



TXT2Remind Version Number:	4.0
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Security Classification:	Premium Clients

TXT2Remind 4.0

Appointment Reminders

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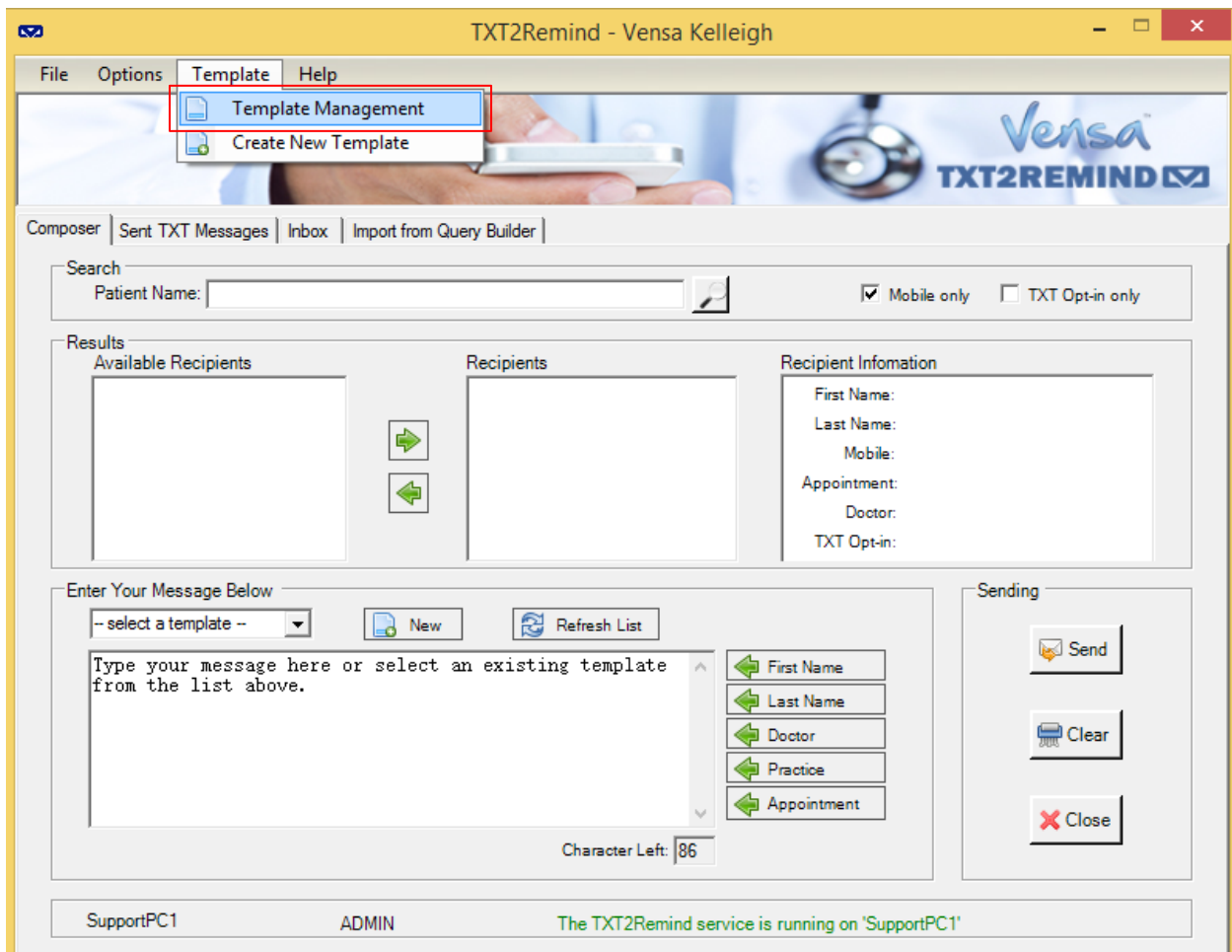
1 Setting Up Automatic Appointments

TXT2Remind 4.0 takes the process of reminding patients one step further by engaging them to confirm or decline their appointment. This is an optional feature that you can choose to turn on or off. The control switch for this feature can be found in your Campaign Manager application. To begin using this feature it is important to ensure that your appointment reminders are correctly set up.

