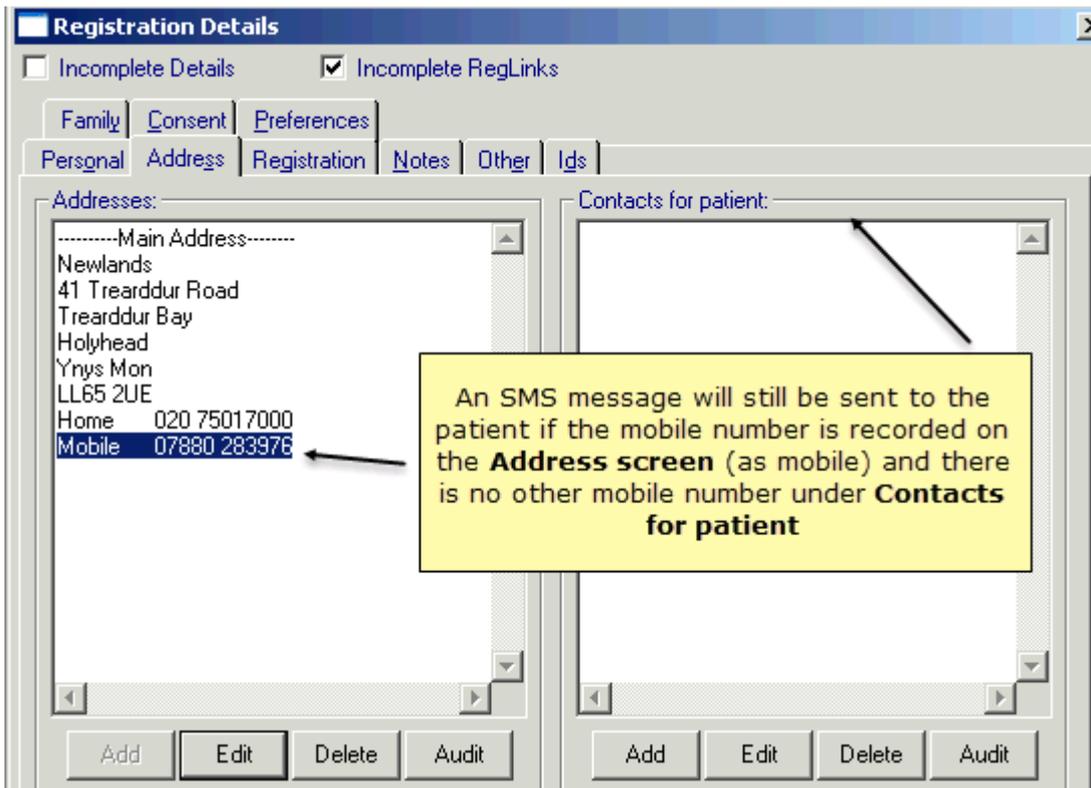
To check that the patient has their mobile number recorded correctly in Vision:

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 **Patient Details** or the Patient details icon  in Consultation Manager.



The screenshot shows the 'Patient Details' tab in a software interface. The patient's name is Adam Daniel Winston, with a date of birth of 25 Jan 1954. A yellow callout box contains the text: **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**. Below this, the address is 6 Lyndhurst Road, Leeds, Z99 9ZZ. The phone number section shows a mobile number 0798123409 with buttons for 'View', 'Edit', and 'Delete'. There are also buttons for 'Add to Address' and 'Add to Patient'.

Patient Details Consultation Manager

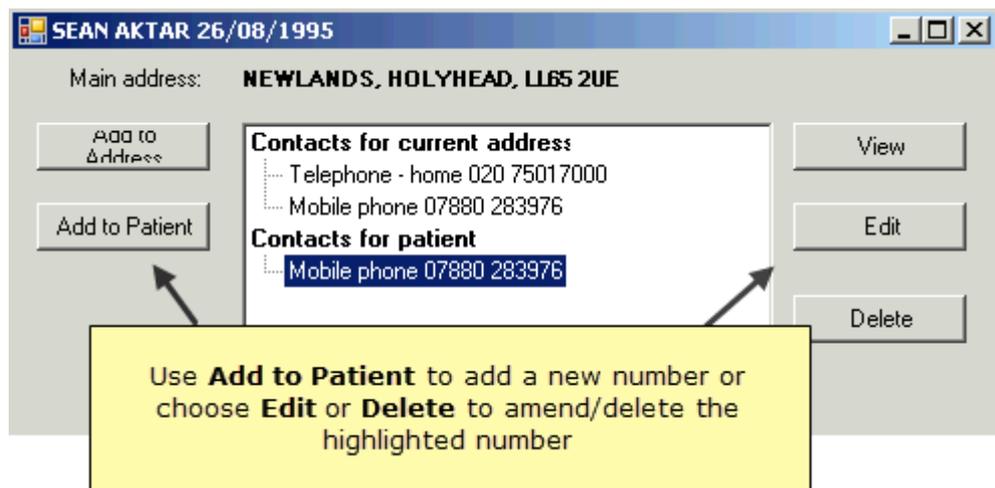
Appointments

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



The screenshot shows the 'Appointment Booking for CLINIC' window. The booking time is 13:30 on Thursday 09/10/2014. The patient is AKTAR SEAN 26/08/1995. A yellow callout box says: Click the icon to Edit Patient Contact Details. A red box highlights an icon of a pencil and envelope in the bottom right corner of the appointment details area.

