Create Templates for the Message Type

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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.

Create a new 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.

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

8. Select **Create Correspondence Template** button.
9. This will return you to the main screen, select **Approve** button to activate the changes.

Example body and scripting:

Hi {patient.given_name}, we are looking forward to seeing you tomorrow at {appointment.start_time} at . Please call 0123456789 if you CANNOT attend.

Code	Description	Body	Script
			If: SMS message text matches ignoring case the text "Y" or if SMS message

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 0882030550	text matches ignoring case 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 0882030550	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.