TXT2Remind Version Number:	4.0
Document Date:	14/03/2018
Security Classification:	Premium Clients

TXT2Remind 4.0

Sending out Flu Vaccine reminders via text and letter for Medtech32 and TXT2Remind

1 Introduction

This document outlines the steps involved in setting up a MedTech32 flu vaccine outbox document template according to the design specifications of TXT2Remind. Once the document is setup correctly, users in the practice can send a flu vaccine reminder mobile text-message to the patients within MedTech32 with the ability of having the messages file against the patient notes.

2 TXT2Remind Outbox Document Setup for Flu Vaccine

To be able to send a text message from your outbox document you first need to set up a document in the Document Designer within your MedTech32 system. This document will be the format 'Text (T)' text-message as opposed to traditional letter based documents.

a. Go to Setup > In/Outbox > Out Box Document
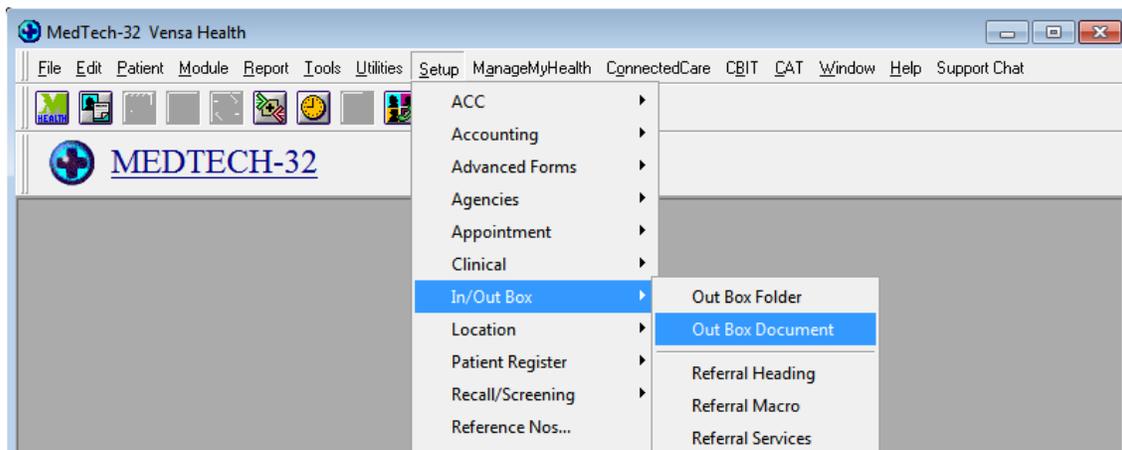
b. Click on the create a new document button. When the Document Designer box pops up fill in the fields circled in red. It is good practice to identify your document code and description with a prefix of "TXT". This will allow you to easily distinguish between letter documents and mobile text document templates.
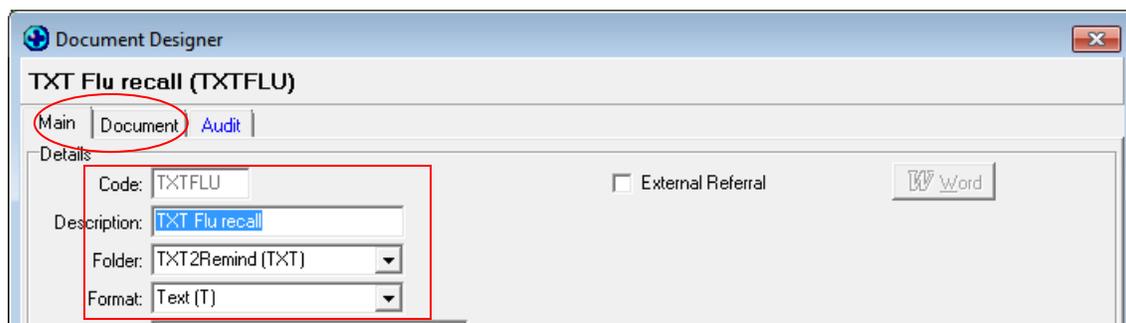
E.g. for Flu vaccine recall you could make code your document: TXTFLU, Description: TXT Flu Recall

c. Click on Document tab

d. Type in your text message body (example below)
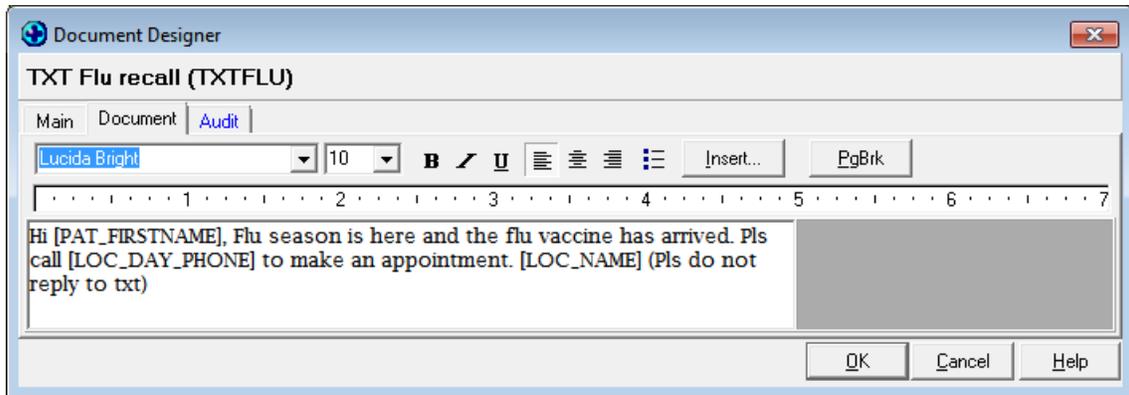
e. Click on the OK button to finish.

3 Template Management

When creating your message, it is very important to limit the content to within 160 characters (including spaces and grammar). The reasoning for this is because patients receive the message in 2 texts rather than 1 if the message is over 160. Therefore, part of the message can sometimes get lost and the patient never receives it. Generally, patients are more likely to read a shorter message, so just provide the minimum information required to gain their attention.

3.1   Merge fields

Be careful of merge fields when checking the limit of characters. When the merge fields such as [PAT_FIRSTNAME] and [LOC_NAME] expand, sometimes the practice name or patient name are longer than the characters of the merge field. Hence, when the text is sent out, it is longer than initially thought. To prevent this, try to leave about 10-20 characters left over in the message.

Some ways to ensure that the message is below 160, are if it is 2 lines or less in length, or to copy and paste it into TXT2Remind application and use the 'characters left' box as a guide.

3.2   Pre-made Templates

Here are some templates that we have made for you to use. Pick the one that best suits your practice and copy the wording to the document designer as your flu season template. Remember, if you make changes to them, make sure that they remain under 160 characters!

Hi [PAT_FIRSTNAME], its Flu season and the vaccine is available at [LOC_NAME]. Ph [LOC_DAY_PHONE] to make an appt. DO NOT REPLY.

