

PrimaryClinic

How to Send SMS Appointment Reminders

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GLOBAL HEALTH

Appointment Reminders

There are two methods to remind patients of their upcoming appointments in PrimaryClinic.

*Appointment reminders can be sent via **SMS** or **Email**. Both of these methods are cost effective and saves the practice time and has also proven to reduce appointment cancellations.*

SMS Appointment Reminders

PrimaryClinic allows the option for the practice to send an individual SMS to a patient that might require an urgent recall or additional information regarding their appointment.

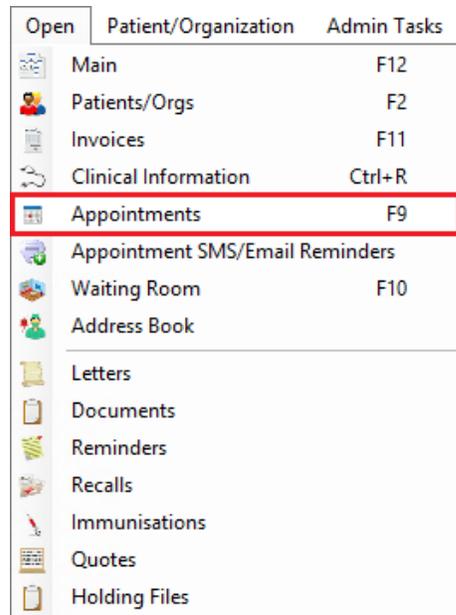
There are two ways to send the individual SMS

From the Appointment book

Sending Bulk SMS reminders

Sending SMS Appointment Book

Open the **Appointment Book** by either pressing **F9** on the keyboard, Open (From the Main Menu) or select the Calendar icon in the Quick Link Toolbar



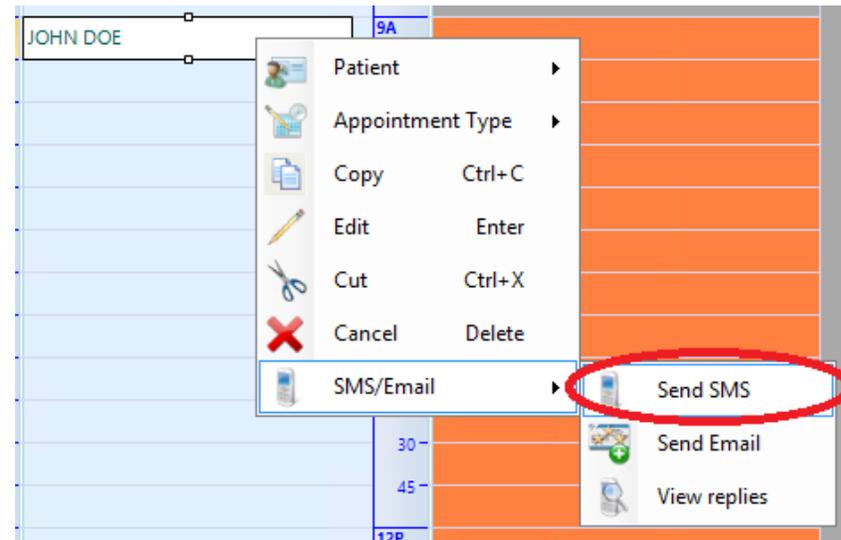
or



Sending SMS Appointment Book

In the **Appointment Book**, locate the **Patient** you wish to send reminder to

Right-Click the appointment and select **SMS/Email** > **Send SMS** (*Please note, if a patient does not Accept SMS you will not be able to send individual SMS*)

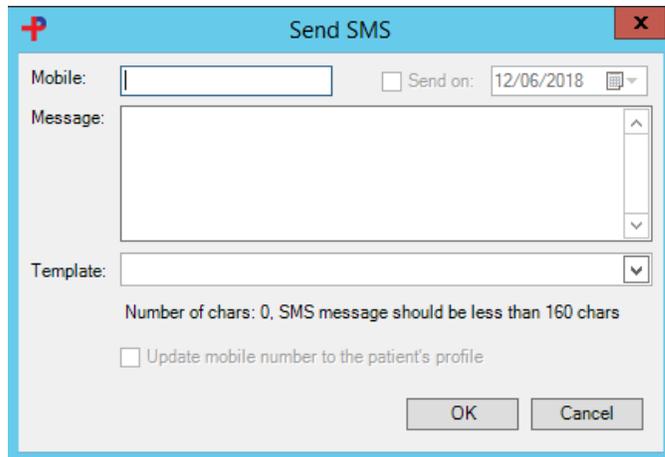


Sending SMS Appointment Book

Providing you have entered the patients **Mobile Number** into their **Patient Details Screen**, The mobile number will automatically appear. If not, you can manually type it in.

