

Patient Reminders Manual Run

22/10/2024 12:51 pm BST

Summary

Email and SMS messages can be sent to clients via the Patient Reminders screen. (Utilities > Reminders)

Details

After running Patient Reminders there are options to either Email or Print the reminders.

Viewing All Patients Reminders - From the Reminders Screen

1. To view reminders for all patients within a specific period, select **Utilities > Reminders**.
2. The 'Patient Reminders' tab is displayed.

The screenshot shows the 'Reminders' screen with the following details:

- Run Criteria:**
 - Work Site: Esher
 - Client Site: All
 - Reminder: All
 - Due From: 16/05/2024
 - Treatment Type: All
 - Species: All
 - Breed: All
 - Date To: 16/06/2024
 - Client Category: All
 - Patient Category: All
- Buttons:** Run, Reset
- Checkboxes:**
 - ☒ Merge into one Letter
 - ☒ Include 2nd Reminder (16/04/2024 00:00 To 15/05/2024 23:59)
 - ☒ Include 3rd Reminder (16/03/2024 00:00 To 15/04/2024 23:59)
- Table Headers:** Client Name, Patient, Species, Description, Work Site, Client Site, Remi..., Address1, Address2, Town, County, Postcode, Type, Animal..., Home P..., Busines..., Mobile P..., Fax, Home E..., Busines...

This screen has several filters to help refine your reminder search.

Work Site = Location the reminder was created (i.e. where the treatment was given).

Client Site = Clients registered site.

Reminder = Reminder type (i.e. Annual Vaccinations).

Treatment Type = Treatment type of the item that created the reminder (i.e. Consultations).

Species = Species of the patient

Breed = Breed of the patient

Client Category = Category of the Client (i.e. Farm).

Patient Category = Category of the patient (i.e. Small Animal)

Due From = The date you want to run your reminders from.

Date To = The date you want to run your reminders to.

3. You can also specify whether you want to include 2nd/3rd Reminders.

2nd Reminders = Outstanding Reminders for the previous month

3rd Reminders = Outstanding Reminders for the month previous to the previous month.

- ☒ Include 2nd Reminder (16/04/2024 00:00 To 15/05/2024 23:59)
- ☒ Include 3rd Reminder (16/03/2024 00:00 To 15/04/2024 23:59)

4. Once you have specified all your criteria, select '**Run**'.

5. All Patient Reminders which meet the specified criteria are displayed.

Reminders [User - jupiter : Site - Esher : Profile - Consult 1]

SMS Template

Print Labels (A4)

Print List

Print Letters

Export to CSV

Manually Send

Automatic Schedule List

Patient Reminders

Reminders Success Rate

Compliance Reminders

Appointment Reminders

Run Criteria

Work Site: Esher

Treatment Type: All

Client Category: All

Client Site: All

Species: All

Patient Category: All

Reminder: All

Breed: All

Due From: 16/05/2024

Date To: 16/06/2024

☒ Merge into one Letter

☒ Include 2nd Reminder (16/04/2024 00:00 To 15/05/2024 23:59)

☒ Include 3rd Reminder (16/03/2024 00:00 To 15/04/2024 23:59)

