



TXT2Remind Version Number:	4.0
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TXT2Remind 4.0

Funding Expiring Campaign

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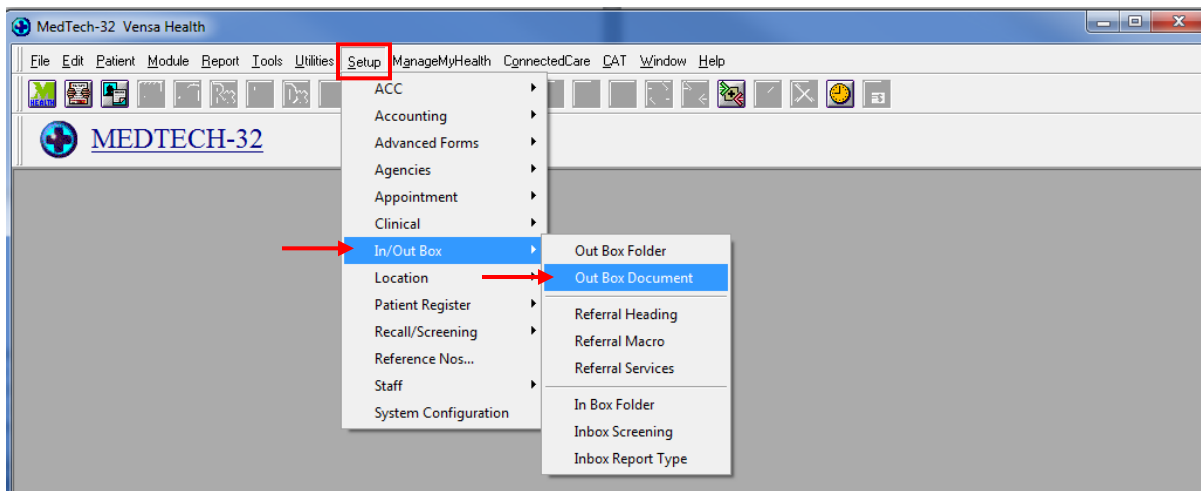
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1 Introduction

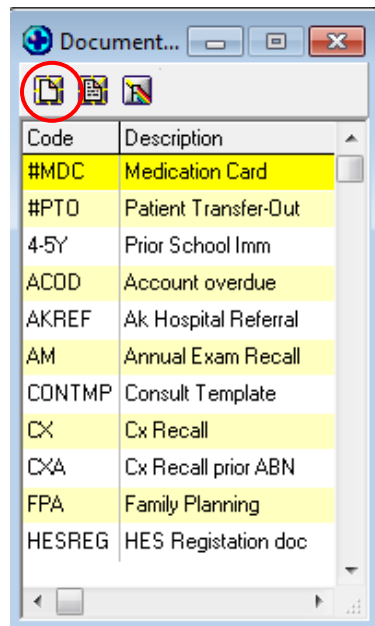
The Funding Expiring campaign has been added to support practices to find those patients whose funding is about to expire and ask them if they plan to stay enrolled. This allows the practice to send an enrolment enquiry text in bulk and receive replies from multiple patients with minimal effort. These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

