



# JADE

## Bp Premier Bp Comms User Guide

---



## Legal notices

---

This document is classified as commercial-in-confidence. Unauthorised distribution of this information may constitute a breach of our Code of Conduct, and may infringe our intellectual property rights. This information is collected and managed in accordance with our Privacy Policy, available on our [website](#).

© Copyright 2019

Best Practice Software believe the information in this User Manual is accurate as of its publication date. The information is subject to change without notice.

You may only copy, change, or use the User Manual as required for your own use as permitted under the End User Licence Agreement or the Order Form. User Manuals are intended for reference only and do not preclude the need for training.

Best Practice Software Pty Ltd  
PO Box 1911  
Bundaberg Queensland Australia 4670  
[www.bpssoftware.net](http://www.bpssoftware.net)

Best Practice Software New Zealand Ltd  
PO Box 1459  
Hamilton New Zealand 3240

The information contained in the User Manual is intended to be a guide only. BPS does not provide any warranty in relation to its currency, accuracy or completeness and, unless otherwise required by law, will not accept any liability in relation to any loss or damage suffered by you or any third party in reliance on the information contained in the User Manual.

Last updated: 18 November 2019

Intended for usage with Bp Premier version Jade SP1 and later. Some features in this User Manual may be available only in versions later than Jade.

---

### Copyright Statement

This material is classified as commercial-in-confidence. Unauthorised distribution of this information may constitute a breach of our Code of Conduct, and may infringe our intellectual property rights. This information is collected and managed in accordance with our [Privacy Policy](#), available on our website. © Copyright 2019

## Bp Comms User Guide

---

Indigo Service Pack 1 introduced Bp Comms via SMS, a new set of tools for practice-patient communications. Bp Premier Jade SP1 extends Bp Comms functionality by adding integration with the Best Health App.

Once configured, Bp Comms can be sent from many areas inside Bp Premier for a variety of reasons including:

- Confirming the patient is attending an appointment.
- Reminding the patient to make an appointment.
- Sending the patient a leaflet regarding their prescription medication.

## Table of Contents

<b>Bp Premier Bp Comms User Guide</b>	<b>1</b>
<b>Bp Comms User Guide</b>	<b>4</b>
Table of Contents .....	5
<b>Bp Comms Practice Setup</b>	<b>8</b>
Set up Bp Comms for SMS .....	8
Obtain SMS user name and initial Bp Comms credit .....	8
Configure Bp Comms for SMS .....	8
Set up SMS .....	8
Set up Bp Comms for Best Health App .....	11
Can I onboard my practice to the Best Health App yet? .....	11
Internet Access Required .....	11
Set user permission .....	11
Onboard Your Bp Premier Location .....	12
Bluetooth beacon .....	15
Preferred Bp Comms sending method .....	16
Bp Comms Consent Configuration .....	18
Bp Comms User Permissions .....	19
Bp Comms Credit .....	21
How Much Bp Comms Credit Do I Have? .....	21
Top up Bp Comms Credit .....	21
Bp Comms Credit Warnings and Messages .....	22
Bp Comms Warning Prompt .....	22
Bp Comms Warning Message .....	23
Bp Comms templates .....	25
How many characters am I allowed? .....	25
Should my template indicate if a reply is required? .....	25
Can I create new template types? .....	26
What data is available to insert? .....	26
Create a template .....	26
Set up reply keywords .....	29
Set up Bp Messaging Service .....	32
Enable firewall access .....	32

Warn a user when the Messaging Service stops .....	33
Configure the Message Service Machine Name .....	33
<b>Bp Comms Patient Setup</b>	<b>36</b>
Bp Comms Consent .....	36
How does Bp Premier handle consent when I run a mail merge? .....	36
Record patient consent and enrol in Bp Comms .....	37
Set consent .....	38
Enrol in SMS .....	39
Enrol in Best Health App .....	41
<b>Sending Bp Comms</b>	<b>43</b>
From where can I send Best Health App messages? .....	43
Bp Comms from the patient record .....	45
How do I see contact notes in the patient record? .....	45
What happens to notes when I move a document? .....	45
How do permissions affect contact notes? .....	45
Send a Bp Comms message to a patient .....	46
Patient consent .....	46
Send Bp Comms appointment reminders .....	48
How do I check for replies? .....	48
Send Bp Comms message reminders in bulk .....	48
Duplicate Reminders .....	51
Send a single appointment reminder .....	52
Appointment Notices .....	53
Check appointment reminder replies .....	54
Action appointments .....	55
Set up an appointment reminder schedule .....	56
Send clinical communications .....	59
Send a single message .....	60
Send bulk clinical communications with a mail merge .....	61
I don't want to use the default communication methods .....	66

Send health awareness communications .....	68
What templates can I use for health awareness communications? .....	68
Patient opt-out .....	68
Select patients for communications .....	70
Send communications .....	70
I don't want to use the default communication methods .....	74
Send health information to a patient's app .....	76
Send Health Summary .....	76
Send MIMS Consumer Medicines Information .....	77
Send patient education leaflets .....	77
Send clinical reminders .....	79
Select patients for reminders .....	79
Send reminders .....	82
Follow up sent reminders .....	86
I don't want to use the default reminder methods .....	86
Send reminders to print, label, or file .....	88
Follow up sent reminders .....	89
Review the contact history .....	90
Add a contact note .....	91
Resend reminders .....	92
Action Reminders .....	92
Book an appointment .....	93

## Bp Comms Practice Setup

---

Bp Premier needs to be configured with your practice Bp Comms accounts, Bp Comms credit and preferred sending method before sending SMS or Best Health App messages. Follow the instructions below to set up your Bp Comms practice settings.

