

VACCINATION REMINDERS

CONTENTS

VACCINATION REMINDERS	1
Reminder Set Up	2
Creating a New Reminder Type	2
Adding a Reminder to Product	3
Setting Up New Vaccination Complex Products	4
Configuring Reminder Colours on the Patient Record	5
Configuring Reminder Window at Billing	6
Previous Reminders to Mark as Done	6
Record Expiry Date for each Batch	6
Adding Reminders To Patients	7
Adding a Reminder to an Patient from a Bill	7
Adding a Reminder from the Patient Record	8
Printing a Reminder List	9
Viewing Reminders	10
Browse Reminders	10
Sending Reminder Letters/ Emails or SMS	13
Automated Reminders	13
Setting up New Reminder Automation:	13
Editing Existing Automation	15
Setting up Automation for an Existing Reminder Run	15
Manually Processed Reminders	16
Setting Up Reminder Mailers to Send Manually	16
Manually Printing, Emailing, Texting Reminder Mailouts	19
Using Reminder Based Templates	20
Using Run based templates	21

REMINDER SET UP

Creating a New Reminder Type

1. Click on the **'Options'** menu and select **'Pick Lists Setup'**.
2. Click on **'Misc'** and double click on **'Reminder Types'**.
3. The reminder List will open. All your reminder types will be listed here. To enter a new reminder, click on the red plus button at the bottom of the screen.
4. Select **'Yes'** to the prompt and the **'Reminder Type'** window will open.
5. Enter in the relevant fields to set up the reminder.

Number:	System number generated by VetlinkPRO
Name:	Name of the reminder.
Type:	Used to group Reminders when sending mailouts. Eg So all Vaccination reminder can be sent together which may have a different schedule or template then the Treatment type Reminders. Types include: Vaccination , Recall , Treatment and Healthcare .
Patient Types:	Click in the 'Patient Types' field to open a new selection grid where you can select which patient's will receive that reminder.
Default Period:	This field specifies the length of time until the reminder is due.
Period Type:	Related to the default period, and indicated whether the period is in days, weeks, months or years.
Status:	Whether the reminder is active or inactive
Non-Repeating:	When un-ticked, this field indicates that when this reminder has expired another reminder, shown by the 'Next Rem Type' , will be generated automatically.
Next Rem Type:	The next reminder that will be generated when the current reminder expires.

6. Select **'Accept'** to save and exit the reminder.

Adding a Reminder to Product

1. Create a new product or search for and select the product you wish to add a reminder to.
2. On the 'General' tab select the reminder you wish to use from the 'Rem Type' drop down menu.



NOTE: Reminders are mainly used with Kitset, Surgery and Vaccination type complex products. For Kitsets, the reminders are triggered by the 'Rem Type' setting on the component's product record. As Kitsets permit multiple components, the sale of Kitsets may trigger multiple reminder prompts at billing - one for each component with a reminder set. The same applies to Surgery products. In the case of Vaccination products however, the reminder is controlled by the 'Rem Type' setting on the master product.



Fel-O-Vax Fiv Vaccine (Product# 1/6299)

1 : General 2 : More 3 : Stock 4 : Discs 5 : Complex 6 : History 7 : Stats 8 : Doc Mgr

Name	Fel-O-Vax Fiv Vaccine	Pack Prices (Exc Tax)	Price Scheme	List + Markup
Size		List Price		List Price
Class	Drug	\$11.3600		\$11.3600
Printed Name		Buy Discount 1		Markup
Category-1	C/AVACCINAT	- % = \$11.3600		+ 73.3%
Category-2	C/AVAC CAT	Buy Discount 2		Sell Price
Ann Types	*ALL*	- % = \$11.3600		= \$19.69
Action	None	Buy Discount 3	Net Cost	Margin
Rem Type	Vaccinations	- % = \$11.3600		42.3%
Label Typ	No Label	Buy Size	Avg Cost	
Def. Label		1	\$10.92	
Restricted		Prices (Inc Tax)		
Pref. Supplier		Units	Dose Size	
Status	Active		1	
User Code	FELOVAXFIV	Unit Cost	Dose Cost	
Complex	Not Cplx	\$12.56	\$12.56	
Certificate		Unit Sell	Dose Sell	
Handout		\$22.64	\$22.64	
Reporting	No	Pack Sell Price		
		\$22.64		

Right click to add a product image...

