Reminders & notifications

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Send patients SMS confirmations and reminders for their appointments. The reminders can be sent manually or scheduled to go out automatically.
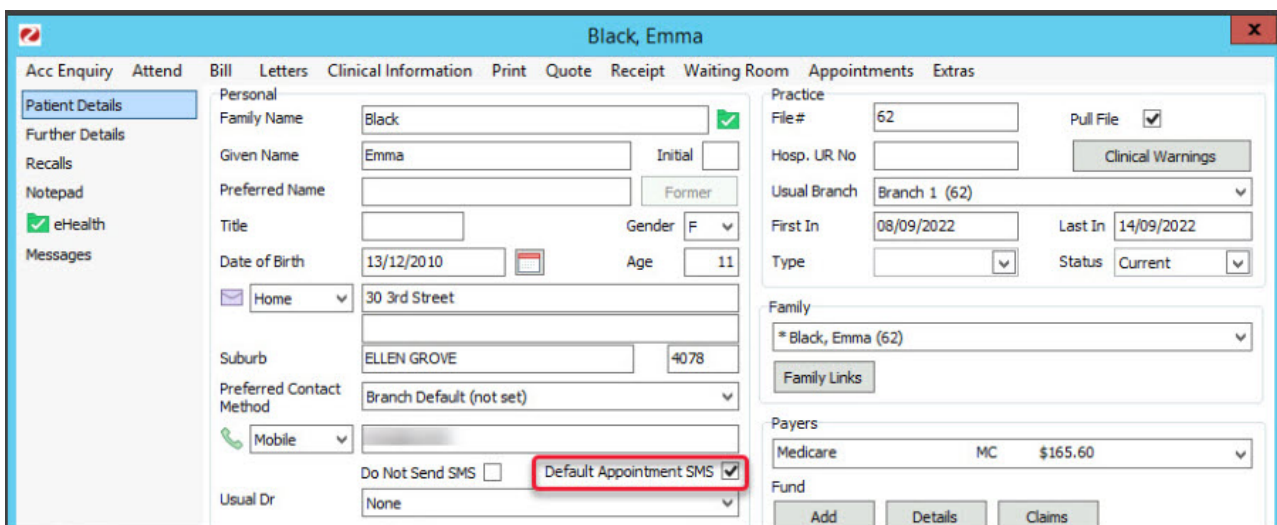
Requirements

Practice requirements

The following requirements are explained in the Set up SMS article: an account with ZedSMS and ZedSMS configured for the practice in Zedmed.

Patient requirements

A patient must have a mobile number in their patient record. For appointment reminders, they must also have **Allows SMS** is ticked on the **Appointment Details** screen for the appointment. **Allow SMS** is ticked by default if **Default Appointment SMS** is ticked in the patient's record.

Appointment confirmations

SMS confirmations for new bookings are sent if **Send Confirmation SMS** is ticked on the **Appointment Details** screen.

Send Confirmation SMS is ticked by default for Online Appointment (OLA) bookings, so SMS notifications are sent whenever a patient books online. For manual bookings, **Send Confirmation SMS** needs to be selected. It is not ticked by default.

The message's content is defined in the Appointment Confirmation Message field.

Appointment reminders - scheduled

Scheduling SMS reminders for the selected appointment types to go out at a specified time and a set number of days before the appointment.

Considerations

- The message's content is defined in the Appointment Reminder Message field, and care needs to be taken when constructing SMS Appointment Reminders to prompt the Patient to reply with a valid response.
- For Linked Appointments, an SMS will only be sent for the 'primary' appointment.
- To stop reminders going out at the same time, send them in batches by selecting the **Message Delay** tab and entering a value in the **Delay** field. The messages will be broken up into batches and the delay will be applied after each batch is sent.

To change an existing schedule, use the steps below to select and edit the schedule's selections.

To schedule a new SMS reminder:

1. Go to Zedmed's **Management** tab.
2. Select **Practice setup** then **SMS Configuration.**

   The **SMS Configuration** screen will open.
3. Select the **Schedule** tab**.**
4. Select **Add Schedule**.

   Select an existing schedule if you want to change its settings.

5. Use the **Description** field to provide a meaningful description.
6. Use the **Days Before** field to set how many days before the appointment the reminders will go out.
7. Use the **Time** field to set the time of day the reminders will go out.
8. In the **Appointment Type** section, use the arrows to move some or all Appointment Types to the **Selected** pane.

   All appointment types in the **Selected** pane will receive the reminders.
9. Select **Close** to save and exit.

