



Health Focus

SMS Service

Reference Guide

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Health Focus SMS

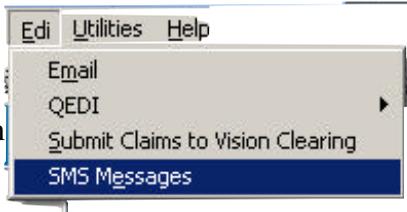
The Health Focus SMS facility allows you to extract patient information, and using a file transfer protocol service, generate a SMS message to patients matching your criteria, providing they have a cell number on file.

The system is quick and easy to use, and only requires an Internet connection. To activate the system, you require a user name and password from Health Focus which is available from our call centre on 0861 110011.

SMS facilities are available for MTN and Vodacom. You will be informed once Cell-C is activated. All provision has been made in your program to activate Cell-C, which will be done automatically.

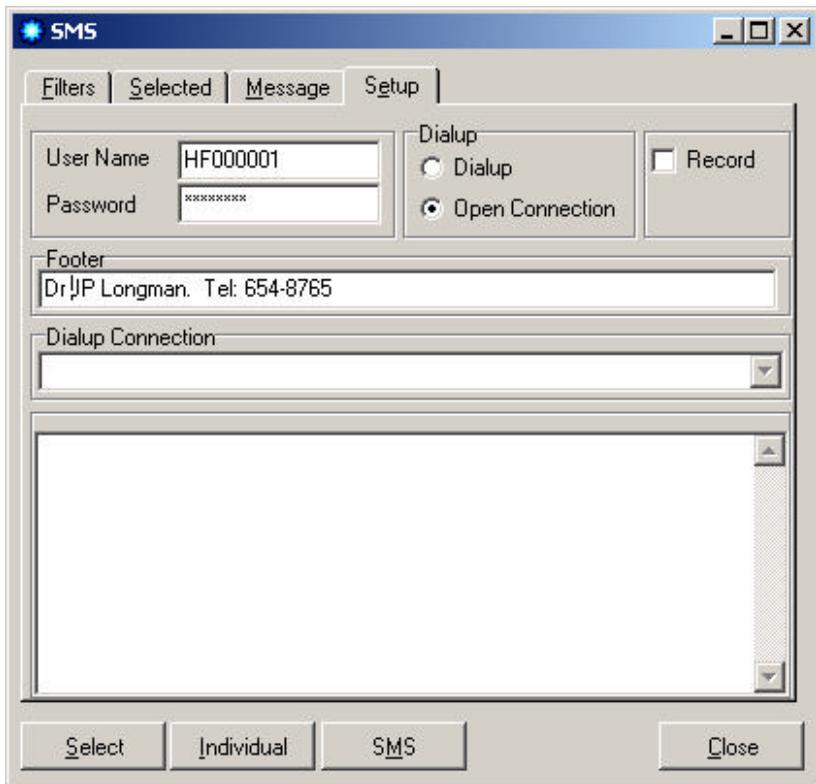
Starting the System

Your first step is to setup the system. This is done by activating the SMS facility from the EDI menu, and clicking on the SMS menu option. Once selected, click on the Setup Tab.



Setting up SMS

This is where you will enter the password provided to you, as well as the way in which you will send your information.



The screenshot shows a window titled "SMS" with a blue title bar and standard Windows window controls. The window contains a tabbed interface with "Filters", "Selected", "Message", and "Setup" tabs. The "Setup" tab is active. It features several input fields and controls:

- User Name:** A text box containing "HF000001".
- Password:** A text box containing "*****".
- Dialup:** A section with two radio buttons: "Dialup" (unselected) and "Open Connection" (selected).
- Record:** A checkbox that is currently unchecked.
- Footer:** A text box containing "Dr J P Longman. Tel: 654-8765".
- Dialup Connection:** A dropdown menu that is currently empty.
- Bottom Buttons:** A row of four buttons: "Select", "Individual", "SMS", and "Close".

User Name. Enter the user name that was provided. This name is case sensitive so make sure it is entered correctly.

Record. If checked, whenever a SMS is sent, it will be recorded in the patients clinical/notes record.

Password. Like the user name, enter the password provided in this edit box.

Footer. Enter your name and telephone number in the edit box provided. This information will be appended onto the message.