### Set up Bp Comms for SMS

This article explains how to enable Bp Comms for SMS messaging only. To set up Bp Comms and enrol patients for both SMS and Best Health App, review [Bp Comms Consent on page 36](#)

#### Obtain SMS user name and initial Bp Comms credit

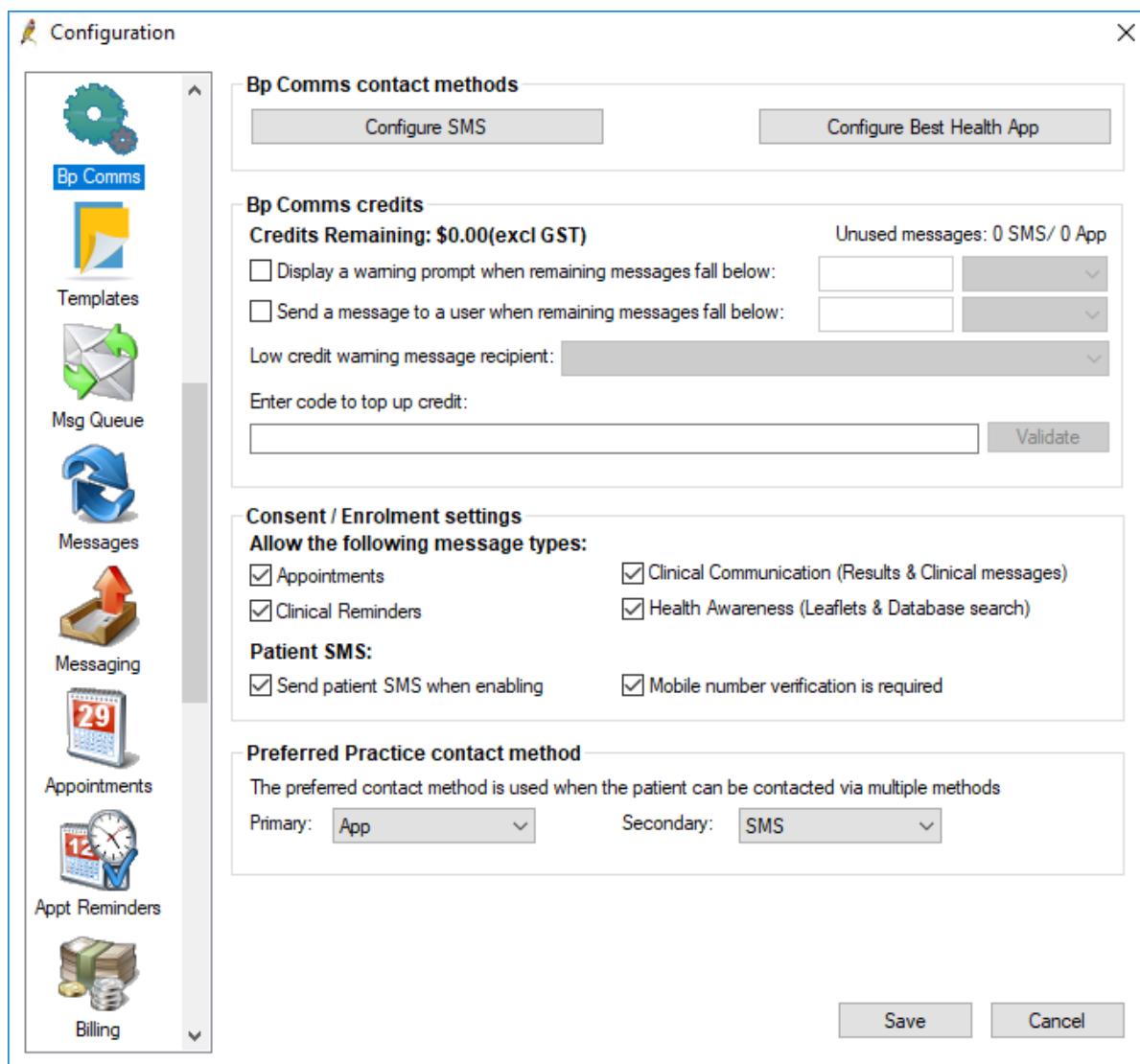
You may already have performed this step as part of your initial setup of Bp Premier.

Contact Best Practice Software to register. Best Practice Software will ask you to complete and return a form. After processing the registration form, Best Practice Software will supply you with an SMS user name to enter during Bp Comms setup and your initial code to top up credit.

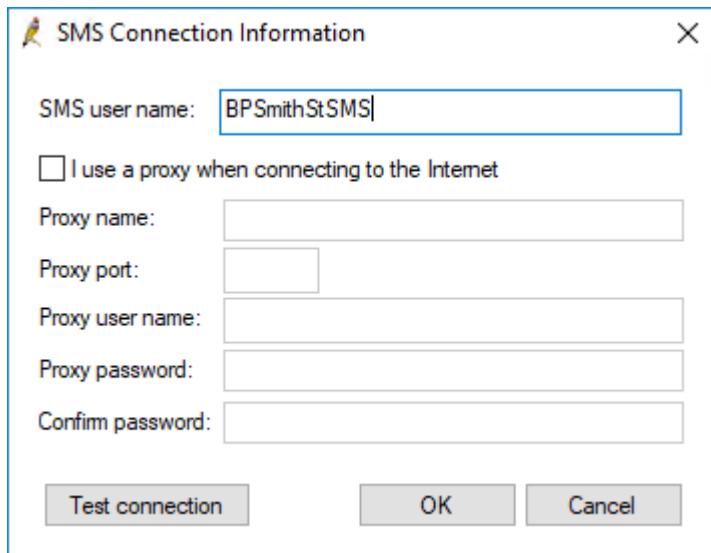
#### Configure Bp Comms for SMS

##### **Set up SMS**

1. Select **Setup > Configuration** from the main Bp Premier screen. Select the **Bp Comms** tab.



2. Click **Configure SMS** at the top to open the **SMS Connection Information** screen.



3. If your network uses a proxy server to access the internet, tick the **I use a proxy when connecting to the Internet** checkbox, and enter the **Proxy name**, **Proxy port**, **Proxy username**, and **Proxy password**. If you are unsure whether your practice uses a proxy, your IT support can assist.
4. Enter the **SMS user name** you were assigned.
5. Click **Test Connection** to test the SMS connection. If the connection is successful, click **OK** to return to the **Bp Comms** screen.
6. Click **Save** to save your Bp Comms settings.

You can now record consent and enrol patients to receive SMS messages.

## Set up Bp Comms for Best Health App

You can enable Best Health App integration for multiple practice locations. Each location is treated as a separate entity and you must enable each one individually.

