



<b>TXT2Remind Version Number:</b>	4.0
<b>Document Date:</b>	14/12/2017
<b>Security Classification:</b>	Premium Clients

## **TXT2Remind 4.0**

---

### Bulk Query Builder Text

Copyright © 2016 Vensa Health Ltd. All rights reserved.  
No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means: electronic, mechanical, photocopy, recording or otherwise without the prior written permission of Vensa Health Limited.  
This document is the property of Vensa Health Ltd.

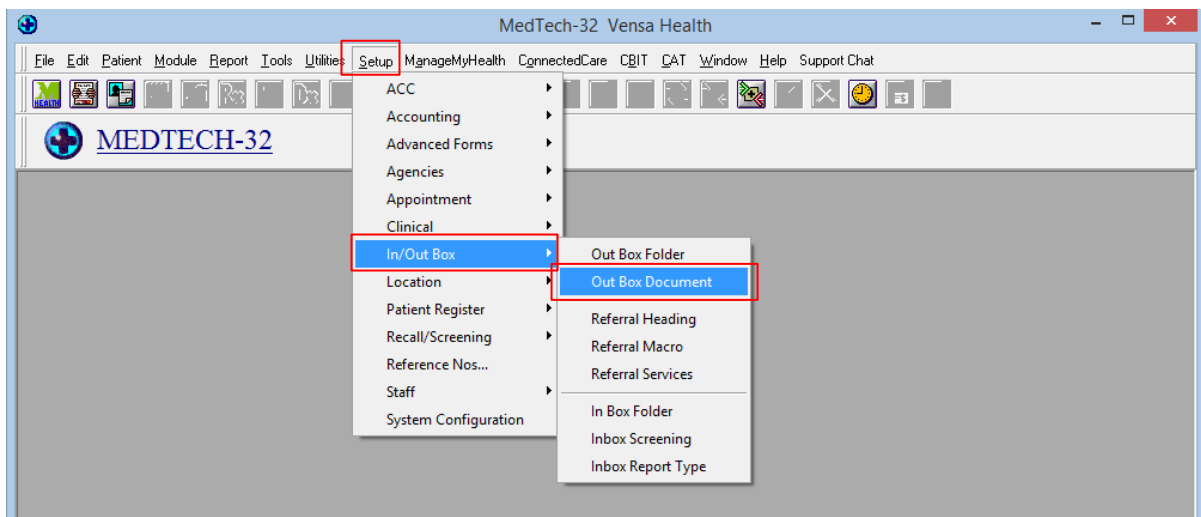
## 1 Introduction

This document outlines the steps involved in setting up an outbox document template according to the design specifications of TXT2Remind. Once the document is set up correctly, users in the practice can send a mobile text message to patients from the Query Builder within MedTech32.

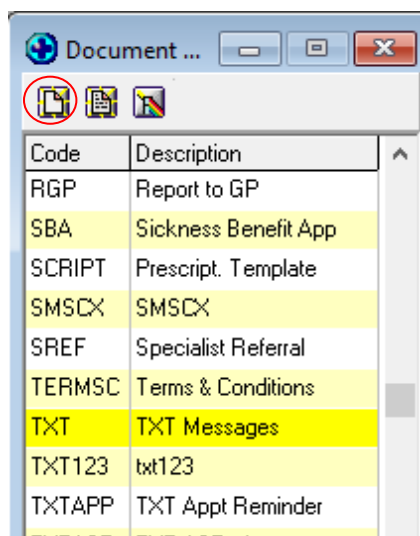
## 2 Outbox Document set up for Xmas Hours (example)

To be able to send a text message, you first need to set up a document in the Document Designer within your MedTech32 system. This document will be a Text (T) as opposed to traditional letter based documents.

