# Sending SMS Text Messages using Patient Groups

To send a one-way text message to a **Patient Group** in **Vision+**:

> ✎ **Note** - First you must have a **SMS Template** available, see Creating an SMS Message Template (opens the Vision+ Help Centre) for more information.

1. From the **Windows Notification Area**, right click **Vision+** ➕ and select **Practice Reports**. **Practice Reports** opens by default on the QOF/QAIF screen, select **Patient Groups** to display all patient groups:

![cegedim Healthcare Solutions]
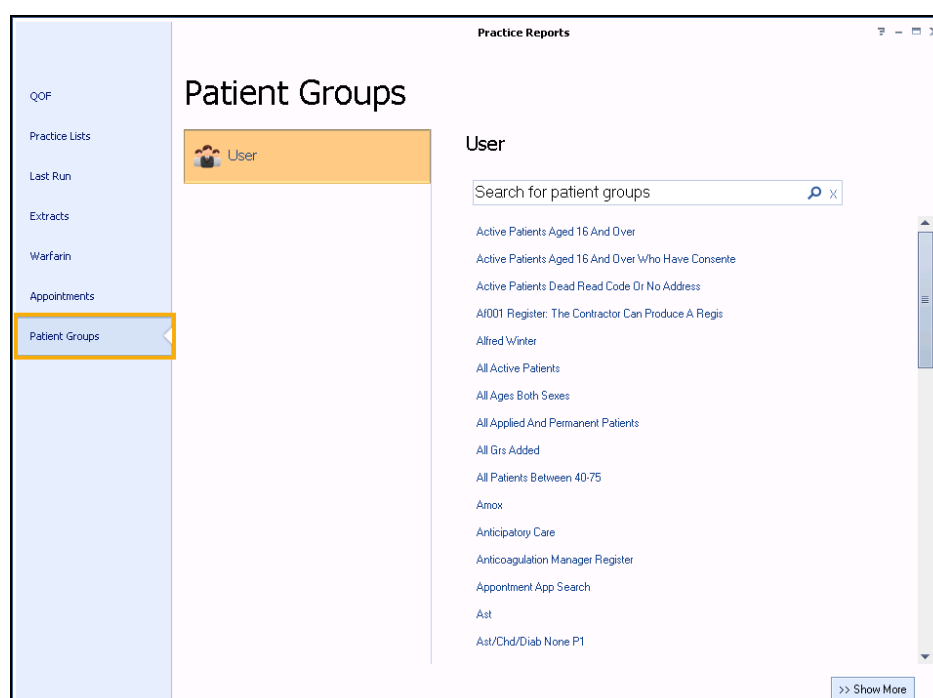
2. The first fifty groups display, to see more groups select **Show More** >> Show More at the bottom right hand side of the screen or to view user specific groups select **User**:
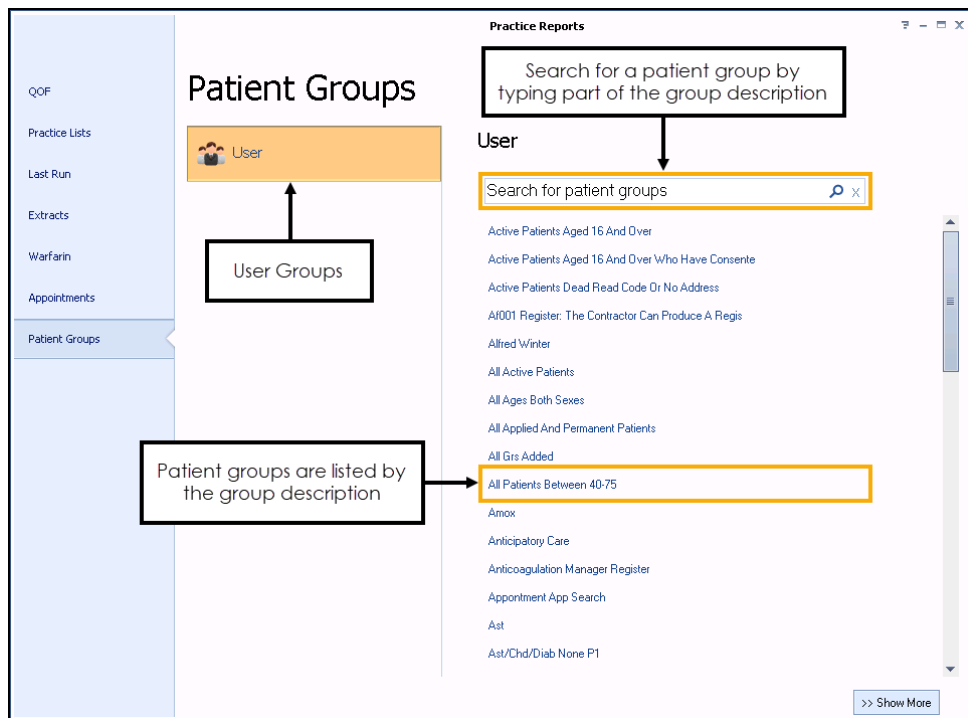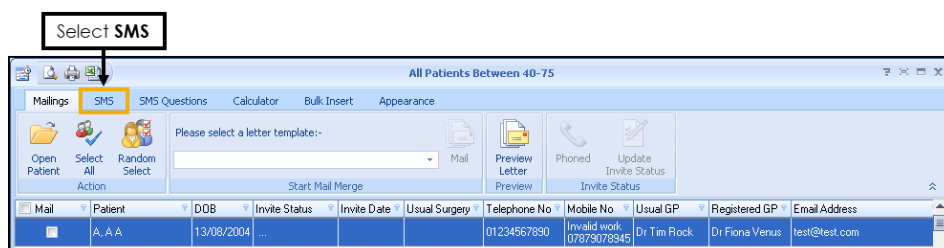