By_Number Menu AF3 : Exit

Setting Up New Vaccination Complex Products

When setting up a vaccination it is highly recommended that you use the complex product type of Vaccination. The vaccination complex product is a service with hidden drug components. It will allow you to incorporate a service fee in the vaccination as well as recording the drugs that were used. More than one drug can be attached to the vaccination with its own reminder and when a tax receipt or statement is printed only the vaccination service will show.



NOTE: If you are unsure about setting up complex products, read the Complex Products chapter in the manual before proceeding.

Order	Description	Qty	Reminder	Price
1	Vacc Comp1	1	Vacc Comp1	
2	Vacc Comp2	0.1	Vacc Comp2	

1. Create drug products for all the drugs to be used whilst performing the vaccination or identify the existing drugs you wish to use.
2. Set the '**Label Typ**' on the drugs as '**Vaccination**' if you wish to print vaccination labels.
3. Create a new vaccination product with the class type '**Service**' and set the pack sell price.
4. Go to the '**Complex**' tab of the master vaccination product and set '**Complex Type**' to '**Vaccination**'.
5. Next click on the '**Plus**' button and add all the drugs components you wish to add to the complex product.
6. Within the complex tab still, look for the '**Reminder Type**' column and choose any reminders you wish to apply from the drop-down list.

7. Set the quantity of each drug you will be using. The price of the drug can be changed from the drug product record.
8. You can also set a reminder for the master vaccination product if you wish by changing the 'Rem Type' on the 'General' tab. If you are getting double ups of reminders when billing, ensure that you don't have the same reminder set on both the master vaccination and component drug products.

Configuring Reminder Colours on the Patient Record

Reminders on the patient record can display in three different colours depending on when they are due. These options can be found under [Options | Setup | Misc | Reminders | Reminders to be Shown \(Grids\)](#).

Mths to Look Backward	Reminders falling within this date range will appear as black text unless a reminder is already appearing in red or blue text.
Mths to Look Forward	Reminders falling within this date range will appear as black text unless a reminder is already appearing in red or blue text.
Show as Red when Due	The number of months that the system looks back to determine whether to display reminders on the patient record in red text (as opposed to black).
Mths Forward in Blue	The number of months that the system looks forward to determining whether to display reminders on the patient record in blue text (as opposed to black).

Reminder Due to be Shown (grids)

Mths to Look Backward (0-48)

Mths to Look Forward (0-48)

Show as Red when Due is mths in the past to 1 month ahead.

Blue when 1 month ahead to mths ahead (0 to disable).

How Reminders would appear by using setup options selected above



Configuring Reminder Window at Billing

Previous Reminders to Mark as Done

The reminder window at billing is split into three sections: **Previous Reminders Due**, **Batch Details** and **Reminders to Record**. The Previous Reminders Due section can be configured to your preferences as to which reminders appear for selection and also which reminders due are automatically ticked to mark as done.

1. Go to **'Options'** and then select **'Setup'**.
2. Log in with the highest access level you have.
3. Click on the **'Misc'** button and then on the **'Reminders'** tab.
4. For the **'Reminders Due Shown to Mark as Done'** fields specify how many months the reminders window will display due reminders for. This setting is just for showing the reminders not ticking them as well.
7. For the **'Reminder Due Auto Marked as Done'** specify which of these reminders will automatically be set to mark as done. E.g. Ticked. If you do not wish any reminders to be automatically marked as done, choose the number zero for each. Tick the **'Mark same Type Only'** if you only wish due reminders of the **same type** as the next reminder you are about to add to be marked as done.

Record Expiry Date for each Batch

The reminder window at billing can record the batch date and expiry date for drugs that were used during the patients visit. This information will also be saved against the vaccine for the next time the vaccination is billed so you should only have to enter in the batch number and expiry date once, unless a new batch is being used. Entry into this field can be made mandatory or optional.

1. Go to **'Options'** and then select **'Setup'**.
2. Log in with the highest access level you have.
3. Click on the **'Product'** button and then on the **'1: Options'** tab.
4. If you wish entry of the batch details to be mandatory tick the **'Record Batch and Expiry for Vaccines'** option.

ADDING REMINDERS TO PATIENTS

Adding a Reminder to an Patient from a Bill

1. Create a new bill.
2. Add a product with a reminder attached to it.
3. If **Record Batch and Expiry for Vaccines** is ticked in setup. Then the Batch and Expiry Recording window come up so you can record batch and expiry details.
4. The vaccination details screen will open. Check that the details are correct. The reminder form is split into three sections: **Batch Details**, **Previous Reminders Due** and **Reminders to Record**.