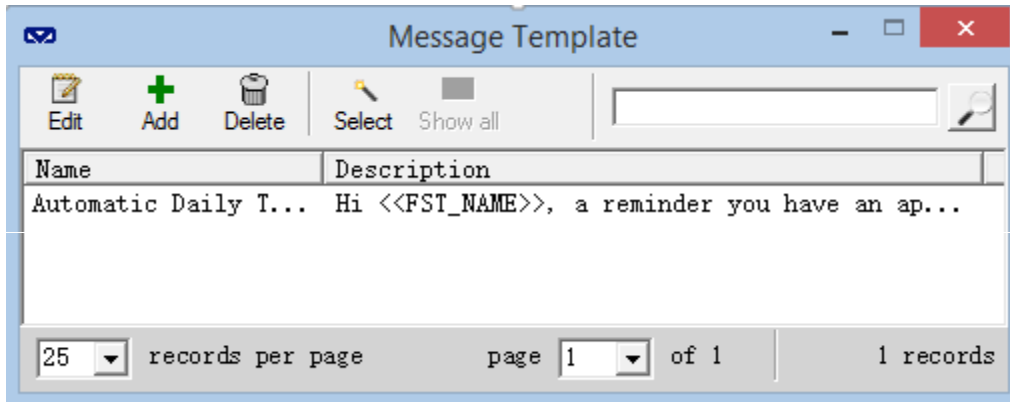
1.1 Template Management

Create or modify automatic appointment reminders to display a personalised message of your choice.