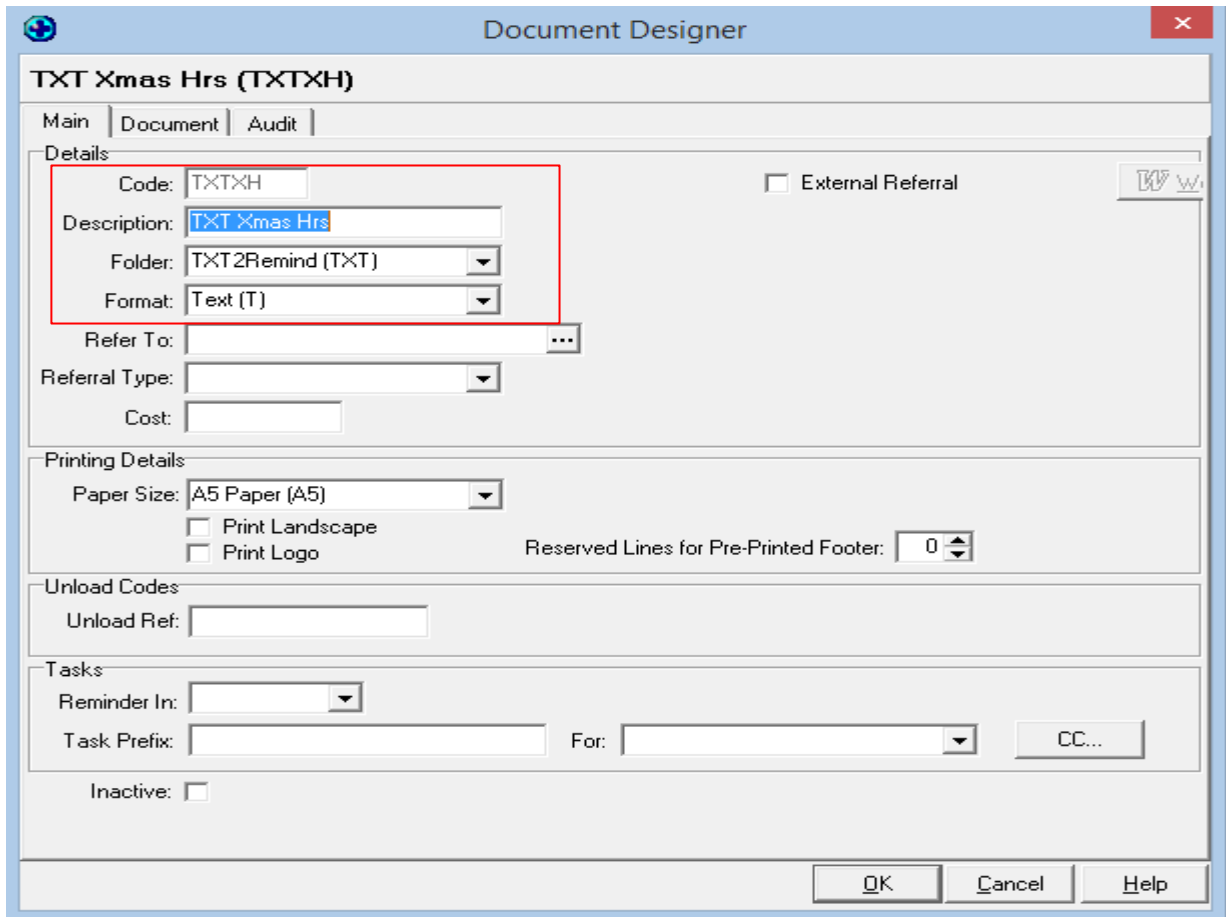
- a. Go to Setup
- b. In/Out Box
- c. Out Box Document



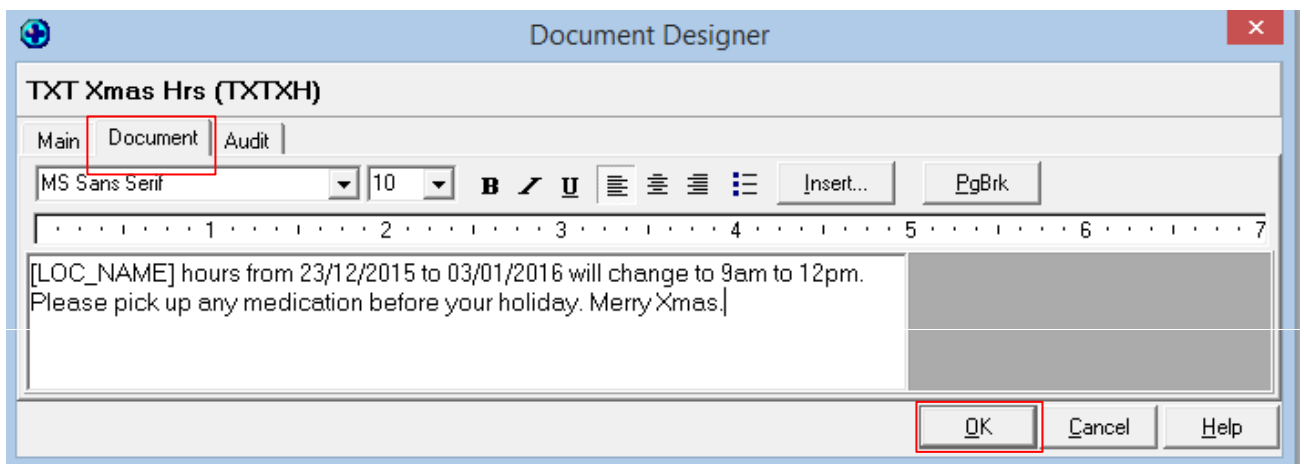
- d. Click on the create a new document button.