A

Batch Details

The Batch details section is used to record the batch number and expiry date for drugs that have been used. Options in setup control whether filling in these fields is mandatory or not. Please refer to the Configuring the Reminders Window section for more information.

B

Previous Reminders Due

The previous Reminders Due section will list all the reminders for the patient that are still due. If the reminder has been done you need to put a tick in the **'Mark as Done'** check box. Alternatively, if the reminder is still due remove the tick. Population of reminders in this section is controlled by options in set up. Please refer to the Configuring the Reminders Window section for more information.

C

Reminder To Record

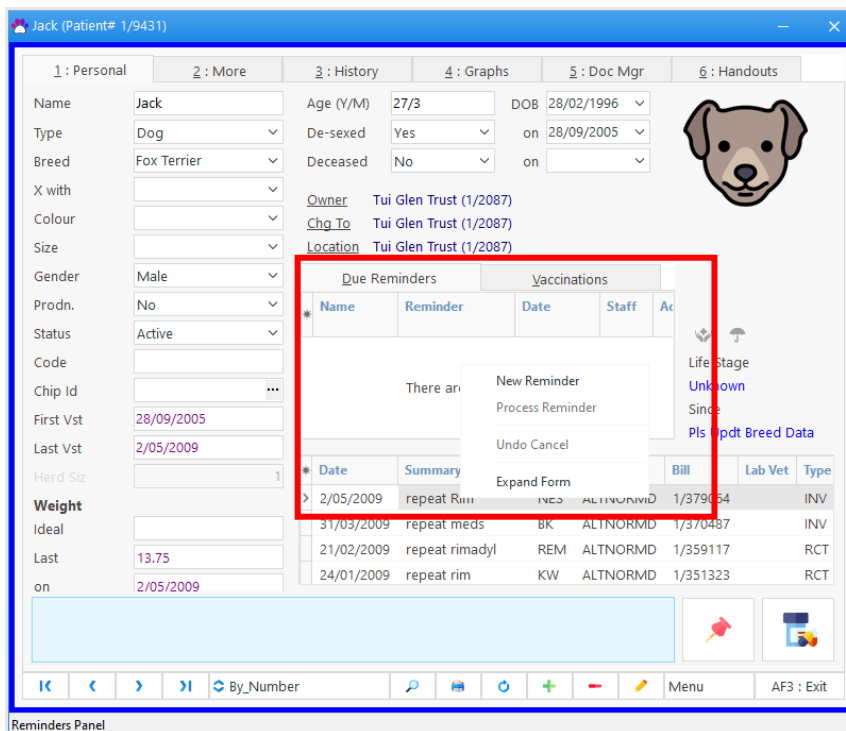
The Reminder to Record section is where you record reminders. To record a reminder, select the **'Next Reminder'** and **'Due On'** information and ensure that the **'Record Reminder'** tick box is ticked. You are also able to untick **'Record Reminder'** for any of the reminders if you do not wish them to be recorded. Please note that the drug details are recorded against the patient regardless of whether a reminder is recorded or not.

5. Click **'Accept'** to the reminder details form and then finish the bill.
6. The Patient record will now be automatically updated with the new reminder details.

Adding a Reminder from the Patient Record

If you have not created a bill but would like to add a reminder to an patient you can do so from the patient record by following the steps below.

1. Search for and open the patient record.
2. Right click on the due reminders grid and choose **'New Reminder'**.
3. Select **'Yes'** to the prompt and a new form will open.
4. You will now need to enter the Staff member who is creating the reminder, the type of reminder and the due date for the reminder. Any further details can be added in the actions field.



PRINTING A REMINDER LIST

A reminder list shows summary of the reminders for a specified period. This list will show the client's name, patient name, reminder, due date and client contact number. You will normally generate this list when confirming appointments.

1. Click on the **'Reports'** button.
2. Double click on **'Reports/Lists'**.
3. Click on **'Client'**.
4. Double click on **'Reminder List'**.
5. Choose the relevant filters to generate the report:

Branch:	If you are running a multi-branch system, select the branch which you wish to generate the reminder list for.
Anm Status:	Whether you want reminders for active or inactive patient.
Anm Type:	The type of patient you wish to generate the reminder list for.
Rem Type:	The type of reminder you are generating the list for, either vaccination, treatment, health care or recall.
Reminder:	This field lets you choose a specific reminder to generate the list for.
Rem Status:	Whether you wish to generate a list of Due, Cancelled, Done or All reminders.
Due Range:	The period for which you wish to generate the reminder list for.