Hi [PAT_FIRSTNAME], the vaccine for Flu season is here at [LOC_NAME]. Ph [LOC_DAY_PHONE] to make an appt. DO NOT REPLY.

Hi [PAT_FIRSTNAME], you are eligible for a free flu vaccine this year at [LOC_NAME]. Ph [LOC_DAY_PHONE] to make an appt. DO NOT REPLY.
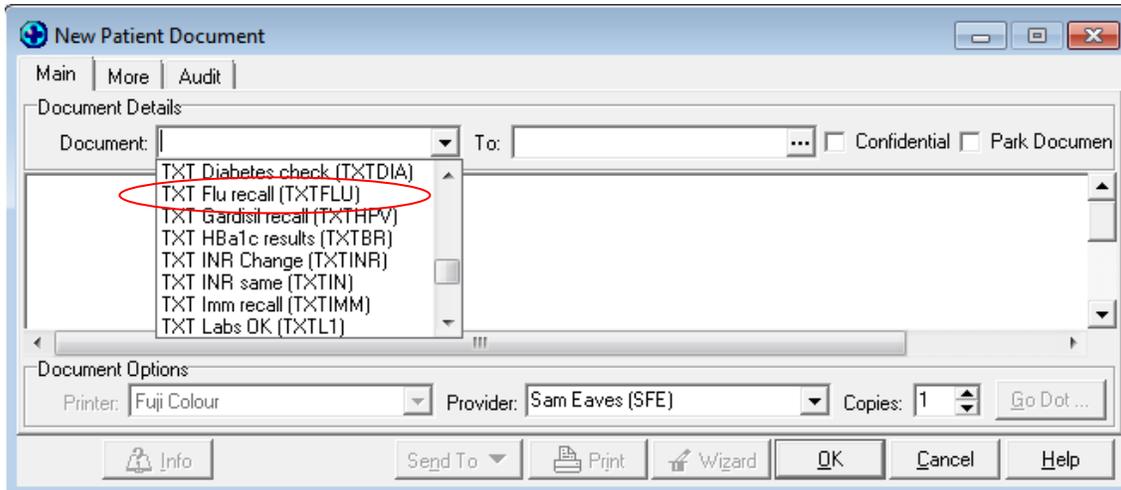
4 TXT2Remind Outbox Document Setup for Flu Vaccine

Once an outbox document is created in your patient management system, you can now send messages within the patient manager screen as outlined in this section.
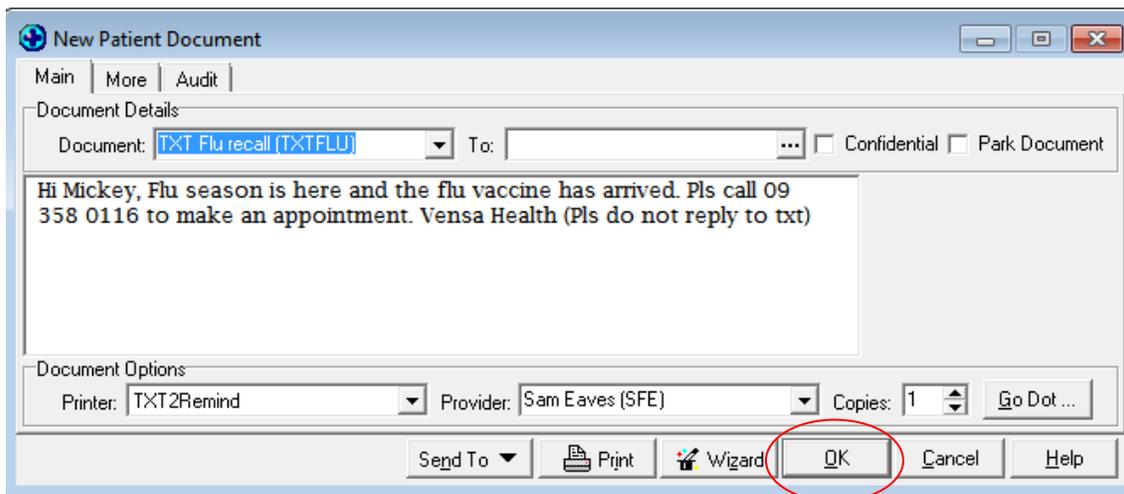
a. Once you identify the patient, ensure that they are on the palette. In the example below we have chosen Mickey Mouse. Once the patient is on the palette, go to the Patient Manager screen (F6) within MedTech and click on Out Box > New Document:
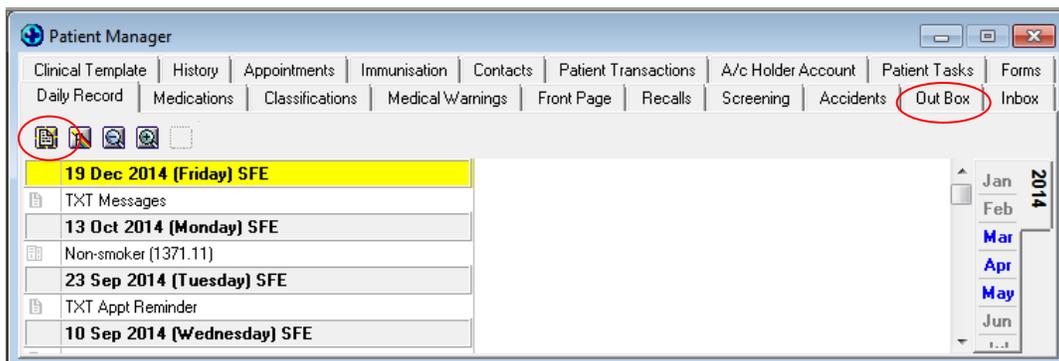
b. Select the TXT Flu recall document from drop down options

