

TXT2Remind Version Number:	4.0
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TXT2Remind 4.0

Campaign Manager for BPAC

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1 Introduction

The Campaign Manager is a tool that provides the ability to automatically update read code classifications within Medtech based on a patient's reply. This tool has been used extensively across New Zealand in the areas of Smoking Ask, Brief and Cessation. Below is a detailed guide on how to use the TXT2Remind 4.0 Campaign Manager to meet your Smoking ABC targets.

2 Set up your TXT Outbox Document within Medtech

HedTech-32 Vensa Health		
File Edit Patient Module Report Loois Lilities Image: State of the stat	Setup ManageMyHealth Conn ACC A Accounting A Advanced Forms A Agencies A Appointment A Clinical A	ectedCare <u>C</u> AT <u>Window Help</u>
	In/Out Box Location Patient Register Recall/Screening Reference Nos Staff System Configuration	Out Box Folder Out Box Document Referral Heading Referral Macro Referral Services In Box Folder Inbox Screening
		Inbox Report Type

a. Go to Setup, In/Out Box, Out Box Document.

b. Click on the "Add a New Document" icon.





c. When the Document Designer box pops up fill in the fields in red. Ensure the Code and Description has a prefix of TXT. This will distinguish the difference between a hard copy document and a Text document, it will also make it much easier to locate. Choose the TXT2Remind (TXT) folder and select Text (T) for the Format.

🕑 Document Designer		×
TXT Smoking Brief (TXTSMB)		
Main Document Audit		
Details]	
Code: TXTSMB	📃 External Referral	BØ <u>W</u> ord
Description: TXT Smoking Brief		
Folder: Vensa (TXT)		
Format: Text (T)		
Refer To:	··· Cc1: ···	Cc3:
Referral Type:	Cc2:	Cc4:
Cost:		
Printing Details		
Paper Size: A5 Paper (A5)	Print Preview	
☐ Print Landscape ☐ Print Logo	Reserved Lines for Pre-Printed Footer: 0 🌩	

E.g. for Smoking ABC, enter:

Code as: TXTSMA and the Description as: TXT Smoking Ask

OR:

Code as: **TXTSMB** and the Description as: **TXT Smoking Brief**

- d. Click on Document tab and type your message. Use the "Insert" button to insert merge fields that will personalise the message, if you choose.
- e. Click on the OK button to finish.

3 Set up a Campaign

a. Open your campaign manager from your Desktop





b. To create a campaign, click 'Add'

TXT2Remind Cam	paign Mar	nager								-	
template SMS4-5 H	nas been c	hanged at 08/07/2016 17:32:08. Cli	ck for more detail.								
ampaign Outhow (luoni										
Appointment Status I	Jodate										
Enable A	Appointn	nent Status Update	Confirm appointment when reply with - Y, Yes, Yep, Yeah, Yay, Sure, Ok And Cancel appointment when reply with - N, No, Nay, Nah and Nope.	d Ae.							
Classification Status	Update										
											Add
Campaign Name	Doc Code	Message		Reply1	Reply2	Reply3	Reply4	Reply5	Start	End	
Campaign Name TXT Smoking Ask	Doc Code TXTSMA	Message Hi [PAT_FIRSTNAME], it is a Ministry	requirement for us to obtain your smoking status, and we are updating our	Reply1 137R.00	Reply2 137K.00	Reply3 1375.00	Reply4 1371.11	Reply5	Start 22/07/2016	End 29/07/2016	T Z .

c. Once the campaign opens, first select your date range. From experience, the highest response is within the first few hours of running the campaign. Some patients may reply a week later, but between a fortnight to a month is a sufficiently long enough period to run the campaign.

l Campaign						—]
Campaign Query								
Document Code and Messag	e							
Start: 6/14/2018	End:	6/28	/2018					
Select Document Code:	TXTSMB ~	4		J	une 20	18		×
		Sun	Mon	Tue	Wed	Thu	Fri	Sat
Campaign Name:	TXT Smoking Brief	27	28	29	30	31	1	2
		3	4	5	6	_7_	8	9
Campaign Description:	TXT Smoking Brief	10	11	12	13		15	16
		17	18	19	20	21	22	23
	Hi [PAT_FIRSTNAME], [LOC_NAME]	V 24	25	26	21		29	30
Message:	smokefree, as it is the best thing for you Quit 2. Not Ready to Quit 3. Quit less th	и 1	2	3	4 Today	ے : 6/14/	2018	1

d. Select your document code. This will be the code of the outbox document you will be sending out to your patients.