2 Set up your TXT Outbox Document within Medtech

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

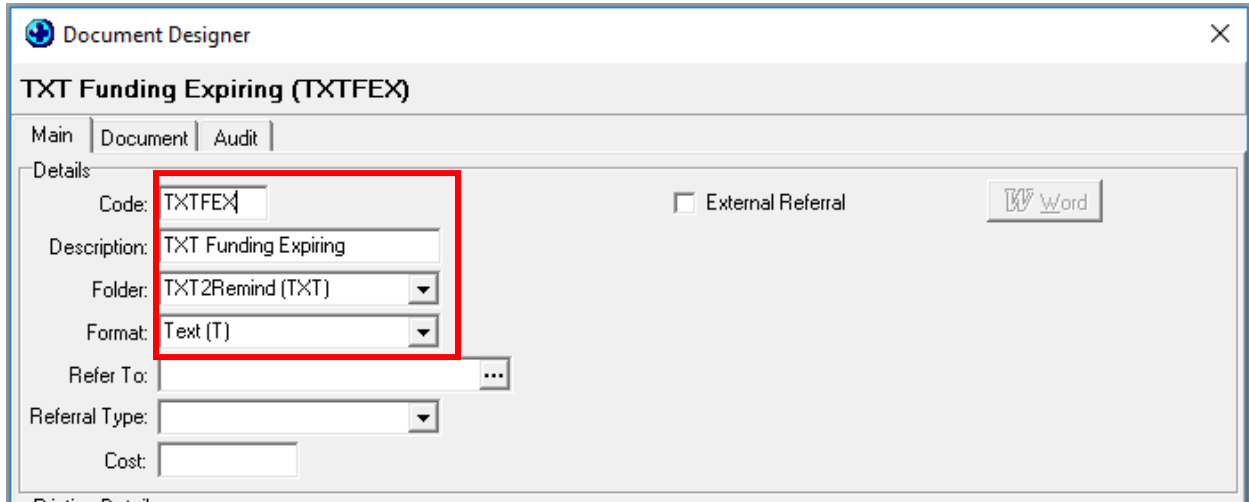


- b. Click on the "Add a New Document" icon.

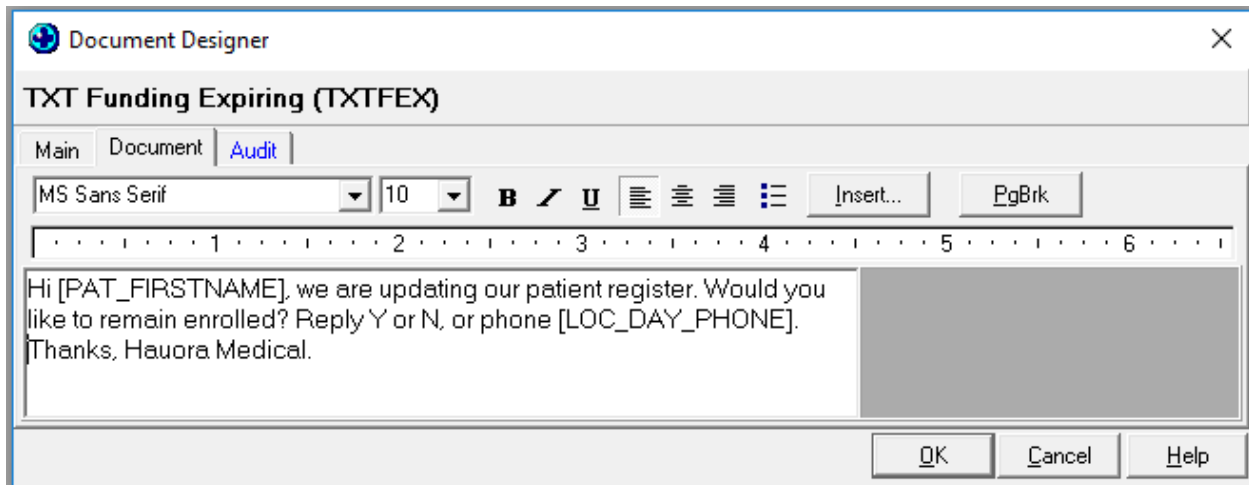


- c. When the Document Designer box pops up fill in the fields in red. Ensure the Code and Description has a prefix of TXT. This will distinguish the difference between a hard copy document and a Text document, it will also make it much easier to locate. Choose the TXT2Remind (TXT) folder and select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

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



- 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]



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.