- e. When the Document Designer box pops up fill in the fields in the red square. It is good practice to identify your document code with "TXT" then the name of the document. This will allow you to easily distinguish between letter documents and mobile text document templates.



- f. Click on the document tab and type your message (example only) Code: **TXTXH**, Description: **TXT Xmas Hours**, Folder: **TXT2Remind**, Format: **Text (T)**
- g. Click on the OK button to finish.

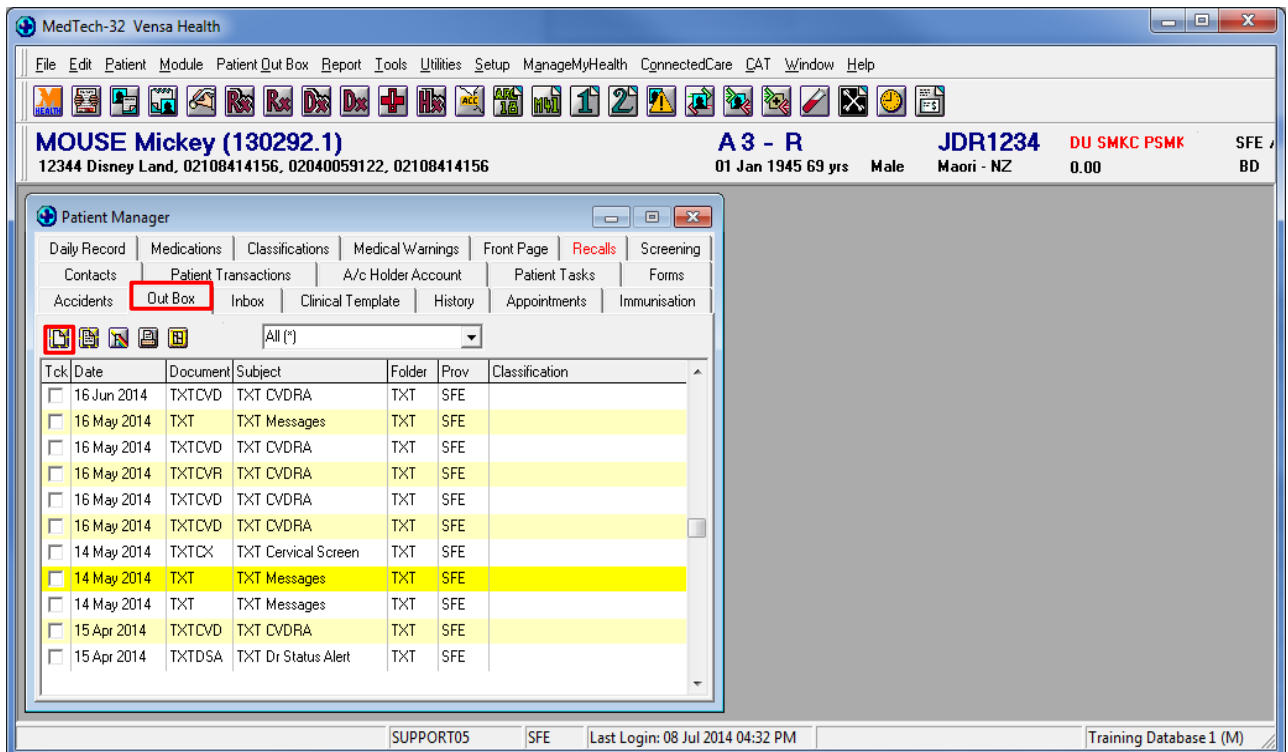


You can now send individual messages to specific patients or a bulk message to all your patients.