   The Appointment Reminder and Confirmation tabs are where you provide the text for the SMS messages.
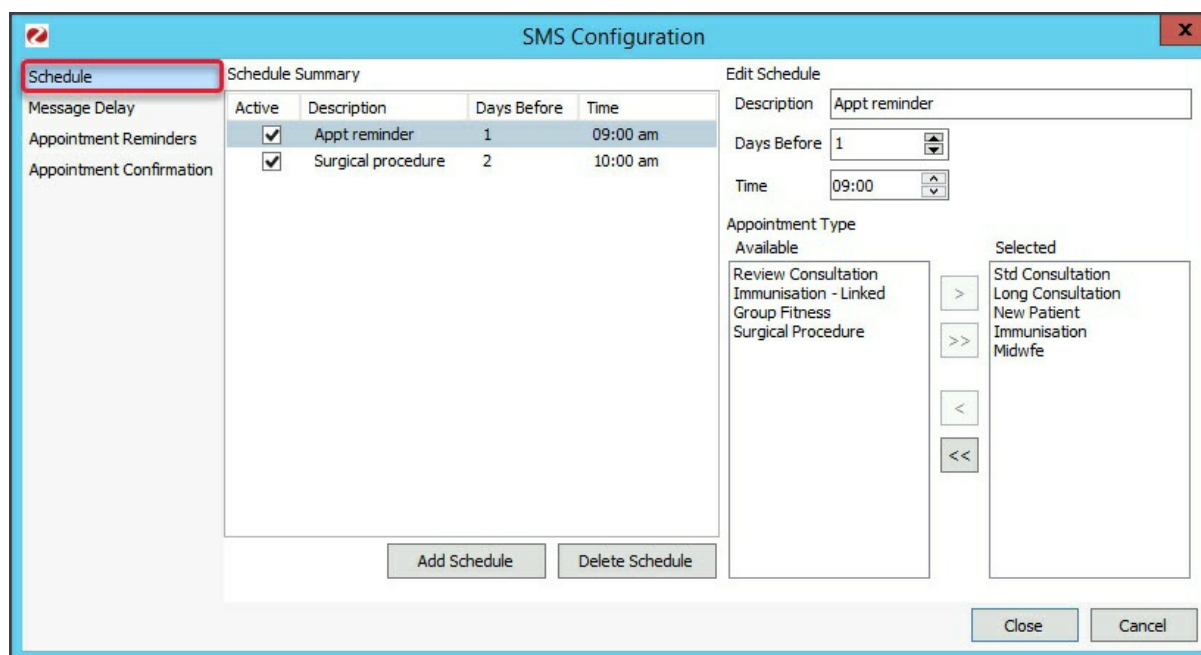
Appointment reminders - manual

You can manually send out SMS reminders by selecting the criteria for who will receive the reminder then selecting send.

The message's content is updated using the Modify SMS Text button.

To manually send SMS reminders:

1. Go to Zedmed's **Reception** tab.
2. Select **Daily reports** then **Appointments.**

   The **Appointment Report** screen will open.
3. Select **Send Appointments via SMS.**

   This will update the screen so it can be used to configure and send SMS reminders.
4. Use the following criteria to determine who is to receive the reminder:
   a. Set the **Date from** and **To**. Reminders are sent to all patients with appointments in this date range.
   b. Select the **Branch** the appointments are at. The default is the branch you're logged in at.
   c. Select the **Doctor** or **Resource** (not both) the appointments are booked under. The default is all doctors.
   d. Select the **Appointment Type** that the reminders will be for. The default is all appointment types.
5. When you're satisfied with the message's criteria, select the **Send SMS** button.

If you get the message "No appointments match the criteria you have selected" when selecting **Send SMS** or **Screen.**

One of the following may apply:

- SMS messages have already been sent for appointments matching the selected criteria.
- There are no appointments matching the criteria.
- The appointments that match the criteria are not set to **Allow SMS.**
- The patients do not have a mobile phone number in their patient records.

The **Appointment Report** can also be used to modify the text used in the messages. The modifications are made using the **Report** and **Mail Merge** tabs and the **Send Appointments via SMS** option.

Check if notifications were sent

You can check if SMS reminders were sent using both the **Message Manager** and the **Appointment Listing** report.

Message Manager

The Message Manager allows you to filter all SMS communications by specific criteria including **Confirmed** or **Cancelled** responses to messages sent to the patient.

To learn more, see the Message Manager guide.

Appointment Listing report.

To check SMS notifications:

1. Go to Zedmed's **Reception** tab.
2. Select **Daily reports** then **Appointments.**

The **Appointment Report** screen will open.

3. Select the branch.
4. Select the date range you want to check.
5. Select the **Screen** button.

   The **Appointment Listing** report will open showing all appointments in that date range.

6. Review the report.

   The **SMS** column will have a tick for each patient that was sent a reminder.

7. Select **Close** to save and exit.

   You can also check what message a patient was sent by opening their patient record and selecting the message tab.