

# Set up SMS

Last Modified on 09/10/2024 9:56 am AEDT

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.](#)

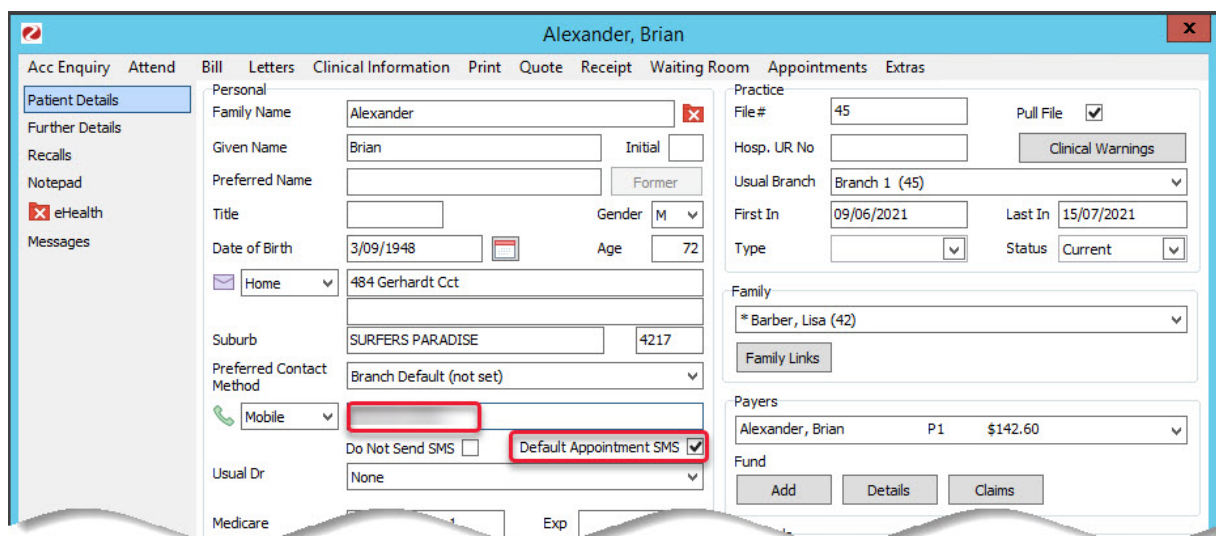
## Set up a patient for SMS

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. The 'Default Appointment SMS' checkbox is checked and highlighted with a red box. The interface includes a navigation menu on the left with options like 'Patient Details', 'Recalls', 'Notepad', 'eHealth', and 'Messages'. The main area is divided into 'Personal' and 'Practice' sections. The 'Personal' section includes fields for Family Name, Given Name, Preferred Name, Title, Date of Birth, Home, Suburb, Preferred Contact Method, Mobile, Usual Dr, and Medicare. The 'Practice' section includes fields for File #, Hosp. UR No, Usual Branch, First In, Last In, Type, Status, Family, Payers, and Fund. The 'Default Appointment SMS' checkbox is located in the 'Mobile' section.

**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 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 Payers		
Transport Accident Commission	MV	\$ .00
Slater and Gordon	LG	\$ .00
Medicare	MC	\$ .00
Alexander, Brian	P1	\$ .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' field set to 'ZEDSMS'. The 'User Name' field is set to 'name@name.com' and the 'Password' field is masked with dots. The '2-Way SMS' section is also visible, with 'Enable 2-Way SMS' and 'Enable Auto-Cancel of Appointments' options.

## 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.

