

# Set up SMS

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Enable SMS so your practice can send notifications to patients' mobile phones using **ZedSMS**, a fast and secure, low-cost solution that supports 2-way SMS for recalls and reminders. ZedSMS is available in Zedmed v33.12 or later and is required to send SMS messages in Zedmed.

## Options for sending an SMS

Zedmed uses ZedSMS to send messages for a range of reasons, including:

- To automatically send patients appointment reminders. [Learn More](#)
- To provide patients with appointment confirmations. [Learn More.](#)
- To manually send a patient an appointment reminder. [Learn more.](#)
- To manually send a message to a patient from the patient record. [Learn More.](#)
- To manually send a message to multiple patients based on specific criteria. [Learn More.](#)

## Set up a patient for SMS

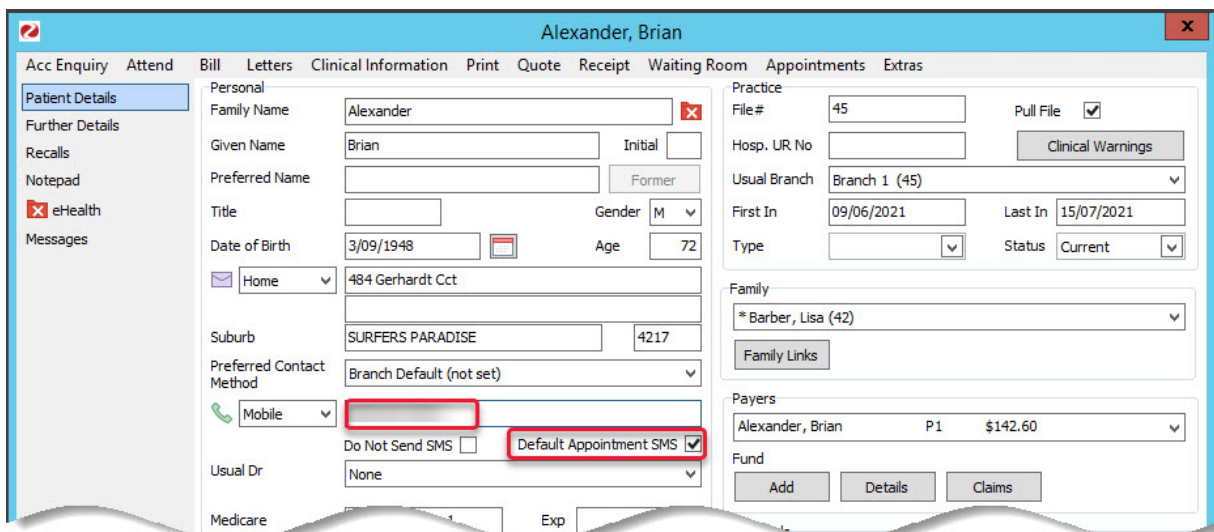
To learn how SMS works for appointment reminders and confirmations, see the [Appointment Notifications guide](#).

To confirm or set up a patient for SMS:

1. Go to Zedmed's **Reception** tab.
2. Select **Patients** or **Waiting Room** then locate the patient and open their record.

For more information, see the [find a patient's record article](#).

3. Check that the Mobile field has a mobile number. If there is not, enter the number the patient wants reminders to be sent to.
4. Check that **Default Appointment SMS** is selected.
5. Select **Close** to save and exit.



The screenshot shows the Zedmed patient record interface for "Alexander, Brian". The "Patient Details" tab is selected. The "Mobile" field is highlighted with a red box, and the "Default Appointment SMS" checkbox is also highlighted with a red box. The "Default Appointment SMS" checkbox is checked. The "Mobile" field contains a redacted number. The "SMS" section includes options for "Do Not Send SMS" (unchecked) and "Default Appointment SMS" (checked). The "SMS" section also includes a "Family" dropdown menu and a "Family Links" button. The "SMS" section also includes a "Payers" dropdown menu and a "Fund" dropdown menu. The "SMS" section also includes "Add", "Details", and "Claims" buttons.