- a. Go to Template
- b. Select Template Management

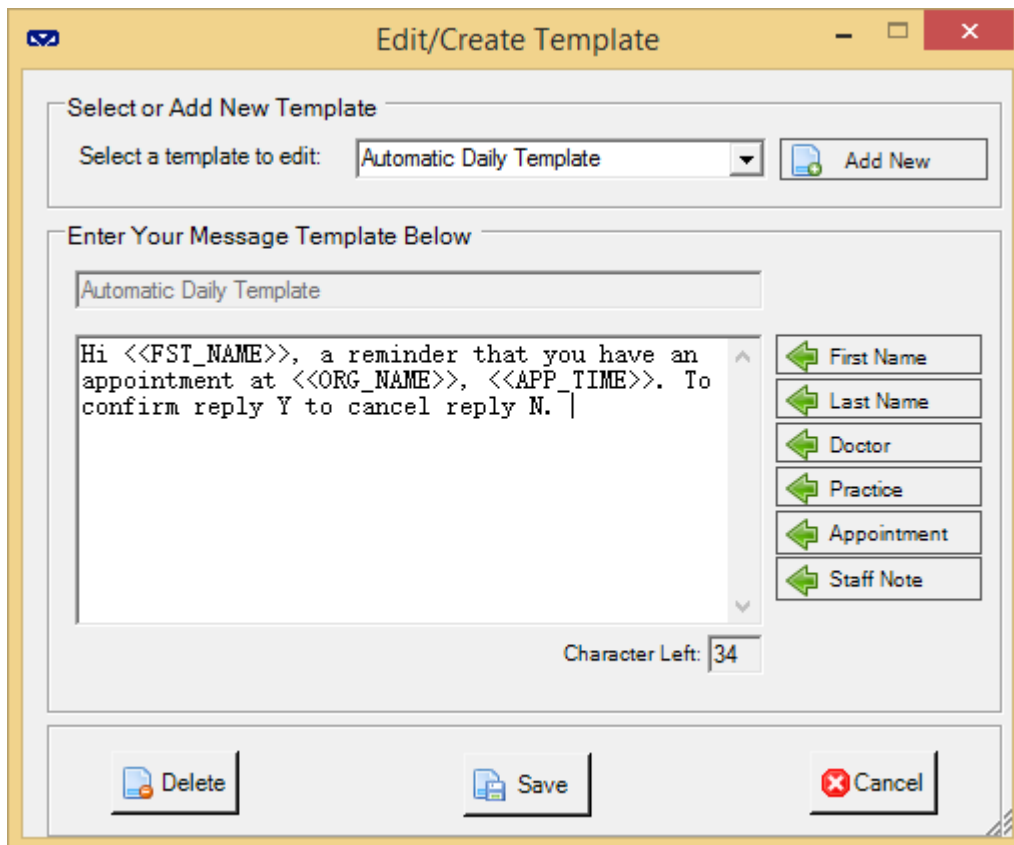


c. The 'Message Template' box will appear.



1.2 Modify the Automatic Daily Template

- a. Select the Automatic Daily Template so it is highlighted
- b. Click on the Edit button



- c. Make changes to the template. Ensure you have at least 10 - 20 characters left to accommodate merge fields

Example:

Merge Fields Character Count

Hi <<FST_NAME>>, a reminder that you have an appointment at <<ORG_NAME>>, <<APP_TIME>>. To confirm reply Y to cancel reply N. **[126 characters including spaces]**

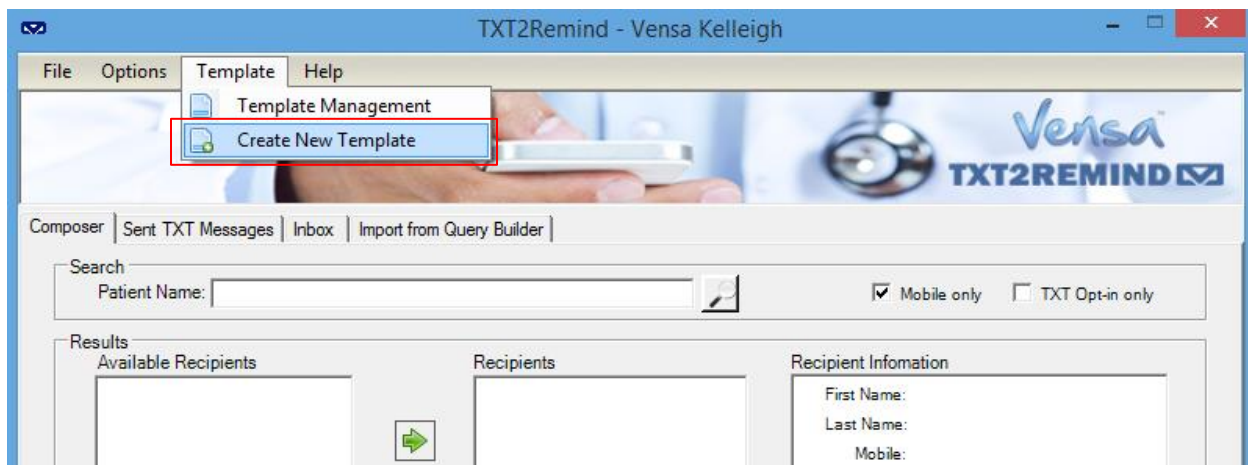
Merged Text Character Count

Hi Mickey, a reminder that you have an appointment at Vensa Health, 27/10/2017 @ 1:00pm. To confirm reply Y to cancel reply N. **[125 characters including spaces]**