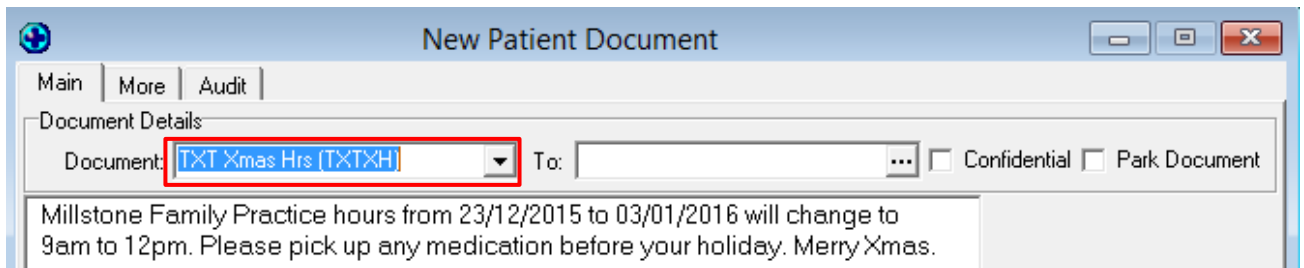
### 3 Sending a Text from Outbox Document

Once an outbox document is created, you can now send messages to one patient at a time within the patient manager screen as outlined in this section.

- a. Ensure that you have a patient on the palette. In the example below we chose Mickey Mouse. Go to the patient manager screen (F6) within MedTech and click on Out Box > new document button:



- b. A New Patient Document box will pop up. Select a TXT document from drop down options in the Document cell. The message will appear as below, replacing the merge fields with the appropriate text. To send the text message press OK.



**NB You can only have 160 characters per text message**

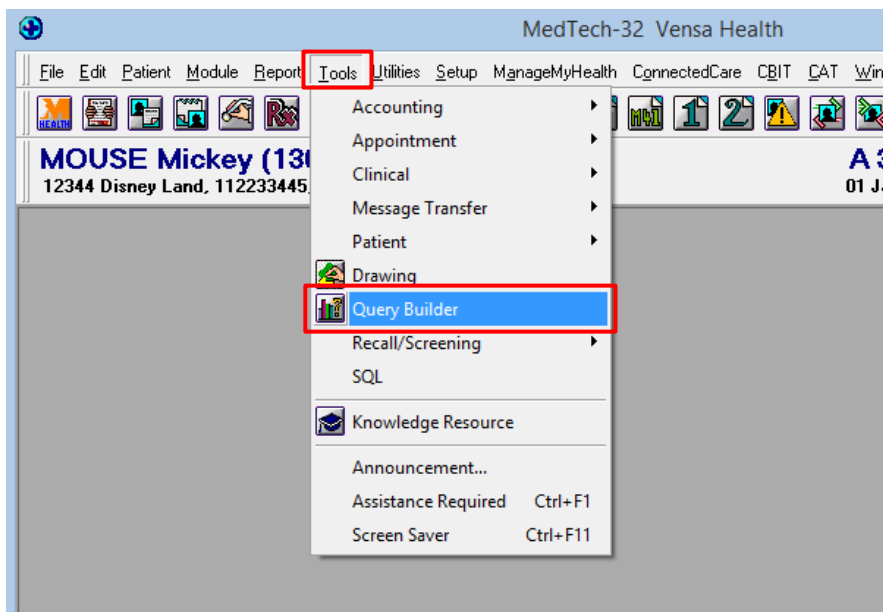
The text message will queue to your practice server where the TXT2Remind client will process it. Please note that by default TXT2Remind processes outbox documents every 5 minutes (hence the patient may not receive the message instantly but it should be within a few moments). Click OK.

