



<b>TXT2Remind Version Number:</b>	4.0
<b>Document Date:</b>	16/03/2018
<b>Security Classification:</b>	Premium Clients

## **TXT2Remind 4.0**

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### Overdue Accounts Campaign

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## 1 Introduction

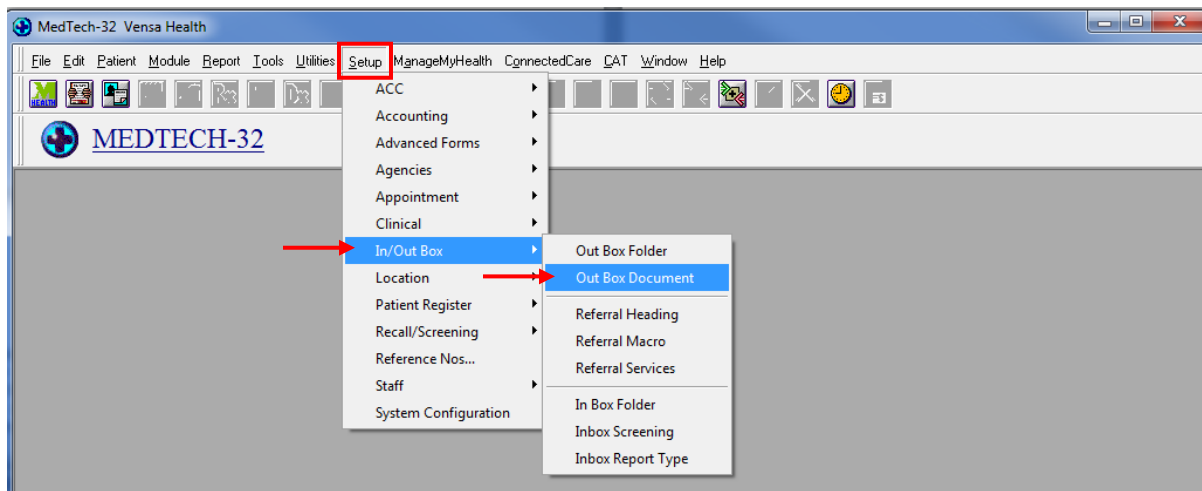
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The Overdue Accounts Campaign can find a list of patients who have overdue balances at the practice and remind them that payments are due to be made.

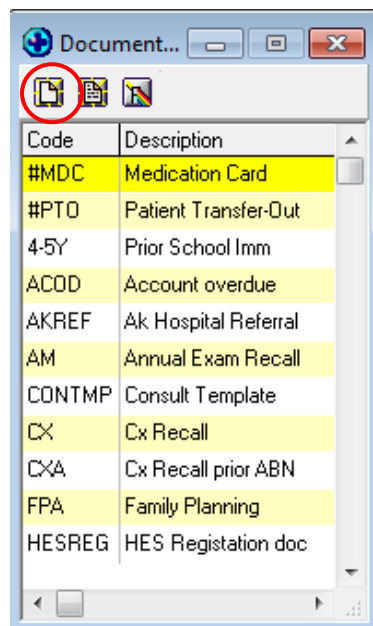
## 2 Set up your TXT Outbox Document within Medtech

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- 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 Overdue Accounts, enter the Code as: **TXTO/D** and the description as: **TXT Acct Overdue**.

The screenshot shows the 'Document Designer' window with the title 'TXT Acct overdue (TXTO/D)'. It has three tabs: 'Main', 'Document', and 'Audit'. The 'Details' section contains the following fields:

- Code: TXTO/D
- Description: TXT Acct overdue
- Folder: TXT2Remind (TXT)
- Format: Text (T)
- Refer To: (empty field with a dropdown arrow)
- Referral Type: (empty field with a dropdown arrow)
- Cost: (empty field)

There is an 'External Referral' checkbox which is unchecked, and a 'Word' button with a Word icon.

- 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]**

The screenshot shows the 'Document Designer' window with the title 'TXT Acct overdue (TXTO/D)'. It has three tabs: 'Main', 'Document', and 'Audit'. The 'Document' tab is active, showing a text area with the following message:

Hi [PAT\_FIRSTNAME], reminder of overdue balance at Hauora Medical Centre of \$[PAY\_BALANCE]. Pls pay to Bank acct# 00-0000-0000000-00. Thank you.

