

REACTIVATING PATIENT COMMUNICATIONS

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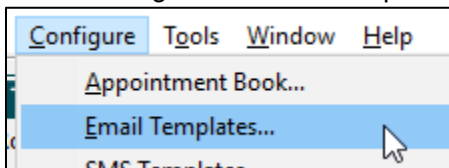
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Introduction

If you have paused your appointment and recall automation, this guide will assist with reinstating these tools.

Removing COVID-19 Information from Your Templates Email Templates

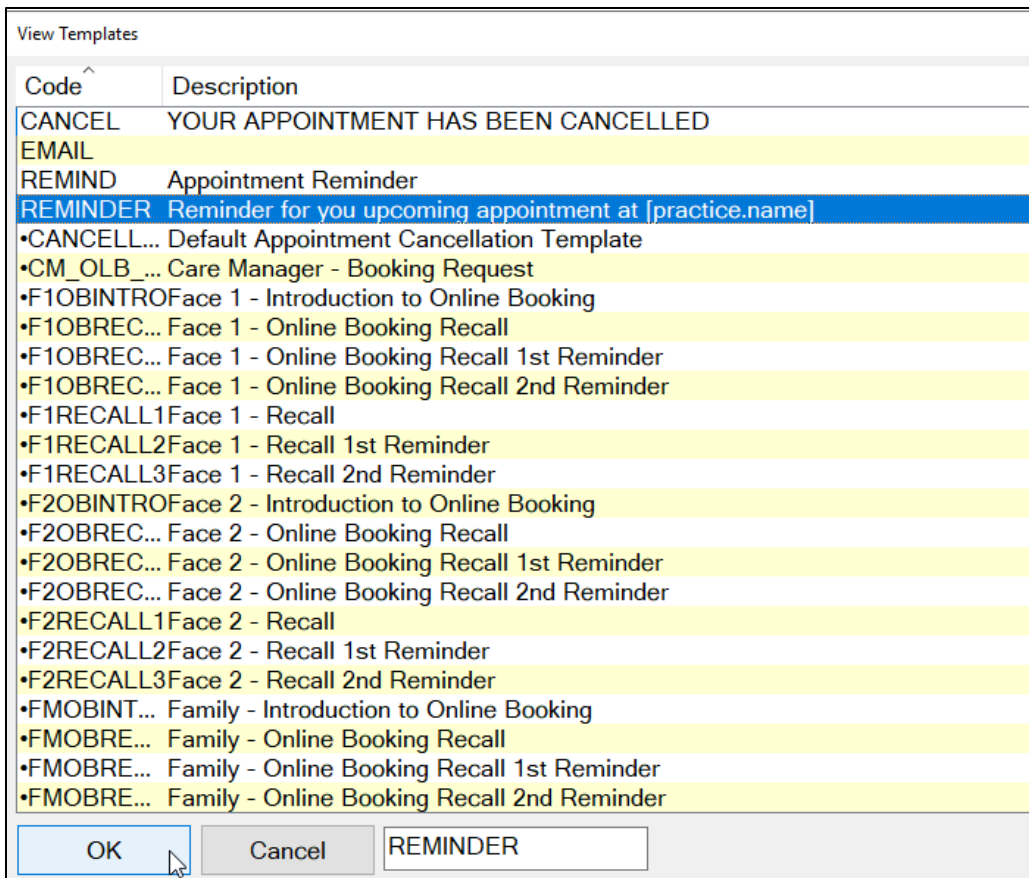
1. Go to Configure > Email Templates



2. Click on the list button beside the code box



3. Select your reminder template from the list then select OK

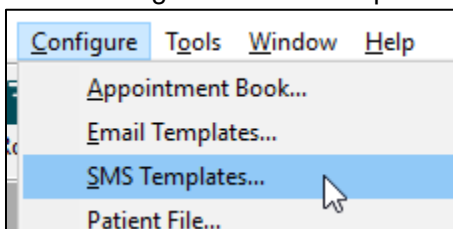


4. Highlight the COVID-19 information then select backspace on your keyboard

5. Then click the  button on the tool bar.

SMS Templates

1. Go to Configure > SMS Templates



2. Click on the list button beside the code box



3. Click on the template for your SMS reminder then click on OK.

View SMS Templates

Code ^	Description	Approximat
TEST	Test	0
·ACKCANCELL...	Acknowledge Cancellation	88
·ACKCONFIRM...	Acknowledge Confirmation	82
·CANCEL	Need To Cancel	93
·CM_OLB_SMS	Care Manager - Booking Request	110
·FAMILYRECALL	Family Recall	69
·FTA	Failed To Arrive	76
·GAP AVAILABLE	Short Notice List Gap Available	121
·GAP CONFIR...	Short Notice List Gap Confirmed	96
