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:


   ![Configure SMS Reply Behaviour window](image)

   **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.
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.
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, tick 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 are 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 an 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.
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**.