When you open the **Best Health Settings** setup utility from Bp Premier Configuration, the utility will retrieve details for all the practice locations you have defined in **Setup > Practice Details**. You cannot add or remove locations from **Best Health Settings** setup, but you can update some practice details.

A user will need the **Configuration** and **Best Health Settings** permissions set to 'Add/Edit/Delete' to update Best Health App settings.

### Can I onboard my practice to the Best Health App yet?

The Best Health App is available for general release. **Your practice must upgrade to Jade SP1 and install the October 2019 data update before onboarding to use the Best Health App.**

### Internet Access Required

Your practice requires internet access to use Best Health App integration. The following URLs should be allowed for BHA outbound/inbound traffic.

- \*ap-southeast-2.amazonaws.com (notice "\*", so that all URLs ending with "ap-southeast-2.amazonaws.com" are whitelisted)
- prod.bpbesthealthapi.net
- cognito-idp.ap-southeast-2.amazonaws.com
- cognito-identity.ap-southeast-2.amazonaws.com
- s3-ap-southeast-2.amazonaws.com
- \*.bpbesthealthapi.net (notice "\*", so that all URLs ending with "bpbesthealthapi.net" are whitelisted)

If applicable, whitelist the above URLs in your antivirus and firewalls to ensure that your server and all machines that will use the Best Health App can access the above URLs.

### Set user permission

A user will need the user permission **Best Health Settings** set to 'Add/Edit/Delete' to make changes in the Best Health App Configuration window.

1. Log in to Bp Premier as an administrator-level user who can grant permissions.
2. From the main menu, select **Setup > Users**. Select the user to grant permissions to and click **Edit**.
3. Click **Set Permissions**.
4. Scroll down in the **Permissions** window and set **Best Health Settings** set to 'Add/Edit/Delete'.

 Permissions

User:	Dr Craig Aram	Inherit
Section	Permission	
Patient education material	Add/Edit/Delete	
Download data	Allowed	
HealthLink	Allow access	
Bulk Document Import	Allow access	
Double book appointments	Allowed	
Override 'On the day' appointments	Allowed	
Waiting room	Allow access	
Strata SSO	Deny access	
Appointments	Add/Edit/Delete	
Accounts	Add/Edit/Delete	
Payments	Add/Edit/Delete	
Direct Billing	Add/Edit/Delete	
Send Bp Comms Messages	Allowed	
Reports	Allow access	
Setup sessions	Add/Edit/Delete	
Setup fees	Add/Edit/Delete	
Banking	Allow access	
Cheque details	Allow access	
Resend batches	Deny access	
Best Health Settings	Add/Edit/Delete	