Example below

c. Click OK

This will queue the text message to your practice server where the TXT2Remind client will process it. Please note that by default TXT2Remind processes outbox documents every 5mins, hence the patient may not receive the message instantly, but it should be within a few moments given the default settings are not increased to a time greater than 5mins.
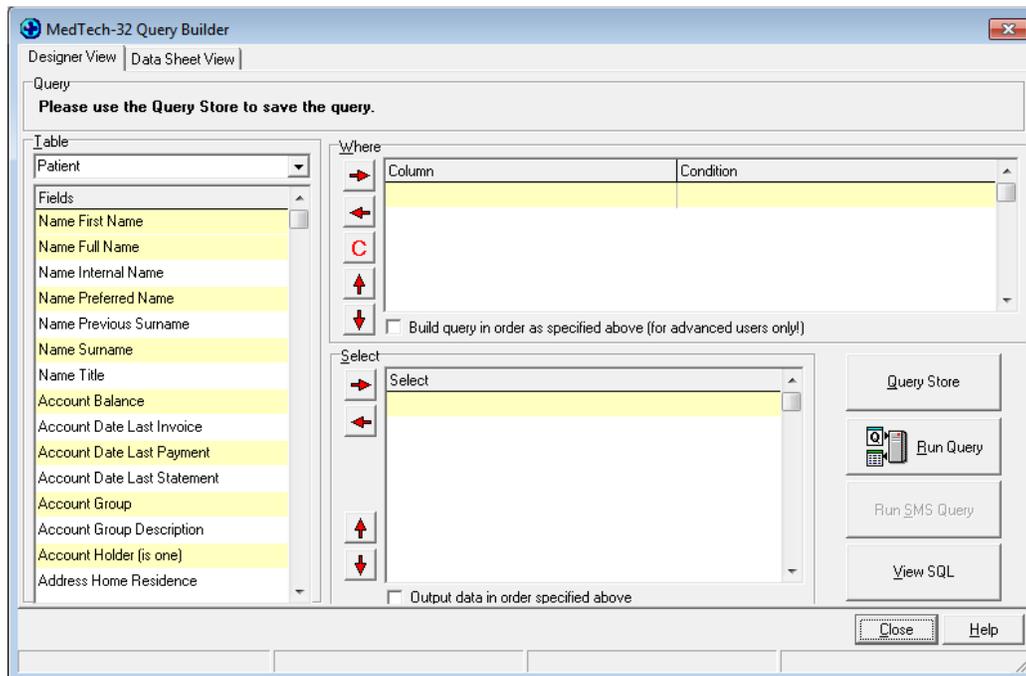
5 TXT2Remind sending bulk flu text messages from Query Build

Once an outbox document is created in your patient management system, you can then send messages from your query builder for your recalls or any mass texting you may want to send as outlined in this section.

a. Go to Medtech > Tools > Query Builder
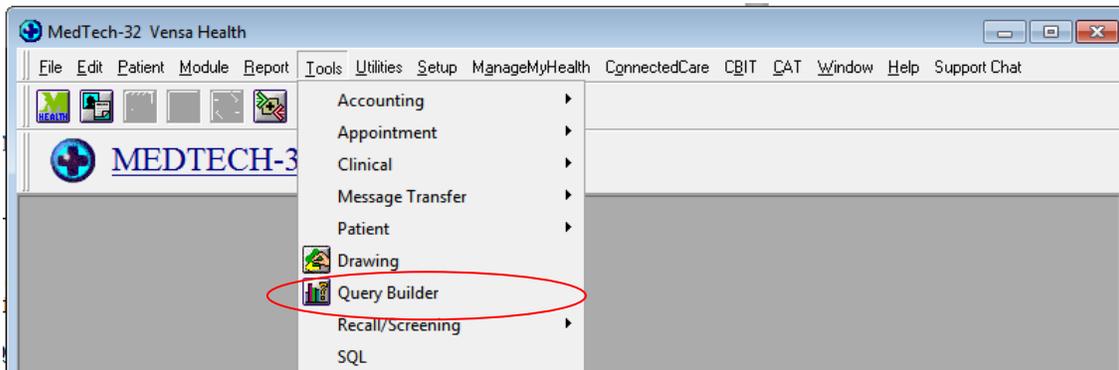
b. The Query Builder will open

c. Choose one of the options below for instructions.