## 4 Sending bulk text messages from the Query build

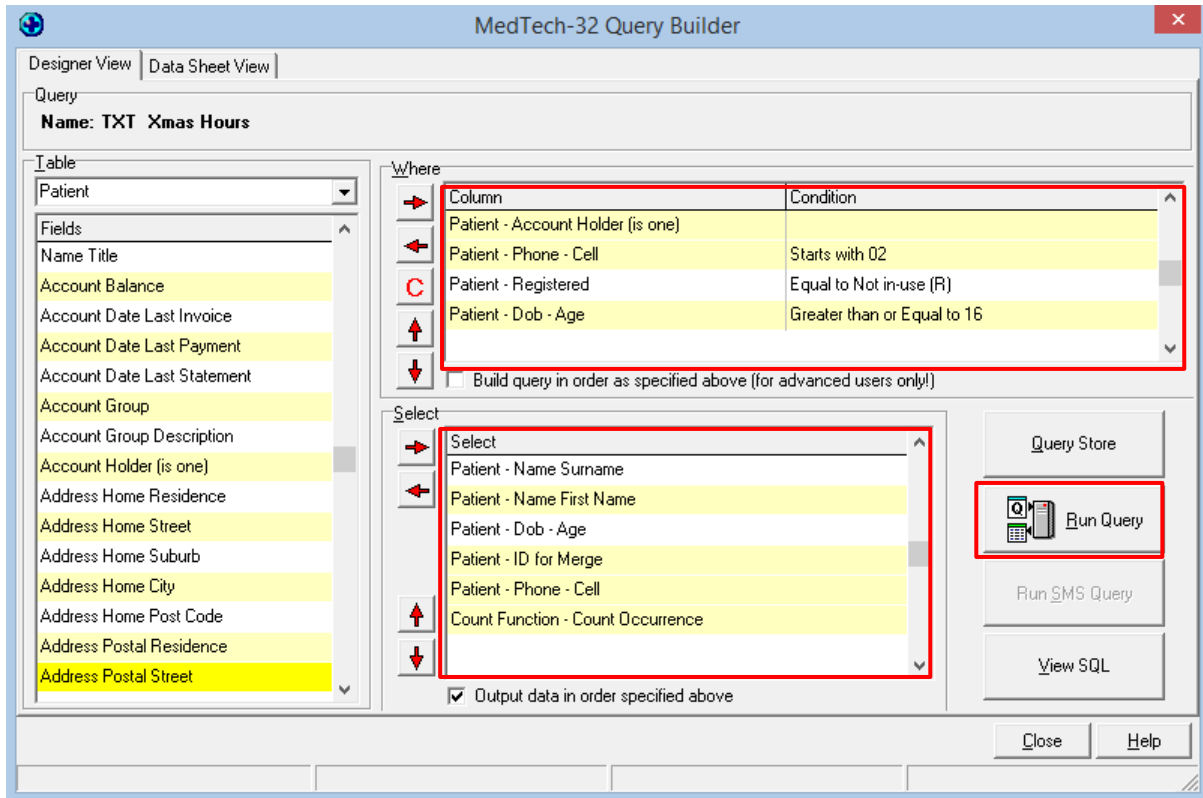
---

Once an outbox document is created, you can then send messages from your Query Builder for your recalls or any mass texting you may want to send as outlined in this section. The instructions are below.

Open Medtech > Tools > Query Builder



- a. Build the Christmas Hours (example) List. Ensure you have all the fields listed below in the red boxes. Then hit Run Query.



### Conditions

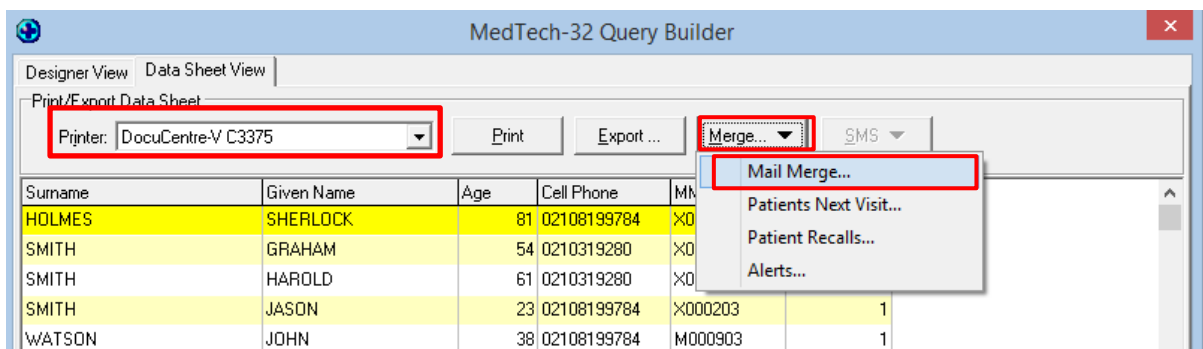
Patient – Account Holder (is one): This option can be used for family households that don't necessarily need one text each. If you rather a text sent to each patient regardless, then remove the condition and replace with Patient – (is one).