·GAP GONE	Short Notice List Gap Gone	132
·OUTSTANDIN...	Outstanding Balance	74
·PLND_OLB_S...	Planned Treatment SMS Template	106
·RECALL	Recall	72
·REMINDER	Reminder	202
·REMINDERFIR...	First Reminder	79
·REMINDERSE...	Second Reminder	87
·REMINDERTHI...	Third Reminder	82
·SMS_SURVEY	SMS_Survey_Template	128
·SPECIALOFFER	Special Offer	80
·SURVEY_REP...	Auto_Reply_1	102
·SURVEY_REP...	Auto_Reply_2	115

OK Cancel ·REMINDER Credit Remaining:

6. Highlight the COVID-19 information then select backspace on your keyboard

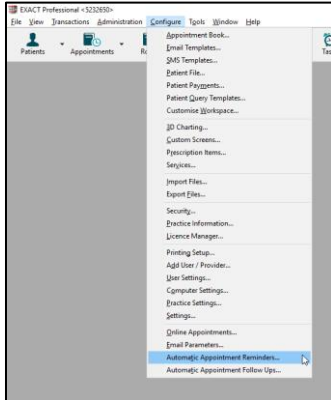
7. Then click the  button on the tool bar.

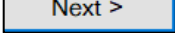
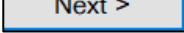
Turning on Automatic Appointment Reminders

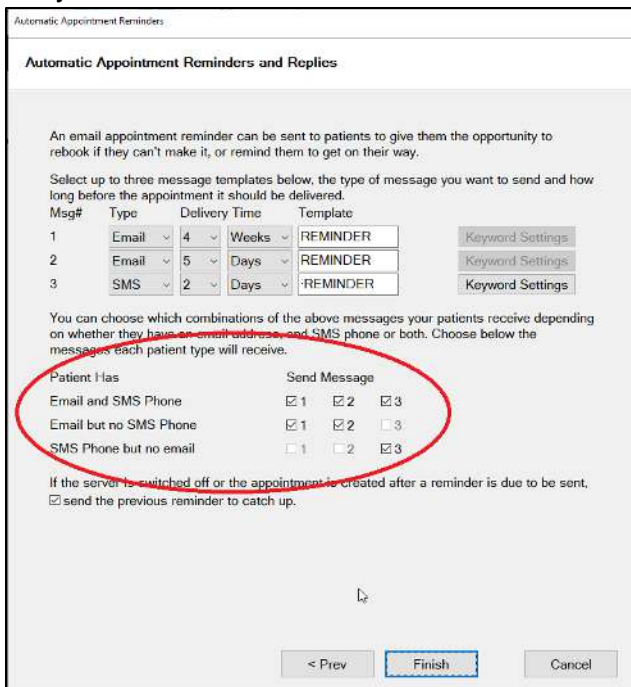
Please follow the instructions below to turn on automatic reminders for your patients.

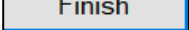
PLEASE NOTE: Before re-enabling automatic reminders, make sure that all appointments currently booked in the future are still 100% accurate.

1. Go to Configure > Automatic Appointment Reminders (you may need to be logged in as a higher user to access this)



2. Click  then click  again
3. Ensure all the boxes circled in the image below are ticked as shown. In order to add the tick you will need to click in the box.