We recommend the following wording, or something similar, for Smoking Brief Advice:

"Hi [PAT_FIRSTNAME], [LOC_NAME] would like to help you become or remain smokefree, as it is the best thing for your health. Pls reply 1 2 3 OR 4. 1. Help Me Quit 2. Not Ready to Quit 3. Quit less than 12 months ago 4. Quit more than 12 months ago. Thanks"



Campaign	Querv						
Docume	nt Code and Messag	e					
	-						
Start:	28-Jun -17		End:	05- Jul -17]	
Select	Document Code:	TXTSMB	\sim				
Campa	aign Name:	TXTFLU TXTHPV TXTIMM	^				
Campa	aign Description:	TXTIN TXTINR TXTL1					
Messa	ige:	TXTL2 TXTMAM TXTO/D TXTREV TXTREY	LOC_NAME of the follow opply)	are offering support wing. 1 Help me quit, 2	to help smokers 2 Not ready to o	s quit. A quit, 3	
Reply R	eadcode Writeback	TXTSBE TXTSBF					
Repl	Readcode	TXTSMB		Auto Reply			
1		SMSSCS TEST SMSCXR		< None >	~	Edit	
2		SMSDEP SMSDIA SMSFLU		< None >	~	Edit	
3		SMSHPV SMSIMM SMSMAM		< None >	~	Edit	
4		TXTHBAS TXTHBA TXTOA SMSCVD		< None >	~	Edit	
5		TXTCXR	× /	< None >	~	Edit	

e. After selecting your document code, change the Campaign Name or leave it as the default. This will auto populate your campaign description and the message from the outbox document created previously.

Note: Appropriate read codes need to be assigned based on the contents of the outbox message and the numbers you have prompted your patients to text back. For example, if the patient has been asked to text back **1** if they are a current smoker, the "Reply 1" needs to have the read code for a current smoker assigned against it.



f. To assign read codes, click the spanner button next to each reply number, and search for the read code by either name or number. Select the appropriate one and move it into the "Selected" box using the arrows. You can assign multiple read codes to each response. After this hit "OK" for the read code(s) to be assigned and saved.

Re	adcode Sear	ch		-	
		Selected			
Readcode Term		Readcode	Term		
137R.00 Current smoker	>>	137R.00	Current smoker		
	<<				
			OK		Cancel

g. For practices that use BPAC we recommend that you use the following read codes for the following replies.

The reason for this is to ensure that the information written back into your PMS by Vensa's Campaign Manager works in conjunction with BPAC. The following read codes will affect how individuals are assessed for Cardio Vascular Risk.

- 1. Help Me Quit
 - a. 137R.00 Current Smoker
 - b. @ZPSB.10 Brief smoking cessation advice given
 - c. @ZPSC.10 Referral to smoking cessation support**

** Ensure a process is in place to follow up with patients who reply (1) to they are referred to smoking cessation support

- 2. Not Ready to Quit
 - a. 137R.00 Current Smoker
 - b. @ZPSB.10 Brief smoking cessation advice given
 - c. @ZPSC.90 Refused smoking cessation support
- 3. Quit less than 12 months ago
 - a. 137G.00 Recently quit/trying to give up smoking
 - b. @ZPSB.10 Brief smoking cessation advice given
- 4. Quit more than 12 months ago
 - a. 137S.00 Ex Smoker
 - b. @ZPSB.10 Brief smoking cessation advice given

(See page 7 for Smoking Ask recommended text message, responses and read codes)



h. Now use the Query tab to decide the query parameters – this takes the place of a Query Builder (example only below).

