

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.](#)

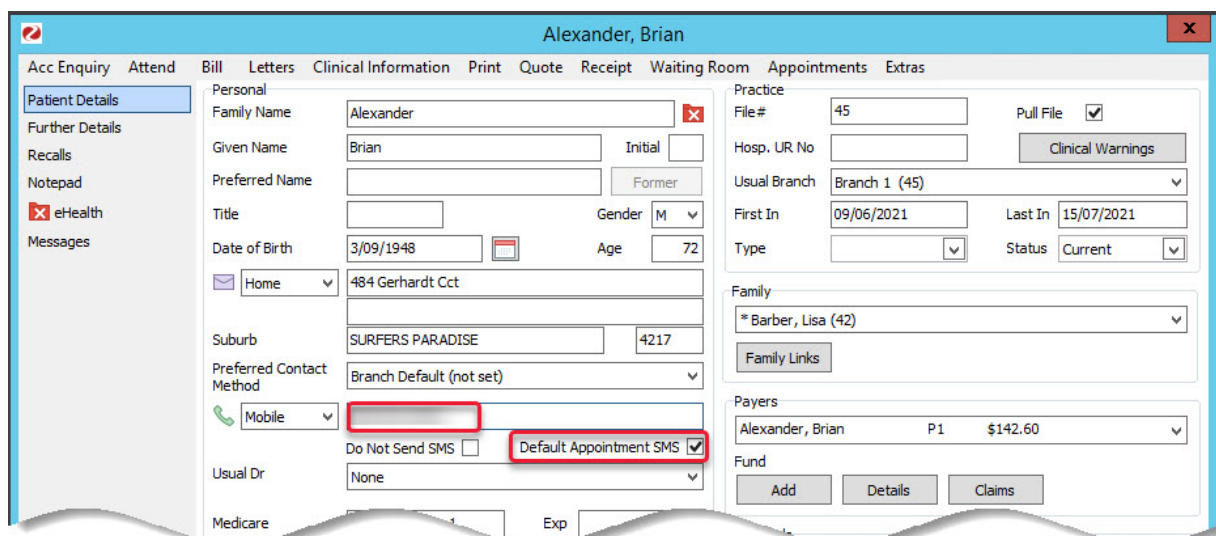
Set up a patient for SMS

See the Appointment Notifications guide to learn how SMS works for appointment reminders and confirmations.

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.

To learn more, see the [Find a patient's record article](#).
3. Check that the Mobile field has a mobile number. If it does not, enter the number the patient wants reminders sent to.
4. Check that **Default Appointment SMS** is selected.
5. Select **Close** to save and exit.



The screenshot shows the patient record for Alexander, Brian. The 'Mobile' field is highlighted with a red box, and the 'Default Appointment SMS' checkbox is checked and also highlighted with a red box. The 'Messages' tab is selected in the left-hand navigation pane.

Field	Value
Family Name	Alexander
Given Name	Brian
Preferred Name	
Title	
Date of Birth	3/09/1948
Home	484 Gerhardt Cct
Suburb	SURFERS PARADISE 4217
Preferred Contact Method	Branch Default (not set)
Mobile	[Redacted]
Do Not Send SMS	<input type="checkbox"/>
Default Appointment SMS	<input checked="" type="checkbox"/>
Usual Dr	None
Practice File #	45
Usual Branch	Branch 1 (45)
First In	09/06/2021
Last In	15/07/2021
Type	
Status	Current
Family	* Barber, Lisa (42)
Payers	Alexander, Brian P1 \$142.60
Fund	

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 must be selected each time an appointment is made.

The screenshot shows the 'Appointment Details' form for a patient named Brian Alexander. The appointment is for Tuesday, 24 May 2022, at 10:45 AM, with a duration of 00:10, ending at 10:55 AM. The appointment type is 'Std Consultation'. The 'Allow SMS' checkbox is checked and highlighted with a red box, while the 'Send Confirmation SMS' checkbox is unchecked. The form also displays patient contact details, other details like referral and alerts, and a list of 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

Set up a practice for SMS

Zedmed uses ZedSMS to send text messages to patients. ZedSMS is set up for new customers as part of the onboarding process.

To set up ZedSMS:

1. Go to Zedmed's **Management** tab.
 2. Select **Practice Setup**, then **Branches**.
- The **Practice Details** screen will open.
3. Select **Options**.

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, and 2-way responses will not work.

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. To learn more, see [2-way SMS replies](#).
- **Enable Auto-Cancel of Appointments** is enabled if you want a "No" or "N" reply to cancel the patient's appointment in Zedmed automatically. 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 'SMS Setting' section is highlighted, showing the 'Provider' dropdown set to 'ZEDSMS'. The 'User Name' field contains 'name@name.com' and the 'Password' field is masked with dots. The '2-Way SMS' section has 'Enable 2-Way SMS' and 'Enable Auto-Cancel of Appointments' options. The 'General' section includes fields for 'Default Encounter Sheet', 'Default Account Holder', 'Default Bank Account', 'Invoice Header', and 'Assignment Form Type'. The 'File Numbering' section has 'System' selected. The 'Waiting Room' section includes 'Default Order', 'Default Filter', and 'Default Lookback'. The 'MC Plus Items' section has 'Auto Include Incentive (10997)' unchecked and 'Enable Stock Management System' checked. The 'MA Online' section has 'Direct Bill and DVA', 'Patient Claims', and 'ECLIPSE' checked.

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 be displayed.