4. Once all the boxes are ticked select .

For a walk-through video, please visit our YouTube channel at this link:

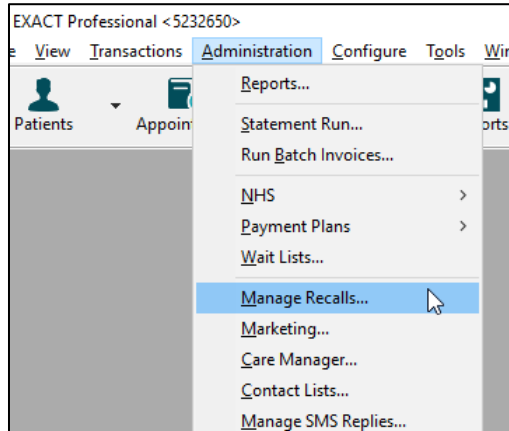
<https://youtu.be/6dqdHDWQZFA>


Turning on Automatic Recalls

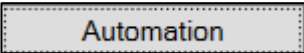
Please follow the instructions below to re-enable your automatic recalls for your patients.

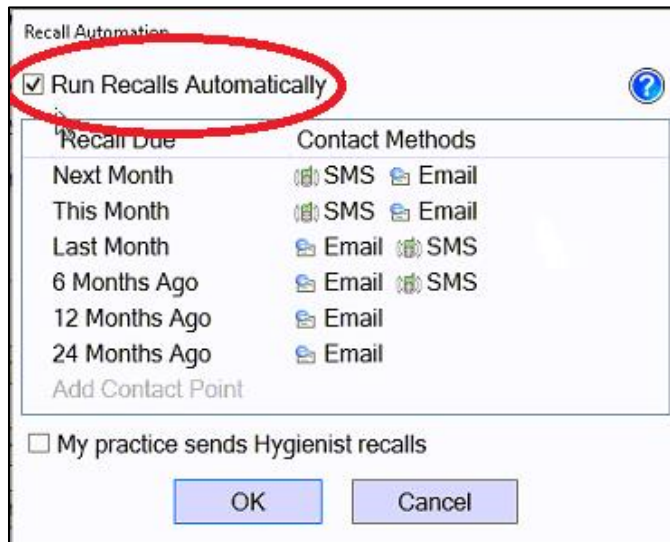
PLEASE NOTE: It is imperative that you DO NOT press “run recalls” before taking the following steps.

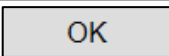
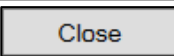
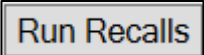
1. Go to Administration, Manage Recalls,



2. Click the  in the bottom right. *Please note: you may need to be logged in as an administrator to view this button.*

3. Click on  then tick the box for Run Recalls Automatically as shown below.



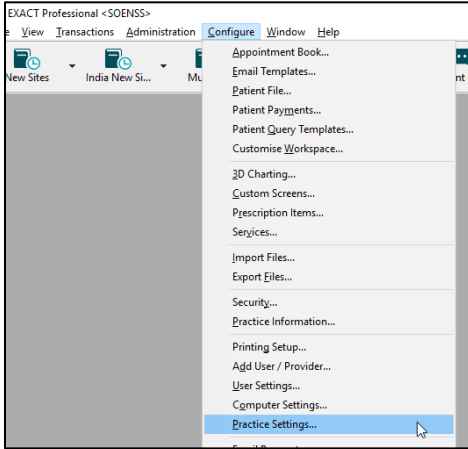
4. Click  then click .
5. Click on .