Description	Parameters
Registered Patient Only	
Patient Enrolled	
Patient Fully Funded	
NOSMS Unchecked	
Patient Age Between	MinAge 15 MaxAge 74
Phone Number Starts With	Phone 02
Patient Of Doctors	Code1 Code2
Patient Of Location	Location
Patient Was Smoker Between	StartDate 3/31/2017 v EndDate 6/30/20
Patient Not Given Brief Advice Between	StartDate 3/31/2017 v EndDate 6/30/20

Note: When entering the dates for when 'Patient was Smoker Between' and 'Patient Not Given Brief Advice Between' ensure that both of these dates go back <u>15 months from the end of your current quarter.</u>

- E.g. Today's date = 13^{th} June 2018 End of this quarter = 30^{th} June 2018 15 Months from end of quarter = 31^{st} March 2017
- i. Choose your criteria and click Save.
- j. When running another campaign later, you can copy the previous one, just change the start and end dates, campaign name (some people like to add the send date to the campaign name) and query dates if applicable.



splate SMS4-5 has been changed at 08/07/2016 17:32:08. Click for more detail.	TXT2Remind Camp	oaign Mar	nager							-	
aign Outbox Quey ontment Status Update Confirm appointment when reply with - Y, Yes, Yep, Yeah, Yey, Sure, Ok And Ae. Cancel appointment when reply with - Y, No., Nay, Nah and Nope. affication Status Update Confirm appointment when reply with - Y, No., Nay, Nah and Nope. affication Status Update Confirm appointment when reply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment when reply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. affication Status Update Confirm appointment of the neply with - N, No., Nay, Nah and Nope. afficat	template SMS4-5 h	as been cl	hanged at 08/07/2016 17:32:08. Click for more detail.								
ontment Status Update Confirm appointment when reply with - Y, Yes, Yep, Yeah, Yey, Sure, Ok And Ae. Cancel appointment when reply with - N, No. Nay, Nah and Nope. affication Status Update	mpaign Outbox G	luery									
Confirm appointment when reply with - Y, Yes, Yep, Yea, Yao, Sure, OK, And Ae. Cancel appointment when reply with - Y, Yes, Yep, Yea, Yao, Sure, OK, And Ae. affication Status Update	Appointment Status L	lpdate									
Status Update Note Note </td <td>Enable A</td> <td>ppointm</td> <td>nent Status Update Confirm appointment when reply with - Y, Yes, Yep, Yeah, Yay, Sure, Ok An Cancel appointment when reply with - N, No, Nay, Nah and Nope.</td> <td>d Ae.</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Enable A	ppointm	nent Status Update Confirm appointment when reply with - Y, Yes, Yep, Yeah, Yay, Sure, Ok An Cancel appointment when reply with - N, No, Nay, Nah and Nope.	d Ae.							
Image:	Classification Status (Jpdate									
mcaige Dec (sease) Meessage Reply1 Reply2 Reply3 Reply4 Reply5 Stat End											Add
T Smoking Ask TXTSMA H [PAT_FIRSTNAME], it is a Ministry requirement for us to obtain your smoking status, and we are updating our 137R.00 137R.00 1371.11 22/07/2016 29/07/2016 T Smoking Bief TXTSMB H [PAT_FIRSTNAME], it is a Ministry requirement for us to obtain your smoking status, and we are updating our 137R.00	Campaign Name	Doc Code	Message	Reply1	Reply2	Reply3	Reply4	Reply5	Start	End	
T Smaking Bief TXTSMB Hi [PAT_FIRSTNAME], [LOC_NAME],thinks emoking is hamful and would like to offer bief advice to help you qu 137R.00, 137R.00	XT Smoking Ask	TXTSMA	Hi [PAT_FIRSTNAME], it is a Ministry requirement for us to obtain your smoking status, and we are updating our	137R.00	137K.00	137S.00	1371.11		22/07/2016	29/07/2016	47
	XT Smoking Brief	TXTSMB	Hi [PAT_FIRSTNAME], [LOC_NAME] thinks smoking is hamful and would like to offer brief advice to help you qu	137R.00,	137R.00,	137S.00,			22/07/2016	29/07/2016	YZ,

k. Smoking ASK Examples:

We recommend the following wording, or something similar, for Smoking **ASK**:

"Hi [PAT_FIRSTNAME], [LOC_NAME] is updating records and is offering smokefree support, as it is the best thing for your health. Pls reply 1 2 3 4 OR 5. 1. Help Me Quit 2. Not Ready to Quit 3. Quit less than 12 months ago 4. Quit more than 12 months ago 5. Never Smoked. Thanks"