You have the option to **Compose** your own message or by selecting a **Pre-Created SMS Template** (See How to create a SMS template)

Once you have **Completed** composing the SMS, Select the **OK** button. You will receive a message on screen that the SMS reminder has been sent



Send SMS

Mobile: Send on: 12/06/2018

Message:

Template:

Number of chars: 0. SMS message should be less than 160 chars

Update mobile number to the patient's profile

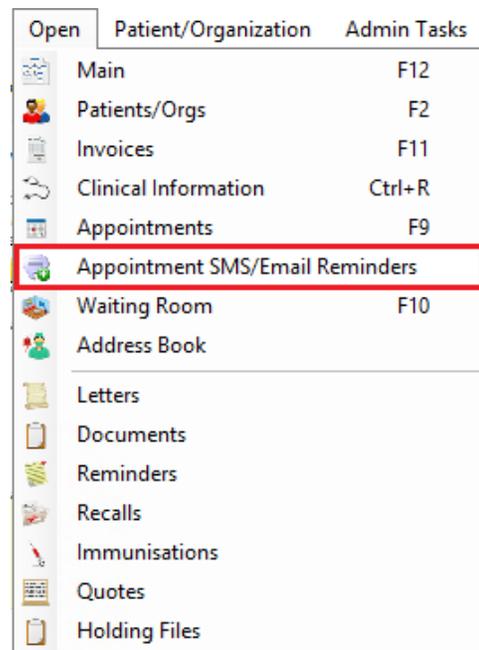
OK Cancel

*PLEASE NOTE: A **maximum of 160 characters** is allowed, If the message if more than 160 characters you will be charged accordingly.*

Sending Bulk SMS Reminders

If you need to send SMS reminders to a group of patients, for instance, patients who are booked in on a particular day, sending a bulk SMS reminder will save you time.

Select **Open** from the **Main Menu > Appointment SMS/Email Reminders**



The image shows a screenshot of a software application's main menu. The menu is organized into three columns: 'Open', 'Patient/Organization', and 'Admin Tasks'. The 'Appointment SMS/Email Reminders' option is highlighted with a red rectangular border. Below this menu, there are several other menu items listed in a single column.

Open	Patient/Organization	Admin Tasks
Main		F12
Patients/Orgs		F2
Invoices		F11
Clinical Information		Ctrl+R
Appointments		F9
Appointment SMS/Email Reminders		
Waiting Room		F10
Address Book		
Letters		
Documents		
Reminders		
Recalls		
Immunisations		
Quotes		
Holding Files		

Sending Bulk SMS Reminders

Select the **Date Between** and other filters on the left to display the group of patients you need to send reminders to.

Click the **Find** button to fetch the selected Patients from the database and display on the **SMS/Email Reminder window**.

The screenshot shows the 'SMS/Email Reminder' window. The left sidebar contains filters for Family/Org, First Name, Providers (with a search box and a list of providers), Locations (PrimaryClinic Practice - Darling), Type (Break, Others, Working, Absent, new patient), and Date between (25/01/2018 to 25/03/2018). The main table has columns for Send, AcceptSMS, and Appointment Time. The 'Find' button is highlighted with a red box.

Send	AcceptSMS	Appointment Time
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	26/02/2018 02:00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	27/02/2018 11:00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	27/02/2018 11:00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	28/02/2018 01:30
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/03/2018 11:00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/03/2018 08:30
<input type="checkbox"/>	<input checked="" type="checkbox"/>	09/03/2018 10:00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	09/03/2018 11:00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	20/03/2018 11:00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	22/03/2018 09:30
<input type="checkbox"/>	<input checked="" type="checkbox"/>	22/03/2018 09:45
<input type="checkbox"/>	<input checked="" type="checkbox"/>	23/03/2018 11:00

Sending Bulk SMS Reminders

Tick the box next to Send to select all patients or Manually Tick the box for the patients you are wanting to send the reminder to.