For a walk-through video, please visit our YouTube channel at this link:

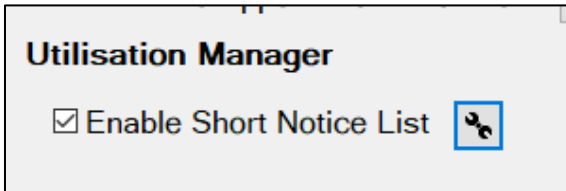
<https://youtu.be/TPQK0-rNVuQ>

Turning on Short Notice List notifications

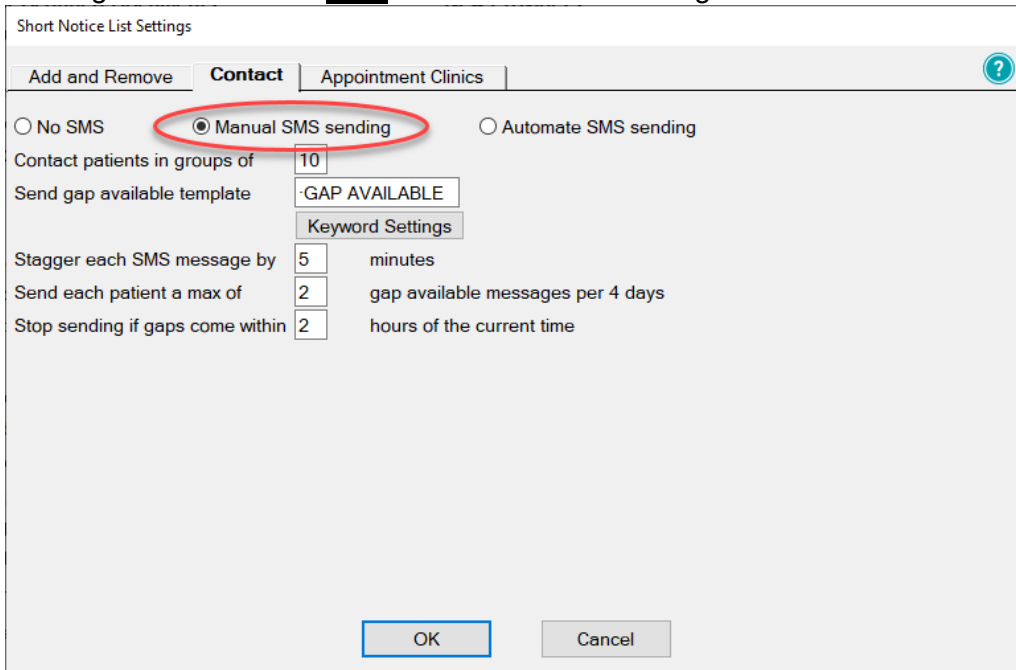
1. Go to Configure > Practice Settings



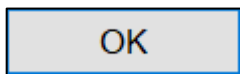
2. Click on the spanner next to 'Enable Short Notice List'



3. Unless you had specifically turned on the automation, Ensure that 'Manual SMS sending' is selected and **NOT** 'Automate SMS sending' as shown below



4. Select



ADDITIONAL PRODUCTS

Reactivating Online Booking or Marketing Campaigns

Please call our support team on 1300 889 668 for assistance.

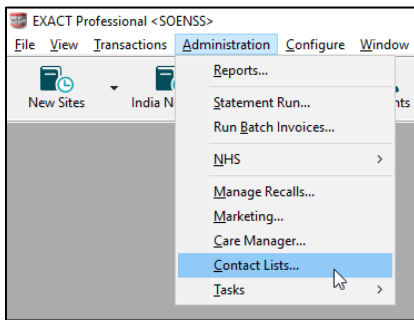
CONTACTING ALL OF YOUR PATIENTS

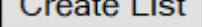
Contact Lists


If you would like to contact all of your patients to advise that the practice is now open, you can follow the steps below:


Create a Contact List

1. Go to Administration > Contact Lists



2. Click on  in the bottom right hand corner

3. Click on  beside the 'Select Patients' field

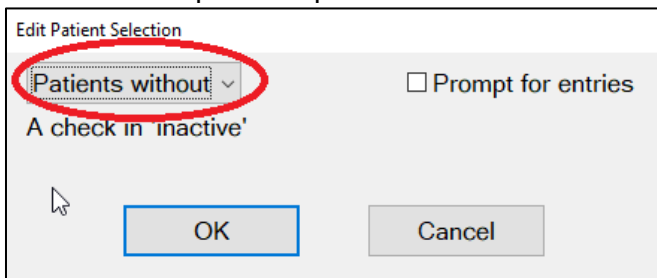
4. Click on 

5. Enter 'All active patients' into the description box


6. Click on the  button in the bottom right

7. Click on 'A check in 'inactive' and select 

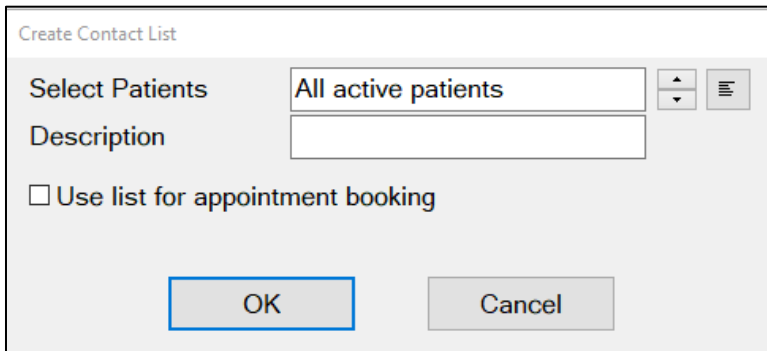
8. Ensure the drop down option is set to 'Patients without' as shown below



9. Select  then select  again

10. From the 'View Query Templates' screen ensure the 'All Active Patients' query is highlighted in blue then select 

11. Select OK on the screen shown below to run the list




The 'Create Contact List' dialog box contains the following elements: a title bar 'Create Contact List', a 'Select Patients' dropdown menu with 'All active patients' selected, a 'Description' text input field, a checkbox for 'Use list for appointment booking' which is currently unchecked, and two buttons at the bottom: 'OK' and 'Cancel'.

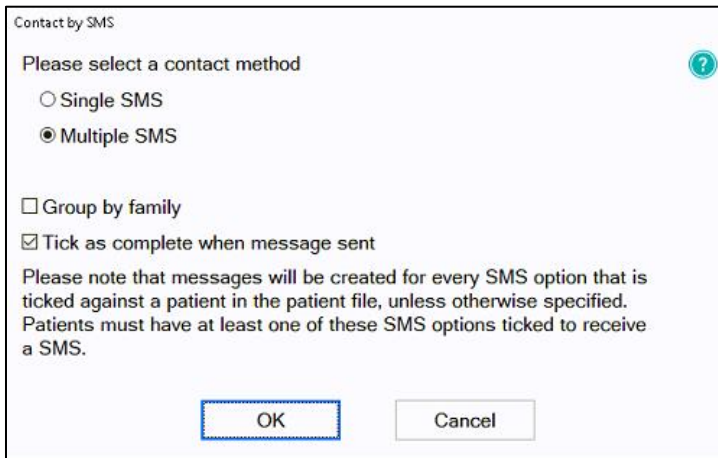
12. Once the list has run you will see all of your active patients and you will be able to contact them from this screen.

Please use the link below for a video guide on creating contact lists.

<https://www.youtube.com/watch?v=Qb-44c7B5l0&t=1s>

Sending SMS from the Contact List screen

1. From your contact list click on the  button in the bottom right
2. Set the screen as shown below and select OK



The 'Contact by SMS' dialog box contains the following elements: a title bar 'Contact by SMS', a question mark icon in the top right, the text 'Please select a contact method', two radio button options: 'Single SMS' and 'Multiple SMS' (which is selected), a checkbox for 'Group by family' which is unchecked, a checkbox for 'Tick as complete when message sent' which is checked, a paragraph of explanatory text: 'Please note that messages will be created for every SMS option that is ticked against a patient in the patient file, unless otherwise specified. Patients must have at least one of these SMS options ticked to receive a SMS.', and two buttons at the bottom: 'OK' and 'Cancel'.

3. Set the 'Contact Patients' screen as shown below and select OK

Contact Patients

You can limit the contact list using the selections below. If you want to contact the full list of patients, simply untick all the available options

Limit patients to those...