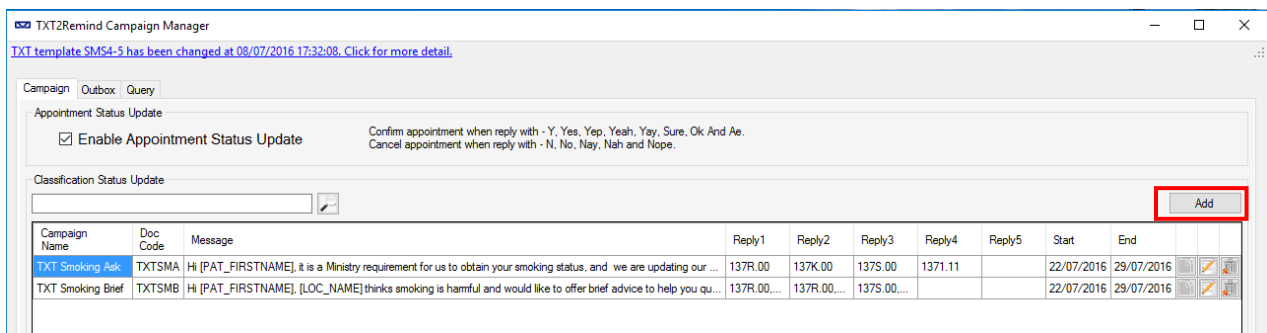
- e. Click on the OK button to finish.

3 Set up a Campaign

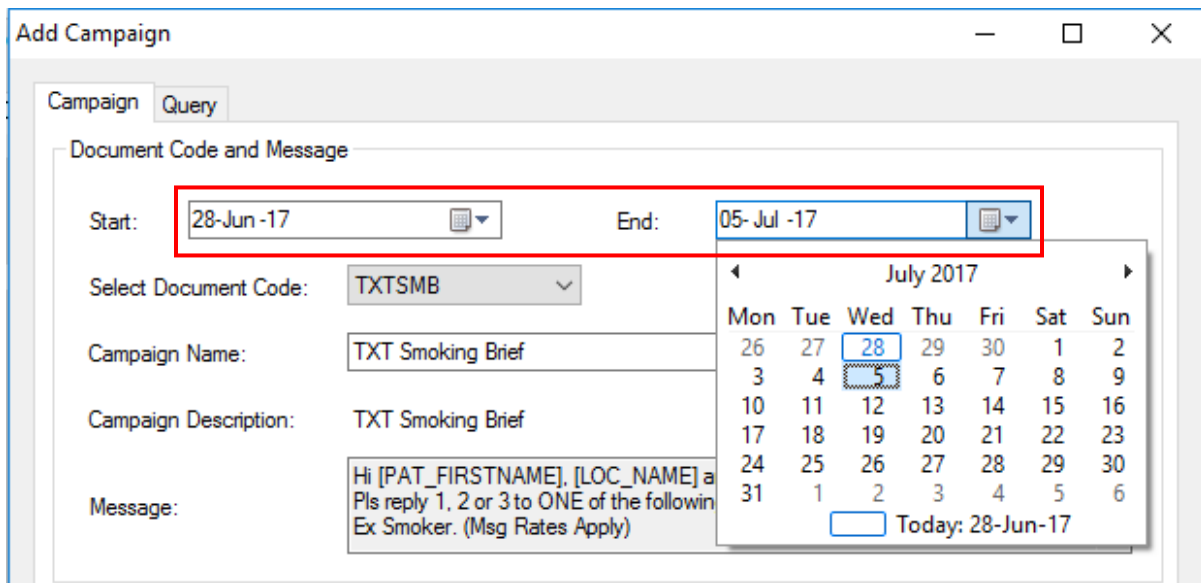
- a. Open your Campaign Manager from your Desktop



- b. To create a campaign, click 'Add'



- 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.



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

Add Campaign

Campaign Query

Document Code and Message

Start: 15-Mar-18 End: 15-Mar-18

Select Document Code: TXTFEX

Campaign Name:

Campaign Description:

Message: We are updating our patient register. Would you like to ... or N, or phone [LOC_DAY_PHONE]. Thanks, Hauora

Reply Readcode Writeback

Repl	Readcode		Auto Reply
1		<input type="checkbox"/>	< None > Edit
2		<input type="checkbox"/>	< None > Edit
3		<input type="checkbox"/>	< None > Edit
4		<input type="checkbox"/>	< None > Edit
5		<input type="checkbox"/>	< None > Edit

Save Cancel

- 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-17 – 31-Dec-17** and **31-Dec-14**. 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.

