

<b>TXT2Remind Version Number:</b>	4.0
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Bulk Query Builder Text

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# 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

•	MedTech-32 Vensa Health	- 🗆 🗙
Ele Edit Patient Module Beport Iools Utilities	Setup       ManageMyHealth       ConnectedCare       CBIT       CAT       Window       Help       Support Chat         ACC       Accounting       Advanced Forms       Image: ConnectedCare       Imag	
	Location     Out Box Document       Patient Register     Referral Heading       Recall/Screening     Referral Macro       Reference Nos     Referral Services       Staff     In Box Folder       Inbox Screening     Inbox Report Type	

d. Click on the create a new document button.

😧 Docur	ment 🗖 🗖 屋	×
Code	Description	^
RGP	Report to GP	
SBA	Sickness Benefit App	
SCRIPT	Prescript. Template	
SMSCX	SMSCX	
SREF	Specialist Referral	
TERMSC	Terms & Conditions	
TXT	TXT Messages	
TXT123	txt123	
TXTAPP	TXT Appt Reminder	
TVTACD	TVT ACD I	



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.

D	ocument Designer
TXT Xmas Hrs (TXTXH)	
Main Document Audit	
	Eutomal Referral
Folder: TXT2Bernind (TXT)	
Format: Text (T)	
Refer To:	
Beferral Tupe:	
Cost	
-Divise Details	
Printing Details Paper Size: (A5 Paper (A5)	
Print Landscape	
Print Logo	Reserved Lines for Pre-Printed Footer: 0 🌩
Unload Codes	
Unload Ref:	
Tasks	
Reminder In:	
Task Prefix:	For:
Inactive:	
	<u> </u>

- 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.

Document Designer	×
TXT Xmas Hrs (TXTXH)	
Main Document Audit	
MS Sans Serif	<u>P</u> gBrk
····· · · · · · · · · · · · · · · · ·	5 · · · · · · · 6 · · · · · · · 7
[LOC_NAME] hours from 23/12/2015 to 03/01/2016 will change to 9am to 12pm. Please pick up any medication before your holiday. Merry Xmas.	
	<u>OK</u> <u>C</u> ancel <u>H</u> elp

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:

MedTech-32 Vensa Health							
<u>File E</u> dit <u>P</u> atient <u>M</u> odule Patient <u>O</u> ut Box <u>R</u> eport	<u>T</u> ools <u>U</u> tilities <u>S</u> etup M <u>a</u> nageMyHealth C <u>o</u> nnectedC	are <u>C</u> AT <u>W</u> indow <u>H</u> elp					
M 🖼 🔁 📷 🖉 📷 🛤 🐜 🗰 🎽 🎬 🖬 11 22 💁 💐 🔯 🖉 🖾 🕗 🛅							
MOUSE Mickey (130292.1) 12344 Disney Land, 02108414156, 0204005912	22, 02108414156	<b>A 3 - R</b> D1 Jan 1945 69 yrs Male	JDR1234 Maori - NZ	DU SMKC PSMK SFE A 0.00 BD			
Patient Manager		Ì					
Daily Record   Medications   Classifications   Me	dical Warnings   Front Page   Recalls   Screening						
Contacts Patient Transactions A/c H	Holder Account Patient Tasks Forms						
Accidents Out Box Inbox Clinical Tem	plate History Appointments Immunisation						
	<b>T</b>						
Tck Date Document Subject	Folder Prov Classification						
☐ 16 Jun 2014 TXTCVD TXT CVDRA	TXT SFE						
🔲 16 May 2014 TXT TXT Messages	TXT SFE						
□ 16 May 2014 TXTCVD TXT CVDRA	TXT SFE						
☐ 16 May 2014 TXTCVR TXT CVDRA	TXT SFE						
□ 16 May 2014 TXTCVD TXT CVDRA	TXT SFE						
☐ 16 May 2014 TXTCVD TXT CVDRA	TXT SFE						
🔲 🔲 14 May 2014 🛛 TXTCX 🛛 TXT Cervical Screen	TXT SFE						
14 May 2014 TXT TXT Messages	TXT SFE						
🔲 🔲 14 May 2014 TXT 🛛 TXT Messages	TXT SFE						
15 Apr 2014 TXTCVD TXT CVDRA	TXT SFE						
15 Apr 2014   TXTDSA   TXT Dr Status Alert	TXT SFE						
	<b></b>						
	SUPPORT05 SFE Last Login: 08 Jul 20	14 04:32 PM		Training Database 1 (M)			

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.

•	New Patient Document	
Main More Audit		
Document Details		
Document: TXT Xmas Hrs (TXTXH)	To:	😶 🗖 Confidential 🗖 Park Document
Millstone Family Practice hours	from 23/12/2015 to 03/01/2016 will chang	eto
9am to 12pm. Please pick up ar	ly medication before your holiday. Merry	/Xmas.

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.