1. Help Me Quit

- a. 137R.00 Current Smoker
- b. @ZPSB.10 Brief smoking cessation advice given
- c. @ZPSC.10 Referral to smoking cessation support**

** Ensure a process is in place to follow up with patients who reply (1) to they are referred to smoking cessation support

2. Not Ready to Quit

- a. 137R.00 Current Smoker
- b. @ZPSB.10 Brief smoking cessation advice given
- c. @ZPSC.90 Refused smoking cessation support
- 3. Quit less than 12 months ago
 - a. 137G.00 Recently quit/trying to give up smoking
 - b. @ZPSB.10 Brief smoking cessation advice given
- 4. Quit more than 12 months ago
 - a. 137S.00 Ex Smoker
 - b. @ZPSB.10 Brief smoking cessation advice given
- 5. Never Smoked
 - a. 1371. Never smoked tobacco



4 Sending messages via Campaign Manager

a. Click the Query tab and use the drop down to select the Campaign you are running.

b. Then click Search

5	а тхт	Remind Cam	paign Manager								-		×
<u>TX</u>	T tem	plate SMS4-5 h	as been change	ed at 08/07/2	016 17:32:08	. Click for	more detail.						
	Campai	gn Outbox G	luery										
									P	Export Edit Query Search		Send	
		Sumame	Given Name	Gender	Mobile	NHI	Ethnicity	Date of Birth	Prov	TAX Broken Bert Status Outcome			$\hat{}$
													^
													~

c. Searching will generate a list of those patients who fulfil your query criteria. To send to all, select with the tickbox on the left of the window and press Send. You may also scroll through the list and untick individual patients to stop them receiving the text if you choose.

😎 TXT	2Remind Cam	paign Manage	r							- 🗆 X
XT tem	plate SMS4-5 H	as been chang	ed at 08/07/.	2016 17:32:08.	Click for I	more detail.				
								P	TXT Smoking Ask 28.07	Edit Query Search Send
	Sumame 🔺	Given Name	Gender	Mobile	NHI	Ethnicity	Date of Birth	Prov	Status Outcome	Patients selected to send message = 2
	LOVEGOOD	LUNA	F	021684699	ABC1231		8/02/2000	SFE		
	SNAPE	SEVERUS	м	021684699			4/09/1956	SFE		patient who :
										 Is enrolled have not opt out of receiving texts (No SMS) Is between 15 and 65 years old have a cell phone that starts with 02 have no classification within tobacco consumption #137.00 ever



5 View Sent Messages, Status Updates and Number of Replies

To view sent messages and replies received, open your Campaign Manager and select the Outbox tab.

a. Use the drop-down menu to select the campaign you ran, change the 'from:' date to the campaign-ran date, and click the magnifying glass.

npaign Outb	0X Query	changed at 08/07/	2016 17:32	08. Click for r	nore detai	<u> </u>		
moking Ask		~				From: 12/07/2016 To: 28/07/2016	Export	Print
Sent 🚽	Sender	Patient Name	Patient NHI	Mobile	Doc Code	Message	Msg Status	# of reply
22/07/2016	TXT	HAGRID, Rubeus		6421684699	TXTSMA	Hi Rubeus, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the	137K.00	1
22/07/2016	TXT	LOVEGOOD, Luna	ABC1231	6421684699	TXTSMA	Hi Luna, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the ap	Unknown	1
2/07/2016	TXT	BLACK, Sirius		6421684699	TXTSMA	Hi Sirius, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the ap	137R.00	1
2/07/2016	TXT	SNAPE, Severus		6421684699	TXTSMA	Hi Severus, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the	Unknown	1
	TXT	POTTER, Hany		6421684699	TXTSMA	Hi Harry, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the ap	137S.00	1
leply	Message							Result

- b. Select the 'Status' button to order the messages by the read code status update.
- c. For an 'Unknown' response, click to see the reply in the message preview window at the bottom.