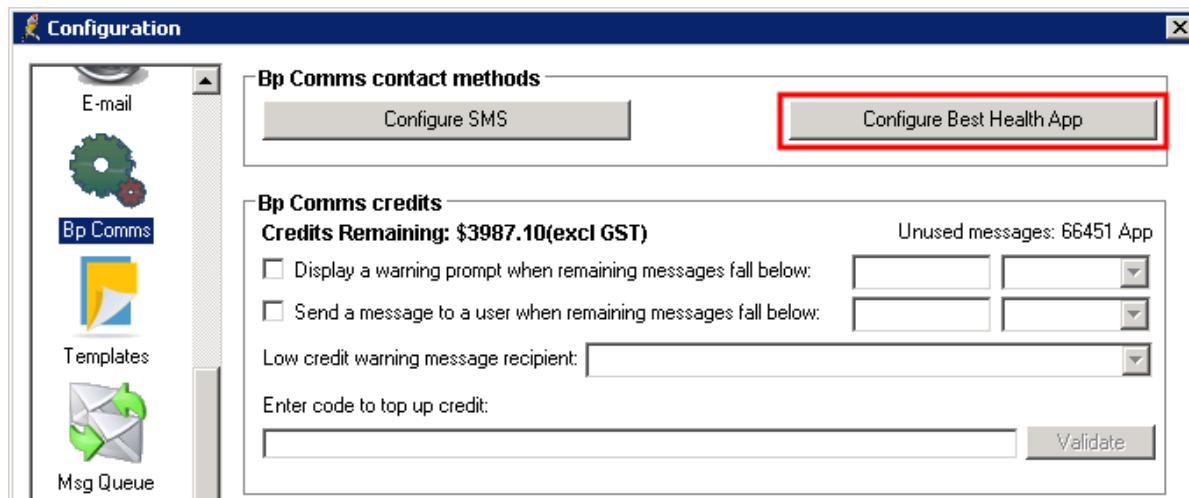
**Save** **Cancel**

5. Click **Save** and **Save** again to return to the **Users** window.

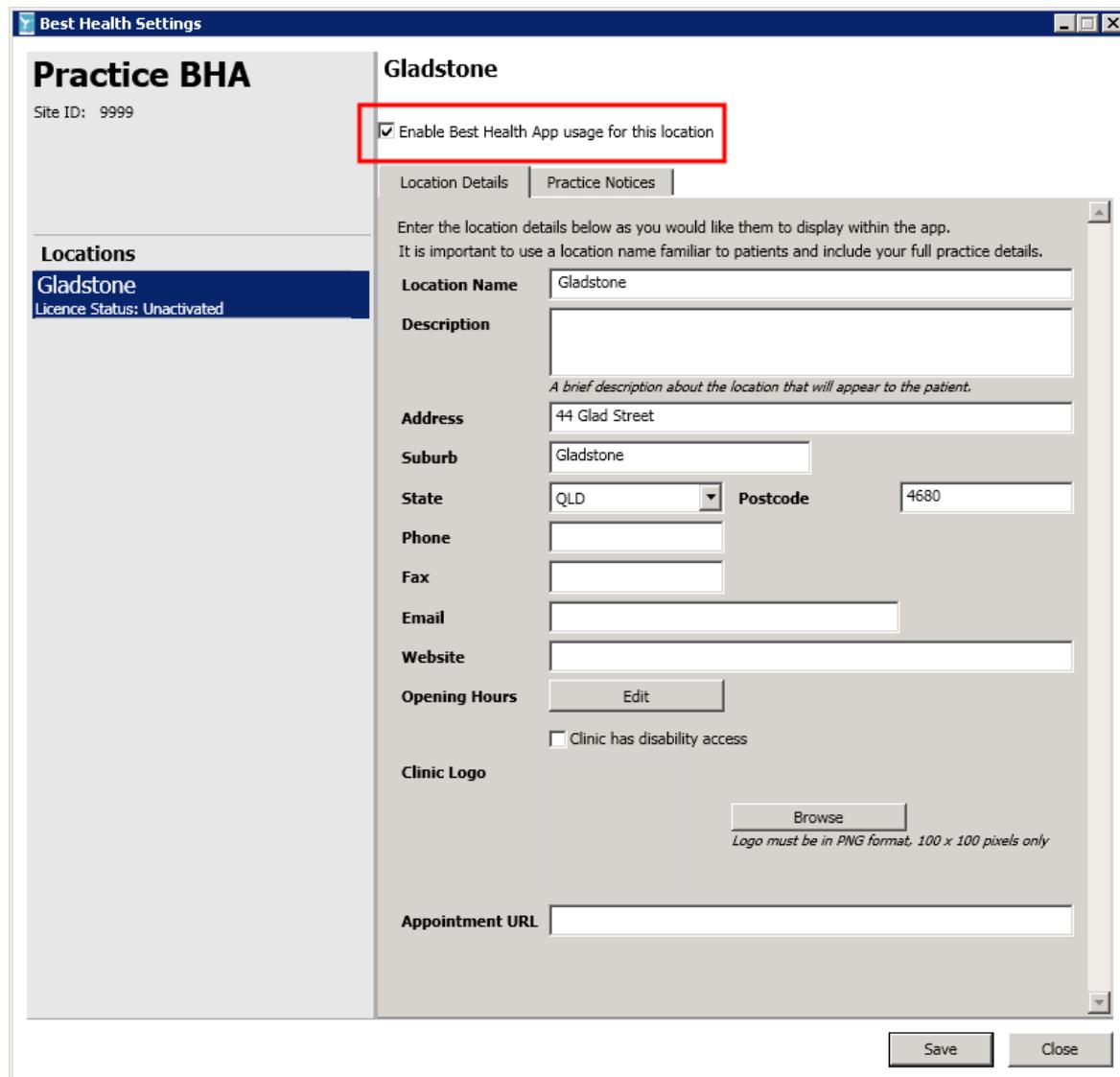
## Onboard Your Bp Premier Location

You must onboard every location where you want to use the Best Health App functionality. Before onboarding your location, check that the location details are correct in Bp Premier by navigating to **Setup > Practice** details from the main screen. When you are sure the location details are correct, you can onboard on your location for Best Health App:

1. Log in to Bp Premier as a user with access to Configuration.
2. Select **Setup > Configuration** from the main menu. Select the **Bp Comms** tab and click **Configure Best Health App**.



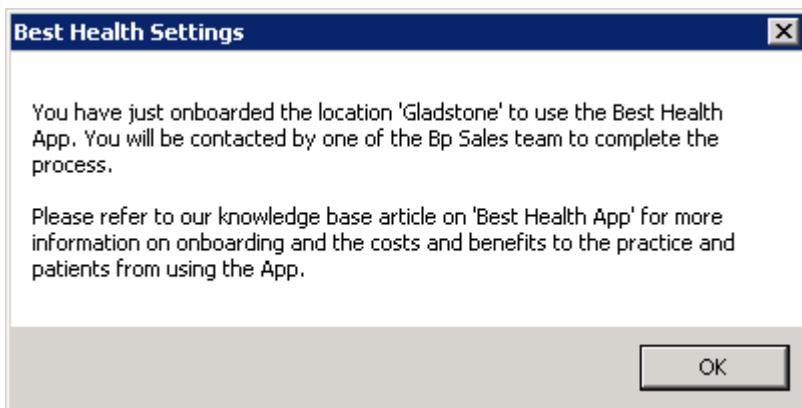
3. Select a user and enter the user's password at the login screen and click **Login**. The **Best Health Settings** utility will appear. In the example below, the location 'Gladstone' has already been defined in **Setup > Practice Details** and the details for this location have been retrieved.



4. Tick **Enable Best Health App usage for this location**. The tabs in the window will be enabled for editing.
5. You can update the practice details retrieved for this window. However, the details displayed here are for the purposes of app onboarding only, and will **not** update the details stored in **Setup > Practice Details**. The details that are entered into this screen will be visible to the users of the Best Health App who are enrolled at your location.
6. You can set the location's **Opening Hours**, **website** if the practice has a website, and add a **clinic logo** to be displayed on the app.
7. If the practice location uses a third-party application to book appointments, enter the **Appointment URL** used for third-party appointment booking.

This link will be available from the appointment section of the patient's app. Clicking the link will open the URL in the mobile device's browser.

8. Click **Save**. Bp Premier will submit the request to Best Practice Software for processing. This may take a minute.



## Bluetooth beacon

Your Best Health App Welcome Pack contains one or more Bluetooth beacons that are configured to be used with your location. The beacon allows patients to check in to their appointment within 30 minutes of the appointment start time if the app has detected the beacon is nearby. Once the appointment start time has elapsed, (60 seconds past the start time), check-in via the app is no longer available.

The beacon needs only to be plugged into a USB power source. The average range for the beacon is 20 meters. If your practice is large or has multiple reception areas, you may need more than one beacon. Best Practice Software provides one free beacon in the Welcome Pack. Additional and replacement beacons are provided at an extra cost.