With the Following Status

Ticked as Completed

Not Ticked as Completed

That are not Inactive

Who have been Contacted Times

With a Contact Preference

From Patient

To Patient

Select Patients

Provider(s)

Who are Family Members

4. Set the 'Stagger SMS' screen as shown below and select OK

Stagger SMS

Send all SMS straight away

Stagger SMS sending

Delivery times

A message should be sent every mins.

Using the above settings the last message will be delivered on - **23/03/2020** at **11:42**

5. On the SMS details screen click into the 'SMS Template' field then lick on the list button to the right

SMS Template

Category

6. Select your SMS template then select OK

7. Select OK again
8. The message you are sending to patients will be displayed if you are happy with this select OK again and this will then contact all of your patients by SMS.

Create SMS

Description


Truncate to (160) characters

Dear [patient.firstname], unfortunately your appointment has been cancelled due to the COVID-19 emergency. We will contact you by phone to reschedule. Stay safe [practice.name].


Approximate Length: 1 SMS's (143 characters excluding merge fields)

Note: Messages will be sent using as many SMS credits as necessary. Choose a 'Truncate To' value to set the maximum number of SMS credits you want to use.

Sending Emails from the Contact List screen

1. From your contact list select  button in the bottom right hand corner
2. Set the screen as shown below

Contact by Email


Please select a contact method 

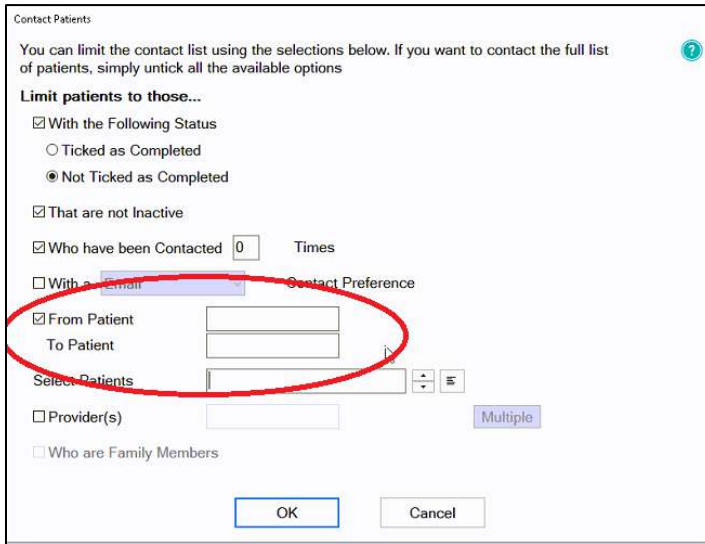
Single email

Multiple email

Group by family

Tick as complete when emailed

- Set the screen as shown below. Ensure there is a check in 'From Patient' and click in the field and enter 'Aa' then click on the  button and select the patient name beginning with A. In the 'To Patient' field enter 'Zz' and select the last patient name beginning with Z.



Contact Patients

You can limit the contact list using the selections below. If you want to contact the full list of patients, simply untick all the available options

Limit patients to those...

With the Following Status

Ticked as Completed

Not Ticked as Completed



That are not Inactive

Who have been Contacted Times

With a Contact Preference

From Patient

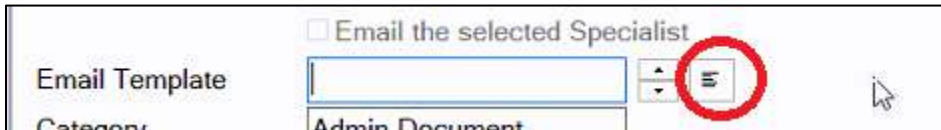
To Patient

Select Patients  

Provider(s)

Who are Family Members



- Select OK.
- Click into the 'Email Template' field and click on the list button



Email the selected Specialist

Email Template

Category

- Select your email template and select OK
- Your email template will be displayed if you are happy with the message click on



 Send