Run

Reset

Client Name	Patient	Species	Description	Work Site	Client Site	Remi...	Address1	Address2	Town	County	Postcode	Type	Animal ...	Home P...	Busines...	Mobile P...	Fax	Home E...	Busines...
Mrs X Brown	Affie	Feline	Estimate provided today	Esher	Derby	1905...	Tongham Road		ALDER		GU12 4AB	Estimates	29/06/20...						
Mr/Mrs Siro...	Molly	Canine	Vaccination Booster ...	Esher	Shrewsb...	3105...	3 Worthington Close	Henbury	Maccles...		SK11 9NS	Vaccinat...	30/08/20...						
Ms A Fry	Cozi	Canine	Dental Advised	Esher	Esher	1305...	Tudor Way	135	Egham	Hertford...	SG14 2FH	Consult...	13/11/20...						
Mrs A Henry	Daisy	Feline	Milbenmax Tasty Tabs ...	Esher	Esher	1206...	15 Queens Walk		Guildford	Surrey	GU20 2QA	Wormer							
Mr/Mrs Nick...	Paddy	Feline	Recall Set By Recept...	Esher	Esher	0706...	12 Cambane Business...		NEWRY		BT35 6QH	Cat Boo...	15/09/20...						
Mrs Holman	Milo	Feline	Recall Set By Recept...	Esher	Esher	1204...	16 Poole's Court		Weybridge	Surrey	GU13 5LW	Cat Boo...	12/10/20...						
Mr/Mrs Nick J.	Notch	Canine	Booster Vaccination ...	Esher	Derby	0304...	Louth Towers Eastgate		Louth	Lincolns.	LN11 9AG	Vaccinat...	06/01/20...						
Mr/Mrs Nick J.	Notch	Canine	NOBIVAC DHPP1 10 ...	Esher	Derby	0304...	Louth Towers Eastgate		Louth	Lincolns.	LN11 9AG	Dog Vac...	06/01/20...						
Emperor Ann.	Bertie	Canine	Btvpur 50 Dose 1x50	Esher	TestSite	0905...	Beech Close		Egham	Surrey	GU13 7HB	Blue Ton...	30/05/20...						
Mrs T1 Jupiter	Pony	Canine	AB Dog Annual Booster	Esher	Esher	0706...	22 Malloy Park		Maidenht...	Berkshire	SL6 6SQ	Dog Vac...							
Mrs T1 Jupiter	Charlie	Canine	Nobi vac Lepto 2(123	Esher	Esher	2503...	22 Malloy Park		Maidenht...	Berkshire	SL6 6SQ	Eller's V...	23/05/20...						
Mr/Mrs Nick J.	Notch	Canine	NOBIVAC DHPP1 10 ...	Esher	Derby	0304...	Louth Towers Eastgate		Louth	Lincolns.	LN11 9AG	Dog Vac...	06/01/20...						

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Reminders Options

After you have run the Reminders, you have the following options:

Reminders [User - jupiter : Site - Esher : Profile - Consult 1]									
	SMS Template		Print Labels (A4)		Print List		Print Letters		Export to CSV
	Manually Send		Automatic Schedule List						

SMS Template

This will open a window named SMS Template Editor, whereby you can view and edit existing SMS templates, or create new ones.

Print Labels (A4)

Selecting this will produce sheets of name and address labels on a laser printer.

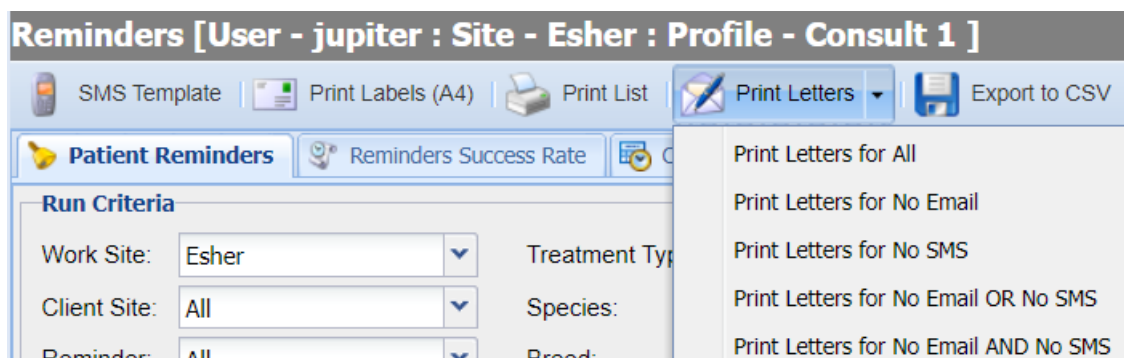
The label sheets required are of the Avery Standard L7163 which contain 14 labels per sheet.

Print List

Clicking this will print the list that you have produced on screen, so that you have a paper copy of the reminders due to be sent.

Print Letters

Clicking this will produce a printable letter from the templates created.



