



# 2-WAY SMS User Guide

# CONFIGURATION

1. Go to 'Admin Configuration'
  - ➡ Click on 'Settings'
  - ➡ Click on 'Appointment Reminders'

The screenshot shows the 'Appointment Reminders' configuration page. On the left is a dark sidebar with a menu containing: Dashboard, Widgets, Modules, Users, Workflows, Appointments, Settings (expanded), Bulk Load, Patient Banner, Appointment Reminders (highlighted), iCal Settings, and Address Lookup. The main content area has a green header 'Appointment Reminders'. Below it, the 'Send SMS' setting is configured to '1' day(s) before appointment date, at '10:00 AM'. There are checkboxes for 'Receive replies' and 'Update appointment status', both of which are checked. A section titled 'Matching words are case insensitive' contains two input fields: 'Y, YES, Yes' (with a clear button) and 'N, NO, No' (with a clear button). To the right of these fields are labels 'means Booked' and 'means Cancelled' respectively. A green 'Save' button is at the bottom left of the main content area.

Appointment Reminders

Send SMS 1 day(s) before appointment date, at 10:00 AM

Receive replies ☒

Update appointment status ☒

Matching words are case insensitive

Y, YES, Yes × means Booked

N, NO, No × means Cancelled

Save

2. Choose when you'd like to send the SMS appointment reminder to your client

3. Enter the appointment status responses:

- Yes, or Y, for booked
- No, or N, for cancelled

# CONSENT FROM CLIENT

4. In order to send SMS reminders, you need to obtain consent from your client

*Note: the patient mobile number must be recorded for an SMS to be sent*

Update consent by selecting your client's record, and editing consent under the 'Consent' tab

The screenshot shows the 'Edit Contact Details' form for a client named SMITH, John. The form is divided into several sections:

- Name and Details:** Includes fields for Title\*, First Name\* (John), Surname\* (Smith), Date of Birth\* (1/1/1999), Age (20), Gender\*, and a checkbox for 'Estimated?'. There are also buttons for 'Cancel', 'Save & Exit', and 'Save'.
- Address:** Includes fields for Street Address\* (Address Line 1, Address Line 2, Address Line 3), Suburb, State\*, Postcode, Country\* (Australia), and a dropdown for 'Estimated?'. There are also buttons for 'Cancel', 'Save & Exit', and 'Save'.
- Contact:** Includes fields for Business Hours Phone, Mobile, After Hours Phone, and Email (joseph.vu.g@john@gmail.com).
- Health Care Cards:** Includes a button for 'Add Health Care Card'.
- Client Identifiers:** Includes a text field for the client's identifier (https://alliedhealthdemo.hothealth-staging.com/api/fhir/Patient/21fe8892-f59b-44ac-9706-2d42477249ec).
- Consent Items:** Includes a button for 'Add Consent'.

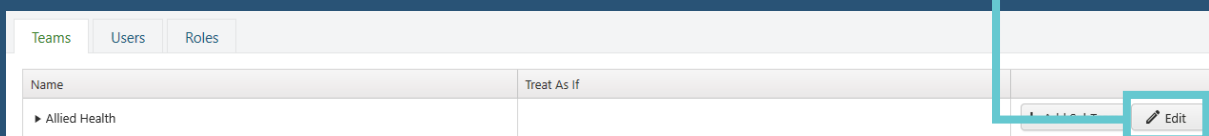
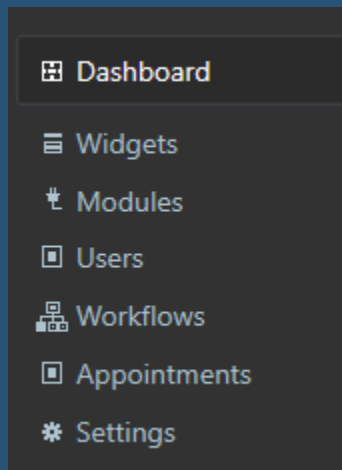
A red box highlights the 'Add Consent' button in the Consent Items section.

The screenshot shows the 'Add/Edit Consent' dialog box. The dialog box has a title bar 'Add/Edit Consent' and a close button. It contains a dropdown for 'Consent for\*' (Appointment SMS reminders), a toggle for 'Given consent' (checked), and buttons for 'Cancel' and 'Save'.

# SMS SETTINGS FOR TEAMS

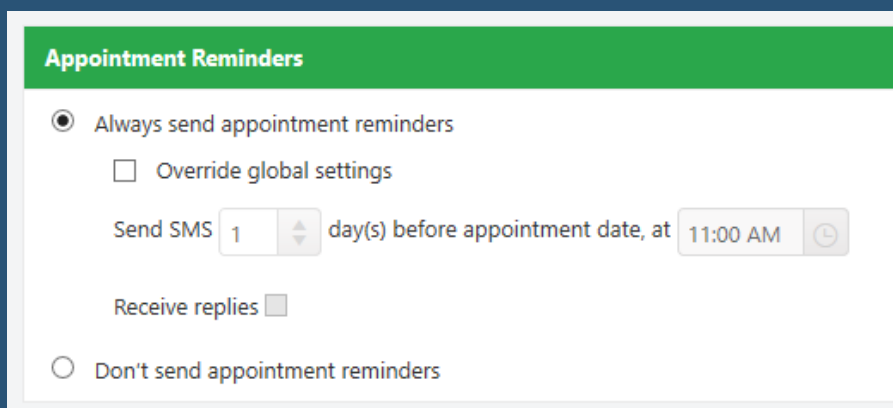
Different teams can have different SMS appointment settings

1. Go to 'Users', and click 'Teams'
2. Select the team you wish to edit and click 'Edit'



3. Scroll to 'Appointment Reminders' and edit the chosen settings

*Note: There is also an option to not send appointment reminders*

A form titled 'Appointment Reminders' with a green header. It contains two radio buttons: 'Always send appointment reminders' (selected) and 'Don't send appointment reminders'. Under the selected option, there is a checkbox for 'Override global settings'. Below that, a field 'Send SMS' has a value of '1' in a spinner box, followed by the text 'day(s) before appointment date, at' and a time picker set to '11:00 AM'. There is also a checkbox for 'Receive replies'.