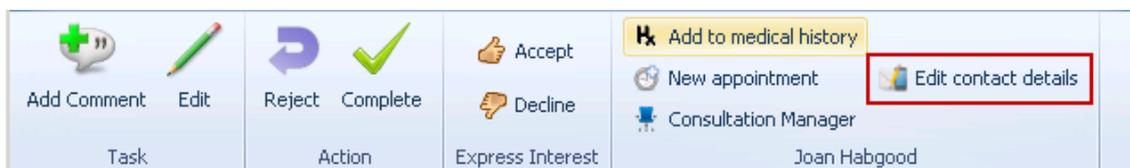
Contact details



Add, Amend or Delete the Mobile number

Daybook

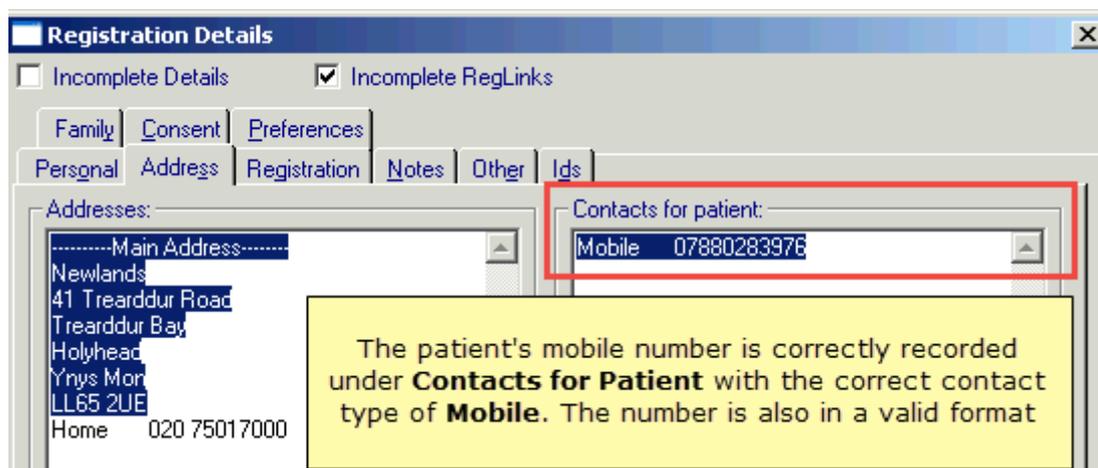
With a task attached to a patient highlighted or from a selected task, select **Edit contact details**.



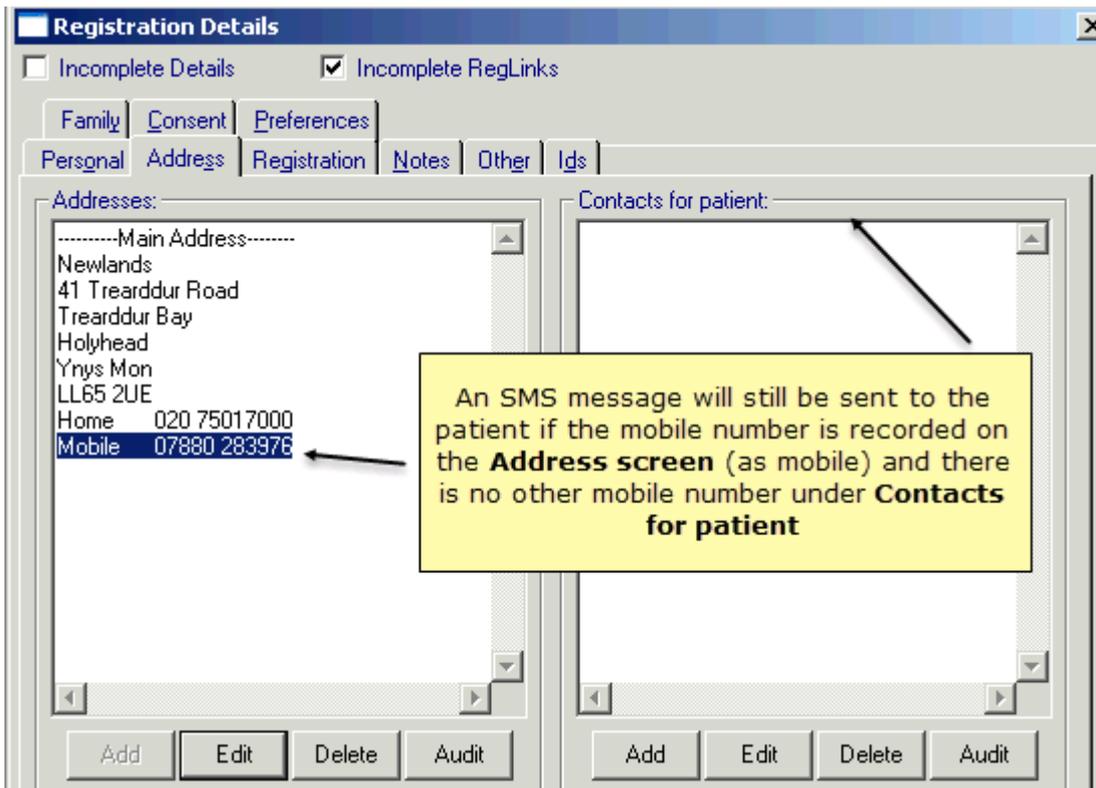
Daybook - Add, Amend or Delete the Mobile Number