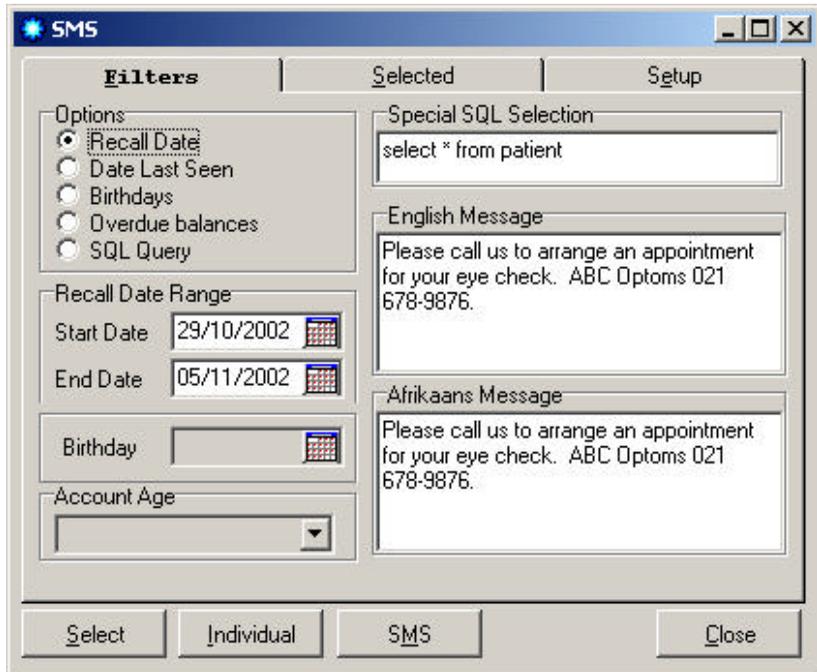
Dialup or Open Connection. If you are using a modem with a dial up connection, then activate this option. If you are using a router, or have an open line to the Internet, then select the open connection option.

Dialup Connection. If you are using a dial up, select the dial up name you want to use from the list provided.

You have now completed the complete setup and are ready to start sending your SMS messages.

Using Filters

The filters allow you to select patients that have a valid cell number and are selected off the Filter tab.



The screenshot shows the SMS application window with the 'Filters' tab selected. The window has a title bar with 'SMS' and standard window controls. The 'Filters' tab is divided into three sections: 'Options', 'Recall Date Range', and 'Account Age'. The 'Options' section has five radio buttons: 'Recall Date' (selected), 'Date Last Seen', 'Birthdays', 'Overdue balances', and 'SQL Query'. The 'Recall Date Range' section has 'Start Date' (29/10/2002) and 'End Date' (05/11/2002) with calendar icons. The 'Account Age' section has a dropdown menu. The 'Selected' tab shows a 'Special SQL Selection' text box with the text 'select * from patient'. The 'Setup' tab shows two text boxes: 'English Message' and 'Afrikaans Message', both containing the text 'Please call us to arrange an appointment for your eye check. ABC Optoms 021 678-9876.'. At the bottom, there are four buttons: 'Select', 'Individual', 'SMS', and 'Close'.

Options

These options allow you to choose which patients must be selected.

- *Recall date.* Selecting this option will allow you to extract patients who have a cell number and whose recall date falls within the dates that you specified.

- *Date last seen.* This option allows you to select patients who last had a transaction posted in the date range specified.
- *Birthdays.* This option allows you to select patients who have a birthday in the DD/MM of the date specified.
- *Overdue balances.* If selected, you can extract patients that have balances over the amount of days selected.
- *SQL Query.* This facility allows you to create your own SQL query, and select patients by any means you require.

As you change your option, the message will also change. Health Focus SMS stores and records the messages you have created. This is designed to save you from re-typing the message each time. Only individual messages are not stored. You can cut and paste messages into the message memo, which is saved once you exit from the memo.

Recall Date Range

This range allows you to enter two dates. Patients who either have a recall date between these two days, or a last visit in the same date range will be selected. The option determines whether you are selecting patient recall dates or date of last visits.

Birthday

If you have selected the birthday option, then enter the date in this edit box provided.

Account Age

This drop down option allows you to select patients that have a cell number and who are overdue by the amount of days stipulated.

Medical systems can specify the rate that must be applied. If a rate is selected, then only those patients linked to that rate will be selected.