6. Click on the **'Next'** button when you have chosen your filters.
7. Click on the **'Print'** button to print or the **'Preview'** button to preview the report.

VIEWING REMINDERS



Browse Reminders

The browse reminders function allows you to quickly generate a list of reminders for a specified period. When the list is generated you are then able to update the reminder status, contact clients or view patient details.

1. Click on **'Utilities'** and then **'Browse Reminders'**.
2. The **'Browse Reminders'** form will open. Select the relevant option to open the reminder list.

Branch:	If you are running a multi-branch system, select the branch which you wish to generate the reminder list for.
Staff:	The staff member who has set the reminder.
Type:	The type of reminder you are generating the list for, either vaccination, treatment, health care or recall.
Reminder:	The specific type of reminder you are generating the list for.
Patient Type:	The type of patients you wish to generate the reminder list for.
Period:	Select from the list the time period you wish to view reminders for.
From: / To:	If range was selected for the period you can select the date range here.
Include Cancel & Done:	Cancelled and Done reminders will be included in the list if this option is selected.
Include Inactive Clients and Patients:	Inactive clients and patients will be included in the list if this option is selected.

3. The reminder list will now show, you can double click on a line to view that reminder.
4. From the list there are a few quick select options to choose from:
 - a. **Call:** Brings up contact phone numbers for the client.
 - b. **SMS:** Brings up SMS template for custom message to send to client. This can be edited before being sent.
 - c. **Email:** Brings up email template for custom email to client. This can be edited before being sent.
 - d. **Done:** Marks reminder as done.
 - e. **Quick History:** Brings up history browser for selected patient.

	Show history on right side of window.
	Show history on left side of window.

Browse Reminders

Reminders

Branch: Takapuna Staff: [] Period: All OverDue

Type: *ALL* Reminder: [] From: 18/05/2023 To: 18/05/2023

Patient Type: *ALL* Include Inactive Clients and Patients Include Cancel & Done

Filter: [] Order List By: Due Date

Patient	Service	Due Date	Call	SMS	Email	Done
Tuanui Lional Frankie	Vaccinations	8/05/2000	Call	SMS	Email	Done
Anderson Alana X Puppies	Vaccinations	14/05/2000	Call	SMS	Email	Done
Hemi Liz Ruby	Vaccinations	21/08/2000	Call	SMS	Email	Done
Ferguson Hamish Whizz	Vaccinations	25/08/2000	Call	SMS	Email	Done
Barsdell Sheryle Kizzy	Vaccinations	24/09/2000	Call	SMS	Email	Done
Roberts Grace Puppies	Vaccinations	13/12/2000	Call	SMS	Email	Done
Barry S_M J D Jane	phone recall	1/10/2003	Call	SMS	Email	Done
Rossiter Barry_Elizabeth	Vaccinations	1/10/2003	Call	SMS	Email	Done

Browse Reminders

Reminders

Branch: Takapuna Staff: [] Period: All OverDue

Type: *ALL* Reminder: [] From: 18/05/2023 To: 18/05/2023

Patient Type: *ALL* Include Inactive Clients and Patients Include Cancel & Done

Filter: [] Order List By: Due Date

Patient	Service	Due Date
Tuanui Lional Frankie	Vaccinations	8/05/2000
Anderson Alana X Puppies	Vaccinations	14/05/2000
Hemi Liz Ruby	Vaccinations	21/08/2000
Ferguson Hamish Whizz	Vaccinations	25/08/2000
Barsdell Sheryle Kizzy	Vaccinations	24/09/2000
Roberts Grace Puppies	Vaccinations	13/12/2000
Barry S_M J D Jane	phone recall	1/10/2003
Rossiter Barry_Elizabeth	Vaccinations	1/10/2003

Hide

Bill#	Date	Staff	Qty	Name	Price
31/07/2006 AP s/o					
		AP	1.00000	Eukanuba Adult Large Breed (15kg)	\$104.95
		AP	1.00000	Suture Removal	\$0.00
19/07/2006 LOC spey + vac					
		LOC	1.00000	Spey & Vaccinate (cat)	\$100.01
8/04/2006 LOC 1st vacc					
		LOC	1.00000	Vaccination (feline)	\$42.50


Viewing Reminder Details from the Patient Record

VetlinkPRO allows you to view reminders for patients directly from their patient record. A number of views are available depending on the detail you wish to see, and you can view all reminders including cancelled, done and due. Double clicking on one of the reminders will allow you to update the reminders status.

