

TXT2Remind Version Number:	4.0
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Security Classification:	Premium Clients

TXT2Remind 4.0 Funding Expiring Campaign

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1 Introduction

The Funding Expiring campaign has been added to support practices to find those patients whose funding is about to expire and ask them if they plan to stay enrolled. This allows the practice to send an enrolment enquiry text in bulk and receive replies from multiple patients with minimal effort. These patients can then be updated in the PMS by staff, depending on the response.

2 Set up your TXT Outbox Document within Medtech

NedTech-32 Vensa Health		
File Edit Patient Module Report Icols Utilities Image: State	ManageMyHealth ConnectedCare CAT Windo ACC Accounting Advanced Forms Image: ConnectedCare Image: ConnectedCare Advanced Forms Advanced Forms Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Advanced Forms Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Advanced Forms Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Agencies Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Agencies Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Clinical Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare Image: ConnectedCare	w <u>H</u> ep
	In/Out Box Out Box Folder Location Out Box Docume Patient Register Referral Heading Reference Nos Staff System Configuration In Box Folder Inbox Screening Inbox Report Typ	ent la

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

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



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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.

[EXAMPLE]. for Funding Expiring, enter the Code as: **TXTFEX** and the description as: **TXTFunding Expiring.**

Ocumen	it Designer	×
TXT Fundir	ng Expiring (TXTFEX)	
Main Docur	nent Audit	
Details		
Code:	TXTFEX External Referral	
Description:	TXT Funding Expiring	
Folder:	TXT2Remind (TXT)	
Format:	Text (T)	
Refer To:		
Referral Type:		
Cost:		

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. [EXAMPLE ONLY BELOW]

Ocument Designer
TXT Funding Expiring (TXTFEX)
Main Document Audit
MS Sans Serif 10 B U ≧ ≦ 目 Insert PgBrk
•••••••••••••••••••••••••••••••••••••••
Hi [PAT_FIRSTNAME], we are updating our patient register. Would you like to remain enrolled? Reply Y or N, or phone [LOC_DAY_PHONE]. Thanks, Hauora Medical.
<u> </u>

Note: If you are already using appointment reminders and have 'Y or N' as your options for confirming or cancelling appointments, you may prefer to use different letters to distinguish replies in the Inbox.

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 Camp	paign Mar	nager								-		2
template SMS4-5 h	as been c	hanged at 08/07/2016 17:32:08. Clic	:k for more detail.									
maziga Qui Q												
Appointment Status I	ludate											
pointmont otatas e	pulle		Confirm appointment when reply with - Y, Yes, Yep, Yeah, Yay, Sure, Ok A	nd Ae.								
Enable A	ppointn	nent Status Update	Cancel appointment when reply with - N, No, Nay, Nah and Nope.									
Classification Status	Appointn Update	nent Status Update	Cancel appointment when reply with - N, No, Nay, Nah and Nope.									
Classification Status (Appointn Jpdate	nent Status Update	Cancel appointment when reply with - N, No, Nay, Nah and Nope.								Add	
Classification Status (Campaign Name	Update Doc Code	nent Status Update	Cancel appointment when reply with - N, No, Nay, Nah and Nope.	Reply1	Reply2	Reply3	Reply4	Reply5	Start	End	Add	
Enable A Classification Status U Campaign Name TXT Smoking Ask	Update Doc Code TXTSMA	Message H (PAT_FIRSTNAME), it is a Ministry	Cancel appointment when reply with - N, No, Nay, Nah and Nope.	Reply1	Reply2 137K.00	Reply3 1375.00	Reply4 1371.11	Reply5	Start 22/07/2016	End 29/07/2016	Add	1

c. Once the campaign opens, first select your date range. In this campaign, we are not looking for replies from patients, therefore the date range is not sensitive.