**Note:** Selecting **Default Appointment SMS** in a patient's record will not enable **Allow SMS** for existing appointments.

When **Default Appointment SMS** is selected in a patient's record - **Allow SMS** - will be ticked in the **Appointment Details** screen for each appointment. **Allow SMS** must be ticked for appointment reminders to go out.

**Send Confirmation SMS** is only selected by default if the patient made the booking in Zedmed Online Appointments. This option sends a confirmation SMS to the patient when the appointment is booked. If it is not a Zedmed Online Appointment, it needs to be selected each time an appointment is made.

**Appointment Details**

Date: **Tuesday, 24 May 2022** Created by PD **Alexander, Brian**

Doctor **Danni Hatcher** on 24/05/22 at 15:24 File No 45 Pull File Yes DOB 3/09/1948

Resource Start Time 10:45 Clinic Branch 1 First in 17/02/2022 Last in Type

Duration 00:10 Status Current

End Time 10:55 Type **Std Consultation**

Notes

Reason for chosen date

Cancellation Waiting Priority

Hide Notes ☐ **Allow SMS** ☒ **Send Confirmation SMS** ☐

Account Payers

Account Payer	Code	Amount
Transport Accident Commission	MV	\$0.00
Slater and Gordon	LG	\$0.00
Medicare	MC	\$0.00
Alexander, Brian	P1	\$0.00

Repeated booking ☐

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

Contact Details

Phone (H) Work (W)

Mobile 0409359465

Address 484 Gerhardt Cct, SURFERS PARADISE 4217

Other Details

Expiry MC HCC

Referral To Dr Phillip Davis  
By Dr John Smith  
On 23/02/2022 for 12 months

Alerts **test**

Clinical Warnings

## Set up a practice for SMS

Zedmed user ZedSMS to send text messages to patients. For new customers, ZedSMS is set up as part of the onboarding process.

To set up ZedSMS:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Branches**.
3. Select **Options**.

The **Practice Details** screen will open.

The **Branch Options** screen will open.

Go to the **SMS Setting** section.

4. In the **Provider** field, select **ZEDSMS**.

The **SMS Sender** field must be blank unless ZedMed has set your practice to appear as the sender. If you put anything here there is an additional cost of 30% more per SMS.

The Provider's URL fields must be blank.

5. In the **User Name** and **Password** fields, enter the username and password provided by Zedmed.
6. In the **2-WAY SMS** section, confirm the options you want to use.
  - **Enable 2-WAY SMS** should be selected if you want the user to be able to send replies. A common example is asking the patient to reply "Yes" or "No" to confirm an appointment.
  - **Enable Auto-Cancel of Appointments** is enabled if you want a "No" or "N" reply to automatically cancel the patient's appointment in Zedmed. This will remove the appointment from the Appointment Book.

You can view cancelled appointments in Zedmed's **Message Manager**.

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

Repeat these steps for each branch subscribed to ZedSMS.

The screenshot shows the 'Branch Options - SP1 Demo' window. The 'General' tab is active. The 'SMS Setting' section is highlighted with a red box. In this section, the 'Provider' dropdown is set to 'ZEDSMS'. The 'SMS Sender' field is empty. The 'Provider's URL', 'Provider's Credit Check URL', and 'Provider's Purchase Credit URL' fields are also empty. The 'User Name' field is set to 'name@name.com' and the 'Password' field is masked with dots. The '2-Way SMS' section shows 'Enable 2-Way SMS' and 'Enable Auto-Cancel of Appointments' both checked. The 'MA Online Overwrite Location' section shows 'Minor ID' and 'Certificate Directory' fields.

## Check your SMS Credits

You can check the SMS credits remaining for the SMS provider configured in the Branch options.

To top up your credits, see the [ZedSMS top-up guide](#).

To check the SMS Credits:

1. Select Zedmed's **Utilities** tab.
2. Select the **SMS Tools > SMS Credit Check**.

The remaining credits will display.

