

Managing SMS messages

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Manage all SMS messages sent to and received from patients, including opt-outs, appointment cancellations and 2-way SMS communications.

Options for sending SMS Messages

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](#).

Message Manager (all patients)

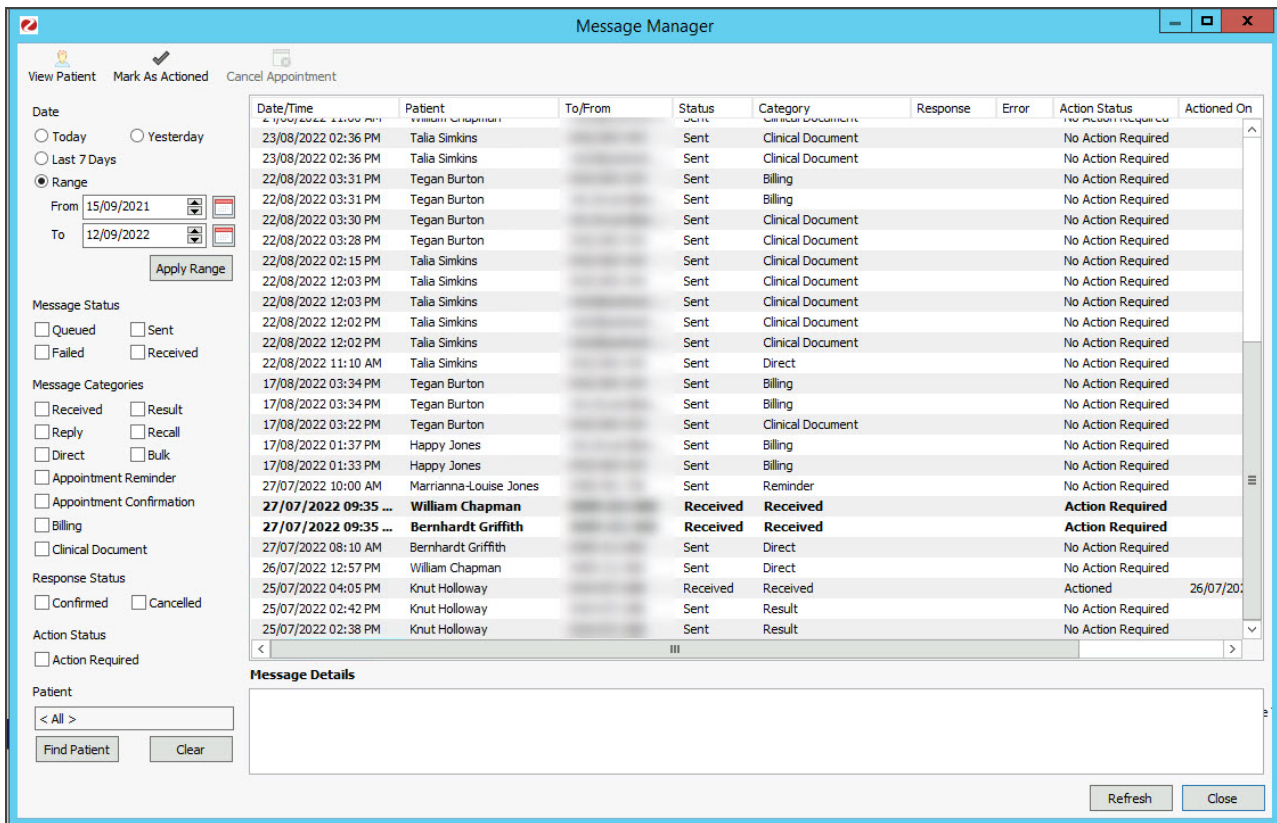
Zedmed Message Manager allows you to view and filter the messages received from all patients.

To open Message Manager:

1. Select Zedmed's **Management** tab.
2. Select the **Messages** button.
3. Use the filters to set the messages you want to see.