Special SQL selection

This memo allows you to enter a SQL query that will allow you to extract patients based on your own requirements. This feature has been incorporated to allow a great deal of flexibility in using the system. For example, if you wanted to select patients who belonged to an accounting group P and F, then you would use a statement like;

```
Select * from patient where idcode = "P" and idcode = "F"
```

The standard SQL language is used, allowing you to filter patients across tables. In all cases, only patients that have a cell number will be selected.

English Message

Patients that are tagged as English speaking will receive this message. The SMS system restricts you to 160 characters in the message. If your message exceeds 160 characters, the message screen will turn red, indicating that you have exceeded the maximum

Special SQL Selection
select * from patient

English Message
It has been over a year since we saw you. Please call us to arrange an appointment for your eye check. It is important that we examine your eyes soon. ABC Optoms 021 678-9876.

Afrikaans Message

number of characters. If you do not correct the message, only the first 160 characters will be sent.

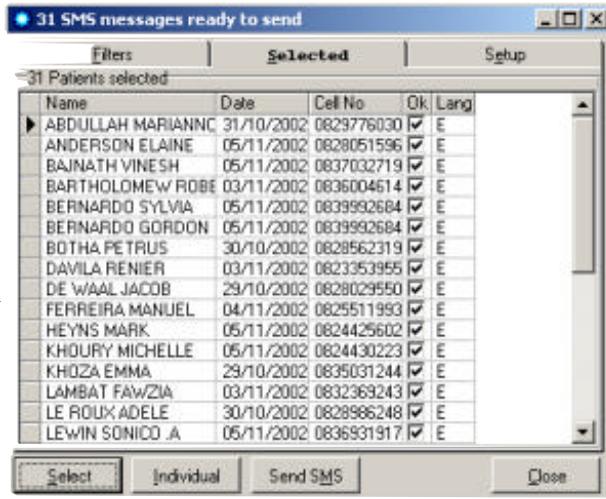
Afrikaans Message

Patients that are tagged as Afrikaans speaking will receive this message.

In the event that a patient is tagged as an unknown language, then the English message will be used and sent by default.

Viewing your selection

You can see which records have been selected for the SMS by clicking on the Selected tab. This window also allows you to stop a message before it is sent, by toggling the tick in the Ok column. Basic



information, allowing you to identify the patient to whom the message will be sent appears on this screen.

Once you have made your selection, the SMS messages can be sent by clicking on the Send SMS button.

Sending an Individual SMS

To send a SMS message to one patient, simply click on the Individual button, and if the patient has a valid cell number, the patient will be shown in the selection window. Only main members can be sent an individual message.

Sending Batch SMS Messages

This option is only available in Health 2000 and allows you to create batches of messages, and then decide at any time to send those batches. Note that whenever a transmission is made, even if they are live messages, the batch messages will be sent.

Batches are useful if you want to send messages to patients in different categories, but send them all at once. This allows you to create a batch for birthdays, and overdue accounts and recalls. Then, at any time, with one Internet connection, send all the messages. This reduces telephone call costs, because it only makes one connection and can send over 1000 SMS messages per minute.

To prepare a batch, set the rules you want and instead of clicking the Select button, from the Batch menu option, select the option “Prepare the Batch”. You can prepare an unlimited number of batches.

When you are ready to transmit the batches you have created, click on the same menu option and select “*Transmit Batches*”.

Sending a stand alone SMS

Medical systems allow you to send an SMS to any cell number, even if the patient is not on file. Select this option from the Message tab.



Enter the cell number in the space provided, followed by the message. To send the SMS click on the Send button.

Mail Merging

The SMS messenger allows you to merge the Patient name into the message. Five mail merge variables are available as per the table below. If the program finds the keyword, it will replace it with the details contained in that patients file. They keywords or variables are not case sensitive.

#Title#	Replaced with the patients or dependant title.
#Initials#	Replaced with the patients or dependant initials.
#Firstname#	Replaced with the patients or dependant first name in Health 2000. In Vision 2000 it is ignored for the main member, but used for the dependant.
#Surname#	Replaced with the patients or dependant surname.
#Total#	Used when selecting the option for overdue balances only.

Note: The #Total# mail merge variable will only work if you have selected the option *Overdue Balances*. The amount that the variable will be replaced with when the SMS message is created depends on the number of days you have selected as overdue.