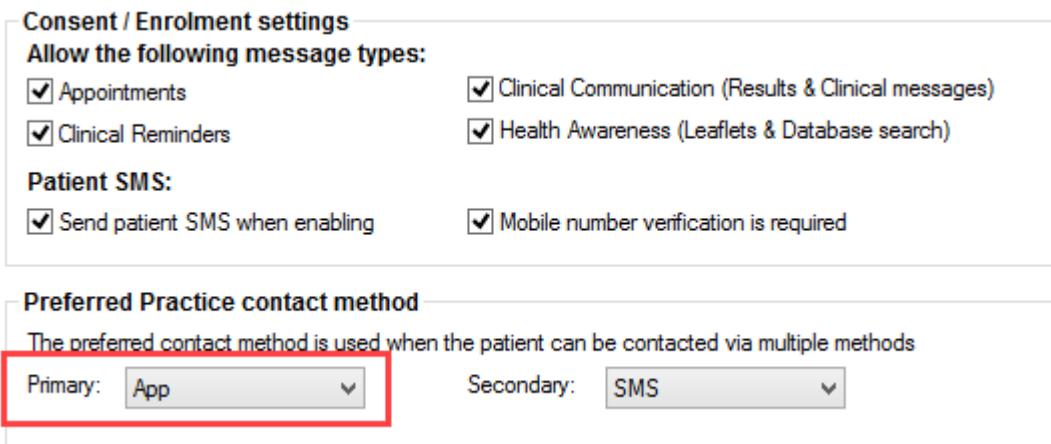


The placement of the Best Health App beacon is significant, because walls, doors, and other obstructions can impact the beacon's signal quality. Materials like wood, synthetic materials, and glass possess low interference potential. However, marble, bricks, concrete and metal have relatively high interference potential. Place the beacon away from walls or any obstruction made of material with high-interference potential.

## Preferred Bp Comms sending method

The **Preferred Practice contact method** setting is used when sending Bp Comms via mail merge such as **Clinical Reminders** or **Follow up Inbox**. In the Jade release, you can choose **SMS** or **App** as your preferred method of sending Bp Comms. Contact methods become available for selection as a preferred contact method once they have been enabled. If you do not have SMS or App configured then you cannot choose it as your preferred method.

1. Select **Setup > Configuration** from the main menu.
2. Select the **Bp Comms** tab.
3. In the **Preferred Practice contact method** section, select 'App' or 'SMS' from the **Primary** dropdown menu.



**Consent / Enrolment settings**

**Allow the following message types:**

<input checked="" type="checkbox"/> Appointments	<input checked="" type="checkbox"/> Clinical Communication (Results & Clinical messages)
<input checked="" type="checkbox"/> Clinical Reminders	<input checked="" type="checkbox"/> Health Awareness (Leaflets & Database search)

**Patient SMS:**

<input checked="" type="checkbox"/> Send patient SMS when enabling	<input checked="" type="checkbox"/> Mobile number verification is required
--	--

**Preferred Practice contact method**

The preferred contact method is used when the patient can be contacted via multiple methods

Primary: <input type="button" value="App"/>	Secondary: <input type="button" value="SMS"/>
---	---

4. If you have more than one Bp Comms method enabled, select it from the **Secondary** dropdown menu.
5. Click **Save**.

When you run a mail merge from a Bp Premier function, the message will be sent by the default method selected here, if the patient has been enabled or enrolled to use that method. If the patient is not setup to use either App or SMS then the communication will be sent via Letter.

When you send a single message for a patient and they are enabled for both SMS and Best Health App messages, then the default sending method is set using the **Preferred Practice contact method** setting. You can still select the alternate contact method if desired.

This below table gives examples of how patient communication will be sent given various setups in **Preferred Practice contact method**. In the below scenarios it is assumed that the patient has consented to receive all types of communication via Bp Comms.

Preferred Practice Contact Method	Patient Enrolled/Enabled	Default method
Primary: App, Secondary: SMS	App, SMS	App
Primary: App, Secondary: SMS	SMS	SMS
Primary: SMS, Secondary: App	App, SMS	SMS
Primary: SMS, Secondary: App	App	App
Primary: SMS, Secondary: App	None	Letter

## Bp Comms Consent Configuration

With Bp Comms, you can send a variety of reminders and message types to your patients. Your practice must decide what type of messages they want to send to patients and set this information in Bp Premier configuration.

1. Navigate to **Setup > Configuration > Bp Comms**.
2. In the **Consent / Enrolment settings** sections, tick which Bp Comms message types your practice intends to send to patients.
  - Appointments — Reminders to attend an appointment that has already been booked
  - Clinical Reminders — Reminders that a patient needs to contact the practice to arrange an appointment for a regular clinical checkup
  - Clinical communications — Other clinical related contact such as follow-up of results or messages from the patient clinical record.
  - Health Awareness — Clinical communications from the Utilities > **Search** screen, such as important changes to your practice.
3. Tick the **Patient SMS** options to determine the level of validation applied when patients enrol in Bp Comms:
  - **Send patient SMS when enabling** — the patient will receive an enrolment SMS message, but no action is required.
  - **Mobile number verification is required** — a validation code is sent to the patient's mobile phone, which must be communicated back to the practice within an hour and validated by a Bp Premier user to confirm the phone number.

If both options are unticked, the patient receives no enrolment message, and no patient action is required to validate the phone number.

---

**IMPORTANT** Best Practice Software recommend ticking **Mobile number verification is required** to ensure the correct mobile number is recorded and to stop the chance of messages being sent to the wrong number.

---

### Consent / Enrolment settings

#### Allow the following message types:

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Appointments       | <input checked="" type="checkbox"/> Clinical Communication (Results & Clinical messages) |
| <input checked="" type="checkbox"/> Clinical Reminders | <input checked="" type="checkbox"/> Health Awareness (Leaflets & Database search)        |

#### Patient SMS:

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Send patient SMS when enabling | <input checked="" type="checkbox"/> Mobile number verification is required |
|--|--|

4. Click **Save**.

## Bp Comms User Permissions

The user permission **Send Bp Comms Messages** governs all electronic communication methods sent from anywhere in Bp Premier.

1. Select **Setup > Users** from the main screen of Bp Premier.
2. Select the user you want to enable permissions for and click **Edit**. The **Edit user details** screen will appear.
3. Click **Set Permissions**. Scroll down to the bottom of the permissions list and look for the permission **Send Bp Comms Messages**.