Examples of Valid/Correctly Recorded Mobile Numbers

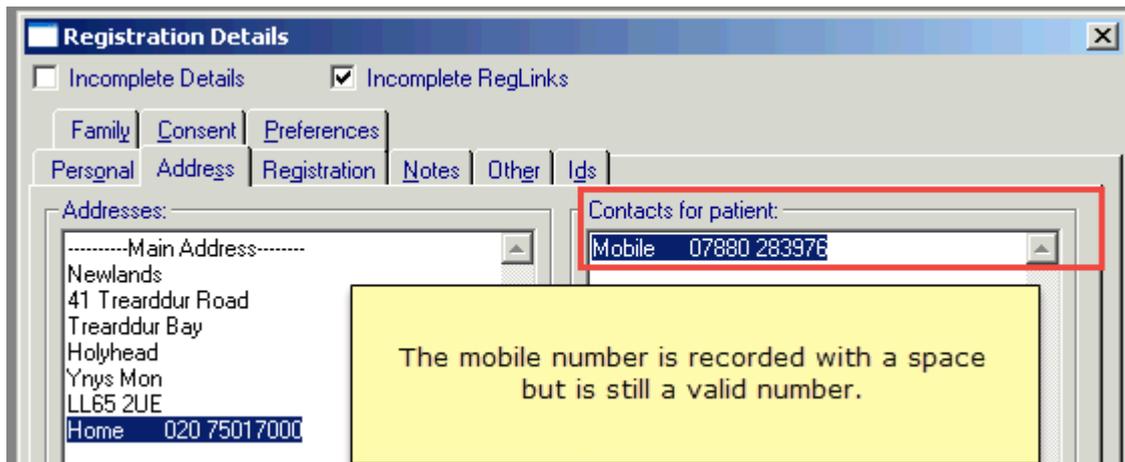
Below are some examples of how mobile numbers should be recorded:



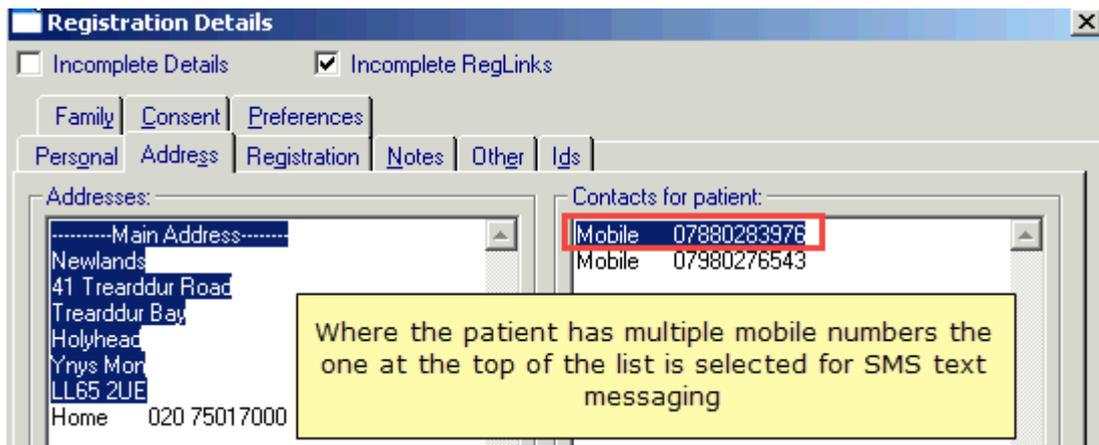
Contact details



Mobile Number under the Address



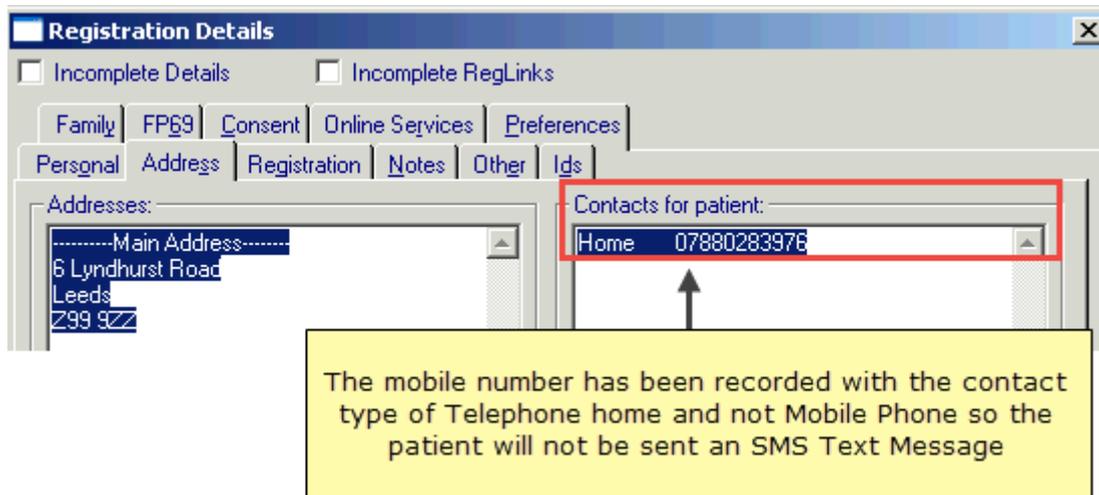
Contact details



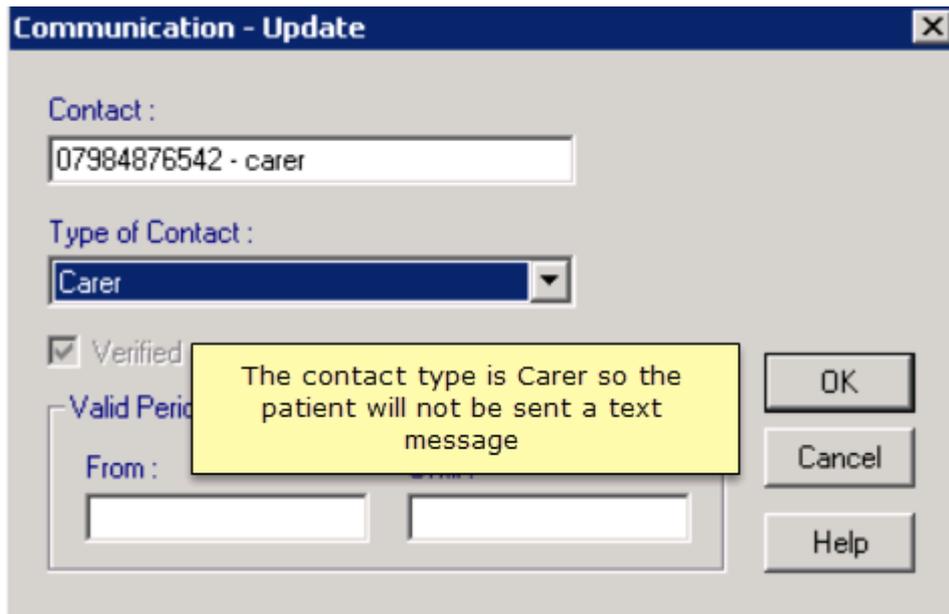
Multiple mobile numbers

Example of an Incorrectly Recorded Mobile Number

Below is an example of an invalid or incorrectly recorded mobile numbers:



Contact details

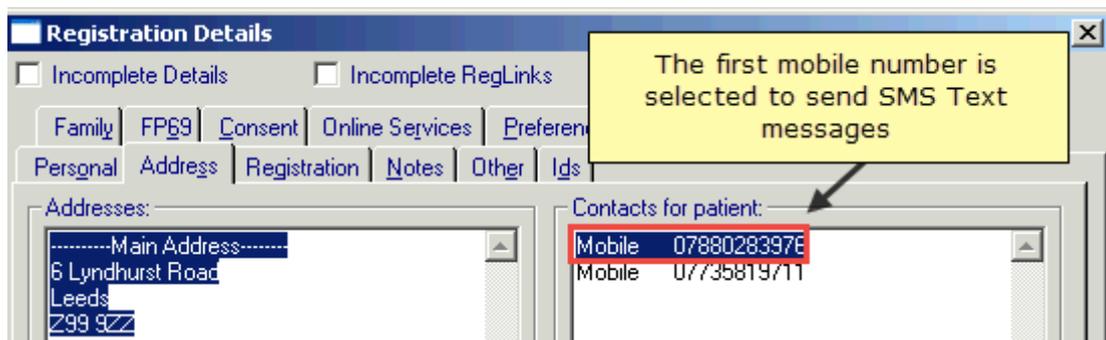


Invalid mobile number format

See also [Valid Mobile Number Formats](#) (page 10), [Examples of Valid/Correctly Recorded Mobile Numbers](#) (page 15) and [Confirming the First Mobile Number](#) (page 18)

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 Mobile Numbers (SMS Validation Audit)

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.

 **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.

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 16, 10/01/2018)

			Total Practice Population
	5376		
	27	0.50%	Patients with a mobile number (begins 07 or other valid format) attached to their address
	85	1.58%	Patients with a mobile number (begins 07 or other valid format) showing as Contact for Patient
	20	0.37%	Patients with a mobile number (begins 07 or other valid format) attached to their address, but has no Contact for Patient
	7	0.13%	Patients with mobile number(s) (begin 07 or other valid format) attached to their address and also Contact for Patient
	2	0.04%	Patients with mobile number(s) (begin 07 or other valid format) under Contact for Patient, but not of type MOBILE
	1	0.02%	Patients with mobile number(s) (begin 07 or other valid format) under Contact for Patient, but containing letters (any type)
	1	0.02%	Patients with mobile number(s) (begin 07 or other valid format) under Contact for Patient, but containing letters (type MOBILE only)
	4623	85.99%	Patients aged =>16 yrs
	4544	98.29%	Patients aged =>16 yrs with NO mobile phone number attached to Contact for Patient
	753	14.01%	Patients aged <16yrs
	5	0.66%	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
	1	20.00%	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

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. Patients in this category will not be sent a text message. See [Monitoring and Recording Mobile Numbers](#) (page 9).