SMS		Email						
Send	<input type="checkbox"/> AcceptSMS	Appointment Time	Sent Date	Patient	Mobile	Provider	Type	Message
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:45		Daniel, Test		Delores, Felica - 240	Hight light	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	08/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Test Appointment	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	14/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	21/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	22/11/2016 09:00		Jane, Smith		Soon, Alfred - 2406	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	25/11/2016 09:30		Jane, Smith		Delores, Felica - 240	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:00		A, Patient A		Dr Test, Doctor - 12	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:15		Jane, Smith		Dr Test, Doctor - 12	Standard	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/12/2016 09:00		A, Patient A		Dr Test, Doctor - 12	Standard	

Sending Bulk SMS Reminders

If all **Patients** are going to receive the same **SMS template**, select the **Template** from the **Drop Down List** you want to send and then click **Apply This Template For Everyone**. This will now **Update** the **Template** for all patients

SMS		Email									Template
Send	AcceptSMS	Appointment Time	Sent Date	Patient	Mobile	Provider	Type	Message			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:45		Daniel, Test		Delores, Felica - 240	Hight light	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	21/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Test Appointment	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	22/11/2016 09:00		Jane, Smith		Soon, Alfred - 2406	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	25/11/2016 09:30		Jane, Smith		Delores, Felica - 240	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:00		A, Patient A		Dr Test, Doctor - 12	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:15		Jane, Smith		Dr Test, Doctor - 12	Standard	Dear			Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/12/2016 09:00		A, Patient A		Dr Test, Doctor - 12	Standard	Dear			Test SMS Template

Sending Bulk SMS Reminders

Alternatively, if you want to send a different appointment reminder template for different patients, manually select the **Template** from the **Drop-Down List** you are wanting to send.

(An example of this would be when each provider has a different template, you would then select the different template based on the provider).

Usually if different providers had **different reminder templates**, you would **filter** the **patients per provider** rather than selecting all providers but this can be done either way.

SMS		Email										
Send	AcceptSMS	Appointment Time	Sent Date	Patient	Mobile	Provider	Type	Message		Template		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Standard			Dr Ely Black		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:45		Daniel, Test		Delores, Felica - 240	Hight light	Dear		Test SMS Template		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard			Dr Ely Black		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	21/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard			Dr Ely Black		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard			Dr Ely Black		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Test Appointment			Dr Ely Black		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	22/11/2016 09:00		Jane, Smith		Soon, Alfred - 2406	Standard	Dear		Test SMS Template		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	25/11/2016 09:30		Jane, Smith		Delores, Felica - 240	Standard	Dear		Test SMS Template		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:00		A, Patient A		Dr Test, Doctor - 12	Standard			Dr Test Doctor		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:15		Jane, Smith		Dr Test, Doctor - 12	Standard			Dr Test Doctor		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/12/2016 09:00		A, Patient A		Dr Test, Doctor - 12	Standard			Dr Test Doctor		

Sending Bulk SMS Reminders

After marking all patients to receive SMS, and the correct template has been set, press the **Send** button.

You will receive a message on screen once the SMS reminders have been transmitted

SMS		Email								Template
Send	AcceptSMS	Appointment Time	Sent Date	Patient	Mobile	Provider	Type	Message		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Standard			Dr Ely Black
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:45		Daniel, Test		Delores, Felica - 240	Hight light	Dear		Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	07/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard			Dr Ely Black
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	21/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard			Dr Ely Black
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14/11/2016 10:00		Tim, Case		Miss Black, Ely - 110	Standard			Dr Ely Black
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08/11/2016 11:00		Jane, Smith		Miss Black, Ely - 110	Test Appointment			Dr Ely Black
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	22/11/2016 09:00		Jane, Smith		Soon, Alfred - 2406	Standard	Dear		Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	25/11/2016 09:30		Jane, Smith		Delores, Felica - 240	Standard	Dear		Test SMS Template
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:00		A, Patient A		Dr Test, Doctor - 12	Standard			Dr Test Doctor
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	28/11/2016 10:15		Jane, Smith		Dr Test, Doctor - 12	Standard			Dr Test Doctor
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/12/2016 09:00		A, Patient A		Dr Test, Doctor - 12	Standard			Dr Test Doctor

Tutorials and FAQs

Read or watch more tutorials on the website.

<https://www.primaryclinic.com.au/tutorials/>

If you have a question or need some help please check the Frequently Asked Questions page before contacting the support team.

<https://www.primaryclinic.com.au/faqs/>

Support:

You can reach support by lodging a ticket on our website:

www.primaryclinic.com.au/support/

Or email us at:

primaryclinic@global-health.com

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