

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.

Message Manager (all patients)

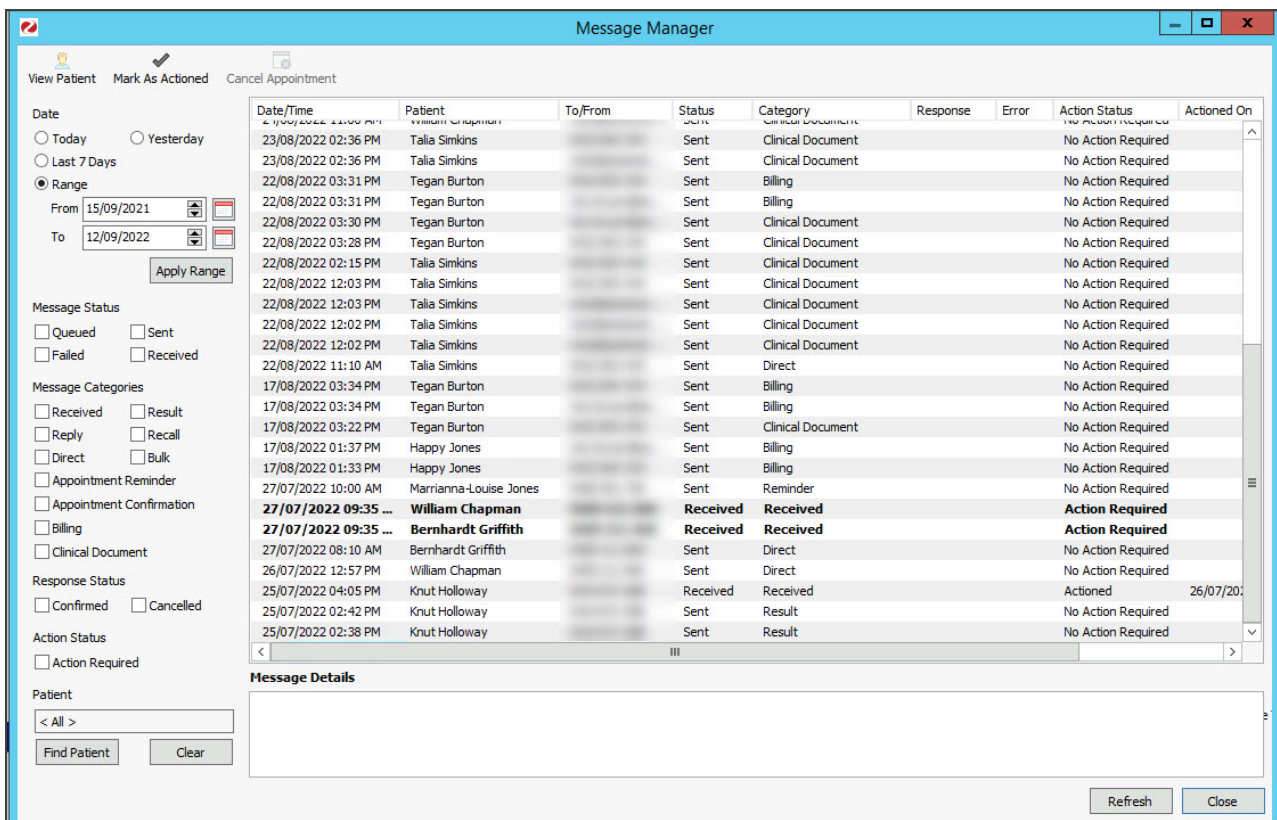
Zedmed Message Manager allows you to view and filter SMS communications with patients.

To open Message Manager:

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

Considerations:

- Message Manager displays the current day's SMS messages by default.
- 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 Manager

View Patient | Mark As Actioned | Cancel Appointment

Filters:

- Date:
 - ☐ Today
 - ☐ Yesterday
 - ☒ Range
 - From: 15/09/2021
 - To: 12/09/2022
 -
- Message Status:
 - ☐ Queued
 - ☐ Sent
 - ☐ Failed
 - ☐ Received
- Message Categories:
 - ☐ Received
 - ☐ Result
 - ☐ Reply
 - ☐ Recall
 - ☐ Direct
 - ☐ Bulk
 - ☐ Appointment Reminder
 - ☐ Appointment Confirmation
 - ☐ Billing
 - ☐ Clinical Document
- Response Status:
 - ☐ Confirmed
 - ☐ Cancelled
- Action Status:
 - ☐ Action Required

Message List:

Date/Time	Patient	To/From	Status	Category	Response	Error	Action Status	Actioned On
23/08/2022 02:36 PM	Talia Simkins		Sent	Clinical Document			No Action Required	
22/08/2022 03:31 PM	Tegan Burton		Sent	Billing			No Action Required	
22/08/2022 03:30 PM	Tegan Burton		Sent	Clinical Document			No Action Required	
22/08/2022 03:28 PM	Tegan Burton		Sent	Clinical Document			No Action Required	
22/08/2022 02:15 PM	Talia Simkins		Sent	Clinical Document			No Action Required	
22/08/2022 12:03 PM	Talia Simkins		Sent	Clinical Document			No Action Required	
22/08/2022 12:03 PM	Talia Simkins		Sent	Clinical Document			No Action Required	
22/08/2022 12:02 PM	Talia Simkins		Sent	Clinical Document			No Action Required	
22/08/2022 11:10 AM	Talia Simkins		Sent	Direct			No Action Required	
17/08/2022 03:34 PM	Tegan Burton		Sent	Billing			No Action Required	
17/08/2022 03:34 PM	Tegan Burton		Sent	Billing			No Action Required	
17/08/2022 03:22 PM	Tegan Burton		Sent	Clinical Document			No Action Required	
17/08/2022 01:37 PM	Happy Jones		Sent	Billing			No Action Required	
17/08/2022 01:33 PM	Happy Jones		Sent	Billing			No Action Required	
27/07/2022 10:00 AM	Marrianna-Louise Jones		Sent	Reminder			No Action Required	
27/07/2022 09:35 ...	William Chapman		Received	Received			Action Required	
27/07/2022 09:35 ...	Bernhardt Griffith		Received	Received			Action Required	
27/07/2022 08:10 AM	Bernhardt Griffith		Sent	Direct			No Action Required	
26/07/2022 12:57 PM	William Chapman		Sent	Direct			No Action Required	
25/07/2022 04:05 PM	Knut Holloway		Received	Received			Actioned	26/07/2022
25/07/2022 02:42 PM	Knut Holloway		Sent	Result			No Action Required	
25/07/2022 02:38 PM	Knut Holloway		Sent	Result			No Action Required	

Message Details

Patient: < All >

Message filters

Message Status :

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

There is no **Retrying** filter, as it is an interim status before a message is **Sent** or **Failed**.

Message categories:

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

Message actions

The **Status** column and **Mark As Actioned** button help manage SMS messages using three status types:

- **Actioned** - this status is assigned by selecting a message and clicking the **Mark As Actioned** button.
- **Action Required** - the system assigns this status if:
 - There is a Message Status of **FAILED**
 - There is a Message Category of **RECEIVED** with a negative response, while **Auto Cancel of Appointments** is off.
- **No Action Required** - the system assigns this status if:
 - There is a Message Status of **SENT**
 - There is a Message Category of **REPLY** with positive or negative Response while **Auto Cancel of Appointments** is on.

Message Information

- **Message Details field:** Shows the full text of the selected message.
- **Response column:** Shows the patient's reply if the practice has **2-way SMS** enabled, for example, Y or N.
- **Status column:** Shows if the Message was Sent or Received and has the following status types of replies:
 - **Confirmed** - Displayed when the patient has responded with a valid, positive response.
 - **Cancelled** - Displayed when the patient has responded with a valid, negative response.

Messages tab (single patient)

The **Messages tab** displays the patient's message history.

Send an SMS

The **Send SMS** section allows you to send a message to the patient. There is a 160-character limit, and the remaining character count will display as you type. If you go over 160 characters, you will be charged for 2 SMS messages, which will still be sent as 1 SMS. If updates have been made to the Patient Details before sending a

message, the user will be prompted to save the changes before sending the message.

The screenshot shows the Zedmed software interface for a patient named 'Holloway, Knut'. The interface has a top menu bar with options: Acc Enquiry, Attend, Bill, Letters, Clinical Information, Print, Quote, Receipt, Waiting Room, Appointments, and Extras. On the left, there is a sidebar with options: Patient Details, Further Details, Recalls, Notepad, eHealth (checked), and Messages (selected). The main area displays a list of messages with columns: Date/Time, Sent By, To/From, Status, Category, and Response. The messages are as follows:

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					

Below the message list is a 'Send SMS' form. It contains the text: '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.' At the bottom right of the form, it says '2 messages, 124 characters remaining'. There is a 'Send' button. At the very bottom of the interface, there are buttons for 'Delete', 'Print', 'Patient Verification', 'Find', 'Close', and 'Cancel'.

2-way SMS replies

You can configure Zedmed to allow patients to reply Y/Yes or N/No to SMS messages, for example, to confirm or cancel an appointment when they receive a reminder. Care should be taken when **composing reminders** so the patient replies with a valid response.

Configurations

- To receive appointment notifications, a patient must have **Allows SMS** 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.
- Enable 2-Way SMS must be ticked in practice **SMS Settings to allow patients to reply to messages**. [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 be displayed 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 the **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 who 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

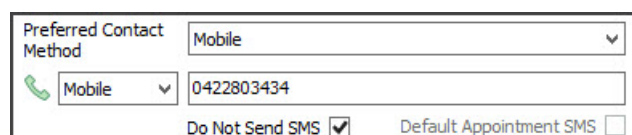
When a patient uses SMS to send a string of text, you can view it in both **Message Manager** and the Patient's **Messages** tab.

If the patient replies with a string of text:

- A Notifications alert will be received. 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 that you can send a reply SMS to the patient.

SMS opt-outs

Patients 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 SMS messages from the practice via Zedmed.



The screenshot shows a form for patient contact preferences. It includes a dropdown for 'Preferred Contact Method' set to 'Mobile', a text field for a phone number '0422803434', and two checkboxes: 'Do Not Send SMS' (checked) and 'Default Appointment SMS' (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 be displayed.