Add Campaign						—		ı ×
Campaign Query								
Document Code and Message								
Start: 28-Jun -17	End:	05- Jul	-17					
Select Document Code: T	KTSMB ~	4		Ju	ily 201	7		- •
		Mon	Tue	Wed	Thu	Fri	Sat	Sun
Campaign Name:	(T Smoking Brief	- 3	4	28	29 6	30 7	8	9
Campaign Description: T)	KT Smoking Brief	10	11 18	12 19	13 20	14 21	15 22	16 23
Hi	[PAT_FIRSTNAME], [LOC_NAME];	24	25	26 2	27 3	28 4	29 5	30 6
message:	: Smoker. (Msg Rates Apply)		() I	Foday:	28-Ju	in-17	

Campaig	gn				-		×
ampaign	Query						
Docume	nt Code and Message	e					
Start:	15-Mar-18		End:	15-Mar-18			
Select	Document Code:	TXTFEX	\sim				
Campa	aign Name:	TXTL1 TXTL2 TXTMAM	^]		
Campa	aign Description:	TXTO/D TXTREV TXTRX					
Messa	ge:	TXTSBE TXTSBF TXTSBH TXTSMB TXTSMC	ve are upo or N, or p	lating our patient regist hone [LOC_DAY_PHO	er. Would you like NE]. Thanks, Ha	uora ×	
Reply Re	eadcode Writeback -	SMSSCS TEST					
Repl	Readcode	SMSCXR SMSDEP TXTFEX		Auto Reply			
1		SMSDIA SMSFLU SMSHPV		< None >	∼ Edit		
2		SMSIMM SMSMAM TXTB4S		< None >	∽ Edit		-
3		TXTHBA TXTOA TXTACG		< None >	∼ Edit		-
4		SMSCVD TXTCXR TXTXMS		< None >	∼ Edit		
5		TXTMAC	× /	< None >	∼ Edit		-
							_
					C	-	

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

e. After selecting your document code, change the Campaign Name or leave it as the default. We recommend adding the current date to it though, for ease in finding and using it later. This will auto populate your campaign description and the message from the outbox document created previously. There are no readcodes to assign for this campaign. f. Now use the Query tab to decide the query parameters – this takes the place of a Query Builder (example only below).

The 'Patient Funding Expiring Between' parameter should be the current quarters' dates, and the 'Patient Has Not Had Consultation Since' should be the corresponding date of the end of the current quarter, but 3 years ago. E.g. **01-Oct-<u>17</u> – 31-Dec-<u>17</u>** and **31-Dec-**<u>14</u>. This will find those patients who have not visited for around 3 years and will be losing their funding because of this within the current quarter.

	rund	ing Explining		•
Description	Parameters			
Registered Patient Only				
Patient Enrolled				
Patient Fully Funded				
NOSMS Unchecked				
Patient Age Between	MinAge 15	MaxAge 65		
Phone Number Starts With	Phone 02			
Patient Of Doctors	Code1	Code2		
Patient Of Location	Location			
Patient Funding Expiring Between	StartDate 01-Oct -17	EndDate 31-De	ec-17 🔲 🔻	
Patient Has Not Had Consultation Since	Date <u>31</u> -Dec-17 ,			

g. Choose your criteria and click Save.

h. When running another campaign later, you can copy the previous one, just change the start and end dates, date in the campaign name, and query dates if applicable.

Z TXT2Remind Can	npaign Mai	nager							-		×
Campaign Outbox	<u>has been c</u> Query	hanged at 08/07/2016 17:32:08. Click for more detail.									
Appointment Status	^{Update} 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		
TXT 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	1	ŵ
TXT Smoking Brief	TXTSMB	Hi [PAT_FIRSTNAME], [LOC_NAME] thinks smoking is harmful and would like to offer brief advice to help you qu	137R.00,	137R.00,	137S.00,			22/07/2016	29/07/2016	6	1

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	D TXT	2Remind Cam	npaign Manager	r						
ТХ	T tem	plate TXTEEX	has been chang	ed at 20-11-2	017 11:51:20). Click for m	ore detail.			
			nus been enung				ore accom			
		_	_							
	Campai	an Outbox	Query Patient /	Verts						
		g., o allo an	, and the second s							
									C Event	c
									- Export	C
									TXT Smoking Brief	
			Ciuca						TX1 Smeking Bird 1.1.16	
		Sumame	Given	Gender	Mobile	Balance	ACGroup	NHI	Ethn UXI Funding Expiring	
			Name						Birth	

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.