**Appointment Reminders**

☒ Always send appointment reminders

☐ Override global settings

Send SMS  day(s) before appointment date, at

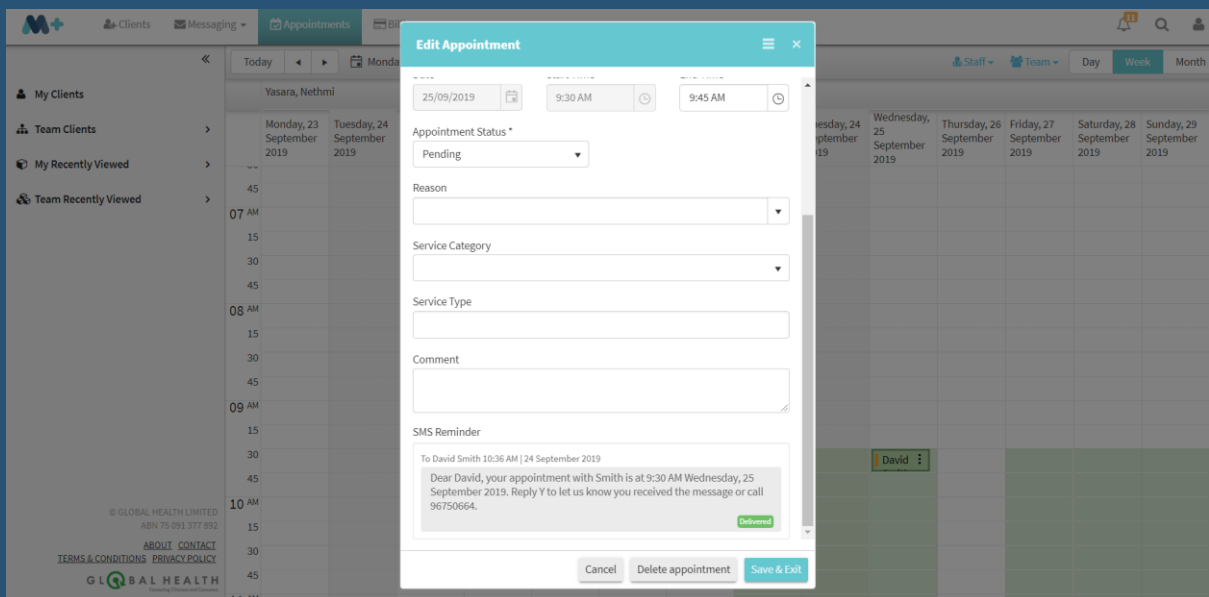
Receive replies ☐

☐ Don't send appointment reminders

# VIEW STATUS

1. Select an appointment via the 'Appointments' tab

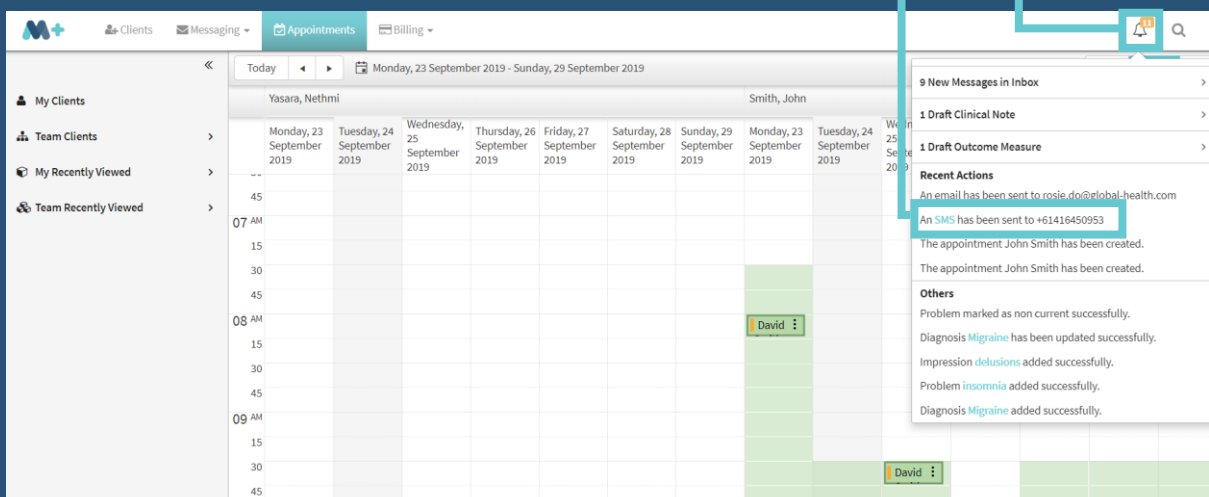
At the bottom of the 'Edit Appointment' screen, you'll be able to view the SMS status, and the client's response



2. When a client sends a response, you will receive a notification

Click on the bell symbol, to view notifications

3. Click on the SMS link on the notifications tab



4. You'll be able to view the SMS history between you and your client on this page

Select the time period within which you'd like to view the SMS history, and then click 'Apply'