Below the text area is a ruler with markings from 1 to 7. At the bottom right are buttons for 'OK', 'Cancel', and 'Help'.

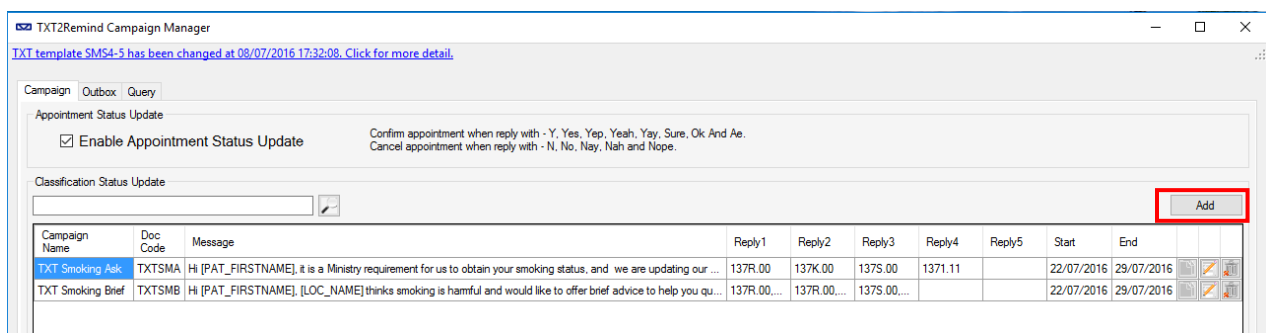
- e. Click on the OK button to finish.

### 3 Set up a Campaign

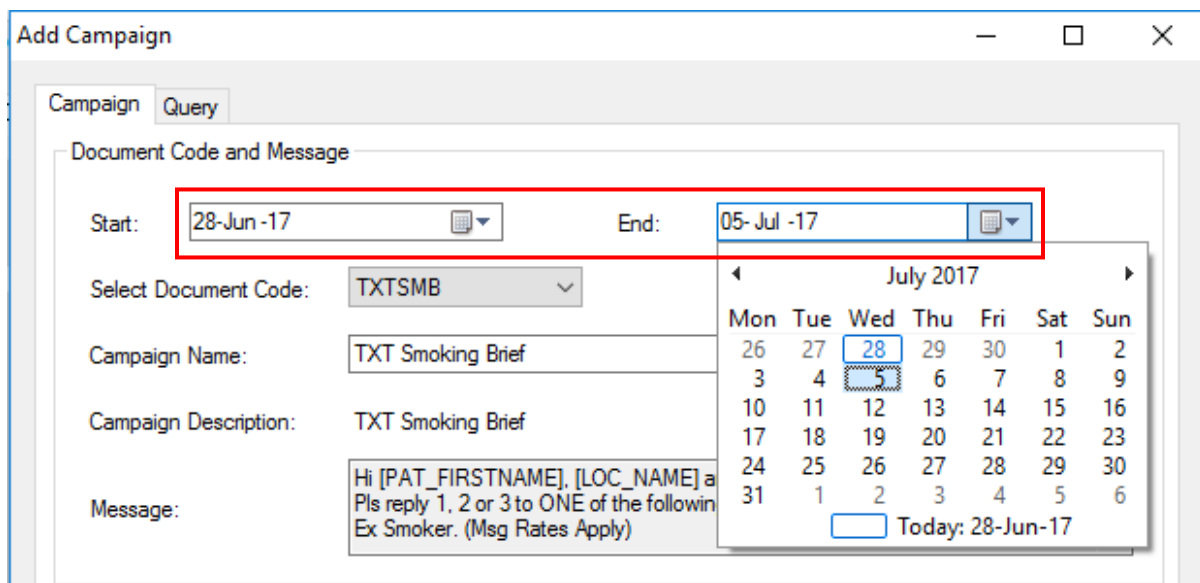
- a. Open your Campaign Manager from your Desktop



- 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.

