

Patient Reminders Administration

22/10/2024 12:47 pm BST

Summary

This page documents the configuration of automated Patient Reminders. This functionality allows you to send SMS/Emails on an automated schedule to clients regarding their pet's treatment requirements.

Details

There are three stages to configuring Patient Reminders: Creating Reminder Types, Code Entry configuration and Scheduled task configuration.

Reminder Types

Reminder Types are used to group reminders to then tie them to items within Code Entry.

To add a new Reminder Type, use the Top toolbar menu to navigate to: Administration > Reminders > Reminder Types.

The Name and Description should be completed in the top blank row and the Treatment Type reflects which treatment types the new Reminder Type should be available for. This could either be a specific type (e.g. Consults, Vaccines, etc) or can be left as available for all Treatment Types.

If 'Always show in Summary' is ticked, the Reminder Type will display in the patient's summary side panel.

Please note - It is important to keep the Reminder Type of 'Vaccinations' separate from 'Kennel Cough' as these Reminder Types can cancel each other out. For example, if a dog visits the practice and a DHP and L4 vaccine are added as treatment, that will kick in the Kennel Cough reminder even though the dog hasn't received it as it's under the same Reminder Type.

Reminder Types

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Name	Description	Treatment Type	View Order	Always show in Summary
		All	0	<input type="checkbox"/>
Kennel Cough	Kennel Cough	All	1	<input type="checkbox"/>
Myxo	Myxo	All	1	<input type="checkbox"/>
Rabies	Rabies	All	1	<input type="checkbox"/>
Vaccinations	Vaccinations	All	1	<input type="checkbox"/>

Reminder Code Setup

1. Navigate to Code Maintenance (**Administration > Code Entry > Code Maintenance**).
2. Select an item and select **'Edit'**

3. Select '**Reminder Options**'.
4. Select the '**Reminder Req**' button to enable reminders for this code. Once enabled, this will turn green.
5. Enter the details for the reminder.

The screenshot shows a software interface for 'Code Entry'. The title bar reads 'Code Entry [User - jupiter : Site - Esher : Profile - Consult 1]'. Below the title bar, there's a 'Code Details' tab and an 'Edit DOGCRS' button. A 'Site' dropdown is set to 'Esher', with 'Cancel' and 'Save' buttons. A left sidebar contains a 'Configurations' section with a double-left arrow and a list of buttons: 'Code Details', 'Pricing', 'Treatment Options', 'Label Options', 'Product Alert', 'Reminder Options' (highlighted in blue), 'Discount Category', 'Send To', 'Notes', and 'Composite'. The main area is titled 'Reminder Options' and contains two sections. The top section, 'Reminder Req', has a green checkmark icon and a button labeled 'Reminder Req'. Below it, the text 'Create reminder of type' is followed by a dropdown menu showing 'Dog Vaccine R', then 'to send a reminder in', a text input '12', a dropdown menu showing 'Month(s)', and finally 'next reminder code' followed by a text input field. The bottom section, 'Compliance Reminder', has a red 'X' icon and a button labeled 'Compliance Reminder'. Below it, the text 'Send Reminders every' is followed by a text input '0', a dropdown menu showing 'Day(s)', then 'Repeating', a text input '0', and finally 'Times(s) with product description' followed by a text input field. At the bottom of the interface, a status bar displays 'Type(New Vaccines),Code(DOGCRS),Description(Dog Health Check & Vaccination Course)'.

Reminder Type = Type of reminder. For example, 'Dog Vaccine Reminder'

Send a reminder in = The period of time after the item is dispensed. i.e 12 months

Next reminder code = The next item required, if it differs from this one.
