



MedicalDirector®

Recommendations for SMS Messaging with
Appointments, Recalls, and Reminders



Introduction

AVANT, Australia's leading medical defence organisation (MDO) has provided very helpful tips for sending SMS messages;

- [Dos and don'ts of patient SMS communication](#)
- [Recommendations when using SMS messaging](#)

In MedicalDirector PracSoft and MedicalDirector Clinical, doctors and practice staff can protect patient personal information when using text communication by taking a few simple steps.

Step 1: [Obtain and Document Patient Consent](#)

Step 2: [Limit Information Contained in Text Messages](#)

Step 3: [Implement a System for Following-up Patients who do not Respond to Recall SMS Messages](#)

Step 4: [Document Text Messages in the Patient's Medical Record](#)

Please note that these are the recommendations that can be managed within the system, there are other steps mentioned in AVANT recommendations that may require manual steps outside the system.

Step 1: Obtain and Document Patient Consent

For Practices with MedicalDirector PracSoft and Clinical 3.16 or later:

Appointment Reply Text Message

On sending an appointment confirmation SMS, the user can configure reply options which allow the patient to reply with the following offerings:

1. Within the Appointment Book, select **SMS > Message Templates > Configure SMS Reply Behaviour**. The **Configure SMS Reply Behaviour** window appears.

Configure SMS Reply Behaviour

Reply matching is not case sensitive

Confirmation

Default: **Yes or Y**

Additional alternate replies:

Enter a list of valid additional alternate replies, separated by commas

Cancellation

Default: **No or N**

Additional alternate replies:

Enter a list of valid additional alternate replies, separated by commas

Action:

Deletion comment:

Opt out

Default: **Stop**

Additional alternate replies:

Enter a list of valid additional alternate replies, separated by commas

Save Cancel

Opt out: Patients also have the ability to inform you that they no longer wish to receive SMS messages from your practice. Typically, they reply "Stop". This section allows you to specify additional acceptable responses, such as "S" or "Unsubscribe". When MedicalDirector PracSoft receives such a reply, it will automatically flag the patient's record to indicate that they no longer wish to receive SMS messages.

2. Within the Appointment Book, select **SMS > Message Templates > Configure Templates**. The **Configure SMS Message Templates** window appears.

This allows the patient to not only confirm the appointment but also express consent if they wish not to receive SMS notifications.

When MedicalDirector PracSoft receives such a reply, it will automatically flag the patient's record to indicate that they no longer wish to receive SMS messages.

If your practice also uses MedicalDirector Clinical it will also automatically flag in patient's record.

The screenshot shows the 'Patient Details' window in MedicalDirector. The form is divided into several sections:

- Pt. Details:** Includes fields for Title (Mr), First Name (Ezra), Middle Name, Surname (Cohen), Known as (Ezra), Date of Birth (24/11/1974), Gender (Male), and Transgender checkbox. It also has a 'Head of Family' section with a dropdown showing 'Mr Ezra Cohen (41 yrs)' and a 'Set' button.
- Medicare:** Fields for Medicare No (2950 47258 1), Medicare Expiry (31/12/2020), Pension No (1234567), DVA No, Safety Net No, and Record No.
- Pension Status:** Radio buttons for None (selected), Pension/HCC, Full DVA, and Limited DVA.
- IHI:** Fields for IHI No (8003 6085 0003 1620), IHI Record Status (Verified), and IHI No Status (Active). Includes 'Validate' and 'IHI History' buttons.
- Contact Details:** Includes 'Preferred Mailing Address' (Residential selected), Address (14 Lachlan Gr), City/Suburb (Boronia Park), and Postcode (2111).
- Default phone number to be displayed:** Radio buttons for Home, Work, and Mobile (selected). Phone field contains 0430747459.
- E-mail:** Field contains julie.serrano@medicaldirector.com.
- Preferred Contact:** A dropdown menu with a red circle around the 'Do not send SMS' option.
- Other options:** 'Update address for all family members' (unchecked) and 'Auto-capitalise names' (checked).
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

To Confirm that Patients who Opt-out are Not Receiving Text Messages

When a user tries to send an SMS for a patient who has opted out of SMS notification, the following message is displayed.

Patient Contact Details X

Shaun Lee has chosen not to receive SMS reminders. Please contact the patient by other means.