 **Permissions**

User:	Dr Frederick Findacure	Inherit
Section	Permission	
Script lookup	Allow access	
Download data	Allowed	
HealthLink	Allow access	
Bulk Document Import	Allow access	
Double book appointments	Allowed	
Override 'On the day' appointments	Allowed	
Waiting room	Allow access	
Strata SSO	Deny access	
Appointments	Add/Edit/Delete	
Accounts	Add/Edit/Delete	
Payments	Add/Edit/Delete	
Direct Billing	Add/Edit/Delete	
Send Bp Comms Messages	Allowed	<input checked="" type="checkbox"/>
Reports	Allow access	
Setup sessions	Add/Edit/Delete	
Setup fees	Add/Edit/Delete	
Banking	Add/Edit/Delete	
Cheque details	Allow access	
Resend batches	Allow access	
Best Health Settings	No access	

**Save** **Cancel**

4. Change the permission status to **Allowed**, and click **Save**.
5. Repeat steps 2–4 for all users who need to send Bp Comms messages.

A user with 'Allowed' set for the **Send Bp Comms permission** can:

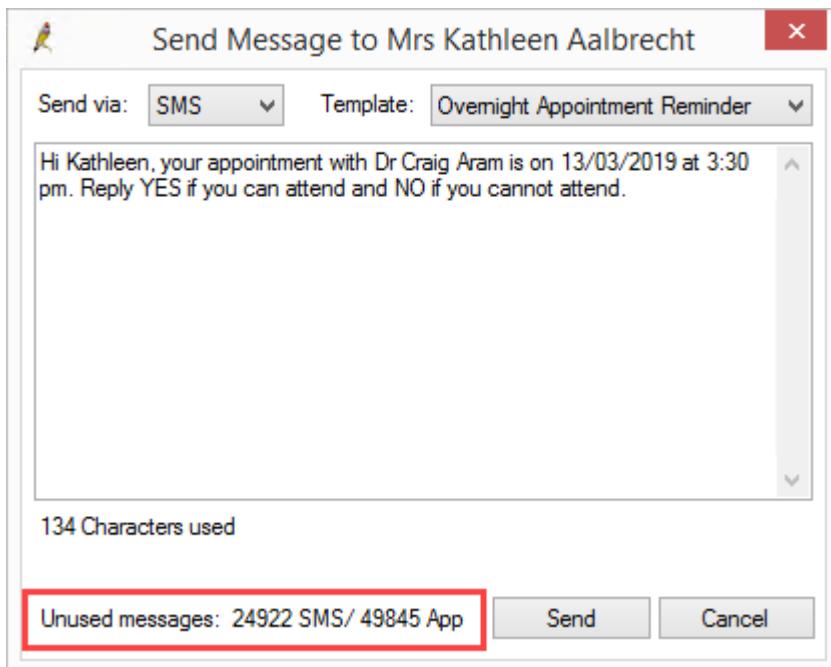
- Send appointment reminders
- Send bulk messages from a mail merge
- Send messages via the Inbox and Follow up inbox
- Send via the Bp Comms menu in the patient record
- Resend messages from contact notes

## Bp Comms Credit

A Bp Comms credit code contains a dollar amount that can be used for sending both Best Health App and SMS messages. Contact Best Practice Software Sales to obtain a Bp Comms credit code. You may have also received Bp Comms credit as part of your Best Health App Welcome Pack.

### How Much Bp Comms Credit Do I Have?

The balance of your Bp Comms credit is often displayed when you send a Bp Comms message. This information is located at the bottom of the screen and displays how many SMS or App messages you could send using your remaining credit. You can also view your available credit by navigating to **Setup > Configuration > Bp Comms**.



### Top up Bp Comms Credit

If a user has permission to access Configuration, he or she can top up the Bp Comms credit at any time.

1. Contact Best Practice Software Sales to obtain a Bp Comms credit code.
2. Go to **Setup > Configuration** and select the **Bp Comms** tab.
3. Under **Bp Comms credits**, enter the code you received into **Enter code to top up credit** and click **Validate**. Bp Premier will update the Credits Remaining and Unused messages values.

**Bp Comms credits**

Credits Remaining: \$2990.76(excl GST)	Unused messages: 24923 SMS/ 49846 App	
<input checked="" type="checkbox"/> Display a warning prompt when remaining messages fall below:	1000	App
<input checked="" type="checkbox"/> Send a message to a user when remaining messages fall below:	1000	App
Low credit warning message recipient:	Dr Craig Aram	
Enter code to top up credit:	<input type="text" value="101"/> <input type="button" value="Validate"/>	

- Click **Validate**. The **Credits Remaining** value should be increased by the top-up amount. It will also indicate how many SMS or Best Health App messages you can send with your remaining credits.

## Bp Comms Credit Warnings and Messages

Configurable warning prompts and messages are available to ensure no interruptions occur to Bp Comms functionality as a result of lack of credit.

### Bp Comms Warning Prompt

This prompt can be set up to remind you to contact Best Practice Software Sales to purchase additional credit. If the available Bp Comms message credit falls below the configured limit a single **warning prompt** is displayed whenever you enter a screen that can send a Bp Comms message. To configure the Bp Comms warning prompt:

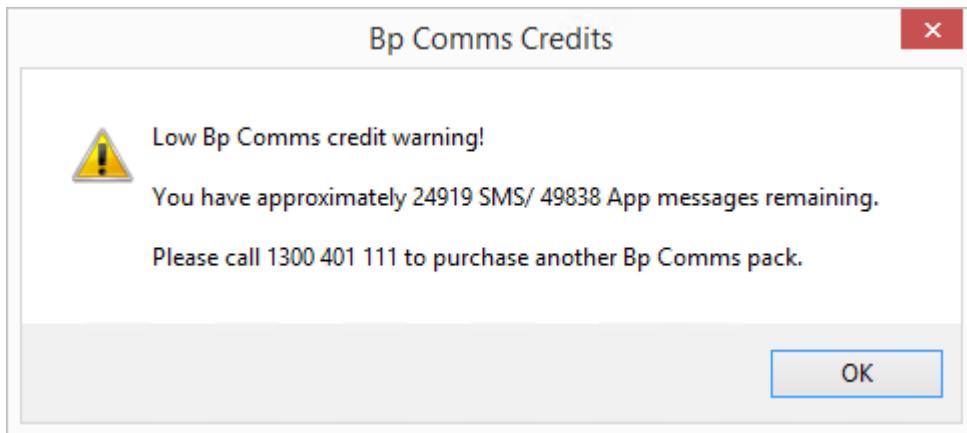
- Navigate to **Setup > Configuration** and select the **Bp Comms** tab.
- Check the **Display a warning prompt when remaining messages fall below** checkbox.