- Build a new query
- Use an existing query

5.1   Build a new query

a. Chose the criteria you want in your query but include **Patient – Phone– Cell** with the condition as '**starts with 02**" in the 'Where' field, and **Patient - ID for Merge** and **Count Function – Count Occurrence** in the 'Select' field.
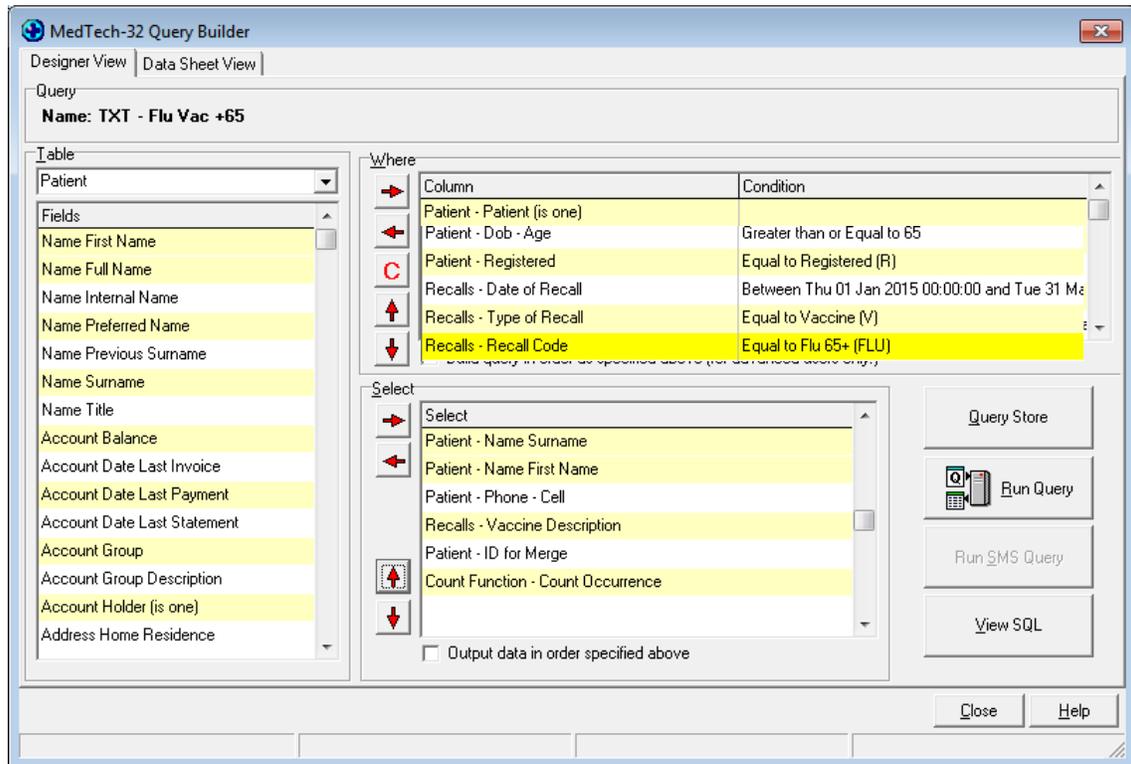
Please note the above query is an example for Flu 65+, criteria and conditions can change over time, ensure you are happy with the query according to your clinical standards.
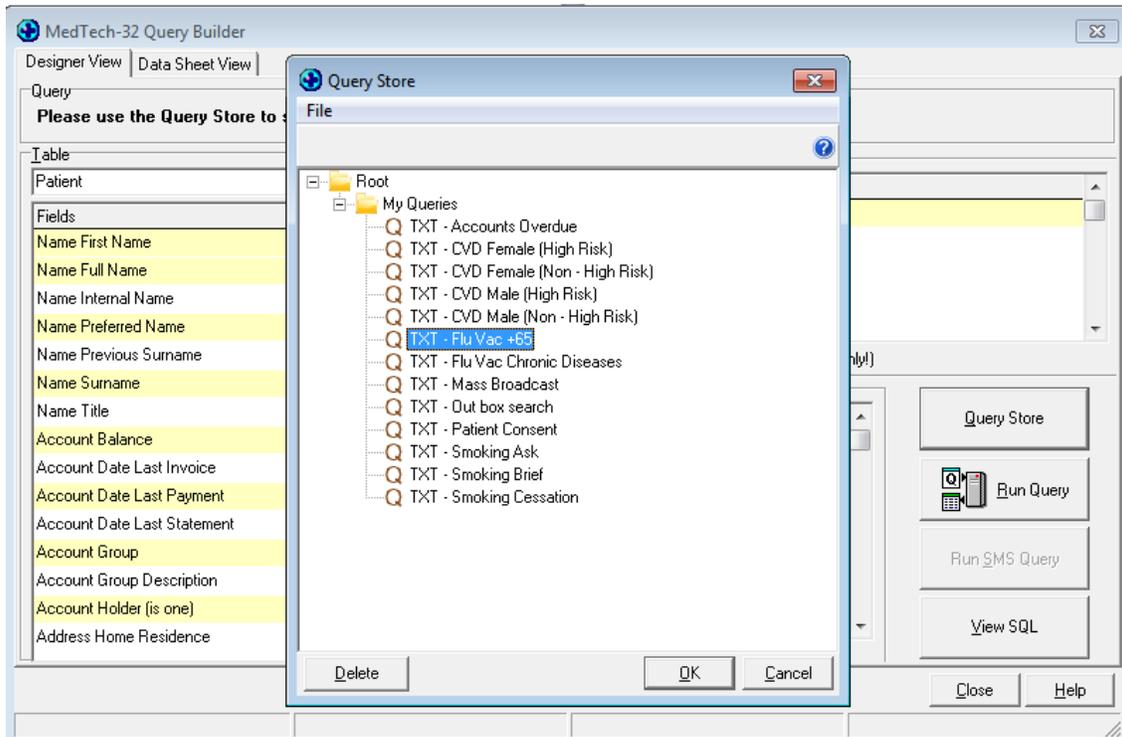
b. To Save for future use, go to Query Store and in the drop-down box click on 'Save Query'. Name your query (preferably with the prefix TXT) and click OK
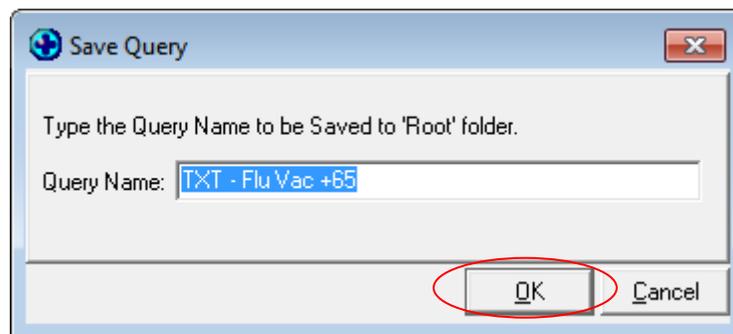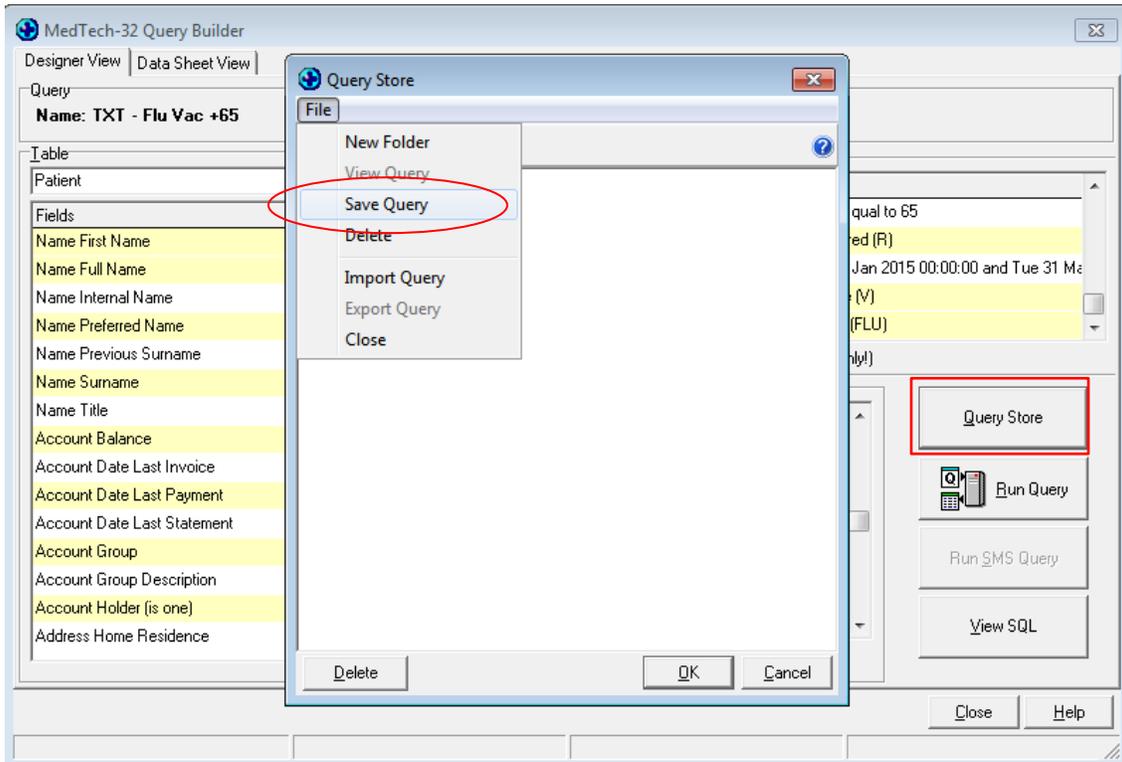
5.2 Use an Existing Query

If you have sent a flu vaccine query in the past, you may have saved that query, which will make your work easier this time.
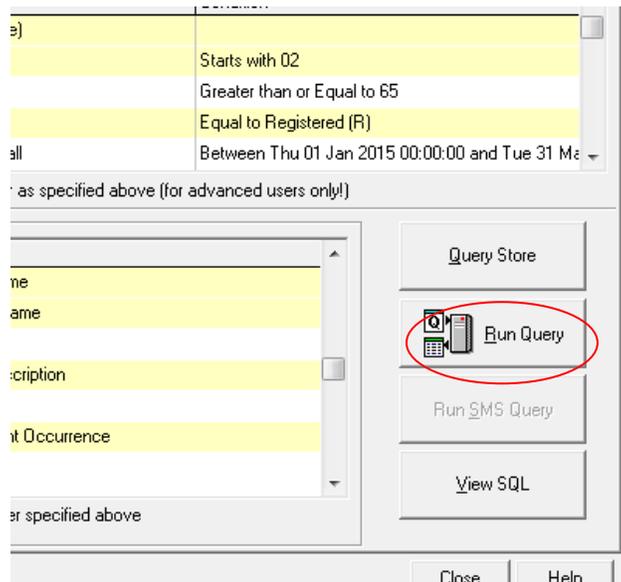
a. Click on Query Store > Locate your query > Select and press OK.