Considerations:

- By default, Message Manager displays the SMS messages sent and received that day.
- If you change the date range, select Apply Range to update the messages shown.
- Any filters applied with a tick box are applied immediately.
- Selecting the **Refresh** button will load any new messages based on the current filters.



Message displays

- **Message Details** shows the message text that was sent in the selected message.
- **Response** shows what the patient replied if the practice has **2-way SMS** enabled, for example, Y or N.

Message filters

Message Status for sent and received SMS Messages:

- **Queued** - The SMS is in a queue to be sent.
- **Failed** - The SMS failed to send to the SMS provider. The maximum attempts to retry have been made.
- **Sent** - The SMS has been sent to the SMS provider.
- **Retrying** - The SMS has failed to send, but the maximum attempts to retry have not yet been made.

The **Retrying** option is not available as a filter as it is an interim status of a message before it is either **Sent** or **Failed**.

System location from where the SMS message was generated/sent or received:

- **Received** - SMS received was not matched to an Appointment.
- **Reply** - SMS received was then matched to an Appointment.
- **Direct** - SMS message was sent directly from Patient Details.
- **Appointment Reminder** - SMS message was sent from the Appointment Report.
- **Results** - SMS message was sent from the Results Inbox.
- **Recall** - Currently unavailable - due in a future release.
- **Bulk** - SMS Message was sent from the Patient Services Report.

Message Status

Status of the reply SMS message:

- **Confirmed** - Displayed when the patient has responded with a valid, positive response.
- **Cancelled** - Displayed when the patient has responded with a valid, negative response.

Status of any action taken/yet to take by the user:

- **Actioned** - this status is set by selecting a message and clicking on **Mark As Actioned** button.
- **Action Required** - this status is assigned by the system if there is a Message Status of FAILED or Message Category of RECEIVED having a valid, negative Response while Auto Cancel of Appointments option is switched off.
- **No Action Required** - this status is assigned by the system for Message Status of SENT or Message Category of REPLY having a valid, positive or negative Response while Auto Cancel of Appointments option is switched on.

Messages tab (single patient)

Message Manager displays both sent and received messages. To reply to a message, double-click on it to open the **Messages** tab in the patient record. The **Messages tab** displays the patient's message history. If updates have been made to the Patient Details prior to sending a message, the user will be prompted to save the changes before sending the message.

Send an SMS

The **Send SMS** section allows you to send a message to the patient. When you type a message, the remaining character count will display. If you go over the 160-character count, you will be charged for 2 SMS messages but it will still be sent as 1 message.

Holloway, Knut

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Patient Details
Further Details
Recalls
Notepad
 eHealth
Messages

Date/Time	Sent By	To/From	Status	Category	Response
20/01/2023 10:01 AM	Dr P Davis	[Redacted]	Sent	Confirmation	
Your appointment with Dr Phillip Davis on 20/01/2023 at 11:00 AM at Branch 1 is confirmed. Please call 03 9284 3300 if you cannot attend.					
20/01/2023 10:00 AM	[Redacted]	[Redacted]	Received	Received	
I will call at 12.30am today					
20/01/2023 09:57 AM	Dr P Davis	[Redacted]	Sent	Direct	
Non urgent, please call doctor Davis.					
19/10/2022 10:00 AM	Dr P Davis	[Redacted]	Sent	Reminder	
You have an appointment on 20/10/2022 at 12:30 PM with Dr Phillip Davis at Branch 1. Reply Y to attend. Call [Redacted] if you cannot attend.					
10/10/2022 10:05 AM	Dr P Davis	[Redacted]	Sent	Direct	
test 2					
10/10/2022 10:04 AM	Dr P Davis	[Redacted]	Sent	Direct	
hello, testing					
06/10/2022 10:55 AM	Dr P Davis	[Redacted]	Sent	Clinical Document	
Message text is not available for File Delivery messages					
Referral: Ref Letter - Standard					
06/10/2022 10:55 AM	Dr P Davis	rickd@zedmed.com.au	Sent	Clinical Document	
Message text is not available for File Delivery messages					
Referral: Ref Letter - Standard					
05/10/2022 02:32 PM	Dr P Davis	[Redacted]	Sent	Clinical Document	
Message text is not available for File Delivery messages					

Send SMS

Hi Knut,

You will have received a reminder for the new appointment time. I know you were not 100% sure you could make it, so please call if it does not suit and we can reschedule.

