

SMS confirmations & reminders

Last Modified on 07/10/2024 2:08 pm AEDT

Send patients SMS confirmations and reminders for their appointments. The reminders can be sent manually or scheduled to go out automatically.

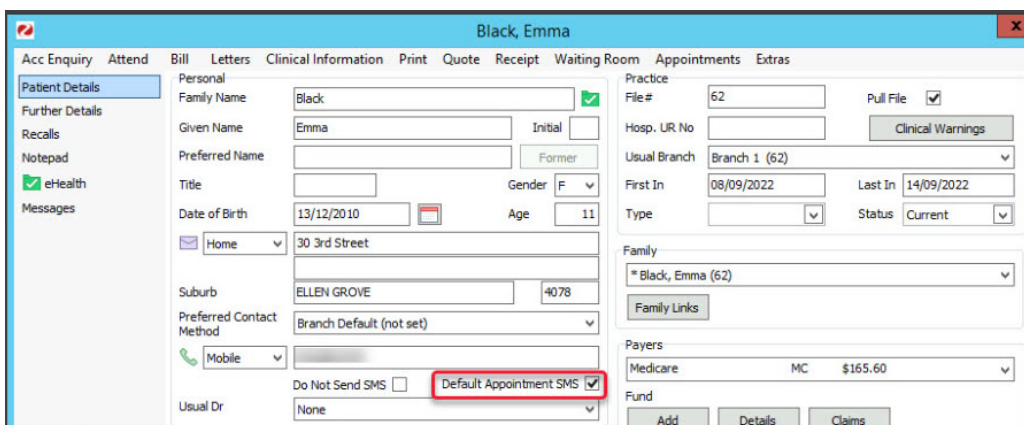
Requirements

Practice requirements

The [Set up SMS article](#) explains the following requirements: an account with ZedSMS and ZedSMS configured for the practice in Zedmed.

Patient requirements

A patient must have a mobile number in their patient record. For appointment reminders, they must also 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.



The screenshot shows the 'Patient Details' screen for Emma Black. The 'Default Appointment SMS' checkbox is checked and highlighted with a red box. Other visible fields include Family Name (Black), Given Name (Emma), Date of Birth (13/12/2010), and Mobile number (partially obscured).

2-way SMS replies

Zedmed can be configured to allow patients to reply Y/Yes or N/No (not case-sensitive) to SMS reminders to confirm or cancel an appointment. Zedmed can auto-cancel appointments when an N or No is received. The Appointment Book will reflect the response with a phone icon and a cross or tick. To learn more, see [Managing SMS messages](#).

Appointment confirmations

SMS confirmations for new bookings are sent if **Send Confirmation SMS** is ticked on the **Appointment Details** screen.

Send Confirmation SMS is ticked by default for Online Appointment (OLA) bookings, so SMS notifications are sent whenever a patient books online. For manual bookings, **Send Confirmation SMS** needs to be selected. It is not ticked by default.

The message's content is defined in the **Appointment Confirmation Message** field.

Appointment Details

Date: **Friday, 9 December 2022** Created by PD **Black, Emma** ✓

Doctor: **Igor Fuller** on 09/12/22 at 12:38 File N° 62 Pull File Yes DOB 13/12/2010

Resource: Start Time 11:15 Clinic Branch 1 First in 8/09/2022 Last in 14/09/2022 Type

Duration 00:30 Status Current Contact Details: Phone (H) Work (W) Mobile 0422803434 Address 30 3rd Street, ELLEN GROVE 4078

End Time 11:45 Type **Std Consultation**

Notes

Reason for chosen date

Cancellation Waiting Priority

Hide Notes **Allow SMS** **Send Confirmation SMS**

Account Payers

Medicare	MC	\$165.60
Department of Veterans Affairs	DVA	\$141.60
Black, Emma	P1	\$71.30

Repeated booking

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

Appointment reminders - scheduled

Schedule SMS reminders for selected appointment types to go out at a specified time and a set number of days before the appointment. The schedules are set up in the **Management** tab > **Practice setup** > **SMS Configuration** > **Schedule** tab

These automatic reminders are set up for the practice, and the steps are documented in the **Schedule reminders** guide.

Appointment reminders - manual

You can manually send out SMS reminders by selecting the criteria for who will receive the reminder then selecting send.

The message's content is updated using the **Modify SMS Text** button.

To manually send SMS reminders:

1. Go to Zedmed's **Reception** tab.
2. Select **Daily reports** then **Appointments**.

The **Appointment Report** screen will open.

3. Select **Send Appointments via SMS**.

This will update the screen so it can be used to configure and send SMS reminders.