- In the centre of the patient record, you can view the reminders that are due. Double clicking on a line will open that reminder.
- The oldest reminders will display first. If you cannot see all the reminders you can right click on the Due Reminders grid and choose expand form. This will open an adjustable form to display all the reminders.
- To view all reminders including cancelled and done, click on the **'Rem'** button at the bottom of the screen. This will open a new form to view all reminders for that patient.

Reminder

Tuanui Lional
0210666200
nada4283@cfl.co.nz
P O Box 84, Waipukurau 4242

Frankie (1/34586)
 Cat, DSH, (Female, Spayed)
27/01/2006, Age: 17 yr 4 mth
Last visit at 31/07/2006

Reminder Details

Staff: Created:
 Type: Due:
 Action: Done:

Reminder's Sent: First Rem Sent On: Second Rem Sent On: Third Or Later Rem Sent On:

SENDING REMINDER LETTERS/ EMAILS OR SMS

Your Vaccination and Recall reminders can be sent out via Mail (manual only), Email or SMS. They can be automated to send out without a staff member needing to manually process them or they can be manually sent by a staff member.

Automated Reminders

Setting up New Reminder Automation:

1. Click on the **'Reports'** button.
2. Double-click on the **'Automate'** button. The report properties window will open.
3. Next click on the **'Add New'** button.
4. Click **'Yes'** to the **'Design New Report'** prompt.
5. In the **'Name'** field enter the name for the automated email or SMS (e.g. Vaccination Reminder).
6. Under **'Table Link'**, select **Clin -> Anm -> Rem.**
7. From the **One Entry Per** drop down list select how many reminders to send if multiple reminders exist for a client.

Client	If multiple reminders exist, by setting the One Entry Per field to Client , a mailer will only be sent for the first reminder due for the client.
Patient	If multiple reminders exist by setting the One Entry Per field to Patient , a separate mailer will be sent for the first reminder due for each patient the client has.
Reminder	If multiple reminders exist by setting the One Entry Per field to Reminder , a separate mailer will be sent for ALL reminders due for the client.
Letter (Recommended)	If multiple reminders exist by setting the One Entry Per field to Letter , all the reminders due for the client will be merged into one mailer. To use this setting, you must also insert the Reminder_List mail-merge variable into your mailer.

8. Under the **'Use Client Marketing Tab'** section, select which clients to send emails or SMS messages to by clicking on the drop-down list in each field. This section uses the information set up in the client record.

Email

Don't Send Emails:

Emails will not be generated for clients.

If Email Entered:

In the client record under the general tab, if an email address is entered, an email will be created for that client.

If Reminders checkbox Ticked in 'By Email':

In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By Email'** section, an email will be created for that client.

Txt / SMS**Don't Send Smss:**

SMS's will not be generated for clients.

If Mobile Entered:

In the client record under the **'General'** tab, if a mobile number is entered, an SMS will be created for that client.

If Reminders checkbox Ticked in 'By SMS':

In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By SMS'** section, an SMS will be created for that client.

9. Click on the **'New'** button to create a new template. You may do this for each type of communication you wish to use. e.g. an email or SMS.



NOTE: In the **'Template to Use'** section you can also choose an existing template and you can then edit this template by clicking on the button on the same line.

NOTE: SMS messages are charged per 160 characters sent. If your message is over 160 characters you will be charged for two or more SMS.

10. You will be prompted to enter a file name for your mailer document, enter a filename then click **'OK'**.
11. The appropriate processor will open depending on the type of document; enter the text for your mail merge document.
12. When you have finished, click the save button in the top left-hand corner. Next click the cross in the top right-hand corner to close the window.
13. Click **'Save'** then **'Yes'** to the prompt to save the settings.
14. Your Vaccination Mailer should now be saved to the Automation List
15. Select the report you have just created.
16. Click the **Schedule** tab to set the Schedule:
 - a. **Repeat Every:** Set the frequency the reminder are sent. Eg. Every 2 weeks, Once a month etc...
 - b. **Cut-Off Time:** The time the reminders will be sent. The automated reminders are created at midnight and then are sent at the cut off time. This is so staff are able to check the reminders if they wish before sending.
 - c. **Channel 1:** The way that you would prefer reminders to be sent. (Email or SMS).
 - d. **Channel 2:** The way that reminders will be sent if it cannot be sent via Channel 1. (Eg. they do not have an email).
17. Click the **Filters** tab to choose what reminders will be sent. The most relevant filters are listed below. If the filters are different for each run of a reminder, you will need to set up a separate reminder automation for each run.