۲			MedTech	32 Vensa He	alth		
]] <u>F</u> ile <u>E</u> dit <u>P</u> atient <u>M</u> odule <u>R</u> eport	<u>T</u> ools <u>U</u> tilit	es <u>S</u> etup	ManageMyHealth	C <u>o</u> nnectedCare	C <u>B</u> IT	<u>C</u> AT	<u>W</u> ine
🔛 🗟 🔁 📆 🏹 隊	Accou	nting	•	mi 1 2	1	<b>R</b>	2
MOUSE Miskey (12	Appoir	ntment	•				A 9
12344 Disney Land, 112233445	Clinica	I	· · ·				<b>А о</b> 01 Ja
Щ <b>;</b> ;	Messa	ge Transfer	· •		_	_	
	Patient	:					
	점 Drawir	q					
	🔢 Query	Builder					
	Recall/	Screening	•				
	SQL						
	Knowl	edge Resou	ırce				
	Annou	ncement					
	Assista	nce Requir	ed Ctrl+F1				
	Screen	Saver	Ctrl+F11				

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.



•			MedTech-32 C	uery Builder		×
Designer View Data Sheet View						
-Query-						
Name: TXT Xmas Hours						
able						
Patient	-		olumn		Condition	^
Fields	~	P	atient - Account Holde	er (is one)		
Name Title	-	- 🗲 P	atient - Phone - Cell		Starts with 02	
Account Balance		CP	'atient - Registered		Equal to Not in-use (R)	
Account Date Last Invoice		P	'atient - Dob - Age		Greater than or Equal to	o 16
Account Date Last Payment		1 <b>1</b>				× .
Account Date Last Statement		<u>+</u> [∽	Build guery in order a	as specified above (for a	advanced users only!)	
Account Group		Select				1
Account Group Description			ielect		^	Querv Store
Account Holder (is one)		P P	atient - Name Surnam	e		
Address Home Residence		P	Patient - Name First Na	me		(D)(=)
Address Home Street		P	Patient - Dob - Age			Bun Query
Address Home Suburb		P	atient - ID for Merge			
Address Home City		P	atient - Phone - Cell			Run SMS Query
Address Home Post Code		🛉 🛉	Count Function - Count	Occurrence		
Address Postal Residence		<b>I</b>				V7 001
Address Postal Street	<u> </u>	╷╶╧┙╚	Z. Outer Andrea in order	and a figure of the same	Y	
		· · · · ·	<ul> <li>Output data in order</li> </ul>	specified above		
						<u>C</u> lose <u>H</u> elp
						11.

#### 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

MedTech-32 Query Builder							×
Designer View Data Sheet View Print/Export Data Sheet Printer: DocuCentre-V C337	75 🔹	<u>P</u> rint	<u>E</u> xport		<u>1</u> erge 🗨	<u>s</u> ms 🗸	_
Surname	Given Name	Age	Cell Phone	[	Mail Patie	Merge nts Next Visit	^
HOLMES SMITH	SHERLOCK GRAHAM	81 54	02108199784 0210319280	X0 X0	Patie	nt Recalls	
SMITH SMITH	HAROLD JASON	61 23	0210319280 02108199784	X0 X0002	Alert	s 1	
WATSON	JOHN	38	02108199784	M000	903	1	



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.

۲	Mail Merge	×
	Mail Merge the query using the following document Document: TXT Xmas Hrs (TXTXH)   Print To: Microsoft XPS Document Writer  Add to patients outbox	
		Help

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

Save P	rint Output As	×
$\bigcirc$ $\bigcirc$ $\neg$ $\uparrow$ $\blacksquare$ $\rightarrow$ This PC $\rightarrow$ Documents	✓ C Search Documents	Q
Organize 🔻 New folder		0
Downloads	^ Name	Date
Recent places	🌗 Camtasia Studio	16/06
This DC	Custom Office Templates	2/06/
	🍌 DYMO Label	15/06
	📔 Engagement	24/11
Downloads	Outlook Files	18/06
	v <	>
File name:		~
Save as type: OpenXPS Document (*.oxps)		~
) Hide Folders	Save	

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

۲	MedTech-32 Query Builder						
Designer View Data Sheet View Query Name: TXT Xmas Hours							
 <u>I</u> able		⊏Wher	e				
Patient	•	-	- Column	Condition		~	
Fields	^	-	Patient - Account Holder (is one)				
Name Title	_	-	Patient - Phone - Cell	Starts with	02		
Account Balance		С	Patient - Registered	Equal to N	Equal to Not in-use (R)		
Account Date Last Invoice			Patient - Dob - Age	Greater tha	an or Equal to "	16	
Account Date Last Payment		<u> </u>				¥	
Account Date Last Statement		+	Build query in order as specified	above (for advanced u:	sers only!)		
Account Group		Selec	st	•			
Account Group Description			Select		^	Querv Store	
Account Holder (is one)		-	Patient - Name Surname		_		
Address Home Residence		-	Patient - Name First Name				
Address Home Street			Patient - Dob - Age			Bun Query	
Address Home Suburb			Patient - ID for Merge				
Address Home City			Patient - Phone - Cell			Run SMS Querv	
Address Home Post Code		Count Function - Count Occurrence					
Address Postal Residence		1					
Address Postal Street		<u> </u>			×	<u>V</u> iew SQL	
	v		Output data in order specified at	oove			
						<u>C</u> lose <u>H</u> elp	
					,		

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



END -