Phone (home):

Phone (work):

Phone (mobile):

Email:

Address:

View SMS Audit Log Close

Filter

Showing log for: All Patients

Date range:

Legend

- Sent - not awaiting reply
- Failed to send
- Sent - awaiting reply
- Sent - patient confirmed
- Sent - patient declined
- Sent - reply uncertain

Message Type	Date/Time Sent	New Patient	Appointment Time	Appointment Length	Patient	Mobile Number	Reply	Status
Ad hoc reminder	27/04/2016 1:25 PM	No	27/04/2016 1:00 PM	15	Cohen, Ezra	0430747459	S	■ Sent - awaiting reply
Ad hoc reminder	27/04/2016 1:23 PM	No	27/04/2016 1:00 PM	15	Cohen, Ezra	0430747459	S	■ Sent - awaiting reply
Ad hoc patient	27/04/2016 1:19 PM				Cohen, Ezra	0430747459		■ Sent - not awaiting reply

Message details

Message: Ezra, you have an appointment with Dr. Joe Care on 27/04/2016, at 1:00PM. Please reply YES to confirm or NO to cancel appointment

Reply	Date/time	Status
S	27/04/2016 1:26 PM	

Close

For Practices with MedicalDirector Clinical 3.16 or Later Only

Recalls / Reminders Text Message

To obtain patient consent via SMS from the clinical module, users can set up a custom template. To create a custom template, Select **Correspondence > SMS > Templates > Add**

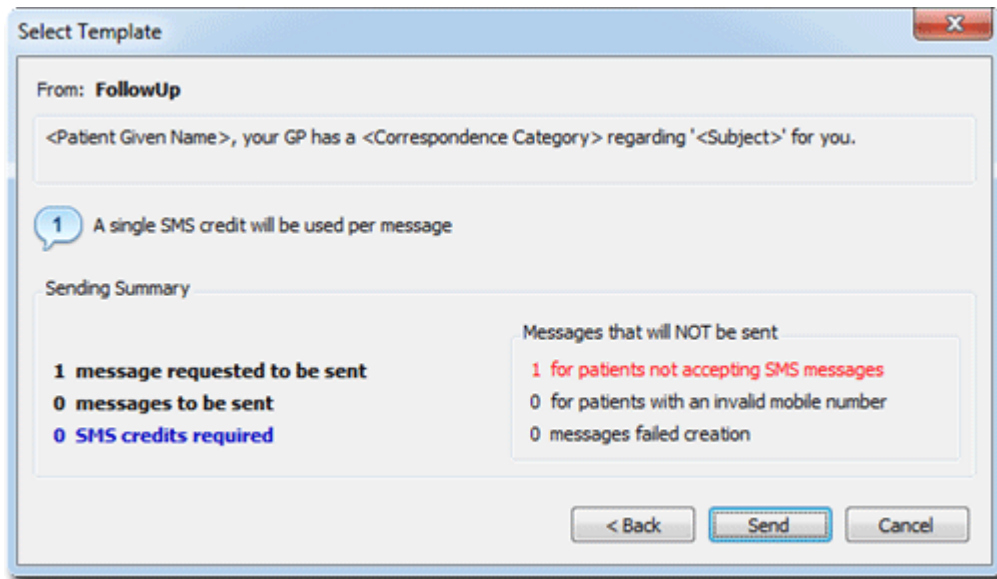
Add appropriate details and save this template. Use this new template when sending an SMS to those patients who need to consent to receiving SMS notifications from the practice.

You can use the default templates provided in the system if you think this is appropriate message to your patient.