- a. **Reminder Type:** select either Vaccination, Recall, Treatment or Healthcare depending on type of Reminder you want sent. The Type is set when you create the reminder in picklists.
- b. **Reminder:** Select a specific reminder or choose ALL.
- c. **Due Range:** Select the range you wish to send for, eg Next week, next month, next year, etc...
- d. **From:** If Custom not selected for the **Due Range** the **From** filter will appear. This works in conjunction with **Due Range** but delays the **Due Range** lookup for a number of days. Eg. Today is 1 Sep, **Due Range** set to next 2 weeks, and **From** set to **Today** + 7. This would mean the mailer will look for reminders due between 8th and 22nd Sep.
- e. **Apt Dates:** If set the mailer will check for any appointment for the patient in the range set. If appointments are found the Reminder will be excluded from the mailout.

18. Click **'Save'**.

Editing Existing Automation

1. Click on the **'Reports'** button.
2. Double-click on the **'Automate'** button. The report properties window will open.
3. Single click the Automation you wish to edit.
4. Edit Automation as needed.
(See **Setting up New Automation** section for more information on available settings)
 - **Schedule:** Set repeat frequency, Cut-off times, End dates and status on the Schedule tab.
 - **Filters:** Used to set what reminders are selected to be sent
 - **Properties:** Used to edit generic reminder templates
 - Click **F7: Edit** to change the Email template.
 - Click **F8: Edit** to change the SMS template.

Note: that Reminder Based templated are available under Options -> Picklists -> Misc -> Reminder Types -> Select Reminder -> Templates Tab -> Edit templates as needed.
5. Save and Exit.

Setting up Automation for an Existing Reminder Run

1. Go to **Reports** -> **Reminders/Recalls**
- 2.
3. Right click on the reminder run you want to automate and select **'Automate'**. The automation options screen will open.
4. Set the cut off time to the time the reminders will be sent. The automated reminders are created at midnight and then are sent at the cut off time. This is so staff are able to check the reminders if they wish before sending.
5. Set **'Channel 1'** to the way that you would prefer reminders to be sent. (Email or SMS).
6. Set **'Channel 2'** to the way that reminders will be sent if it cannot be sent via Channel 1. (Eg. they do not have an email).
7. Click **'Save'**.

Manually Processed Reminders

Setting Up Reminder Mailers to Send Manually

1. Click on the **'Reports'** button.
2. Double-click on the **'Reminders / Recalls'** button.
3. The report properties window will open.
4. Next click on the **'Add New'** button.
5. Click **'Yes'** to the **'Design New Report'** prompt.
6. In the **'Name'** field enter the name for the letter, email or SMS (e.g. Vaccination Letter).
7. From the **'Printer'** drop down list, choose the printer to which this document will print if it is a letter.
8. From the **One Entry Per** drop down list select how many reminders to send if multiple reminders exist for a client.

Client	If multiple reminders exist, by setting the One Entry Per field to Client , a mailer will only be sent for the first reminder due for the client.
Patient	If multiple reminders exist by setting the One Entry Per field to Patient , a separate mailer will be sent for the first reminder due for each patient the client has.
Reminder	If multiple reminders exist by setting the One Entry Per field to Reminder , a separate mailer will be sent for ALL reminders due for the client.
Letter (Recommended)	If multiple reminders exist by setting the One Entry Per field to Letter , all the reminders due for the client will be merged into one mailer. To use this setting, you must also insert the Reminder_List mail-merge variable into your mailer.

9. Under the **'Use Client Marketing Tab'** section, select which clients to send documents, emails or SMS messages to by clicking on the drop-down list in each field. This section uses the information set up in the client record.

Document

Don't Send Letters:

Letters will not be generated for clients.

If Address Entered:

In the client record under the **'General'** tab, if an address is entered, a letter will be created for that client.

If Reminders checkbox Ticked in 'By Post':

In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By Mail'** section, a letter will be created for that client.

Email

Don't Send Emails:

Emails will not be generated for clients.

If Email Entered:

In the client record under the general tab, if an email address is entered, an email will be created for that client.

If Reminders checkbox Ticked in 'By Email':

In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By Email'** section, an email will be created for that client.

Txt / SMS

Don't Send Smss:

SMS's will not be generated for clients.

If Mobile Entered:

In the client record under the **'General'** tab, if a mobile number is entered, an SMS will be created for that client.