Example:

Dear #Title# #Surname#,
It's been almost a year since we saw you last,
please contact us to arrange an appointment.

The recipient will receive:

Dear Mrs Jones
It's been almost a year since we saw you last,
please contact us to arrange an appointment.

When the key words are merged with the patient file, the keyword is replaced with the name in the exact format it appears in the patient file. Bear this in mind when deciding on upper or lower case.

A working example - Recalls

Because the SMS message is sent immediately, it is always better to select patients due for a recall for the current week, rather than the month.

Start off by selecting the Recalls and entering the date range.

Make sure your messages are what you want to send and then click on the Select button. The top of the form will indicate how many patients have been selected.

Filters

Options

- Recall Date
- Date Last Seen
- Birthdays
- Overdue balances option,
- SQL Query

Recall Date Range

Start Date 29/10/2002

End Date 05/11/2002

139 SMS messages ready to send

Filters Selected Setup

If you want to see who has been selected, and maybe prevent some patients from not getting an SMS, click on the Selected tab to view those selected. To stop a SMS from being sent, uncheck that patient in the Ok column.

139 SMS messages ready to send

Filters Selected Setup

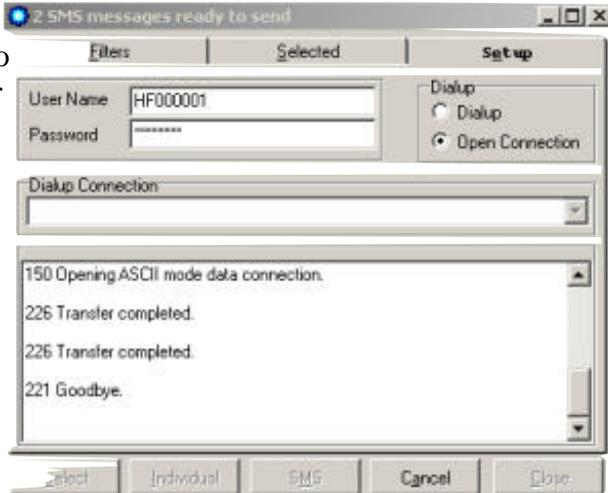
-139 Patients selected

Name	Date	Cell No	Ok	Lang
ABDULLAH MARIANN	31/10/2002	0829776030	<input checked="" type="checkbox"/>	E
AMRA RANDALL KEITH	17/11/2002	0828050388	<input checked="" type="checkbox"/>	E
ANDERSON ELAINE	05/11/2002	0828051596	<input checked="" type="checkbox"/>	E
ANGELOPULO GEORG	28/01/2003	0839890034	<input checked="" type="checkbox"/>	E
ANTONIA SILVA	12/02/2003	0722631380	<input checked="" type="checkbox"/>	O
BAJNATH VINESH	05/11/2002	0837032719	<input checked="" type="checkbox"/>	E
BARTHOLOMEW ROBE	03/11/2002	0836004614	<input checked="" type="checkbox"/>	E
BERNARDO SYLVIA	05/11/2002	0839992684	<input checked="" type="checkbox"/>	E
BERNARDO GORDON	05/11/2002	0839992684	<input checked="" type="checkbox"/>	E
BIRCH ROBERT T	28/10/2002	0832824514	<input checked="" type="checkbox"/>	E
BLOEM LEN	18/12/2002	0826951377	<input checked="" type="checkbox"/>	E
BOTES WILLEM	02/01/2003	0836537051	<input checked="" type="checkbox"/>	E
BOTHA PETRUS	30/10/2002	0828962319	<input checked="" type="checkbox"/>	E
CAMONDO HELMUT	20/12/2002	0832326045	<input checked="" type="checkbox"/>	E
CASH SALE ACCOUNT	18/12/2002	0833030794	<input checked="" type="checkbox"/>	E
CASH SALE ACCOUNT	19/12/2002	0833208154	<input checked="" type="checkbox"/>	E

Select Individual Send SMS Close

To send the SMS's click on the Send SMS button. You will see the activity in the setup tab window, giving you step by step progress. Once sent,

you will be returned back to the program for further transmissions.



A working example – Birthdays

Click on the Birthdays option

Enter the date of the birthday in the edit box provided (the year is ignored)

Click on the Select button

Click on the Send SMS button