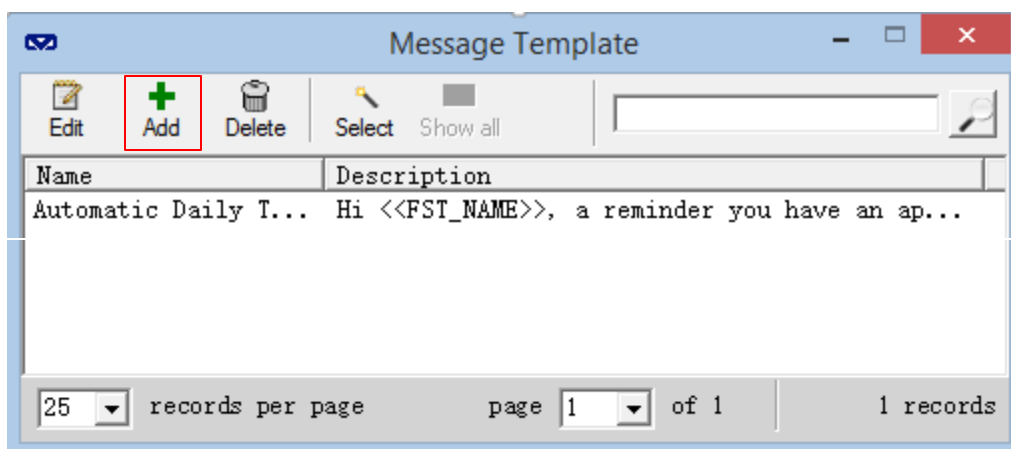
- d. To save changes press Save

1.3 Create New Template

- a. There are two ways to access the template manager. Either go to Template > Create New Template



Or from 'Message Template' box click the Add button



b. The Edit/Create Template box will open

The screenshot shows the 'Edit/Create Template' dialog box. It features a title bar with a mail icon and the text 'Edit/Create Template'. The main content is divided into two sections. The first section, 'Select or Add New Template', includes a dropdown menu labeled 'Select a template to edit:' with 'New Template' selected, and an 'Add New' button. The second section, 'Enter Your Message Template Below', contains a text input field with the placeholder 'Type template name here' and a larger text area with the placeholder 'Type template message here'. To the right of the text area is a list of merge fields: 'First Name', 'Last Name', 'Doctor', 'Practice', 'Appointment', and 'Staff Note', each with a green arrow pointing left. At the bottom right of the text area is a 'Character Left: 134' indicator. At the bottom of the dialog are 'Delete', 'Save', and 'Cancel' buttons. Red arrows point to the name field, the message area, and the 'First Name' merge field.

c. Enter a template name

d. Enter the body of the text message, with optional merge fields from the right

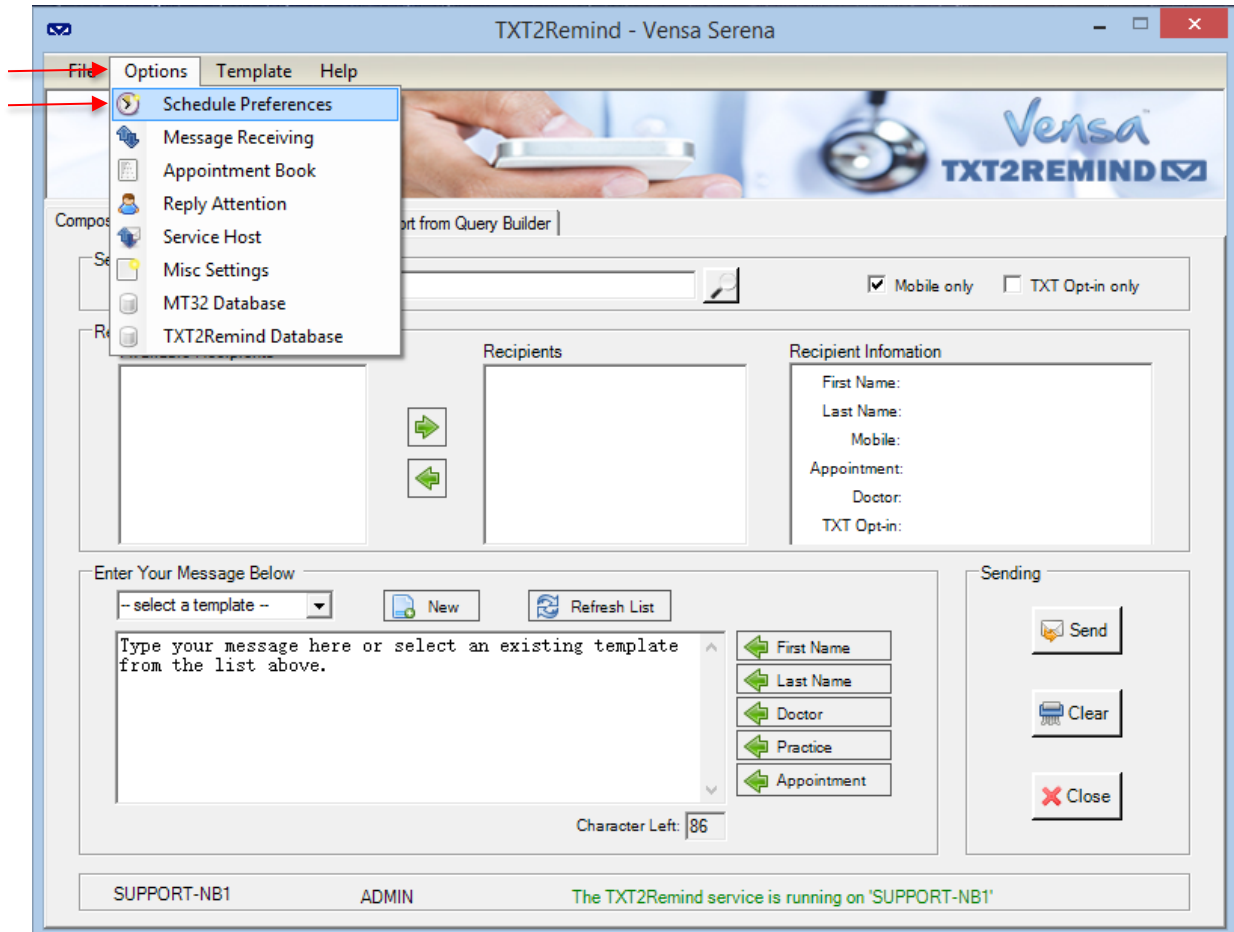
e. Ensure you leave at least 10 – 20 characters to accommodate merge fields expanding