**Bp Comms credits**

Credits Remaining: \$2990.76(excl GST)	Unused messages: 24923 SMS/ 49846 App	
<input checked="" type="checkbox"/> Display a warning prompt when remaining messages fall below:	1000	App
<input checked="" type="checkbox"/> Send a message to a user when remaining messages fall below:	1000	App
Low credit warning message recipient:	Dr Craig Aram	
Enter code to top up credit:	<input type="text" value="101"/> <input type="button" value="Validate"/>	

- Enter how many messages you want remaining before you start receiving the warning prompt.
- Select either **App** or **SMS** from the drop down list. Best Practice Software recommends selecting the BpComms method you use the most.
- Click **Save**.

A prompt similar to below will display when your Bp Comms credit falls below the configured limit.



## Bp Comms Warning Message

The Bp Comms warning message will send an internal Bp Premier message to the selected user when the available message credit falls below the configured limit. This warning method is useful when automated Bp Comms are configured as there is no window or screen to display a warning prompt. To configure the Bp Comms warning message:

1. Navigate to **Setup > Configuration** and select the **Bp Comms** tab.
2. Check the **Send a message to a user when remaining messages fall below** checkbox.

Bp Comms credits	
Credits Remaining: \$2990.76(excl GST)	Unused messages: 24923 SMS/ 49846 App
<input checked="" type="checkbox"/> Display a warning prompt when remaining messages fall below:	1000 <input type="button" value="App"/>
<input checked="" type="checkbox"/> Send a message to a user when remaining messages fall below:	1000 <input type="button" value="App"/>
Low credit warning message recipient: Dr Craig Aram	
Enter code to top up credit:	
101	<input type="button" value="Validate"/>

3. Enter how many messages you want remaining before you start receiving the warning message. Best Practice Software recommend that this value be set *higher* than the warning prompt, so that the nominated user has time to order a new credit key before other users are warned about low credit.
4. Select either **App** or **SMS** from the drop down list. Best Practice Software recommends selecting the BpComms method you use the most.
5. Select the user who you want to receive the message in the **Low credit warning message recipient** drop down list.
6. Click **Save**.

A message similar to below will be received when your Bp Comms credit falls below the configured limit.

Messages

Read	Date	From	Subject	Patient
No	13/03/2018 3:33 pm		Low Bp Comms credit warning	

Low Bp Comms credit warning. There are only '49836' messages remaining. Please call 1300 401 111 to purchase more credit.

Show sent messages     Include read messages since  

[Mark as read](#)  
[New](#)  
[Reply](#)  
[Forward](#)  
[Print](#)  
[Delete](#)  
[Add to To do list](#)  
[Refresh](#)  
[Open patient](#)  
[Close](#)

## Bp Comms templates

A Bp Comms message template is a combination of fixed text and dynamic fields in which data like patient names, doctor names, and appointment times are inserted from the database. Bp Premier supplies several standard templates that you can modify, or create your own.

### How many characters am I allowed?

When creating a template or sending a message, Bp Comms allows up to 500 characters. If a template exceeds 160 characters, Bp Premier will warn that the message may require multiple credits when sent by SMS.

 Edit Bp Comms Template X

Name:  Type:

Hi <PtFirstName>. We at Best Health Practice are pleased to announce your appointment with <DrName> is on <ApptDate> at <ApptTime>. Please confirm your attendance - Yes or No.

<<

<PtSurname>  
<PtFirstName>  
<PtPreferredName>  
<PtFullName>  
<ApptTime>  
<ApptTime24>  
<ApptDate>  
<DrName>  
<ApptType>  
<ApptLocation>  
<DayOfWeek>

Approx characters: 176 Multiple SMS credits may be required to send this message

Set as default template for this template type  Template text can be edited before sending

Appointment template expects a reply

Remember to factor in the potential length of your field data when the message is created, for example, if a patient or doctor's name or the appointment type has many characters.

### Should my template indicate if a reply is required?

Bp Premier only expects and actions replies from messages of type 'Appointment'. Patient replies to any other Bp Comms message types (such as clinical reminders) are not actioned or stored.

The supplied message templates for all types except 'Appointment' have 'do not reply' appended to the body. If you create new message templates, Best Practice Software recommend including similar short text to indicate that a reply is not required.

If you are creating templates for Health Awareness communications from the database search utility, Best Practice Software recommend including 'opt out' text in your template text.

Replies are viewable from the **Contact notes** window.

You can set the reply phrases that Bp Premier will accept as valid replies. See [Set up reply keywords on page 29](#) for more information.

### Can I create new template types?

No, you can only edit the supplied templates or create new templates. New template types may be added in future versions of Bp Premier. You can't modify the Type of a supplied template.

The following table lists the template types and where they are used in Bp Premier:

Template Type	Used
Appointment	When sending SMS or BHA appointment reminders manually from the appointment book or automatically from the Bp Service.
Clinical Reminder	When sending SMS or BHA clinical reminders.
MIMS Leaflet	When sending a MIMS leaflet to BHA.
Patient Education Material	When sending a patient education material to BHA.
Patient Record	When sending SMS or BHA messages from the patient record via <b>Bp Comms &gt; Send Patient Message</b> .
Result	When sending a message from the <b>Inbox</b> or <b>Follow up Inbox</b> .
Search Utility	When sending a message from the <b>Database search</b> window.