Patient – Phone – Cell: Starts with 02

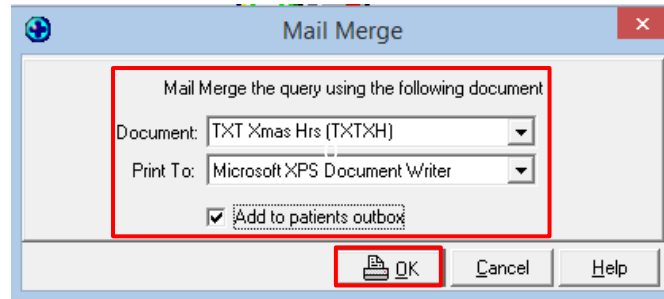
Patient – Registered: Equal to registered *or* In registered and casual

Patient – DOB – Age: Greater than or Equal to 16

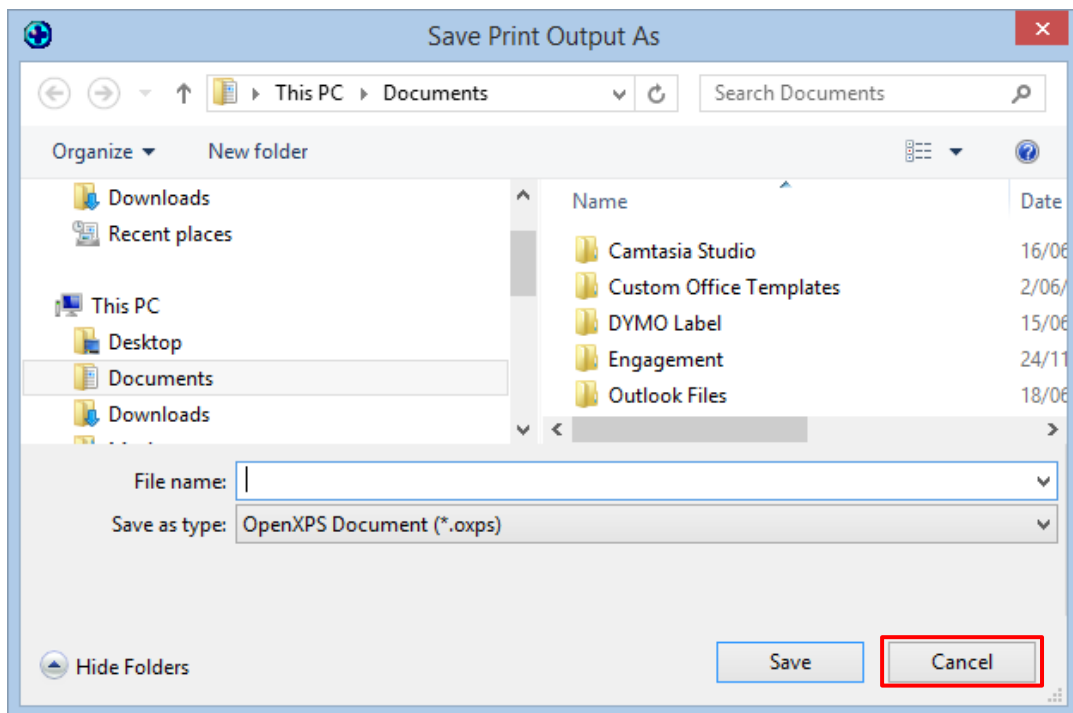
- b. This will bring up all the patients who have a cell phone. **Change the Printer option** to a dummy printer (i.e. Microsoft XPS Document Writer, CutePDF, OneNote). THEN, Click on the 'Merge' Button > Mail Merge



This opens a new window. Select your: Document = e.g. TXT Xmas Hrs, Print To: a dummy printer (i.e. Microsoft XPS Document Writer, CutePDF, OneNote) and tick Add to patients outbox. Then click OK. This will send the text messages.