2 messages, 124 characters remaining

Send

Delete Print Patient Verification Find Close Cancel

2-way SMS replies

You can configure Zedmed to allow patients to reply to SMS messages, for example, to confirm or cancel appointments. Care needs to be taken when **composing reminders** so the patient replies with a valid response.

Configurations

- To receive appointment notifications, a patient must 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.
- To allow patients to reply to messages, **Enable 2-Way SMS** must be ticked in practice **SMS Settings**. [Learn more](#)
- For a No/N reply to cancel an appointment, **Enable Auto-Cancel of Appointments** must be ticked in practice **SMS Settings**.

Appointment confirmations

2-way communication allows patients to confirm or cancel an appointment by replying to the reminder. All responses go to Message Manager and the Messages tab in the patient's record. Responses are not case-sensitive, e.g, nO and No are valid.

If the Patient replies N/No:

- If **Enable Auto-Cancel of Appointments** is ticked, the appointment will be cancelled and removed from the Appointment Book. The Cancelled Appointment will display in the Appointment Audit Report.
- If **Enable Auto-Cancel of Appointments** is not ticked, a Notifications alert will be received in Zedmed, and if you select the notification, Message Manager will open with the **Response Status - Cancelled** and **Action Status - Action Required** filters selected. You can also enable the Appointment Book setting **Show SMS Response Icon (Appointments > View > Options)** to add a red cross to these appointments.
- These outcomes apply even if the message sent to the patient did not ask them to reply with an N or No.

If the Patient replies Y/Yes:

- The message will go to the Message Manager and you can select **Response Status - Confirmed** to see all replies that were specifically a Y or Yes.
- There is no Notification as no action is required.
- A mobile phone icon will appear next to the appointment if **Show SMS Response Icon** has been selected in the **Appointments > View > Options**. This will be replaced with a green tick when the patient is attended.
- To identify patients that were asked to reply Yes/Y and did not, enable the Appointment Book setting **Show SMS Response Icon (Appointments > View > Options)**. This adds ticks to appointments patients respond Yes/Y to, and allows you to see who has not responded.

Text replies

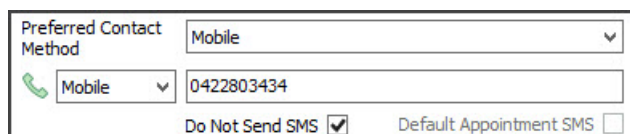
When a patient uses SMS to send a string of text, you can view it in both **Message Manager** and the Patient's **Messages** tab.

If the patient replies with a string of text:

- A Notifications alert will be received, and selecting the notification will open Message Manager with the **Category > Reply** and **Action Status - Action Required** filter selected.
- If you double-click the message, it will open in the **Messages** tab in the patient's record, so you can send a reply SMS to the patient.

SMS opt-outs

A patient can contact the practice to opt out of SMS. If they do, tick **Do Not Send SMS** in their patient record. They will no longer receive any SMS messages from the practice via Zedmed.



The screenshot shows a form with the following fields and options:

- Preferred Contact Method:** A dropdown menu with 'Mobile' selected.
- Mobile:** A dropdown menu with 'Mobile' selected.
- Phone Number:** A text input field containing '0422803434'.
- Do Not Send SMS:** A checkbox that is checked.
- Default Appointment SMS:** A checkbox that is unchecked.

If you use **ZedSMS** and **ZedSMS Message Centre**, patient replies with words like 'stop' and 'cancel' will be displayed in the **List Management > Opt-out** list. This allows you to review messages where the customer may want to opt out. In some cases, you may want to check with the patient first. To learn more, see the **Message Centre guide**.

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.