f. To keep the changes click the Save button

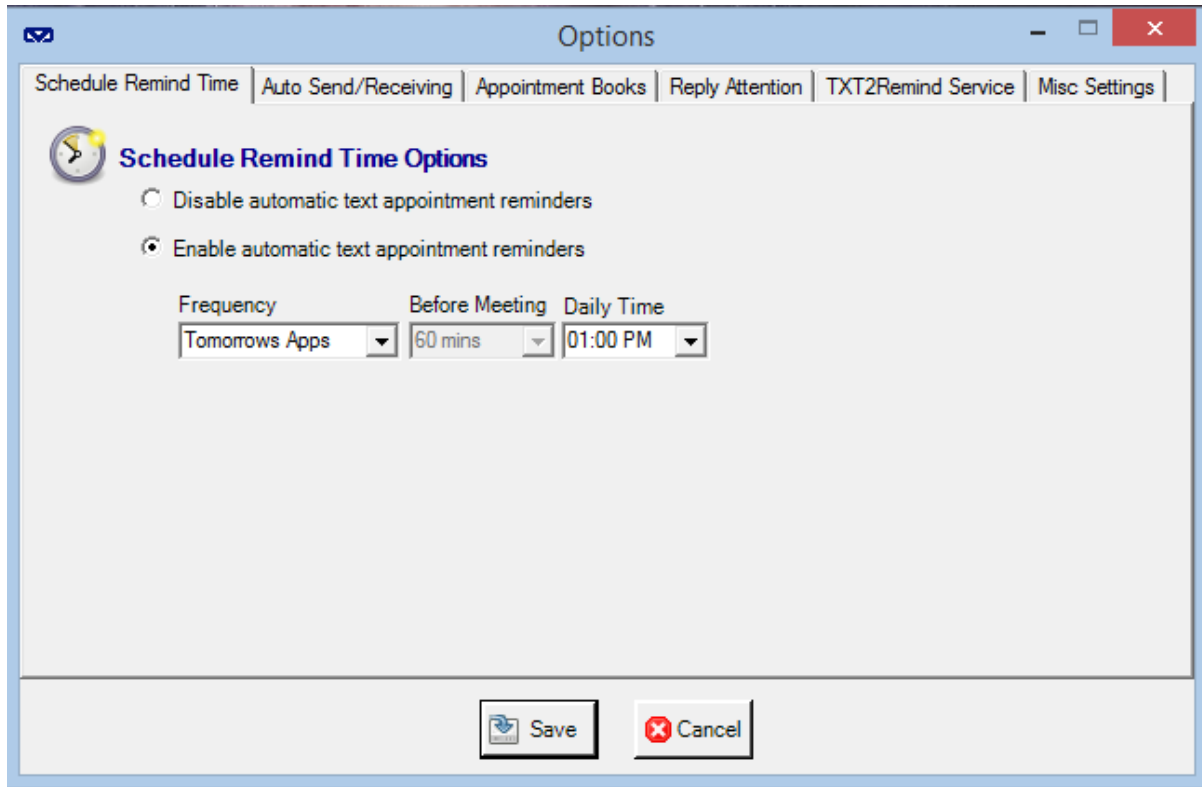
1.4 Schedule Remind Time Options

Chose when your appointment reminders are sent to patients

- On the Medtech server, open TXT2Remind (If you attempt to open on a workstation it will appear greyed out, preventing any changes to be performed)
- Select Options
- Schedule Preferences



d. A popup box will appear named 'Schedule Remind Time Options'



- e. Select 'Enable automatic text appointment reminders'. This will make the lower options available for changes
- f. Select the frequency of your choice (See below for available options)

Frequency	Description
Before Apps	This setting will not allow a set time selection, only the total amount of minutes before the appointment (ranging from 5mins to 120mins)
Today's Apps	This setting allows set time selection only. Be sure to select a time before your first appointment. (i.e. all appointments for today will go out at 8:00am)
Tomorrows Apps	Schedule all appointments for tomorrow to go out at a set time. The set time can be any time of your choosing. Ensure the patient has enough time to reschedule early appointments and there is a staff member available on the phones to take the reschedule call.
2 Days Before Apps	Schedule all appointments for 2 days away to go out at a set time.
3 Days Before Apps	Schedule all appointments for 3 days away to go out at a set time.