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

Shows all patients with a mobile number under Contact for Patient which contain letters. If the mobile number is recorded as anything other than mobile the patient will not be sent a text message but if the contact type is mobile a text message will be sent. To view mobile numbers containing letters which are only of type Mobile see the audit line below.

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

Patients in this audit line are sent a text because they have a mobile number that contain trailing letters and the contact type is set to mobile. After identifying these patients you may want to:

- Change the contact type - Change the Contact Type
- Run the Communications Detail Wizard - [Communications Details Wizard](#) (page 22)
- Attach a reminder

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.

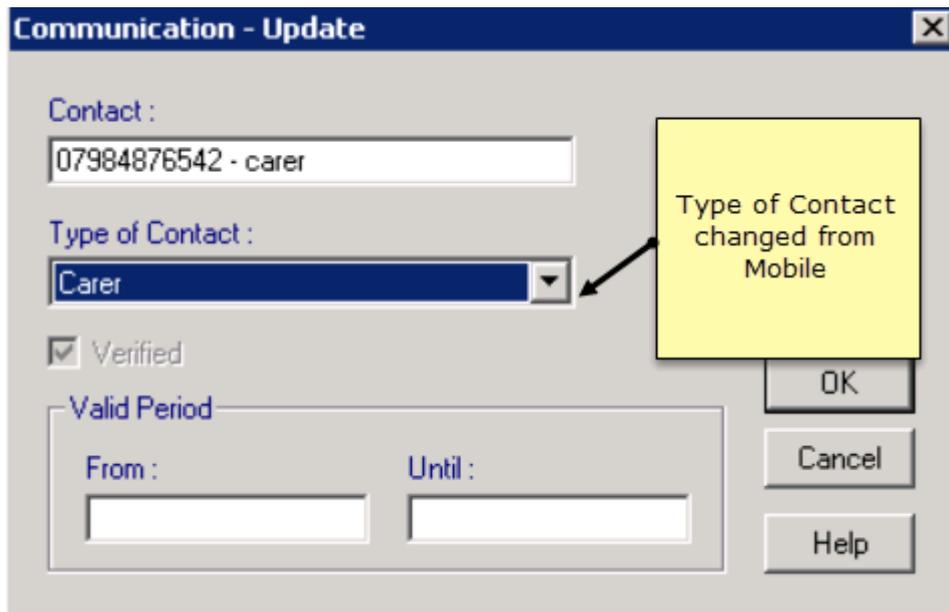
Patients aged =>16 with mobile number attached to Contact for Patient

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 18).

Change the Contact Type

Change the contact type for the patient to anything other than mobile. This automatically stops text messages being sent to the patient.



Communication - Update

Contact :
07984876542 - carer

Type of Contact :
Carer

Verified

Valid Period

From : Until :

OK
Cancel
Help

Type of Contact changed from Mobile

Type of contact - changed from Mobile

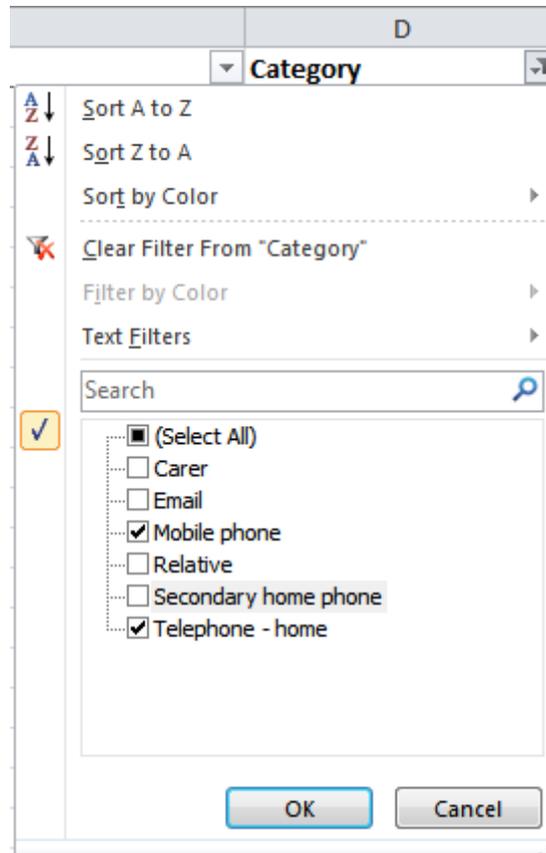


Training Tip - Patient contact details can be updated from Registration, Appointments, Daybook or Consultation Manager.

