

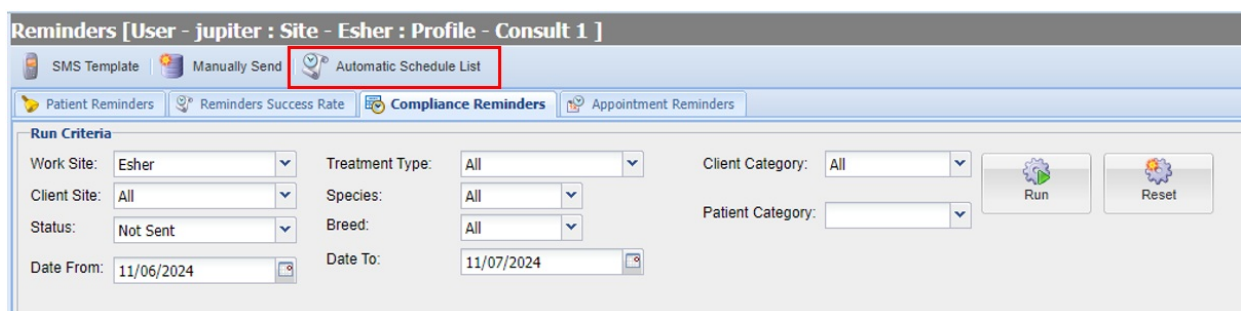
Compliance Reminders Automatic Schedule

30/04/2025 2:10 pm BST

Using the Compliance Reminder Scheduler

For the Compliance Reminders to automatically send, you need to set-up your schedule and filters.

1. Navigate to the Compliance Reminders screen (Utilities > Reminders > Compliance Reminders tab).
2. Select 'Automatic Schedule List'.



The screenshot shows the 'Reminders [User - jupiter : Site - Esher : Profile - Consult 1]' window. The 'Automatic Schedule List' tab is selected and highlighted with a red box. Below the tabs, the 'Run Criteria' section contains several dropdown menus and date pickers. The 'Work Site' is set to 'Esher', 'Client Site' to 'All', 'Status' to 'Not Sent', 'Date From' to '11/06/2024', 'Treatment Type' to 'All', 'Species' to 'All', 'Breed' to 'All', 'Date To' to '11/07/2024', 'Client Category' to 'All', and 'Patient Category' is empty. There are 'Run' and 'Reset' buttons on the right.

3. The 'Automatic Schedule List' window will display.
4. To create a new schedule, select 'Add'.
5. The Create/Edit Schedule window appears.
6. Type in the Schedule Name.
7. Set how often you would like the Compliance Reminders to send, what time they will send and also a start date.
8. 'for reminders due between the next X and X day(s)' - This is how much notice you wish to give to clients. In the screenshot example below, an SMS and email will automatically send to the client 3 days before the pet is due their flea/wormer treatment.

Create / Edit Schedule

Schedule Name

Send Reminder every day(s) at 10:30 starting on 20/07/2023
 for reminders due between the next 3 and 3 day(s)
 and match the following filtered criteria.

Work Site	<input type="text" value="Esher"/>	Client Category	<input type="text" value="[All]"/>
Client Site	<input type="text" value="[All]"/>	Patient Category	<input type="text" value=""/>
Reminder Type	<input type="text" value="[All]"/>	Species	<input type="text" value="[All]"/>
Treatment Type	<input type="text" value="[All]"/>	Breed	<input type="text" value="[All]"/>

Send via SMS

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Select Template

Hello \${ClientName} Just to let you know that \${Animal_Name} is due their \${ProductDescription} on \${ReminderDate}. If you need further medication, please contact us.

Hello \${ClientName} , it is time to apply \${Animal_Name}'s \${ProductDescription} . Please contact the practice if you need to order some more on 01234 567891

Send via Email

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Select Template

Compliance reminder template.docx

COMPLIANCE_REMINDER_.docx

Communication Type

9. There are 3 filters available in this scheduler.

- Work Site - This will default to the site you are logged in as. Please note - if you are a multi-site practice, a Compliance Schedule will require setting up per site.
- Client Site - This allows you to filter down to the clients registered site for the schedule. It is advised to keep as 'All' to capture all relevant reminders.
- Treatment Type - This allows you to filter the Treatment Type to be really specific with what is captured in a schedule. i.e. only sending the reminder for products listed under 'Tablets'. For standard Compliance Reminders, it is advised to keep this to 'All'.

10. Select the Communication Type and templates you wish to use. For more information on Communication Types, please see Reception > Client & Patient Registration > Client Data Consent.

Send via SMS = Tick the checkbox and select the SMS Template you want to use.

Send via Email = Tick the checkbox and select the Document Template you want to use.

11. Select 'Save Schedule' to create the scheduled task.

Note: any reminders sent will add an entry into the client communication tab.

Editing a Scheduled Task

1. Open the The 'Automatic Schedule List' window.
2. Select the task you wish to edit.
3. Select 'Edit'.
4. The Create/Edit schedule window appears, which allows you to modify the existing task.
5. Once modified select 'Save Schedule'

Deleting a Scheduled Task

1. Open the The 'Automatic Schedule List' window.
 2. Select the task you wish to delete.
 3. Select 'Remove'.
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