4 Days Before Apps	Schedule all appointments for 4 days away to go out at a set time.
5 Days Before Apps	Schedule all appointments for 5 days away to go out at a set time.
6 Days Before Apps	Schedule all appointments for 6 days away to go out at a set time.
7 Days Before Apps	Schedule all appointments for 7 days away to go out at a set time.

g. Once the schedule is set, click on the Appointment Books tab

1.5 Appointment Books

The Appointment Books tab displays all providers based at the practice (below is an example only).

Appointment Book	SMS Template
<input checked="" type="checkbox"/> Barry Beta	Automatic Daily Template
<input checked="" type="checkbox"/> Jennifer Wilson	Automatic Daily Template
<input checked="" type="checkbox"/> Joan Baker	Automatic Daily Template
<input checked="" type="checkbox"/> Peter Chapman	Automatic Daily Template
<input checked="" type="checkbox"/> Sam Eaves	Automatic Daily Template

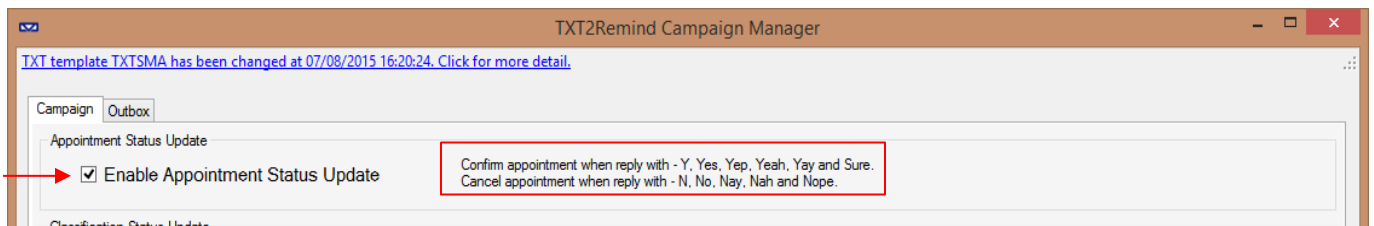
Save Cancel

- Scroll down the list of providers and select the providers you want to activate for automatic appointment reminders.
- Each selected provider is by default set up to send the Automatic Daily Template to their patients. To change this, use the drop menu to assign another template to each of the providers selected. To modify or create another template please see 'Template Management'.
- To save changes press Save.