**Copy Campaign**

**Campaign** Query

**Document Code and Message**

Start: 16-Mar-18 End: 17-Mar-18

Select Document Code: TXTO/D

Campaign Name:

Campaign Description:

Message:

**Reply Readcode Writeback**

Repl	Readcode
1	
2	
3	
4	
5	

**Auto Reply**

< None >	Edit
< None >	Edit
< None >	Edit
< None >	Edit
< 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 query will search based on parameters such as the **Balance** owed (Greater than or Equal To), the **Account Group** of the patient (e.g. Registered, Casual, Company) and when they were last invoiced. You can also exclude patients on automatic payment schedules if they have either a separate account group, or an alert for automatic payments. Inputs for these parameters will differ depending on the individual clinic's database set up and preferences.

**Add Campaign**

**Query**

Conditions

Category: **Account Overdue (Beta)**

- ☒ 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:
- ☒ Balance  
Amount: 5
- ☒ Account Group  
Code1: R Code2: C
- ☒ Last Invoice Between  
StartDate: 20-Nov-99 EndDate: 20-Nov-17
- ☒ Account holder is one
- ☒ Exclude patient with specific alert  
AlertCode: AP

**Save** **Cancel**

- TXT2Remind Campaign Manager**

[TXT template SMS4-5 has been changed at 08/07/2016 17:32:08. Click for more detail.](#)

Campaign   Outbox   Query

Appointment Status Update

☒ Enable Appointment Status Update


Confirm appointment when reply with - Y, Yes, Yep, Yeah, Yay, Sure, Ok And Ae.  
Cancel appointment when reply with - N, No, Nay, Nah and Nope.

Classification Status Update

Add


Campaign Name	Doc Code	Message	Reply1	Reply2	Reply3	Reply4	Reply5	Start	End
<a href="#">TXT Smoking Ask</a>	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	137I.11		22/07/2016	29/07/2016
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

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

 **TXT2Remind Campaign Manager**

[TXT template TXTFEX has been changed at 20-11-2017 11:51:20. Click for more detail.](#)

Campaign Outbox **Query** Patient Alerts



Export

<input type="checkbox"/>	Surname	Given Name	Gender	Mobile	Balance	ACGroup	NHI	Ethnicity	Birth	Age	State	Outcome

Dropdown menu options:
 

- TXT Funding Expiring
- TXT Acct overdue
- TXT M Ac Consumpt

- TXT2Remind Campaign Manager

TXT template SMS4-5 has been changed at 08/07/2016 17:32:08. [Click for more detail.](#)

Campaign | Outbox | Query

TXT Smoking Ask 28.07

Export

Edit Query

Search

Send

<input checked="" type="checkbox"/>	Surname	Given Name	Gender	Mobile	NHI	Ethnicity	Date of Birth	Prov	Status Outcome
<input checked="" type="checkbox"/>	LOVEGOOD	LUNA	F	021684699	ABC1231		8/02/2000	SFE	
<input checked="" type="checkbox"/>	SNAPE	SEVERUS	M	021684699			4/09/1956	SFE	

Patients selected to send message = 2

Total campaign patients = 2

This campaign will retrieve, from Medtech, every patient who:  
\* is confirmed registered  
\* is corollid

## 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.

TXT2Remind Campaign Manager

TXT template TXTFEX has been changed at 20-11-2017 11:51:20. [Click for more detail.](#)

Campaign Outbox Query Patient Alerts

Account Overdue

All Messages  
Smoking Brief  
Smoking Ask  
Smoking Brief(Dr.Info)  
Funding Expiring  
Smoking Brief(BPI)  
Alcohol Consumption(Beta)  
Account Overdue  
Alcohol Consumption

From: 13/03/2018 To: 16/03/2018

Patient Name Patient NHI Mobile Message

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.

Campaign Outbox Query Patient Alerts

Funding Expiring

From: 13/03/2018 To: 16/03/2018 Export Print

Sent Date	Sender	Patient Name	Patient NHI	Mobile	Doc Code	Message	Mag 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...	Error	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

Patient DEL-ROSSI, Marco Mobile: 6421684699 Sent at: 16-Mar-18 10:03:04 AM Sender: TXT

Message: Hi Marco, we are updating our patient register. Would you like to remain enrolled? Reply Y or N, or phone [LOC\_DAY\_PHONE]. Thanks, Hauora Medical.

Reply Date	Message	Result Recorded
16-03-2018	Y	Unknown