If Reminders checkbox Ticked in 'By SMS':

In the client record under the **'Marketing'** tab, if the **'Reminders'** check box is ticked in the **'Send By SMS'** section, an SMS will be created for that client.

10. Click on the **'New'** button to create a new letter. You may do this for each type of communication you wish to use. e.g. a letter, email or SMS.



NOTE: In the **'Template to Use'** section you can also choose an existing template and you can then edit this template by clicking on the button on the same line.

NOTE: SMS messages are charged per 160 characters sent. If your message is over 160 characters you will be charged for two or more SMS.

11. You will be prompted to enter a file name for your mailer document, enter a filename then click **'OK'**.
12. The word processor will open; enter the text for your mail merge document.
13. When you have finished, click the save button in the top left-hand corner. Next click the cross in the top right-hand corner to close the window.
14. Now select the **'Exit'** button from the bottom right-hand corner of the bulk mailers dialog box.

15. You have now completed setting up your Reminder Letter.

New (Report #0)

Name: Status: Profile:

Category: Reminders Preview: Reserved:

Printer: Shared: Custom Props:

Table Link:

Use Following Tables

<input checked="" type="checkbox"/> Client	<input type="checkbox"/> Product	<input type="checkbox"/> Creditor Invoice
<input checked="" type="checkbox"/> Client Address	<input checked="" type="checkbox"/> Reminder	<input type="checkbox"/> Creditor Payment
<input type="checkbox"/> Client Contact	<input type="checkbox"/> History	<input type="checkbox"/> Referral
<input type="checkbox"/> Client Account	<input type="checkbox"/> Health Plan	<input type="checkbox"/> Referral Staff
<input checked="" type="checkbox"/> Patients	<input type="checkbox"/> Appointment	<input type="checkbox"/> Referral clinic
<input type="checkbox"/> Bill	<input type="checkbox"/> Supplier	<input type="checkbox"/> Referral Address
<input type="checkbox"/> Bill Item	<input type="checkbox"/> Order	<input type="checkbox"/> Referral Contact

Special Filters

Audit:

One Entry per:

Client Group:

Bill Type:

Complex Item:

Use Client Marketing Tab

Document:

Email:

Txt / Sms:

Template to Use

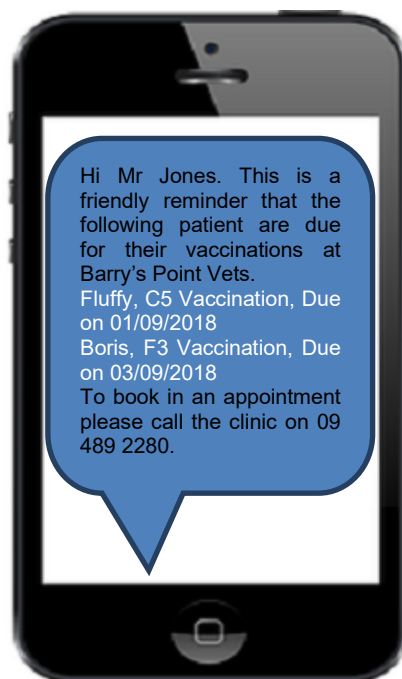
F6 : Edit SF6 : New

F7 : Edit SF7 : New

F8 : Edit SF8 : New

Manually Printing, Emailing, Texting Reminder Mailouts

1. Click on the **'Reports'** button then double-click the **'Reminders / Recalls'** button.
2. Double click on the reminder or recall you wish to send, and the filter page will open.
3. Choose the filters that you want to limit the search by and click the **'Next'** button to start the search.
4. A list will be created with all the results matching the specified filters.
5. You can now finalise which clients are to receive the mailers and what form of communication is to be used. Use the **'Inc, Post, Eml and SMS'** boxes to do this.
6. **Inc (Include):** When unchecked the client will not be sent any type of mailer even if the post, email or SMS boxes are ticked. When unchecked the client's details will change to italics.
 - a. **Post:** If ticked a letter will be printed out for the client.
 - b. **Email:** If ticked the client will be sent an email.
 - c. **SMS:** If ticked the client will be sent an SMS text message.
7. Once you have chosen who to send mailers to and how to send them, click on the **'Process'** button.
8. A copy of the unmerged letter will now be shown. If required you can edit the document. If there are any SMS and email messages pending, these will be sent first, they **will not** be previewed.
9. Click on the **'Merge Preview'** button and the client's details will be merged into the document.
10. Click on the **'Print'** button and the letter will be printed.