Communications Details Wizard

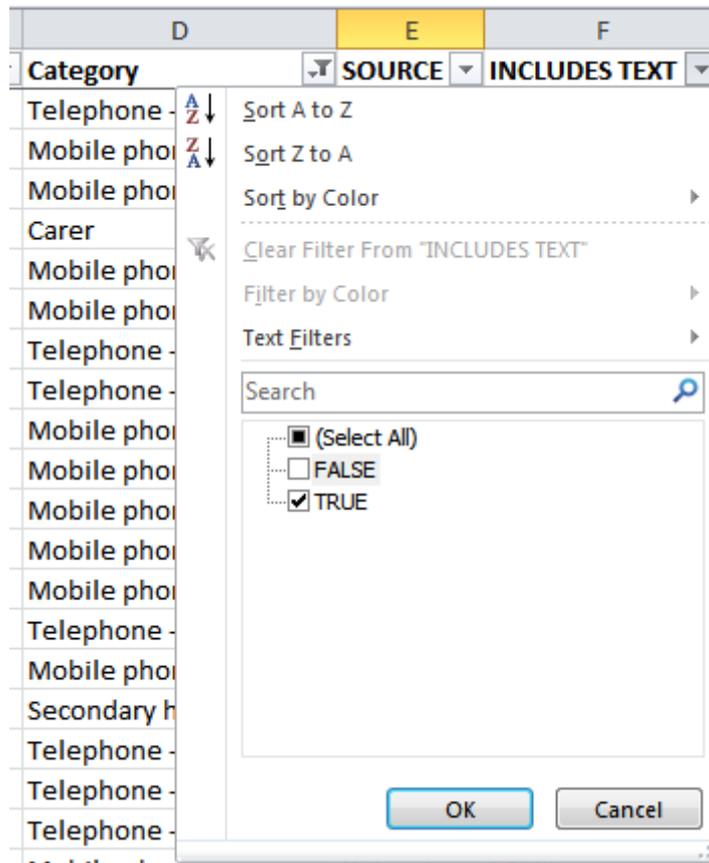
You can use the communication details wizard to audit mobile numbers and email addresses. The spreadsheet enables you to filter mobile numbers that include letters.

1. Download the spreadsheet and follow the prompts to import the data.
2. On completion, select **CommsDetails**.
3. Select the **Category** filter and remove all the ticks except for **Mobile phone** and **Telephone - home**.



Category

4. Click the filter in the last column **INCLUDES TEXT** and remove the tick from **FALSE**.



Include text.

5. You now have a list of contact numbers that include text.

	A	B	C	D	E	F
1	PAT_ID	PATIENT NAME	number	Category	SOURCE	INCLUDES TEXT
27	5039	MR ALAN ABBOTT	01234 567890 mum	Telephone - home	Address	TRUE
35	8266	MRS TRACEY BARZEY	07788999988 MUM	Mobile phone	Patient	TRUE
49	18462	MRS VERA BANCROFT	11111111111 (mUM)	Mobile phone	Patient	TRUE
53	20149	MR ZULFIQAR ABALUNAM	09876 543210 home	Telephone - home	Address	TRUE
62	23445	MISS LALA RICHY	07777 777777 mum	Mobile phone	Address	TRUE

Sheet

6. The pat_id's can be copied and pasted into a new file and saved as a CSV file. The CSV file can be imported into Patient Groups using *Patient Group Import App* http://help.visionhealth.co.uk/DLM550/Apps_Controller/index.htm#68434.

For details on how to manage mobile numbers, see Change the Contact Type and Add an SMS Dissent Code

Attach a Reminder

To assist in checking a patient's mobile number, you can attach a reminder to an audit. Highlight the audit cohort line which displays patients with a mobile number under Contact for Patient and includes letters.

To attach a reminder:

- 1.** Right click on the audit line and select **Reminder**.
- 2.** Type your reminder message and tick the **Active** box.
- 3.** Click **OK**.

8	0.15%	Patients with mobile number[s]
4915	91.60%	Patients aged =>16 yrs
4765	96.95%	Patients aged =>16 yr
451	8.40%	Patients aged <16yrs
12	2.66%	Patients aged <16yrs \
0	0.00%	Patients aged <1
1	8.33%	Patients aged 1 yr
1	8.33%	Patients aged 2 yr
0	0.00%	Patients aged 3 yr
0	0.00%	Patients aged 4 yr

Right click on the audit line and select **Reminder**. Type your reminder message and tick the **Active** box.

Edit Reminder [X]

Active

SMS: Mobile number contains letters. Please check with patient that it is OK to send text messages to this number.