💡 **Training Tip** - You can find a group by typing part of the group description and selecting **Search** 🔍. To remove a filter select **X**.

3. Select the **Patient Group** you want to work with and the **Patient Group** screen displays:
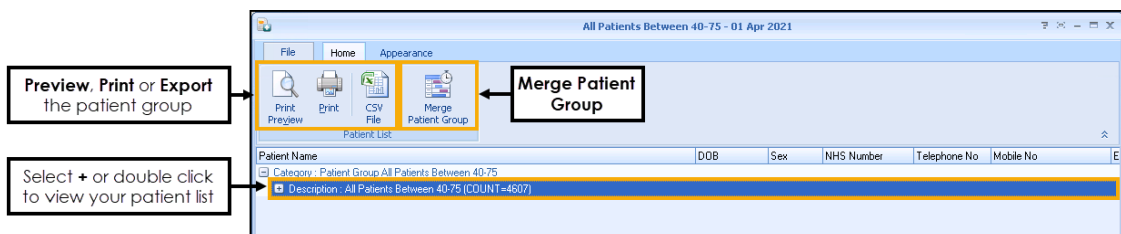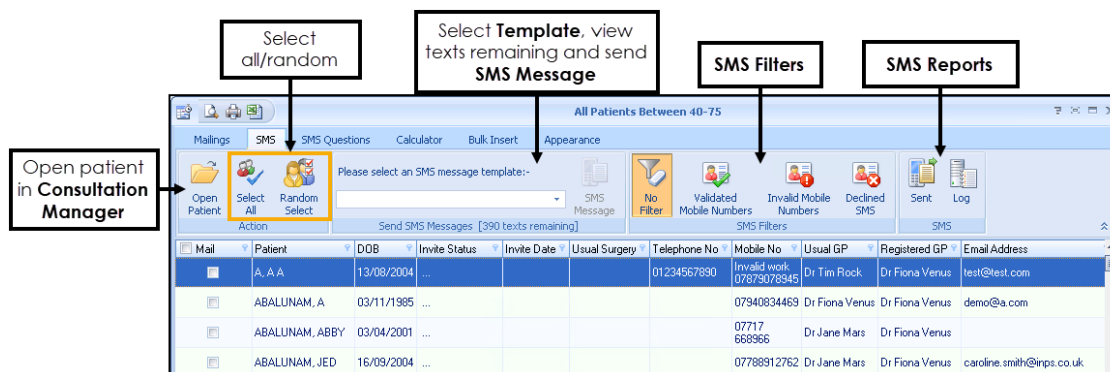


4. Select **Merge Patient Group**.

5. The **Mailings** screen displays, select **SMS**:

> **Training Tip** - For bi-directional messaging you must set up a different template and select **SMS Questions**. See Sending Questionnaires via SMS (opens the Vision+ Help Centre) for more information.

6. The **SMS** screen displays:



From here you can:

- **Open Patient** - Select to open the highlighted patient in **Consultation Manager**.

- **Select All** - Select to flag all the patients in the list with valid mobile numbers. You can then deselect as required.

- **Random Select** - Randomly selects patients in the list. You can deselect/select as required.

- **Please select an SMS messages template** - Select the predefined template required (the content of the text message).

> **Note** - You have different SMS templates available for QOF/QAIF and non-QOF/QAIF **Vision+** templates. If you cannot see one of your SMS templates, it may be attached to another practice list.

- **Send SMS Messages (nn Texts Remaining)** - Displays how many text messages are available to your practice. If you have selected more patients than the balance in your SMS account, you must either:

  - De-select patients down to the account balance, or

  - Purchase more SMS messages.

> **Note** - For practices that have an EE contract, the send SMS messages is automatically maintained for you and displays the message '*EE providing texts*'.

- **SMS Filters** - Filters the patients by:

  - **No Filter**  - Selected by default, all patients within the patient list display. Patients with no mobile number, an invalid mobile number or who have opted out of the SMS text messaging service display in the no filter list but you cannot select them.
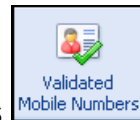
  - **Validated Mobile Numbers**  - Select to display patients with valid mobile number only.