Using Reminder Based Templates

Reminder based templates allow you to customise the letters/emails to include extra information about the treatment that is required, explain the necessity of the treatment or to include product specific discounts etc. Instead compiling the reminder lists individually for each letter, reminder based templates allow you to compile one list and then the correct letter is chosen based on the template in reminders.

1. Go to **Options | Picklist Setup**
2. Click on the arrow next to **'Misc'** and double click on **'Reminder Types'**
3. Double click on the reminder you wish to use Reminder based templates on.
4. Tick the **'Use Rem Based Template'** check box. This will enable the **'Templates'** tab.
5. From the template tab you can create and edit templates specific to that reminder.
6. If you don't wish to include the reminder mail out when sending all reminders tick the **'Exclude when Sending Mailers for "ALL" reminder'** tick box. E.g. This type of reminder you wish to send separately.
7. If this type of reminder only needs to be sent once then tick the **'Send Reminder Once Only'** tick box. E.g. It might be a reminder for removing Sutures which can be sent just once.



NOTE: When using the **'All'** filter option for reminder mail outs, a separate reminder letter/email will be created for every reminder type that has reminder based template selected. If no reminder based template exists, the default template under the reminder/recalls properties will be used.

Blood test T4

Number	Name	Type
1/23	Blood test T4	Vaccination

Details | **Templates** | Products

Patient Types: *ALL*

Status: Active

Default Period: 6

Period Type: Month

Use Rem Based Template

Exclude When Sending Mailers for "ALL" Reminders

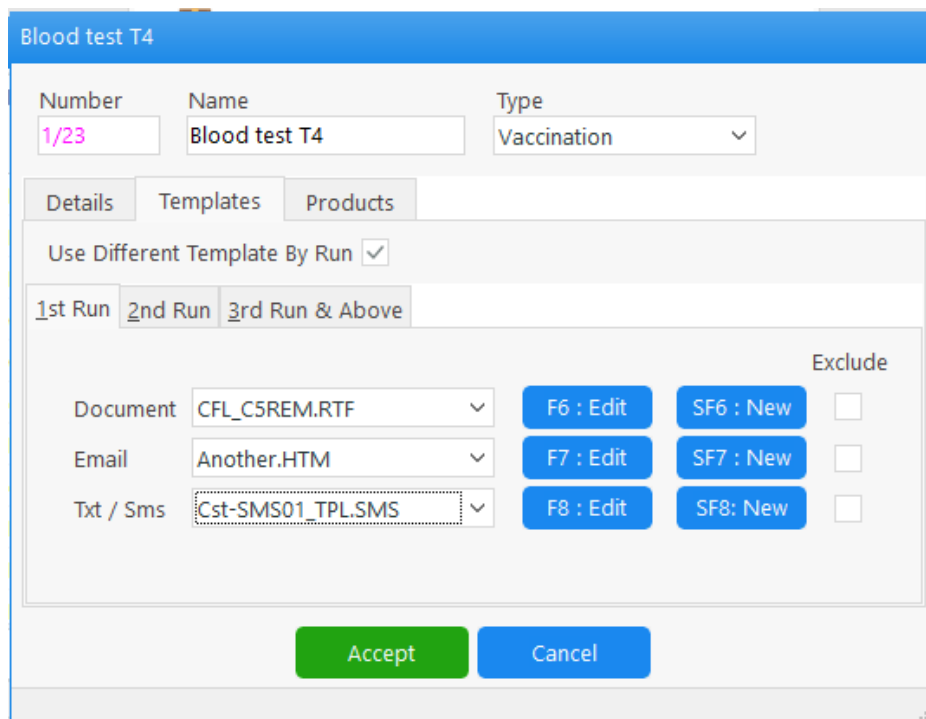
Send Reminder Once Only

Accept Cancel

Using Run based templates

Run based templates allow you to send a different letter, email or SMS to the client depending on whether it is their first, second or third+ communication on the same issue.

1. Go to **Options | Picklist Setup**
2. Click on the arrow next to **'Misc'** and double click on **'Reminder Types'**.
3. Double click on the reminder you wish to use Run based templates on.
4. Tick the **'Use Rem Based Template'** Check box. This will enable the **'Templates'** Tab.
5. From the templates tab, tick the **'Use Different Template By Run'**. This will enable the **'1st Run'**, **'2nd Run'** and **'3rd Run & Above'** buttons where you can select templates for each one.



NOTE: You can view dates that runs were sent to clients by clicking on the reminder on the patient record.