SZ TX	T2Remind Cam	paign Manage	er								-		×
TXT ten	nplate SMS4-5 I	has been chan	ged at 08/07/2	2016 17:32:08	Click for I	more detail.							.::
Camp	aign Outbox	Query						Г	XT Smoking Ask 28.07 V Export	Edit Query Search		Send	
	Sumame 🔺	Given Name	Gender	Mobile	NHI	Ethnicity	Date of Birth	Prov	Status Outcome	Patients selected to send message = 2 Total campaign patients = 2			0
	LOVEGOOD	LUNA	F	021684699	ABC1231		8/02/2000	SFE					-
	SNAPE	SEVERUS	М	021684699			4/09/1956	SFE		I his campaign will retrieve, from Medter patient who : * is confirmed registered * is enrolled	ch, every	/	^

5 View Sent Messages and Number of Replies

To view sent messages and replies received, open your Campaign Manager and select the Outbox tab. Use the drop down menu to find your campaign, change the From: date to the sent date and click the magnifying glass.

6	🚾 TXT2Remind Campaign Manager												
Ð	IXT template TXTFEX has been changed at 20-11-2017 11:51:20. Click for more detail.												
ſ	Campaign Outbox Query Patie	nt Alerts											
ſ	All Messages ~	•				From:	13/03/2018		16/03/2018				
	All Messages Smoking Brief Smoking Ask	ent ne	Patient NHI	Mobile	Message								
	Smoking Brief(Dr.Info) Funding Expiring Smoking Brief(BPI)												
	Alcohol Consumption(Beta) Account Overdue Alcohol Consumption												

Replies will appear in the Status column. Click the coloured box next to the sent message to see the patients reply in the message preview window in the bottom and follow up accordingly.

unding Expiring	g	~				From: 13/03/2018 📑 To: 16/03/2018	Export	Print
Sent -	Sender	Patient Name	Patient NHI	Mobile	Doc Code	Message	Msg Status	# of reply
16-03-2018	TXT	NELSON, Emma		6421684699	TXTFEX	Hi Emma, we are updating our patient register. Would you like to remain enrolled? Reply Y or N, or phone [LOC	Unknown	1
16-03-2018	TXT	CAMERON, Sean		6421684699658	TXTFEX	Hi Sean, we are updating our patient register. Would you like to remain enrolled? Reply Y or N, or phone [LOC	Fror	0
16-03-2018	TXT	DEL-ROSSI, Marco		6421684699	TXTFEX	Hi Marco, we are updating our patient register. Would you like to remain enrolled? Reply Y or N, or phone [LO	Unknown	1
16-03-2018	TXT	JONES, Mia		6421684699	TXTFEX	Hi Mia, we are updating our patient register. Would you like to remain enrolled? Reply Y or N. or phone [LOC	Received	0
		1		1	1			
atient DEL	-ROSSI, Ma	arco Mobile: 642	1684699	Sent at 16-M	ar-18 10:	03:04 AM Sender: TXT		
atient: DEL- lessage: H	-ROSSI, Ma	arco Mobile: 642	1684699 patient reç	Sent at 16-M	ar-18 10: ou like to	03:04 AM Sender: TXT remain enrolled? Reply Y or N. or phone [LOC_DAY_PHONE]. Thanks, Hauora Medical.		
atient: DEL: lessage: H	-ROSSI, Ma	arco Mobile: 642 are updating our	1684699 patient reg	Sent at. 16-M gister. Would yo	ar-18 10: ou like to	03:04 AM Sender: TXT remain enrolled? Reply Y or N, or phone [LOC_DAY_PHONE]. Thanks, Hauora Medical.		
atient: DEL- essage: H leply late	-ROSSI, Ma i Marco, we Message	arco Mobile: 642 are updating our	1684699 patient reg	Sent at 16-M gister. Would yo	ar-18 10: ou like to	03:04 AM Sender: TXT remain enrolled? Reply Y or N, or phone [LOC_DAY_PHONE]. Thanks, Hauora Medical.	Res	ult

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