OK Cancel Help

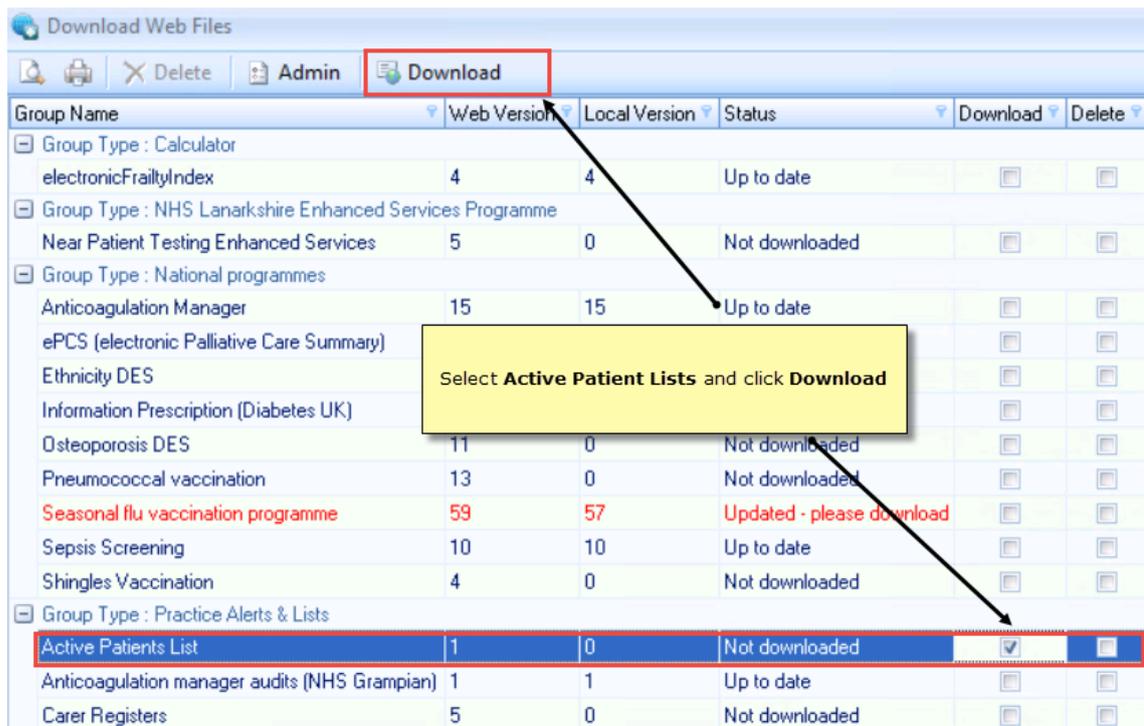
Attaching a reminder

Finding Invalid Mobile Numbers using Vision+ Practice Reports

A Practice report is also available to download which helps identify patients with invalid mobile numbers or numbers requiring attention. Mobile numbers containing letters are listed in this view, enabling you to review before sending SMS text messages.

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

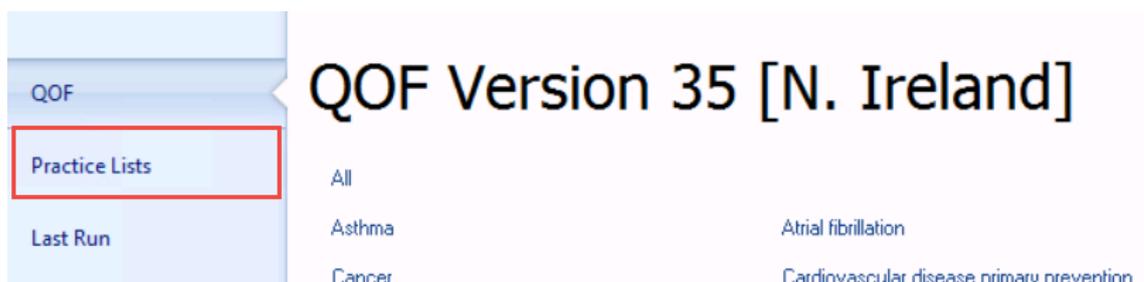
1. From the Windows Notification area, right click on **Vision+**  and select **Download Web Files**.
2. Select **Active Patient Lists** and click **Download**.



Active Patient List

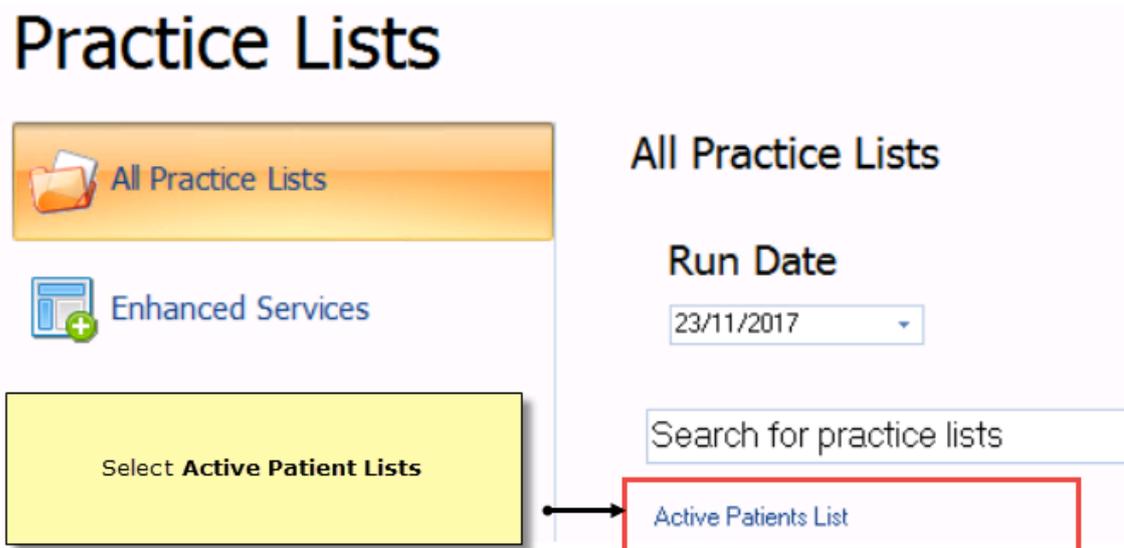
Next, you need to run the **Active Patients List** report, to do this:

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



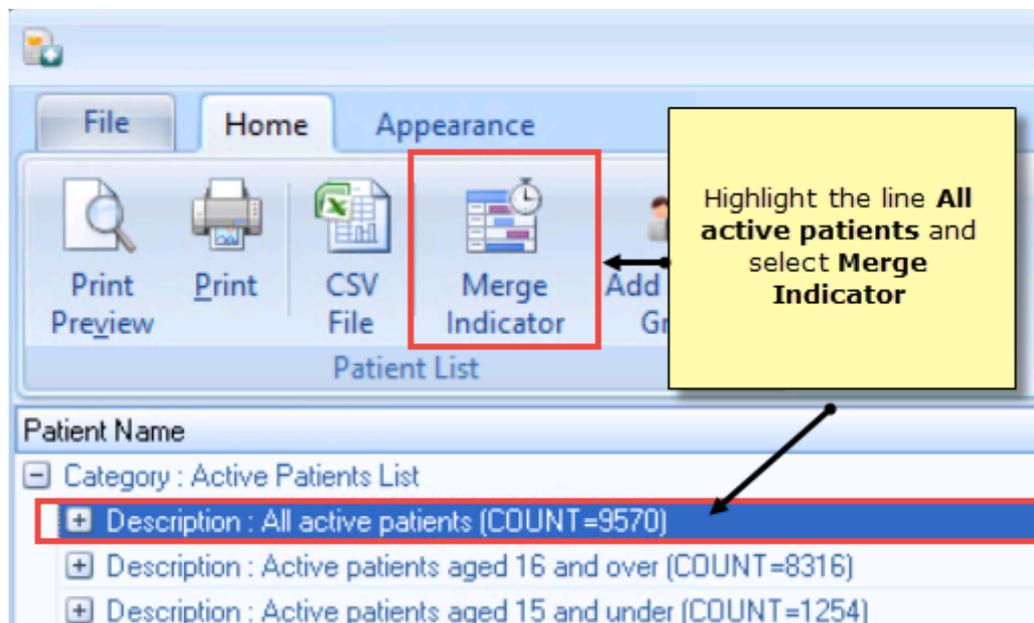
Practice Lists

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



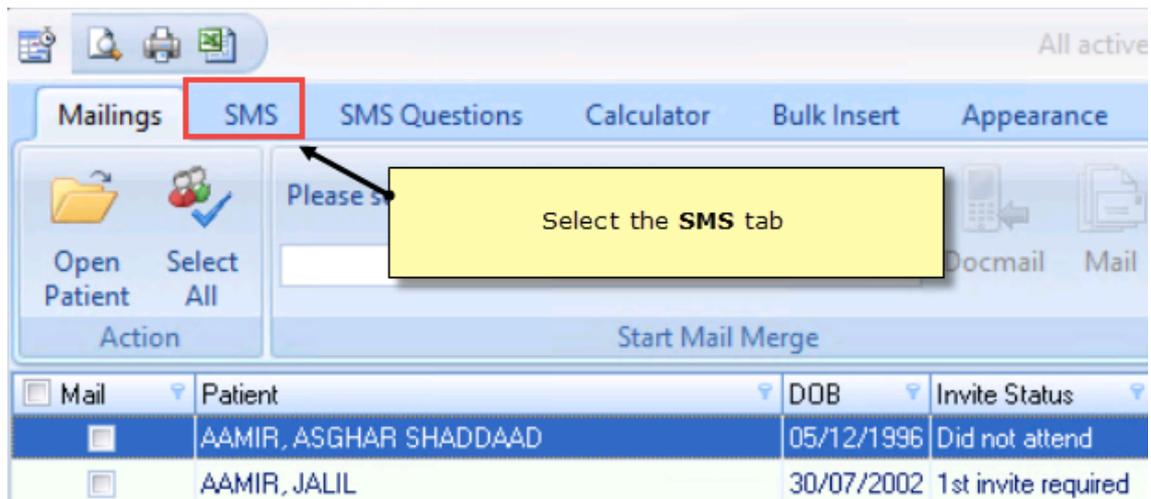
Active patient lists

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



Merge Indicator

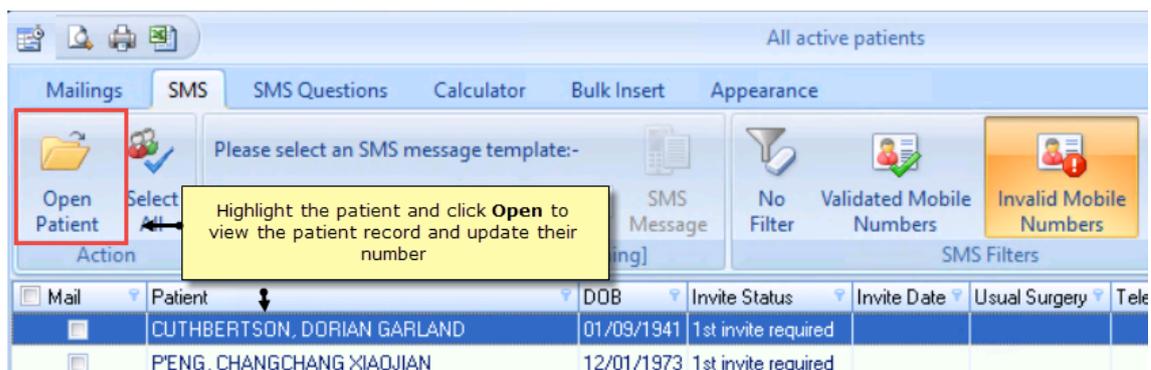
7. All the patients are listed. Select the **SMS** tab.



SMS Tab



- 8.** Select **Invalid Mobile Numbers** to view patients with an invalid number
- 9.** 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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