  - **Invalid Mobile Numbers**  - Select to display patients who have an invalid first mobile number only.
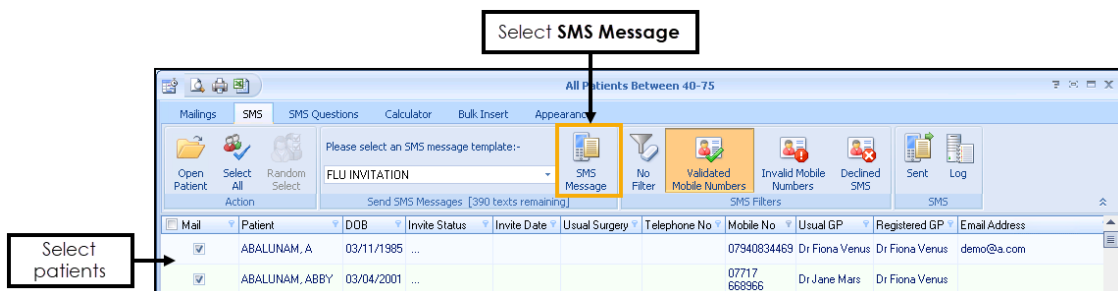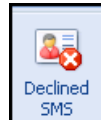
  - **Declined SMS**  - Select to display patients who have opted out of SMS text messaging.

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**Training Tip** - You can use the column headings to sort the report list, for example, if you want to display patients with mobile numbers at the top of the list, select the mobile number column heading.

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7. Place a tick against the patients you want to send a message to or select **Select All**:

8. Select **SMS Message**  to send the messages to the selected patients.

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 **Training Tip** - If you are not on an EE contract you cannot send text messages unless your SMS account is in credit. The status bar above the patient list shows how many SMS messages remain. If you have selected more patients than the balance in your account, **SMS Message** is unavailable. You must either de-select patients down to the account balance or purchase more SMS messages.

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9. Once **Vision+** receives confirmation from the SMS handling service that the message is sent, a clinical term automatically records to the patient's record:



SMS text send to patient is recorded in the patient's record once confirmation is received from the SMS handling service

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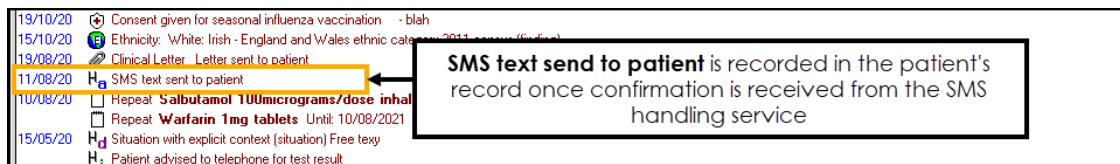
 **Important** - If the message fails to deliver, no entry is made in the patient record and the invite status reverts back to the previous status.

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Here is an example of a recall SMS text message received by a patient:
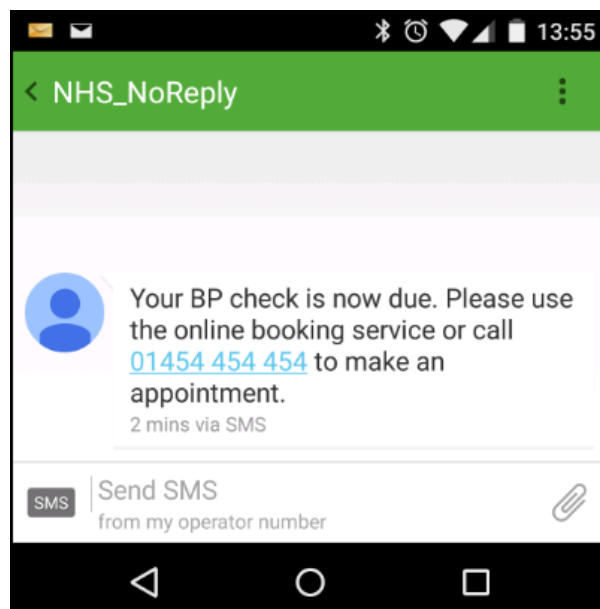
**Please note the following:**

- Where patients share the same mobile number and are within the same group for SMS invitations, only one SMS message is sent and charged for, but both patient records update with the clinical term.

- Patients who receive SMS text messages whilst abroad are not charged.

- The following SMS reports are available:
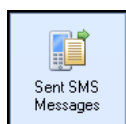
    - **Sent**  - Select to display a list of patients who have been sent a text message along with details of the message description, date sent and message status.

    - **Log**  - The **SMS Log** is for support purposes and displays sent, invalid and declined messages for all sent messages. The file name contains the date and time the SMS messages were sent.

 [Click here for more information (opens the Vision+ Help Centre).](#)