b. Be sure that "ID for Merge" and "Count Occurrence" are in the Select Field. Failure to choose these will prevent the text from going out or result in multiple texts going out to the same patient.
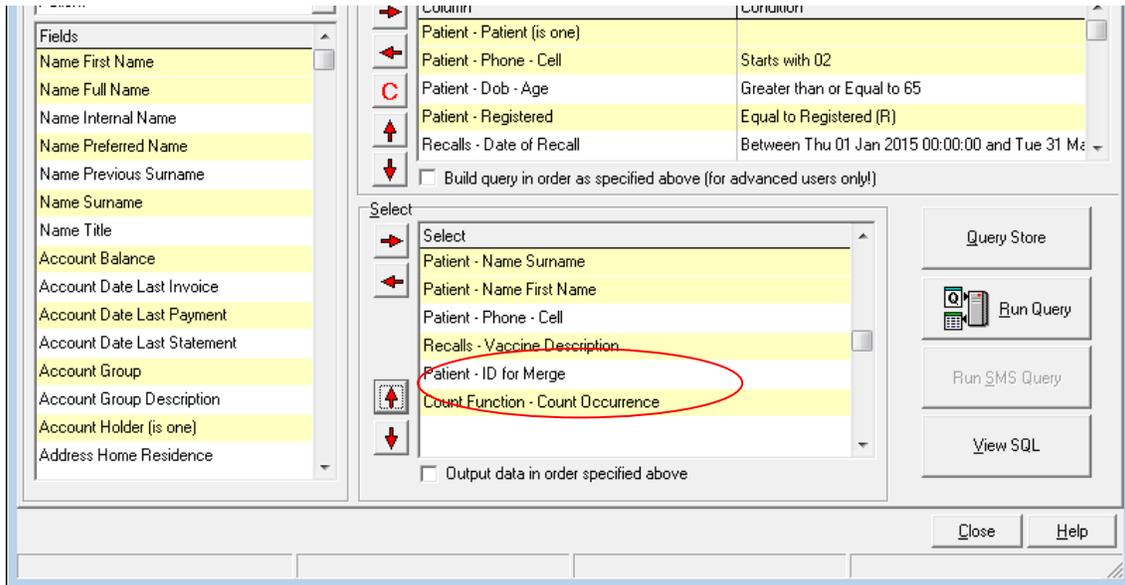

c. Click on the Run Query button

d. This will bring up all the patients who have a cell phone. **Change the Printer option** to a dummy printer (i.e. Microsoft XPS Document Writer, CutePDF, OneNote).

e. THEN, Click on the 'Merge' Button > Mail Merge
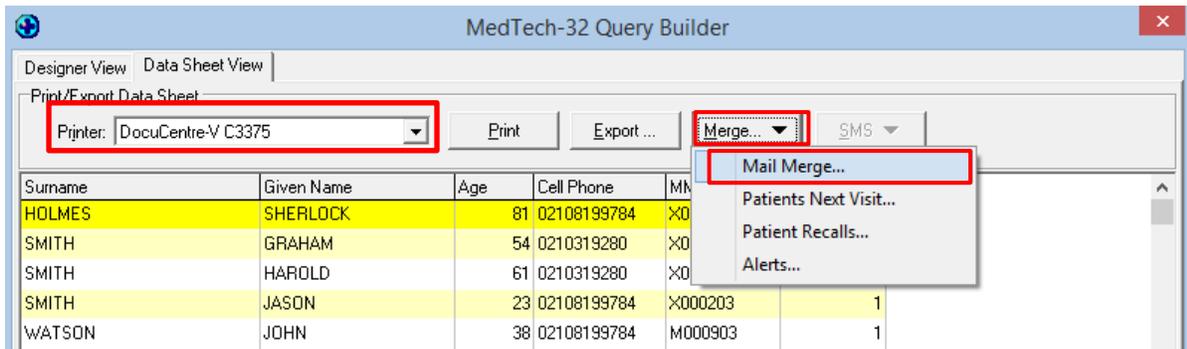
f. The Mail Merge window will open. On the "Document" field, select the text document created that contains the Flu Vaccine reminder. E.g. TXT Flu Recall (TXTFLU). On the "Print To" field, select a dummy (pdf/xps etc) printer. Tick "Add to patient's outbox" (necessary) and press OK.
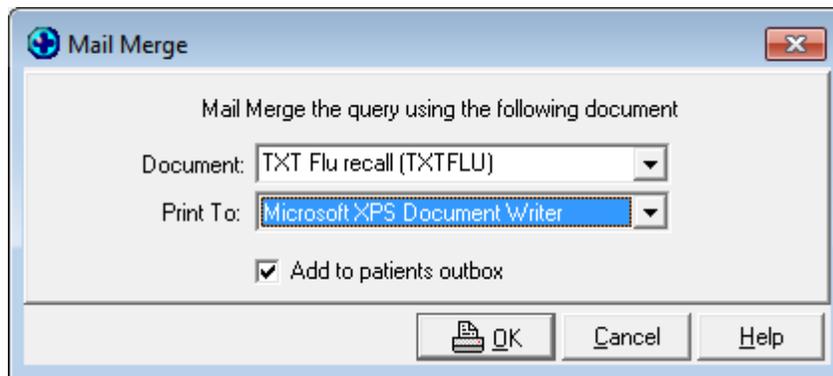
g. If the "Microsoft XPS Document Writer" or other pdf printer is used, a window may appear asking where to save this document. Press the Cancel button and the merge will commence.
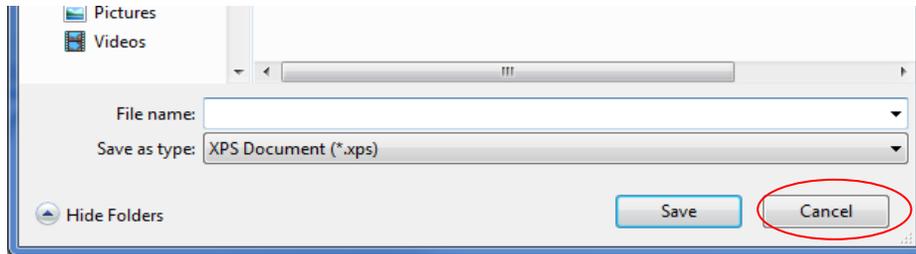
h. A Mail Merge box will appear displaying the amount of pages being 'printed'. In this case, it correlates with the number of text messages being sent. This box will disappear once it is completed.