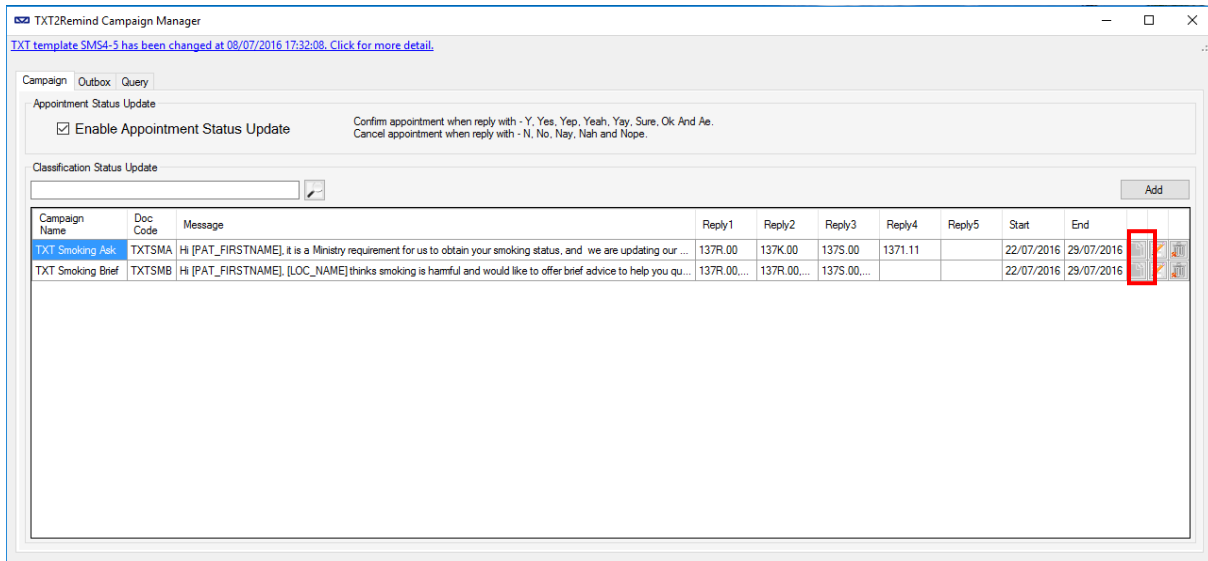
The screenshot shows the 'Add Campaign' dialog box with the 'Query' tab selected. The 'Conditions' section is active, displaying a list of criteria. The 'Category' is set to 'Funding Expiring'. The criteria are as follows:

Description	Parameters
<input checked="" type="checkbox"/> Registered Patient Only	
<input checked="" type="checkbox"/> Patient Enrolled	
<input checked="" type="checkbox"/> Patient Fully Funded	
<input checked="" type="checkbox"/> NOSMS Unchecked	
<input checked="" type="checkbox"/> Patient Age Between	MinAge: 15, MaxAge: 65
<input checked="" type="checkbox"/> Phone Number Starts With	Phone: 02
<input type="checkbox"/> Patient Of Doctors	Code1: , Code2:
<input type="checkbox"/> Patient Of Location	Location:
<input checked="" type="checkbox"/> Patient Funding Expiring Between	StartDate: 01-Oct-17, EndDate: 31-Dec-17
<input checked="" type="checkbox"/> Patient Has Not Had Consultation Since	Date: 31-Dec-17

At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons.

