



Medtech Evolution Sending Bulk SMS Messages

Date: March 2020

Sending Bulk SMS Messages

The below instructions provide guidelines on sending Bulk SMS messages to Patients from within Medtech Evolution

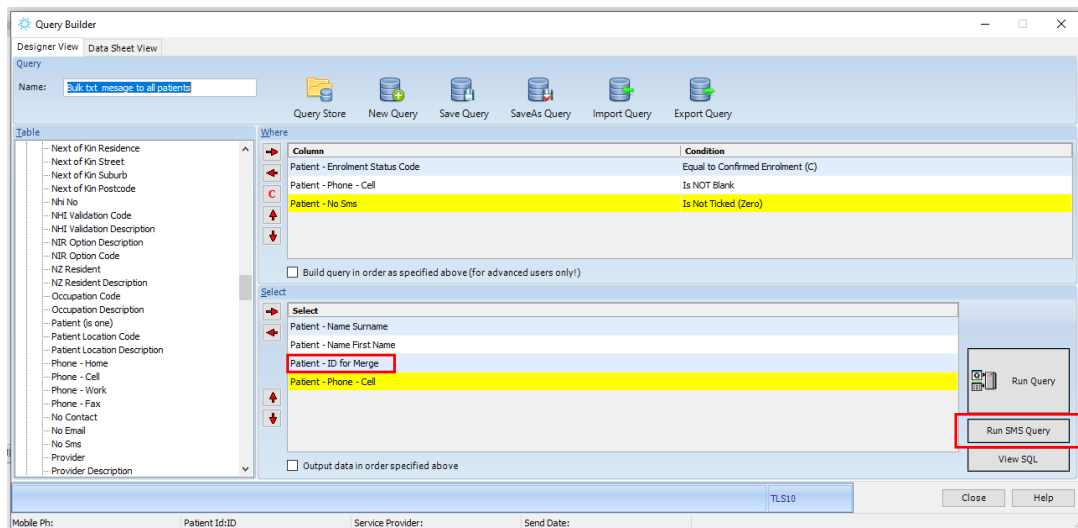
1. Ensure that SMS Set up has been configured to send SMS messages from the Query Builder and appropriate staff have been configured to send SMS messages

The screenshot shows the 'ManageMyHealth SMS' configuration interface. Under the 'Practice Setup' tab, the 'SMS Service Configuration' section includes several checkboxes. The 'Appointment Queue Reminders' section is expanded, and the 'Query Builder' checkbox is checked and highlighted with a red rectangular box. Other visible options include 'Appointment Book Reminders', 'First Appointment Reminder' (set to 2 hours), and 'Second Appointment Reminder' (set to 1 hour).

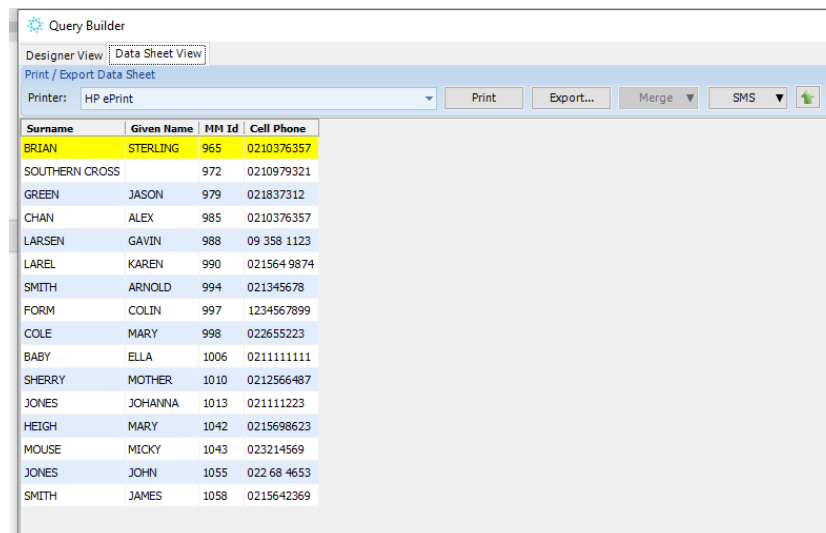
The screenshot shows the 'ManageMyHealth SMS Staff Configuration' table. The 'Query Builder' column is highlighted with a red rectangular box. The table lists various staff members and their permissions for different SMS functionalities.