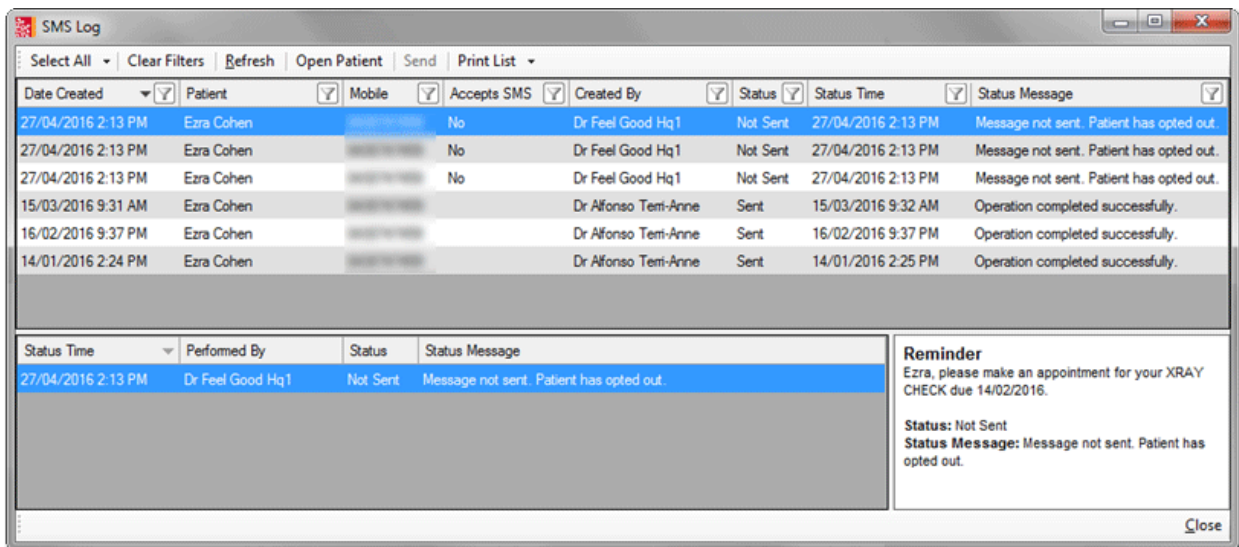
When patient elects to opt-out, ticked the 'Do not send SMS' flag in patient details.

To confirm that Patients who Opt-out are Not Receiving Text Messages

Once the patient's preference is saved in MD, when trying to send an SMS for this patient the user will get a prompt to indicate that patient does not wish to receive SMS communication. This also applies to bulk SMS.



The status message in SMS logs window also indicates if the message has not been sent due to patient opting out.



Step 2: Limit Information Contained in Text Messages

MedicalDirector provides the user the flexibility to control the content of each SMS message.

For Practices with MedicalDirector PracSoft 3.16 or Later

When sending SMS messages via the Appointment Book, the user has the following options:

- **Practice-wide:** Accessible to all Appointment Books, and all practitioners.
- **Appointment-Book-Specific:** Limited to a specific Appointment Book, accessible to a specific practitioner.

Templates can be setup from the Appointment Book, select **SMS > Message Templates > Configure Templates**. The **Configure SMS Message Templates** window appears.

For Practices with MedicalDirector Clinical 3.16 or Later

There two types of SMS templates available in MedicalDirector Clinical i.e. Default templates and User-defined templates, providing users the ability to send standard as well as custom messages.

Select **Correspondence > SMS > Templates**. The **Template Message** window appears.

- For a default template, select a template from the drop down list

You can use the default templates provided in the system if you think this is appropriate message to your patient.

- For a custom template, select Add to start a new blank template. Add information regarding Template name, Template Type, Message, Sender and save the new template.

Alternately, users can also copy a supplied default template; edit this template as desired and save it as a new template.



Step 3: Implement a System for Following-up Patients who do not Respond to Recall SMS Messages

The Search > Recalls function in MedicalDirector Clinical can assist practices with identifying patients who have been recalled, but did not attend the recall appointment.

Recall Search Criteria

Recall Reasons: All Reasons
 Show only reasons from active recalls
 All Reasons

Status
 Include deleted recalls Include completed recalls

Patient Contact
 Attempted to contact patient at least [dropdown]
 Only show patients that have attended in response to a recall

Date Range
 All [dropdown] Start: 1/01/1753 [calendar] End: 1/01/9998 [calendar]

Assigned To: All Users
 Show only users with active recalls
 All Users

Name	Status
Unknown	
Dr Alfonso Temi-Anne	Active
Dr. A. Practitioner	Inactive
Reception	Inactive
Unknown	Deleted

Default Search | Search Name

Load Save Rename Delete

Search Cancel

Surname	First Name	Recall Reason	Due Date	Address	Assigned To	D.O.B.	Contact Attempts	Priority	Attended	Gender	Home Phone
Cohen	Ezra	PROSTATE REV...	14/01/2017	14 Lachlan Gr. N...	Dr Alfonso Temi-A...	24/11/1974	0			M	
Cohen	Ezra	THYROID TEST...	18/01/2016	14 Lachlan Gr. N...	Dr Alfonso Temi-A...	24/11/1974	1	Urgent		M	
Cohen	Ezra	XRAY CHECK	14/02/2016	14 Lachlan Gr. N...	Dr Alfonso Temi-A...	24/11/1974	2	Urgent	Yes	M	