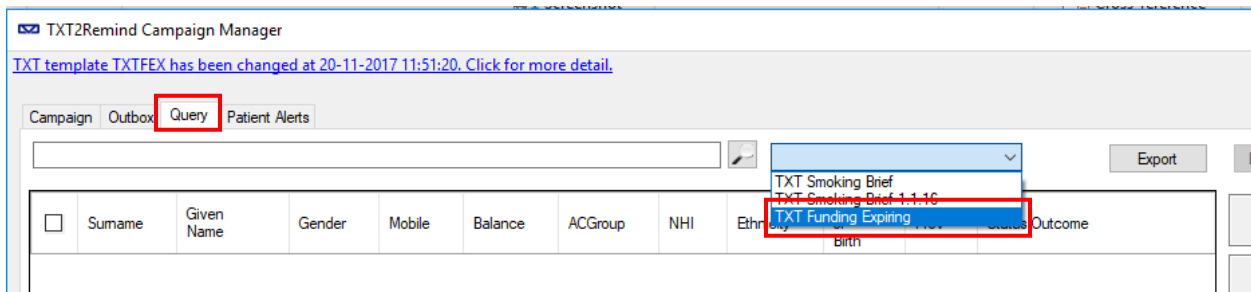
- g. Choose your criteria and click Save.

- 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.

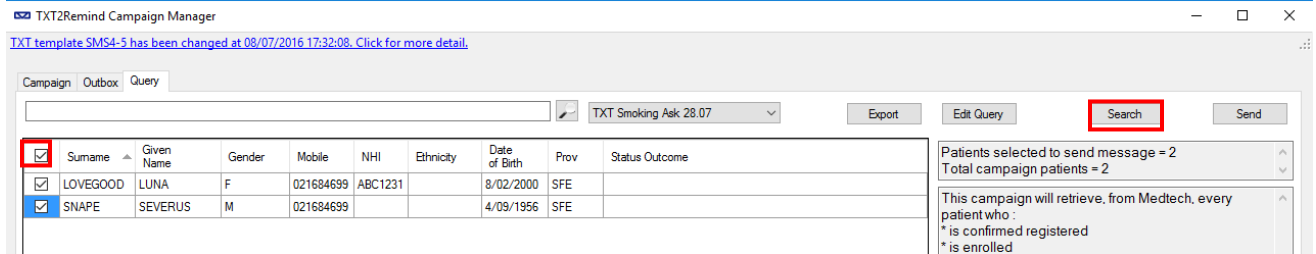


4 Sending messages via Campaign Manager

- a. Click the Query tab and use the drop down to select the Campaign you are running.
- b. Then click Search

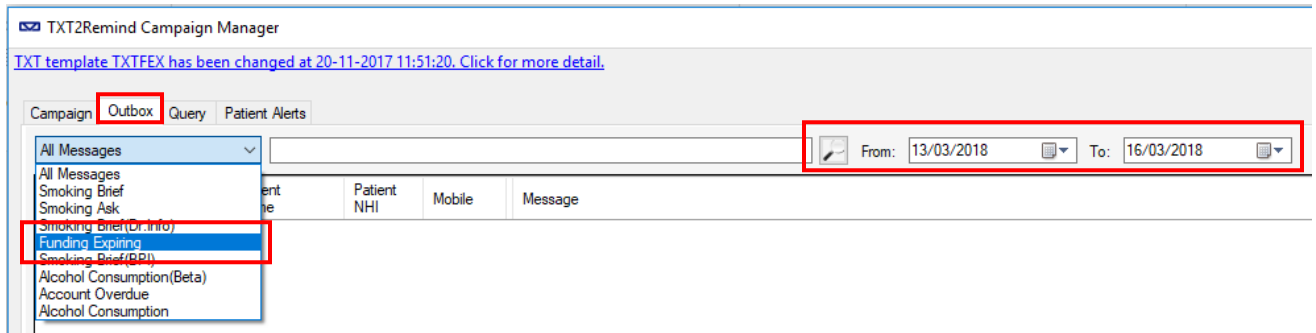


- c. Searching will generate a list of those patients who fulfil your query criteria. To send to all, select with the tickbox on the left of the window and press Send. You may also scroll through the list and untick individual patients to stop them receiving the text if you choose.



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.



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.