Print Letters for All - Print letters for all reminders

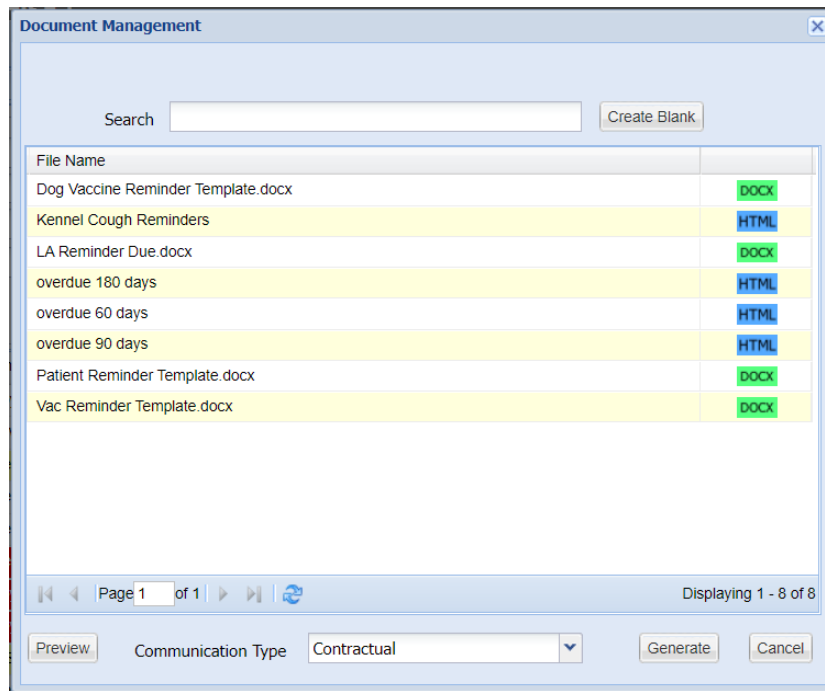
Print Letters for No Email - Print letters if client has no/invalid email address

Print Letters for No SMS - Print letters if client has no/invalid mobile number

Print Letters for No Email OR No SMS - Print letters if client has no email or mobile number saved in their client record.

Clicking any of the above options will bring up the list of available reminder templates to be sent as a letter.

Select the letter you wish to create for all the clients on the list and click **Generate**.




Manually Email, SMS or Print

1. Navigate to **Utilities > Reminders**.
2. Enter your criteria and select '**Run**'.
3. Select '**Manually Send**'.
4. **Tick** the email checkbox.
5. Select the **email and/or SMS templates** you wish to send.

Send Patient Reminders

Send via SMS


☐


Select Template

Hi \${Title} \${Surname} , \${AnimalName} is now due their \${Description} on \${CV_Date} . Please call us on 123456789 to get booked in.

\${AnimalName} is now due their booster. Please call the surgery on \${SitePhone} to make an appointment.

Dear \${Title} \${Surname,} \${AnimalName} is now due their \${Description} . Please contact the practice on \${SitePhone} to book an appointment Thank you Vet Practice

Send via Email


☒

Select Template

Dog Vaccine Reminder Template.docx

Kennel Cough Reminders

LA Reminder Due.docx

overdue 180 days

overdue 60 days

Communication Type

Contractual

Send Reminders

Exit

6. Select '**Send Reminders**'.
7. Any Clients without a registered email address will be displayed. Select '**Print**' to print a copy of the document or '**Ignore**' to proceed.
8. The Client Communication tab will keep an audit of communications sent.

Clients with no/invalid email addresses...

The following client(s) have invalid email addresses to send. Please print the list to fill in email addresses in reception. Please select Ignore Option to carry on sending email to rest of the clients. Please select Cancel Option to cancel sending email process.

No.	ContactId	Client	Email
1	10472	Mrs X Brown	
2	1217809	Mr/Mrs Simon Crawforth	
3	11121	Ms A Fry	
4	12904	Mrs A Henry	
5	1218091	Mr/Mrs Nick Henry	
6	688	Mrs Holman	
7	1217858	Mr/Mrs Nick Jessel	
8	16601	Emperor Anne Jones	
9	1217343	Mrs T1 Jupiter	
10	1217793	Mr/Mrs Y E Jupiter	
11	1217623	Mr/Mrs Ellie Lightowler	
12	1217776	Mr/Mrs O Lewis	

Schedule SMS Reminder

The schedule SMS Reminder option allows you to automate the sending of Patient Reminders. For more information, see the [Patient Reminders Automatic Schedule](#)