2 Appointment Book Colour Coding Confirmation (Campaign Manager)

The Campaign Manager is a new additional tool that completes the process of confirming or declining appointments. This tool also provides a list of acceptable responses. The campaign manager tool can be found as an icon on your desktop and it looks exactly like the TXT2Remind icon, but is called 'TXT2Remind Campaign Manager'.

Ensure the Campaign Manager 'Enable Appointment Status Update' is ticked



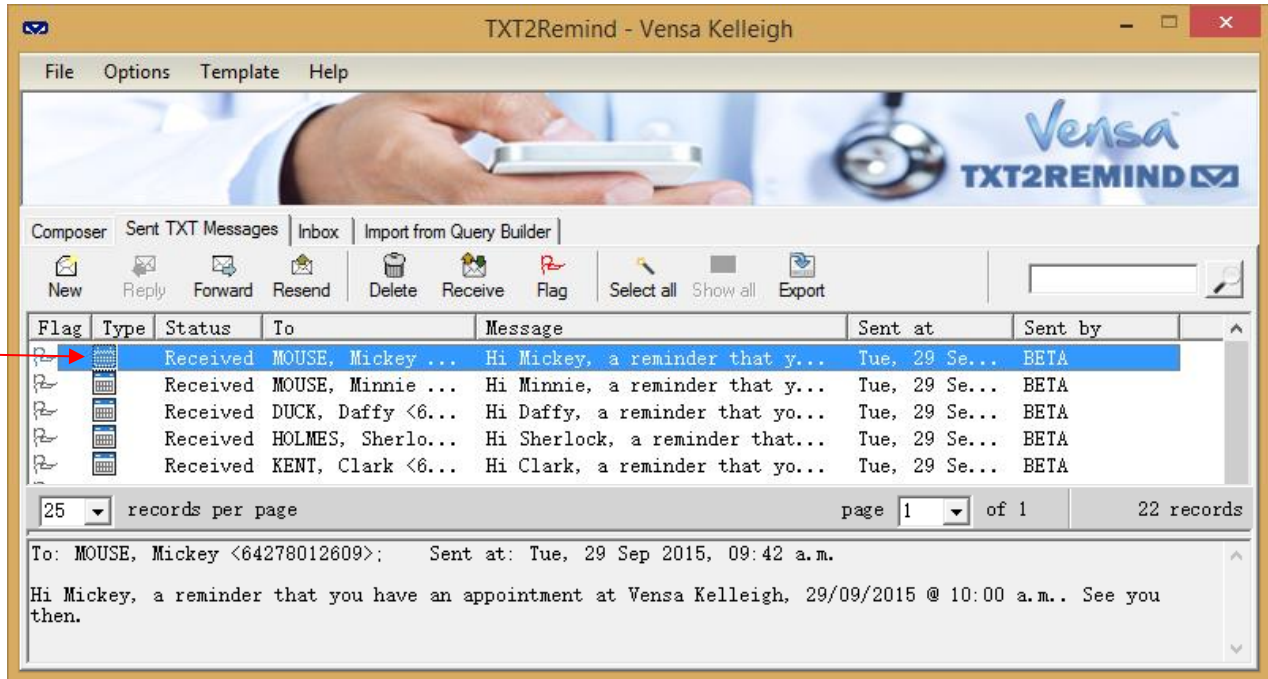
- The response choices are as shown above. When a patient replies with any of the responses this will colour code the appointment book with the appropriate colour