i. To check the status of sent messages, open TXT2Remind and click on the Sent TXT Messages Tab. All the sent text messages that return a "Received" status receipt have been sent successfully as shown below. An 'Error' means the phone number is no longer in use and the patient will need to be contacted another way.
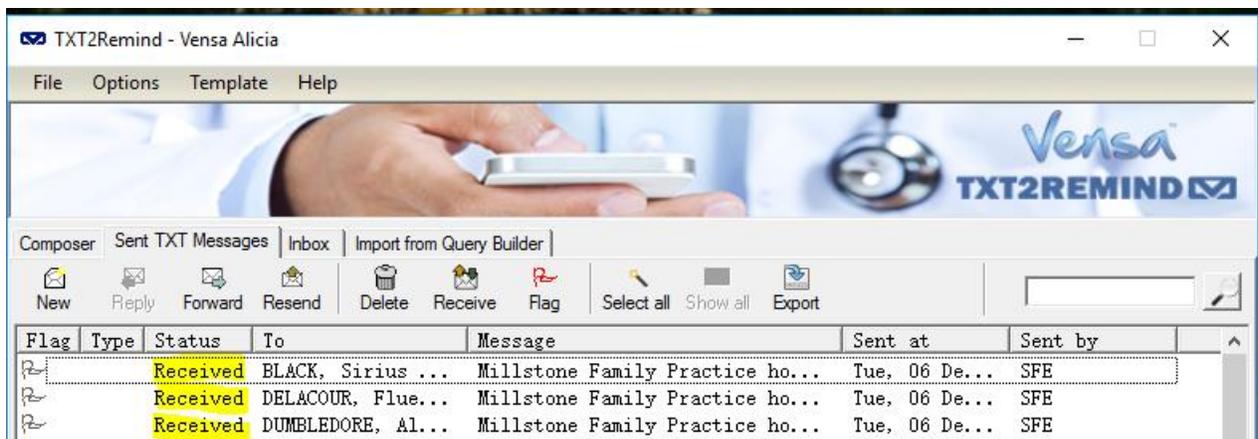
6 TXT2Remind sending bulk flu letters from Query Build

a. Change the flu queries in the "Where" section under '**Patient – Phone – Column**' from a condition of "**Starts with 02**" to '**Is blank**'. Save with a new name if you like. Then click Run Query
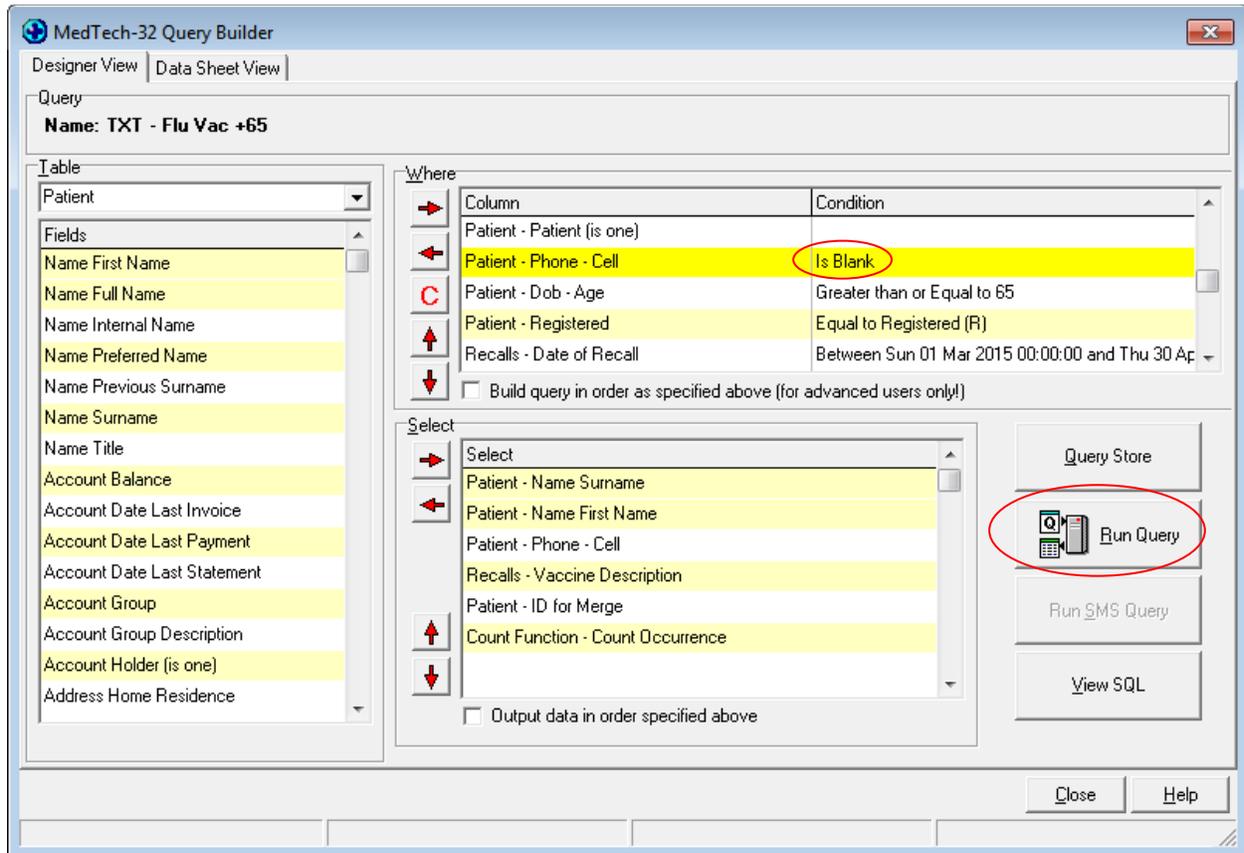

