SMS Configuration 1: Create Message Types and Templates

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

- This document is linked with the User manual, Please don't delete it -

Message Types allow you to create different types of SMS for different situations. Templates can then be associated with a Message Type - it is a multi- step process:

- Step A: Create a Message Type
- Step B: Create Templates for the Message Type
- Step C: Setting the Default Template to use
- Step D: Enable the Message Type

For example, you may create:

- A SMS Message Type for surgery appointment reminders, called "Surgery Appointment Reminder - SMS"
- Associated with this Message Type, you may have two Templates:
  - A: *Surgery - Type A SMS Reminder* - an SMS with fasting instructions for Surgery A, and prompts for a reply to be sent to confirm appointment
  - B: *Surgery - Type B SMS Reminder* - an SMS with fasting instructions for Surgery B, and prompts for a reply to be sent to confirm appointment

The steps below will take you through creating a Message Type and associated templates.

Step A: Create a Message Type

To create a Message Type:

1. Click **Administration**.
2. Select **Correspondence** from the menu.
3. Select **Message Types**.
   a. The Message Types screen will display.
4. Select the **New** button at the top of the screen.
5. Complete fields using the table below as a reference.
6. Click **Create Message Type**.

Field	Description	Examples
Category	Choose to either create a: · Patient SMS Message : This is a message type that does not relate to an appointment and is for the patient. Messages of these types can be	Patient SMS Message Appointment SMS Message

	triggered to send on some system event, or they can be sent via the Patient Correspondence > New SMS screen. · Appointment SMS Message: This is a message that relates to an appointment. This could be triggered to send at the creation of an appointment (or x minutes after creation), or as a reminder a set period before the appointment occurs.	
Code	A unique name for the Message Type	Patient SMS Messages: ·New patient SMS ·Patient has not returned admission pack Appointment SMS Messages: ·New Appointment - Surgery ·Appointment Reminder
Description	A general description for the Message Type	New patient SMS: "New patient SMS message welcoming them to the organisation"

Step B: Create Templates for the Message Type

Once the Message Type has been created, you need to create one or more SMS templates that can be sent out to patients.

- Template are sets of commonly used blocks of text that is used in a SMS message to a patient.

- Templates are version controlled - the latest version will always be used by default.

- Templates have to be Approved before they become live.

To add a Template:

1. Click **Administration**.

2. Select **Correspondence** from the menu.

3. Select **Message Types** sub-menu item, the Message Types screen will display.

4. For the Message Type you just created, select **Templates** button.

5. Select **New** button.

6. Complete fields using the table below as a reference.

7. Select **Create Correspondence Template** button.

8. This will return you to the main screen, select **Approve** button to activate the changes.

Field	Description	Example
Code	Code for the template	see below
Description	Description of the SMS template	see below
Body	SMS Message text, which can include substitution variables for: ·patient first name, ·patient last name, ·appointment time, etc.	see below
Script	Via a drag and drop builder, you can specify what should happen when the patient replies to a SMS message.	see below

Example body and scripting:

```
A: Surgery - Type A SMS Reminder - an SMS with fasting instructions for Surgery A, and prompts for
a reply to be sent to confirm appointment
B: Surgery - Type B SMS Reminder - an SMS with fasting instructions for Surgery A, and prompts for
a reply to be sent to confirm appointment
```

Code	Description	Body	Script
SMS-REMINDER-SURG-A	SMS Appointment Reminder - Surgery A	Hi, this confirms your appointment on - Please Fast 12 hours before, reply Y to confirm or call 08 8203 0550	If SMS message text matches ignoring case the text "y" or If SMS message text matches ignoring case the text "yes" Do set the appointment status to Confirmed By

			SMS (and)
			Mark the SMS message as read
SMS- REMINDER- SURG-B	SMS Appointment Reminder - Surgery B	Hi, this confirms your appointment on {appointment.start_date}} - Please Fast 24 hours before, reply Y to confirm or call 08 8203 0550	If SMS message text matches ignoring case the text "y" or If SMS message text matches ignoring case the text "yes" Do set the appointment status to Confirmed By SMS (and) Mark the SMS message as read

Substitution variables can be used in the body of the message - see below for more details. More information on using the drag and drop script builder is below.

Step C: Setting the Default Template to use

After adding the Template, you must set the default template for the Message Type. If this is not done, then the SMS will not appear in the list of available SMS messages to send to a patient.

1. Click **Administration**.
2. Select **Correspondence** from the menu.
3. Select **Message Types**.
   a. The Message Types screen will display.
4. For the Message Type you just created, select **Edit** button.
   a. The Edit Message type screen will display.
5. in the field **Default Template**, using the drop down, select the Template you just added from the list.

Step D: Enable the Message Type

Once you have set the default Template, you need to Enable the Message Type. This will make it appear for users to select as a Message Type.

1. Click **Administration**.
2. Select **Correspondence** from the menu.
3. Select **Message Types**.
   a. The Message Types screen will display.
4. For the Message Type you just created, select the **Enable** button.

a. The Message Type is now enabled and ready for use.

Updating a Template

If you wish to update a SMS message that is being sent to patients:

1. Click **Administration**.

2. Select **Correspondence** from the menu.

3. Click **Message Types**.

4. For the Message Type you just created, click **Templates**.

5. Click **Edit**.

6. Make any changes.

7. Click **Update Correspondence Template**.

8. Click **Approve** - this will make it live - Without approving the new version of the message will not be used.

Substitution Variables

When setting up a template, you can use Substitution variables to insert fields from the patient record. Substitution variables are denoted by double curly brackets:

Dealing with Replies to SMS messages using Blockly

When setting up a template, you can specify if any action should be taken upon receiving a reply to a SMS message. To do this, you use the drag and drop script builder called "*Blockly*".

We don't cover writing the *Blockly* scripts in this guide (although some sample logic in the script box for the example above).

We suggest you complete the "Frozen tutorial" at http://studio.code.org/s/frozen/reset or the "Hour of code" session http://studio.code.org/s/hourofcode/reset

This takes roughly an hour but will give you the basics of creating Blockly scripts.