Name	Aptmt Reminder	Aptmt Queue	Patient Palette	Query Builder	Recall	Staff Appointment Reminder Template
Scheduler user (#EPS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
External Health Provider (#KIOSK)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
MMH User (#MMH)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Message transfer user (#MSGTR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
NIR transfer user (#NIRTR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Scheduler user (#SCHU)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Service User (#SYS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
System Administrator (ADM)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SMS Appointment Reminder (SMS)
Allan Houston (AH)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sally Heigh (FS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jane Jones (GJ)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ian Alan (IA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ian Bishop (IAN)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SMS Appointment Reminder (SMS)
Jack Dawson (JD)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jane Donaldson (JDS)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
James Parkinson (JP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

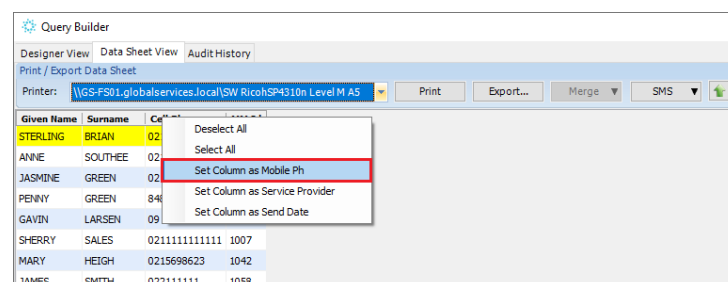
2. Ensure you have permission to access the Query Builder module (this can be checked in the Role Based Access Control)
3. A query needs to be created to capture the group of people you wish to send SMS messages to. Below is an example Query for all Enrolled Patients including only patients with a Cell Phone Number and where NO SMS is unticked in the Patient Register screen (F3 screen)



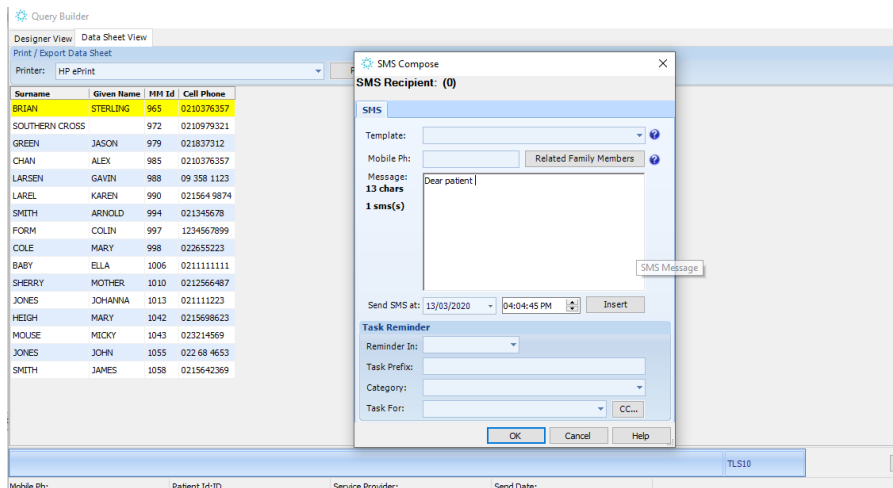
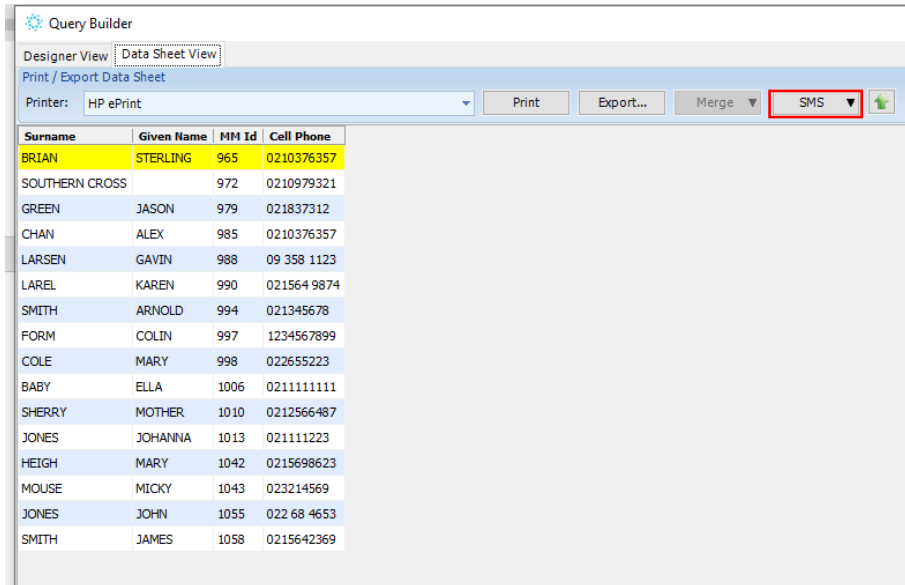
4. Select the Run SMS Query option. If this option is greyed out it is because the Patient – ID for Merge field has not be added to the Select Criteria box (see above).



5. At this point Cell Phone Numbers can be reviewed and changed as required. If a Cell Phone Number is incorrectly formatted, use the Green up arrow to bring the patient on to the Palette and make the change in Patient Register (F3 screen) then run the query again.
6. User can assign Mobile Phone number, Service Provider and Send date by right clicking on the values displayed in the grid. Also user can select all the patients or deselect all the patients from the Right click option.



7. When the query is ready to send select the SMS > Compose option



Select a SMS template from the dropdown or compose the message you wish to send to the patient list, if a SMS message consists of more than 154 characters the message will be split into two messages.

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