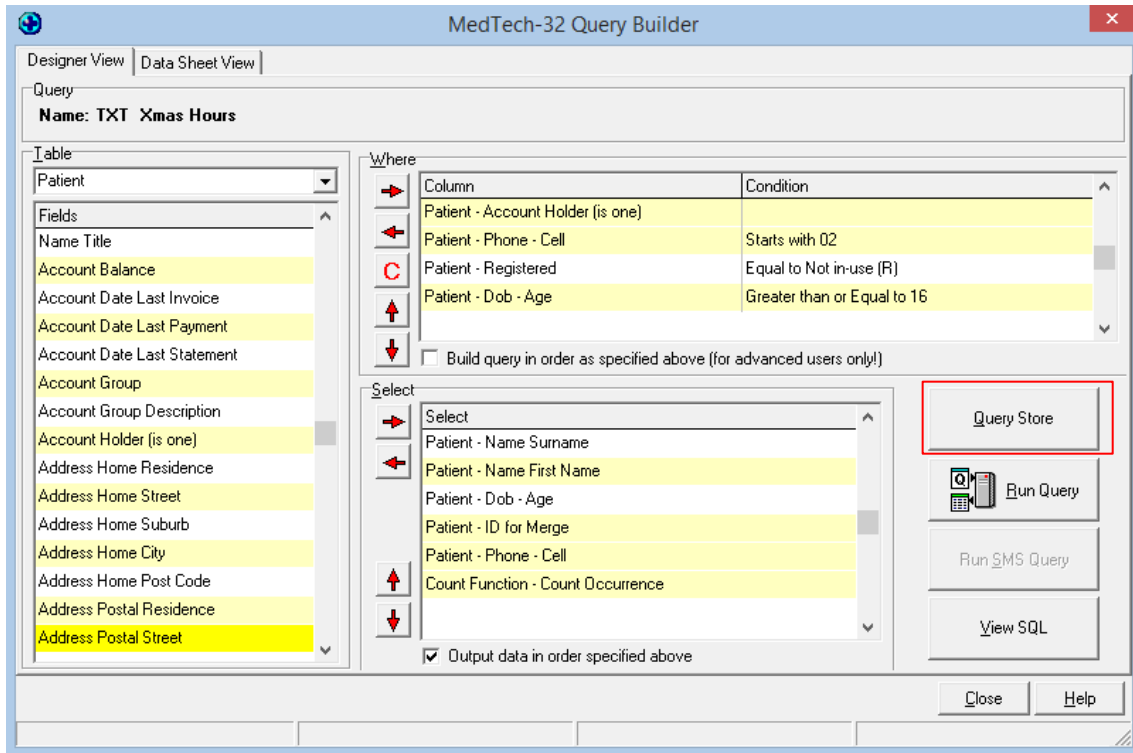
c. If prompted to "Save Print Output As", click Cancel. This will send the text messages.



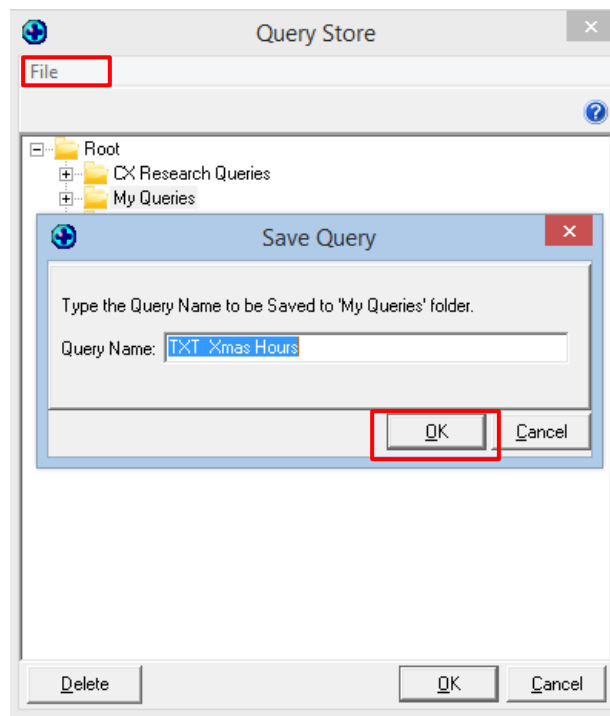
c. Wait for your Query Builder to send out all the messages. The text message will queue to your practice server where the TXT2Remind client will process it. Please note that by default TXT2Remind process outbox documents every 5 minutes.

## 5 To Save the Query

- a. Go up to Query Store



- b. Select File, Save Query. Give your Query a name (e.g. TXT Xmas Hrs) and select OK.



END