Time	Patient	Procedure	Note	Stat	SMS	Location Type
09:00 am						
09:15 am						
09:30 am						
09:45 am						
10:00 am	MOUSE Mickey (130292)					At Practice (AP)
10:15 am						
10:30 am	MOUSE Minnie (130334)					At Practice (AP)
10:45 am						
11:00 am						
11:15 am						
11:30 am	HOLMES Sherlock (13...				■	At Practice (AP)
11:45 am						
12:00 pm	KENT Clark (130336)				■	At Practice (AP)
12:15 pm	KENT Clark (130336)		**			At Practice (AP)
12:30 pm						

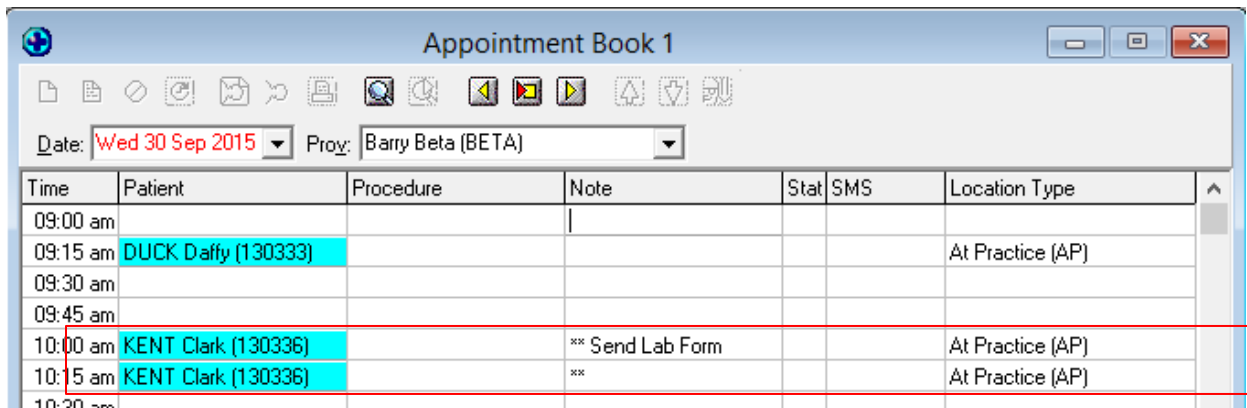
- The example above shows two confirmed appointments
- If your colour coding does not work, it is likely you are not a premium customer or the campaign service is not on. Contact Vensa on 0800 736 463 for further support.

3 Appointment Reminder – Tips

- a. Appointment Reminders appear in TXT2Remind with a calendar icon to the left of the message. All other texts will not have this icon



- b. TXT2Remind 4.0 sends the 1st reminder for double appointments, as opposed to earlier versions sending the 2nd reminder.
- c. To stop appointment reminders going out for single appointments but leave the rest of the appointment book to go out as per usual. Place a ** in the notes column on the line of the appointment you want to avoid sending a reminder. If you have a double appointment, the ** will need to go into both appointment lines. Notes can still be typed into the cell, so long as the ** goes in too.



- d. Automatic Appointment Reminders write back to the patients' outbox. Double click to open the message for viewing.

Patient Manager

Out Box | Inbox | Clinical Template | History | Appointments | Immunisation | Contacts

Tck	Date	Document	Subject	Folder	Prov
<input type="checkbox"/>	5 Oct 2015	TXTSMA	TXT Smoking Ask	TXT	SFE
<input type="checkbox"/>	5 Oct 2015	TXT	TXT Messages	TXT	SFE
<input type="checkbox"/>	29 Sep 2015	TXTSMA	TXT Smoking Ask	TXT	SFE
<input type="checkbox"/>	29 Sep 2015	TXTAPP	Appointment Reminder SM	TXT	BET.

View Patient Document

Main | More | Audit

Document Details

Document: TXT Appt Reminder (TXTAPP) To: TXT2Remind Confidential Park Document

Hi Clark, a reminder that you have an appointment at Vensa Kelleigh, 29/09/2015 @ 12:00 p.m..
See you then.

Document Options

Printer: DocuCentre-V C3375 Provider: Barry Beta (BETA) Copies: 1

END