

Schedule recalls

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Schedule SMS recalls to be sent to a patient at a set number of days before the recall Maturity date. Using this automated SMS solution is preferred to a manual recall letter. Requires Zedmed v36.5 or later.

Schedule an reminder video

Schedule an SMS recall reminder

To administer recall reminders:

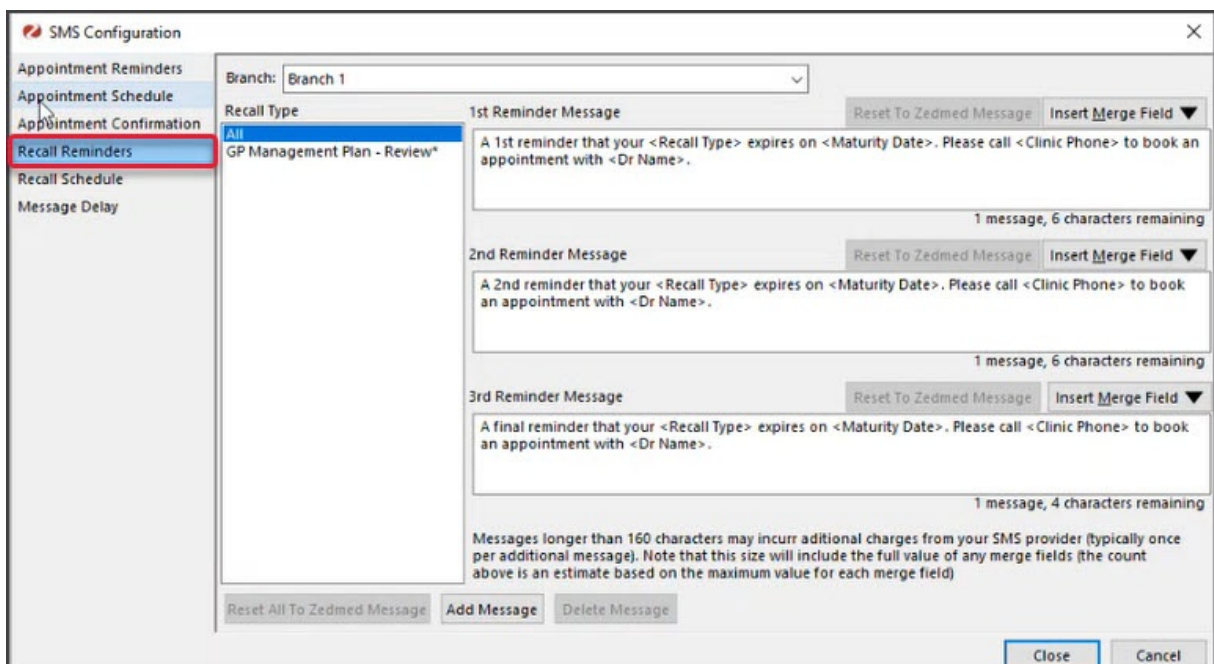
1. Go to Zedmed's **Management** tab.
2. Select **Practice setup > SMS Configuration**.

Step 1 - Review / create the recall text.

3. Select the **Recall Reminders** tab:

Recall Type - 'All' provides preconfigured text that can be used for all recalls.

- Select **Add Message** to create a new recall message for a specific recall type.
- Select an existing **Recall Type** if you want to edit its text.
- Use the **Insert Merge field** to add variables to new and existing recall messages.
- **Reset to Zedmed Message** will replace the current message with the standard **All** message text.



The screenshot shows the 'SMS Configuration' window with the 'Recall Reminders' tab selected. The 'Branch' is set to 'Branch 1'. The 'Recall Type' is 'All'. The '1st Reminder Message' is 'A 1st reminder that your <Recall Type> expires on <Maturity Date>. Please call <Clinic Phone> to book an appointment with <Dr Name>.' The '2nd Reminder Message' is 'A 2nd reminder that your <Recall Type> expires on <Maturity Date>. Please call <Clinic Phone> to book an appointment with <Dr Name>.' The '3rd Reminder Message' is 'A final reminder that your <Recall Type> expires on <Maturity Date>. Please call <Clinic Phone> to book an appointment with <Dr Name>.' The window also includes buttons for 'Reset To Zedmed Message', 'Insert Merge Field', 'Add Message', 'Delete Message', 'Close', and 'Cancel'.

Step 2 - Schedule the recall to automatically send

4. Select the **Recall Schedule** tab.

5. Select the **Add Schedule** button.
6. Complete the following fields
 - a. **Description** - enter a meaningful description for the schedule.
 - b. **Active box** - enables the recall for scheduling. Select after you have finished getting up a new schedule.
 - c. **Time** - sets the time of day the reminder will go out.
 - d. **Reminder Type** - determines the order of reminders (ensures the times match the intended order).
 - e. **To be sent** - sets how many days before the **recall maturity** the reminder will go out.
 - f. **Recall Type** - determines what recalls will use this schedule by moving them into the **Selected** pane.

All recall maturity types in the **Selected** pane will receive the reminders.

7. Use the **Message Delay** tab to send recalls in batches.

This prevents recalls from going out at the same time. Enter a value in the **Delay** field, and that delay will be applied after each batch is sent.

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

Editing schedules

When you select a recall **Description**, the schedule will appear in the **Edit Recall Schedule** where it can be edited.

The screenshot shows the 'SMS Configuration' window. On the left is a sidebar with a tree view containing: Appointment Reminders, Appointment Schedule, Appointment Confirmation, Recall Reminders, **Recall Schedule** (highlighted with a red box), and Message Delay. The main area is divided into two panels. The 'Recall Schedule Summary' panel on the left contains a table with the following data:

Active	Description	Days Before	Time
<input type="checkbox"/>	First GP Management Plan	12	01:30 pm
<input type="checkbox"/>	Second GP Management Plan	10	02:00 pm

Below the table are 'Add Schedule' and 'Delete Schedule' buttons. The 'Edit Recall Schedule' panel on the right has the following fields:

- Description:** First GP Management Plan
- Time:** 13:30
- SMS Reminder:**
 - Reminder Type:** First (selected), Second, Subsequent
 - To be sent:** 12 days before maturity
 - ☒ Suppress reminder if an appointment exists within 2 days of maturity
- Recall Type:**
 - Available:** Mental Health Plan - Review, Team Care Arrangement - Health Assessment*
 - Selected:** GP Management Plan - Review

At the bottom right are 'Close' and 'Cancel' buttons.

Other Recall guides

Send a manual SMS Recall reminder

Practices can manually send SMS recalls to patients using the Recall Report by selecting the criteria for recipients, then selecting Send SMS. See the [Send a manual recall](#) guide in the Office section of the knowledge base

Add a patient recall

Recalls are added to a patient's record, and reminders are sent via SMS using the automatic schedule explained in this guide. See the [Add a patient recall](#) guide in the Office section of the knowledge base

The Recalls Report

This report is used to print the First Recall letter or the Reminder Letter, and to print a report for doctors to review prior to their letters going out. It can also be used to print first or subsequent reminder letters using MS Word. To learn more, see the [Recalls Report guide](#).

Create Recall Types

Create Recall Types with their own Maturity date, for example, a recurring Health Assessment every 12 months or a pathology result review in 1 week. To learn more, see the [Create recall types guide](#).