b. This will bring up all the patients who have no cellphone, and who have flu recall within the date range you choose. Check your printer is correct and then click on the 'Merge' button.
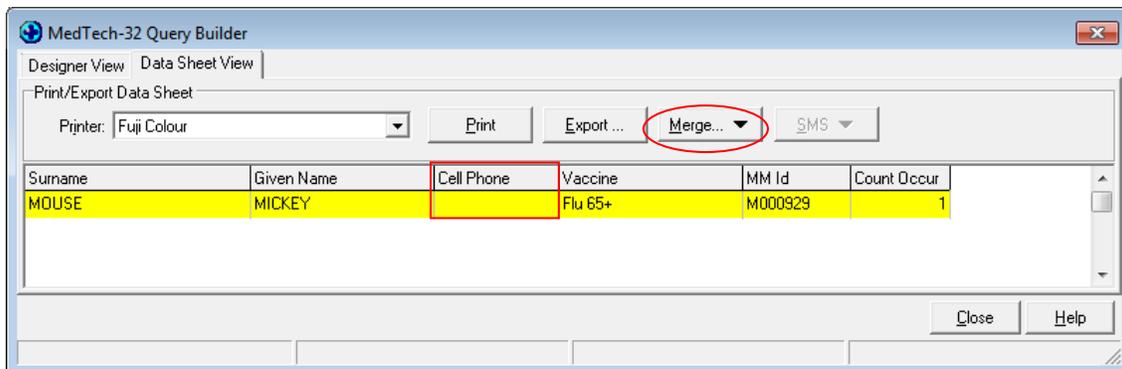
c. Select 'Mail Merge' from the drop-down box.
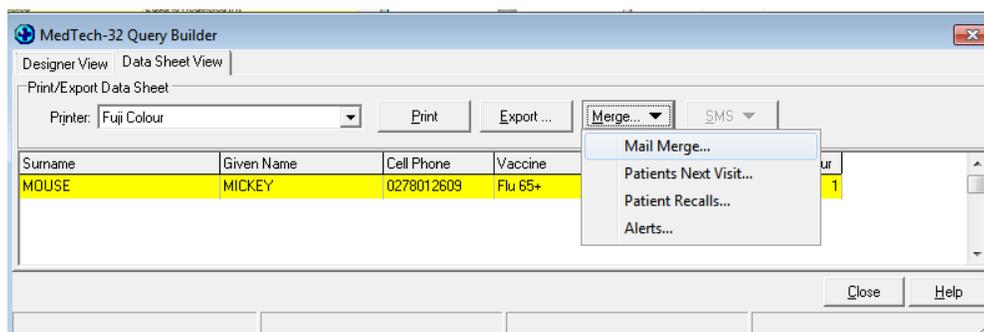
d. The Mail Merge window will open. On the "Document" field, select the **hard copy document** that contains the Flu Vaccine reminder.

e. In the "Print To" field, select the appropriate printer the practice uses to print letters on. Tick the Add to patients outbox and press OK.
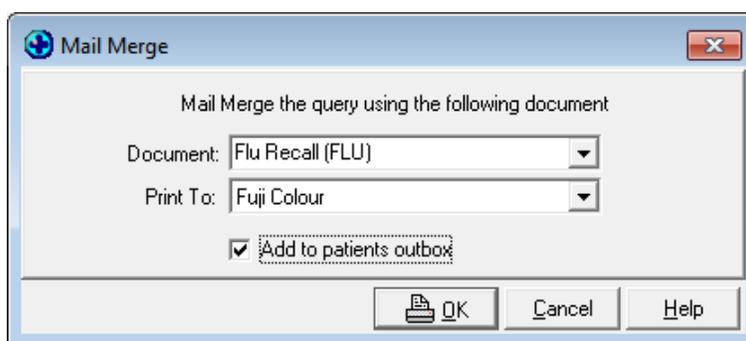

f. A Mail Merge box will appear. This will count the number of letters that are printing. When complete the box will disappear.

7 TXT2Remind sending bulk flu text messages from Recall Contact List

Besides the query builder, you can also use the Recall Contact list for bulk messages.

a. The first step is to refer back to section 2, as a new document needs to be created, but in the 'SMS' as opposed to 'Text' format. The good thing about already creating your text document is that now you can copy that same message body, just as an SMS type. Type the information in 'Main' to correlate to SMS, then copy the text message body into the Document tab and save.
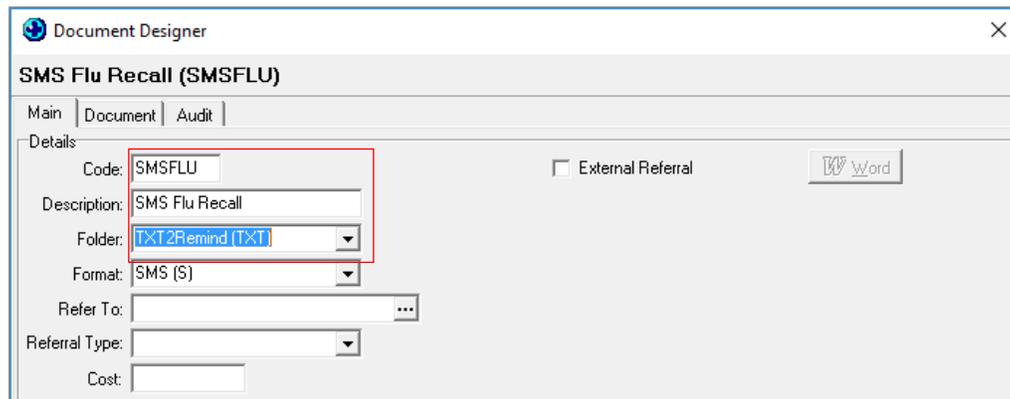
b. Next you need to attach your SMS document to your recall type. Go to Medtech > Setup > Recall/Screening > Vaccine and find your first Vaccine type, e.g. Flu 65+.
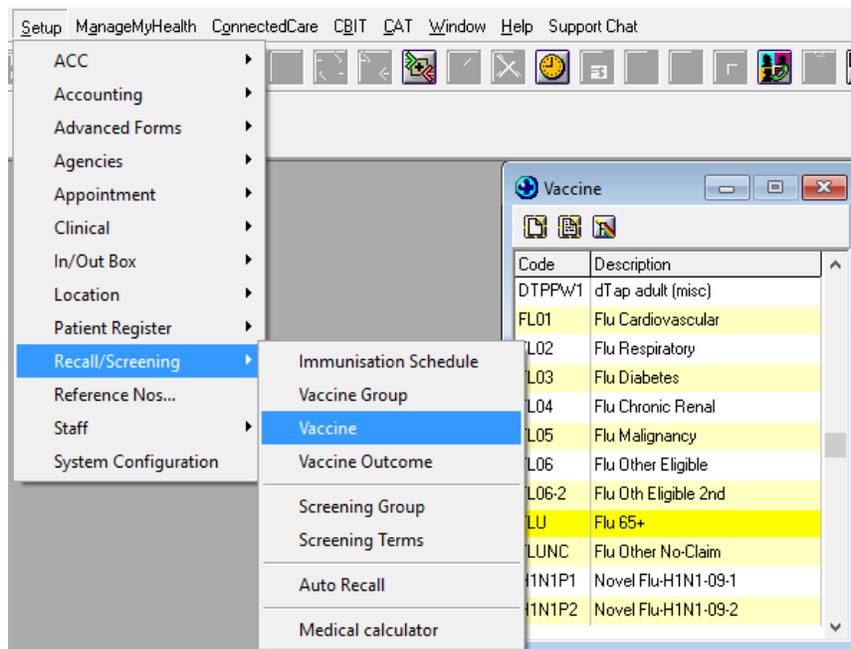
c. Double click the description to open the option menu, and add the SMSFLU document to the SMS Document field. Then click 'OK' to save.
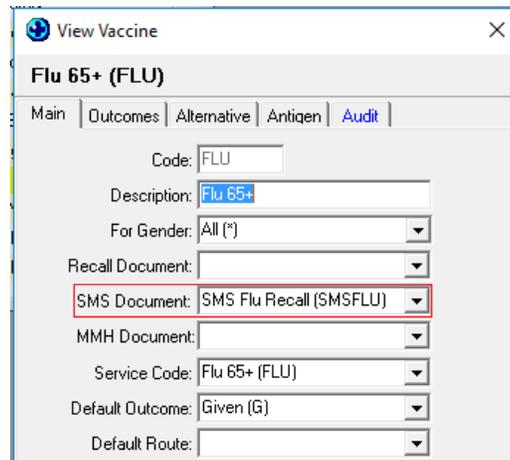
Now that the document is attached to the recall type, you can send the message from the Recall Contact list.