King Ask		~				From: 12/07/2016 🖉 🖝 To: 28/07/2016 🖉 🗸	Export	Pri
nt	Sender	Patient Name	Patient NHI	Mobile	Doc Code	Message	Msg Status	# of reply
/07/2016	TXT	HAGRID, Rubeus		6421684699	TXTSMA	Hi Rubeus, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the	137K 00	1
/07/2016	TXT	LOVEGOOD, Luna	ABC1231	6421684699	TXTSMA	Hi Luna, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the ap		1
/07/2016	TXT	BLACK, Sirius		6421684699	TXTSMA	Hi Sirius, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the ap	137R.00	1
/07/2016	TXT	SNAPE, Severus		6421684699	TXTSMA	Hi Severus, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the	Unknown	1
07/2016	TXT	POTTER, Harry		6421684699	TXTSMA	Hi Harry, it is a Ministry requirement for us to obtain your smoking status, and we are updating our annual records. Please reply with the ap	137S.00	1
tient: LOV ssage: H toker>1yr	EGOOD, L i Luna, it is 4. NonSm	una Mobile: 6421 a Ministry requirer oker. Thanks.	684699 nent for us	Sent at: 22, to obtain yo	07/2016 our smoki	207:15 p.m. Sender: TXT ng status, and we are updating our annual records. Please reply with the appropriate number: 1. Current Smoker 2	2. ExSmoker	<1yr 3. I
ient: LOV ssage: H oker>1yr ^{ply}	EGOOD, L i Luna, it is 4. NonSm Message	una Mobile: 6421 a Ministry requirer oker. Thanks.	684699 nent for us	Sent at 22, to obtain yo	07/2016 our smoki	207:15 p.m. Sender: TXT ng status, and we are updating our annual records. Please reply with the appropriate number: 1. Current Smoker 2	2. ExSmoker Res Rec	<1yr 3.

In this case, the response is from an ex-smoker of 10 years.

d. To automatically update this response in their patient file, right click the 'Unknown' box > Add Reply. In this case the appropriate reply is 'Reply 3) 137S.00' When you hover on this option, it gives the written answer 'Ex-Smoker'



Msg Status	# of reply		
137K.00	1		
Unknown	-		
127P.00	Add Reply	•	Reply 1) 137R.00
1371.00			Reply 2) 137K-00
Unknown	1		112013 27 1011100
1375.00	1		Reply 3) 137S.00
1373.00			Reply 4) 1371.11
			1375 00: Ex smoker
			1373.00; EX SHIOKEI

d. To print the list, select the print button.

template change de	detected.					
omencion Outbox						
btsma				From: 02/09/2015 • To: 02/09/2015 •	Export	Print
Sent Sen	ender Patient Name	Mobile (Doc Code	Message	Status 🔺	# of reply
02/09/2015 SFE	E SMITH, Graham	642108199784 T	IXTSMA	Hi Graham, pls reply if you are:(1)Current Smoker(2)ExSmoker<1yr(3)Ex-Smoker>1yr(4)NonSmokerMillstone	1371.11	1
02/09/2015 SFE	E HOLMES, Sherlock	642108199784 T	TXTSMA	Hi Sherlock, pls reply if you are:(1)Current Smoker(2)ExSmoker<1yr(3)Ex-Smoker>1yr(4)NonSmokerMillston	137R.00	1
02/09/2015 SFE	E MOUSE, Mickey	642108199784 T	IXTSMA	Hi Mickey, pls reply if you are:(1)Current Smoker(2)ExSmoker<1yr(3)Ex-Smoker>1yr(4)NonSmokerMillstone	137S.00	1
02/09/2015 SFE	E SMITH, Jason	642108199784 T	TXTSMA	Hi Jason, pls reply if you are:(1)Current Smoker(2)ExSmoker<1yr(3)Ex-Smoker>1yr(4)NonSmokerMillstone F	Unknown	1

e. To save the list, select the export button and save to an appropriate folder.

		Export Outbox				×
🔄 🦻 🝷 🕇 🎴	≪ Documents → Smoking C	ampaigns	~ Č	Search Smoking	Campaigns	Q
Organize 🔻 Ne	w folder				•== •	0
This PC Desktop Documents Downloads Music Pictures Videos		^ Name	No items r	match your search.	Date modifie	d
File name: Save as type:	Export_11_1_2016 CSV files (*.csv)					× ×
) Hide Folders				Save	Cancel	
			END -			