- = x

SMS Telehealth reminder

Given the increase in the use of Telehealth to connect with clients, below is a simple way to get your remote connection details to a client along with their appointmen details.

1: Create a specific Telehealth SMS Reminder template in Data Maintenance > Reminder templates, something like the following:

	♀ Contact Type	P Template Name →	Message Subject Line	Template Text	Practice Default Template	Characte
1	SMS -					0
	⊕ SMS	Telehealth		Hi [ClientFirstName], your appt with [PractitionerFullName] on [Date] [Time]. Please connect using the following Zoom link To cancel or change please reply.		159

2: Create your Telehealth meeting and copy the meeting Invitation (or URL) as in the example below. Please note that this example uses Zoom but you could use any other remote meeting software in the same way e.g. Skype or Go to Meeting Claire Lawrence's Zoom Meeting

3:00 PM - 3:30 PM | Starts in 16 minutes

Meeting ID: 115-586-989



Hide Meeting Invitation

Paula Colloty is inviting you to a scheduled Zoom meeting.

Topic: Paula Colloty's Zoom Meeting Time: Mar 17, 2020 03:00 PM Auckland, Wellington

Join Zoom Meeting https://zoom.us/j/115586989?pwd=Q3V5eWNSR0Z6U3NLMIAwM1drQm5ZZz09

Meeting ID: 115 586 989 Password: 005519

One tap mobile "115586989# US Toll

Dial by your location US Toll

Meeting ID: 115 586 989 Find your local number: https://zoom.us/u/aeosrWJ5Cq

3: In the Appointment Book

Right click on the relevant Client's appointment Select Send SMS

Select a the Telehealth SMS Template from the drop down

• If the adhoc SMS is created from an appointment, then any merge fields will updated in the template Paste in the Telehealth Meeting Link

🐓 Send SMS - Alana Gregso

Client Name	Alana Gregson 🔹						
Country Code (+)	64						
Mobile No.	▼ Voise form after sending						
Message	Hi Alana, your appt with Claire Lawrence on 18/03/2020 08:00 AM. Please connect using the following Zoom link https://zoom.us/j/115586989?						
Characters	pwd=Q3V5eWNSR0Z6U3NLMIAwM1drQm5ZZ209 To cancel or change please reply.						
210	•						
Warning - Message is more than 160 characters and will require more than 1 SMS Cr							
SMS Template	Telehealth v						
	Send <u>C</u> ancel						

· Note the character count on the bottom left. Click Send

4: A copy of any SMS sent will be in the Client Details > Documents / Phone Calls > Contacts section

🖥 Contacts (Phone/Email/SMS)											
	Add an Email		🛓 Add Phone Call or Other Message								
	Date 🔻	Туре	Duration	Owner	View/Edit						
	17/03/2020	SMS				9	è	-			
Hi Alana, your appt with Claire Lawrence on 18/03/2020 08:00 AM. Please connect using the follow Zoom link https://zoom.us/j/115586989?pwd=Q3V5eWNSR0Z6U3NLMlAwM1drQm5ZZz09 To cancel or change please reply.											