a. Go to Medtech > Module > Recall/Screening > Recall Contact List

b. Choose your dates of recall for your patients. You will have to run the recall list for each of your different patient groups who are eligible for flu vaccine, eg. Flu Cardiovascular, Flu 65+, Flu Diabetes etc. Ensure 'Exclude patients already contacted' is ticked on your filter screen if you have this option.
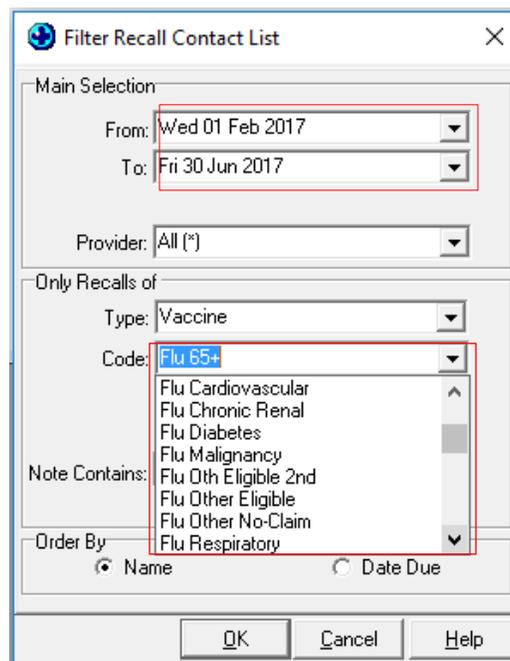
c. You now have the list of Patients who require a recall either by texting them or sending a letter.


Note: If your SMS Icon is greyed out – contact Vensa Health Ltd to get this activated


d. **To send a recall by texting** click on the 'Send SMS' icon. This will send every patient who has a mobile number a text.

e. Once you have clicked on the 'Send SMS' icon it will place a tick and say SMS in the contacted field. This will automatically exclude patients who have opted out of receiving text messages.

f. This will generate a popup dialog which lists a summary of the messages that were not submitted. Click on the **Yes** button to view the rejected list.
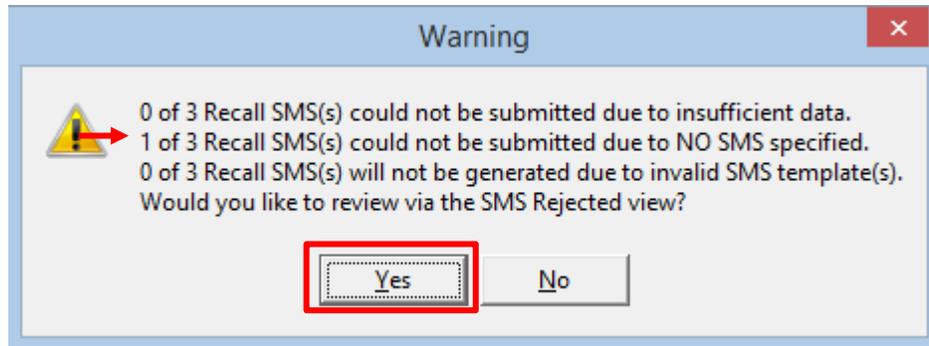

g. The Rejected list opens as a separate window to the contact list and shows the names of the patients and why their respective SMS did not go, this being: the patient does not have a current mobile number or NO SMS in the patient register has been ticked, there is no SMS template assigned to the recall or it is invalid.
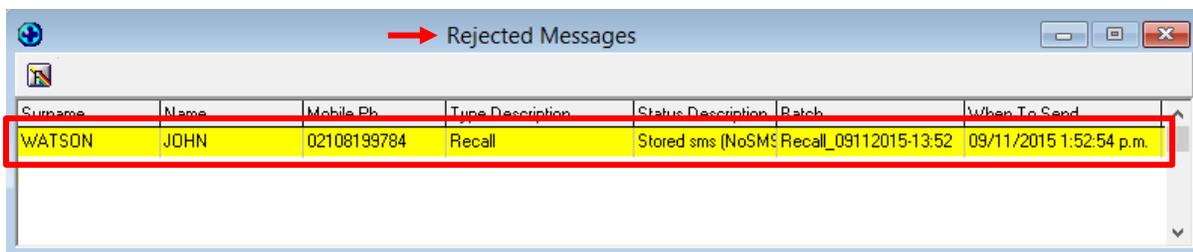
h. On the recall contact list, un-tick the contacted box for the patients in the "Rejected Messages" list and untick anyone who does not have SMS in the last contacted field. These patients are ready to have a letter printed or phone call at your discretion.

i. **To send a recall by letter** to all those who haven't been contacted you text click on the 'Send letters' icon.
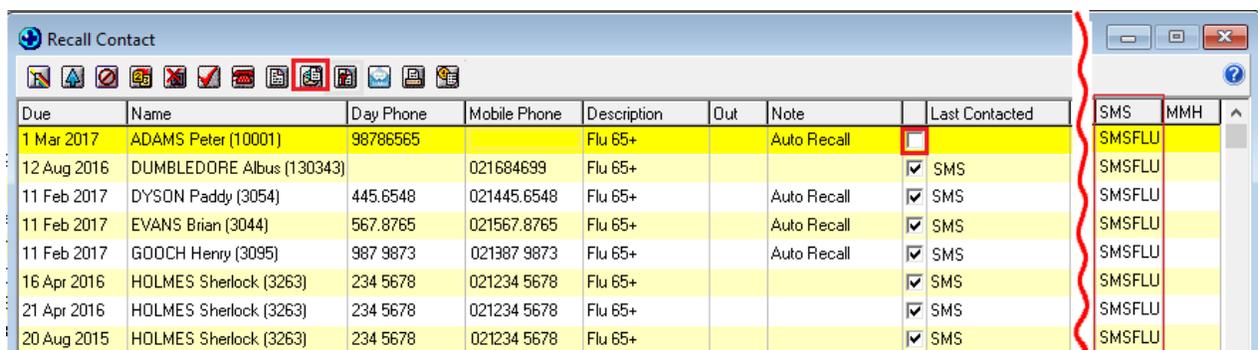
j. Click on OK. This will print the letters for every patient who has not been a text.

k. Your recall contact list will look like this example once you have completed the above tasks.

l. Click on the Exit button to send the texts. This will queue the text message to your practice server where the TXT2Remind client will process it. Please note that by default TXT2Remind processes outbox documents every 5mins, hence the patient may not receive the message instantly, but it should be within a few moments given the default settings.

— END —