4. Use the following criteria to determine who is to receive the reminder:

- a. Set the **Date from** and **To**. Reminders are sent to all patients with appointments in this date range.
- b. Select the **Branch** the appointments are at. The default is the branch you're logged in at.
- c. Select the **Doctor** or **Resource** (not both) the appointments are booked under. The default is all doctors.

- d. Select the **Appointment Type** that the reminders will be for. The default is all appointment types.
5. When you're satisfied with the message's criteria, select the **Send SMS** button.

The screenshot shows the 'Appointment Report' dialog box. It is divided into several sections:

- Style:** Contains radio buttons for 'Appointments Only', 'Appointments and Available Slots', and 'Cancelled/Missed'. Under 'Cancelled/Missed', there are checkboxes for 'Cancelled Only' and 'Missed Only'. The 'Send Appointments via SMS' option is selected and highlighted with a red box. A 'Modify SMS Text' button is next to it.
- Criteria:** Contains date and time filters. 'Date from' and 'Date to' are both set to 15/07/2021. 'Time from' is 06:00 and 'Time to' is 22:00. A red arrow points to this section.
- Report:** Contains a 'Mail Merge' tab and 'Display Options' with checkboxes for 'Addresses', 'Referral Details' (checked), 'Separator Lines', and 'Preferred Name'. An 'Include History' checkbox is also present. A 'Send SMS' button is highlighted with a red box.
- Filters:** Includes dropdown menus for 'Branch' (Branch 1), 'Doctor' (All), 'Resource' (All), and 'Appointment Type' (All).
- Buttons:** 'Screen', 'Export', and 'Close' buttons are visible.

If you get the message "No appointments match the criteria you have selected" when selecting **Send SMS** or **Screen**.

One of the following may apply:

- SMS messages have already been sent for appointments matching the selected criteria.
- There are no appointments matching the criteria.
- The appointments that match the criteria are not set to **Allow SMS**.
- The patients do not have a mobile phone number in their patient records.

The **Appointment Report** can also be used to modify the text used in the messages. The modifications are made using the **Report** and **Mail Merge** tabs and the **Send Appointments via SMS** option.

Check if notifications were sent.

You can check if SMS reminders were sent using both the **Message Manager** and the **Appointment Listing** report.

Message Manager

The Message Manager allows you to filter all SMS communications by specific criteria, including **Confirmed** or **Cancelled** responses to messages sent to the patient.

To learn more, see the [Message Manager guide](#).

Appointment Listing report.

To check SMS notifications:

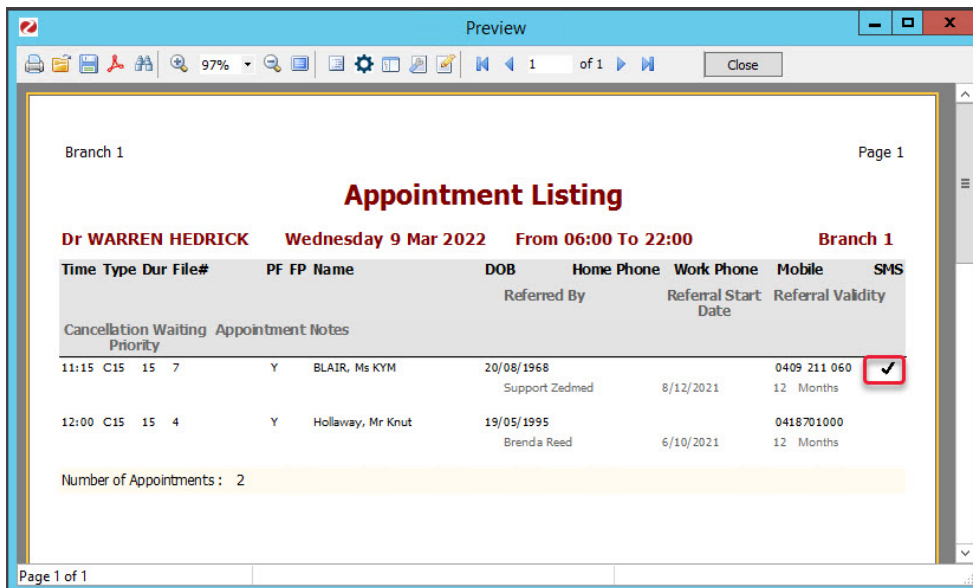
1. Go to Zedmed's **Reception** tab.
2. Select **Daily reports** then **Appointments**.
The **Appointment Report** screen will open.
3. Select the branch.
4. Select the date range you want to check.

5. Select the **Screen** button.

The **Appointment Listing** report will open, showing all appointments in that date range.

6. Review the report.

The **SMS** column will have a tick for each patient sent a reminder.



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

You can also check what message a patient was sent by **opening their patient record** and selecting the message tab.