Action Taken	Date Performed	Performed By	Contact /Attempt	Comments	Date Deleted	Deleted By
Audit	14/01/2016	Dr Alfonso Temi-A...	No	New recall: PROSTATE REVIEW, 14/01/2017		
Send SMS	27/04/2016 2:14...	Dr Feel Good Hq1	No	SMS Status: Not Sent (27/04/2016 2:13PM)		

Ezra Cohen
 DOB: 24/11/1974 Age: 41 Years
 Gender: M
 Preferred Mailing Address: Residential
 14 Lachlan Gr
 Boronia Park 2111
 Preferred Contact:
 Home Phone:
 Work Phone:
 Mobile Phone: 0430747459
 Medicare Number: 2950472581 / 1
 Pension Number: 1234567
 Chart Number:

Print Add Edit Delete Show Deleted Hide Actions Pane Hide Details Panel Close

Currently Loaded Search: New recall search Recall Count: 3 of 42 Unique Patient Count: 1 of 19

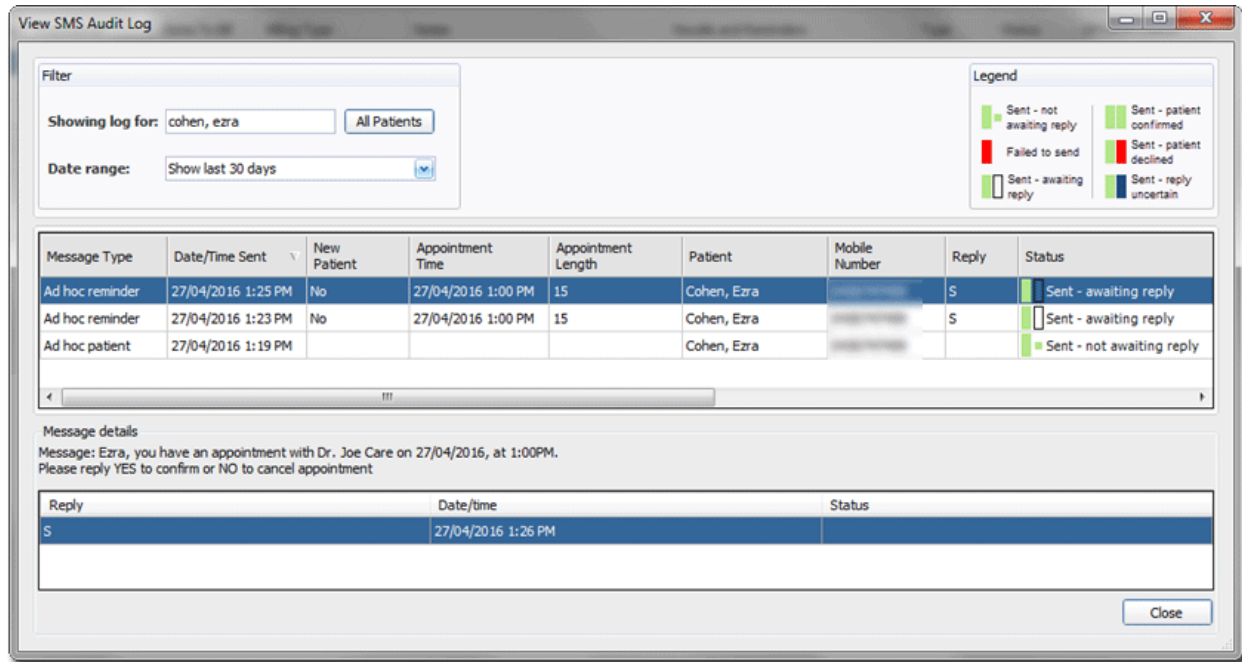
Step 4: Document Text Messages in the Patient’s Medical Record

Any text messages sent from MedicalDirector for an individual patient are logged in that patient’s record.

For Practices with MedicalDirector PracSoft 3.16 or Later

The logs can be accessed by

- Right-clicking an appointment and selecting **View Appointment SMS Log** from the menu that appears.
- Selecting an appointment, and selecting **Appointment > View Appointment SMS Log**.



For Practice with MedicalDirector Clinical 3.16 or Later

The logs can be accessed by selecting correspondence > SMS > Logs