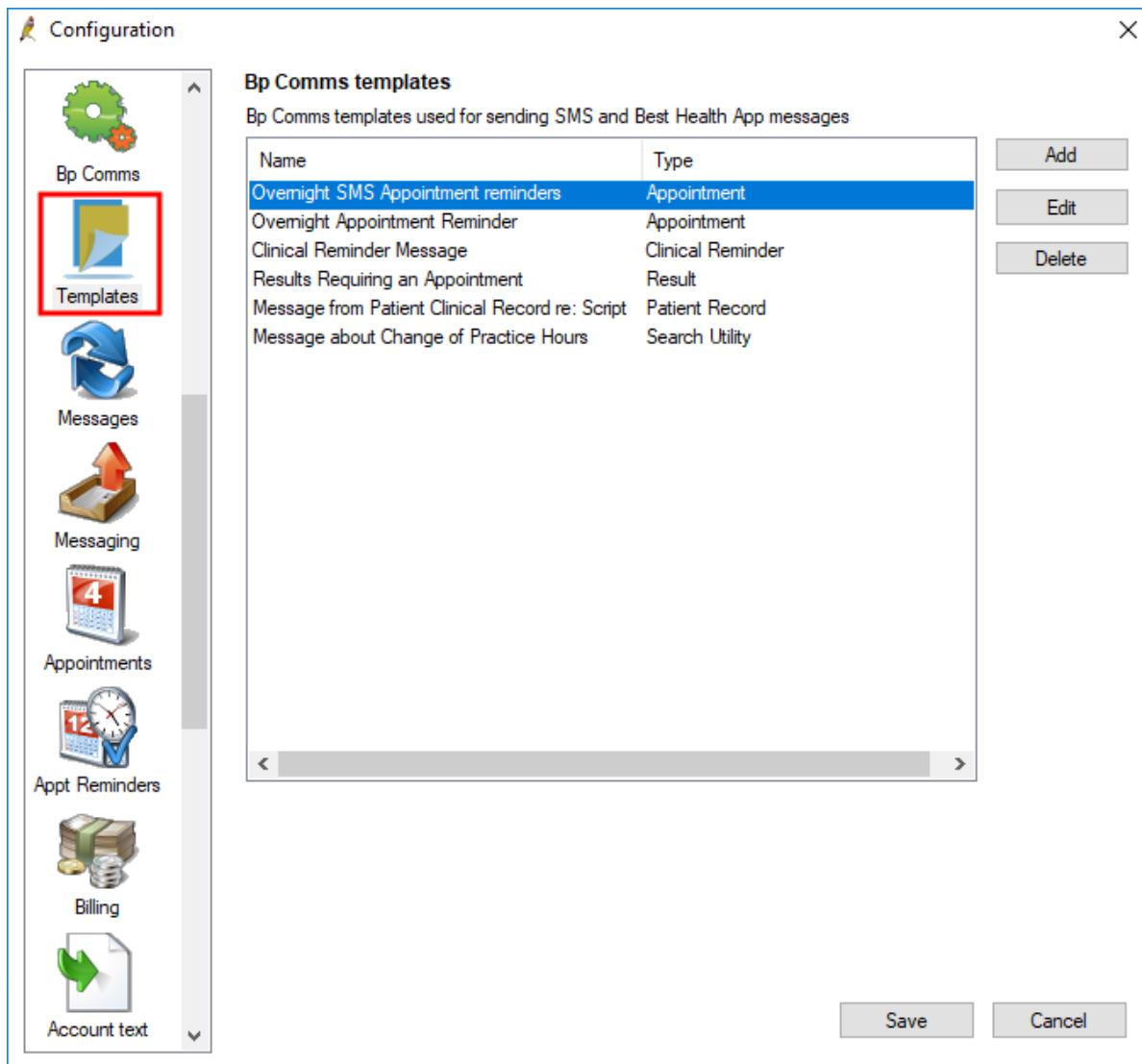
### What data is available to insert?

The available fields on the right hand side depend on the selected Type. The field name indicates the type of information: for example, <PtSurname> indicates patient surname, <ApptLocation> indicates the practice location where the appointment is.

### Create a template

You can create as many message templates as you need.

1. Select **Setup > Configuration** from the main Bp Premier screen. Select the **Templates** icon.



2. Click **Add** on the right. The **Add Bp Comms Template** screen will appear.

 Add Bp Comms Template X

Name:	<input type="text" value="Cervical Screen Results"/>	Type:	<input style="width: 100px;" type="text" value="Result"/>
<p>Hello &lt;PtFullName&gt;. Your &lt;TestName&gt; results have returned. Please contact Best Health Practice to arrange an appt. Do not reply to this message</p>		<div style="border: 1px solid #ccc; padding: 5px; height: 150px; overflow-y: scroll;"> &lt;PtSurname&gt;  &lt;PtFirstName&gt;  &lt;PtPreferredName&gt;  &lt;PtFullName&gt;  &lt;DrName&gt;  <b>&lt;TestName&gt;</b>  &lt;DateOfResult&gt;  &lt;Classification&gt;  &lt;Action&gt;  &lt;Comment&gt;  &lt;UsrPhone&gt;  &lt;UsrLocation&gt; </div>	
<span style="border: 1px solid #ccc; padding: 2px;">&lt;&lt;</span>			
<p>Approx characters: 143</p> <p><input type="checkbox"/> Set as default template for this template type    <input type="checkbox"/> Template text can be edited before sending</p> <p><input type="checkbox"/> Appointment template expects a reply</p>			
		<input type="button" value="Preview"/>	<input type="button" value="Save"/>
		<input type="button" value="Cancel"/>	

3. Enter a **Name** for the template and select the **Type** of template from the dropdown.

The template type determines the functions in Bp Premier from which the template can be selected. For example, templates of type 'Result' are intended for selection when sending messages from the Inbox and Follow up Inbox screen, because those messages will relate to patient investigation results.

4. Type your template text into the text box.
5. The fields on the right hand side will be substituted with information when the reminder is sent. Double-click on a field to insert the field where the cursor is positioned in the template text.
6. Select **Set as default template for this template type** to automatically select this template when a new message of this type is created. You can change the template before sending a message.
7. Tick **Template text can be edited before sending** to allow a user to modify the template text before sending. If this option is not ticked, users will not be able to modify the message text from the template.

---

**NOTE** Your practice should carefully consider which templates are editable by users before sending. Templates should align with your practice's guidelines for patient-practice communications. If you allow editing, you cannot guarantee that the message will conform to those guidelines. You may wish to allow editing only for messages of type 'Patient record', for example, where tailored messages may be required.

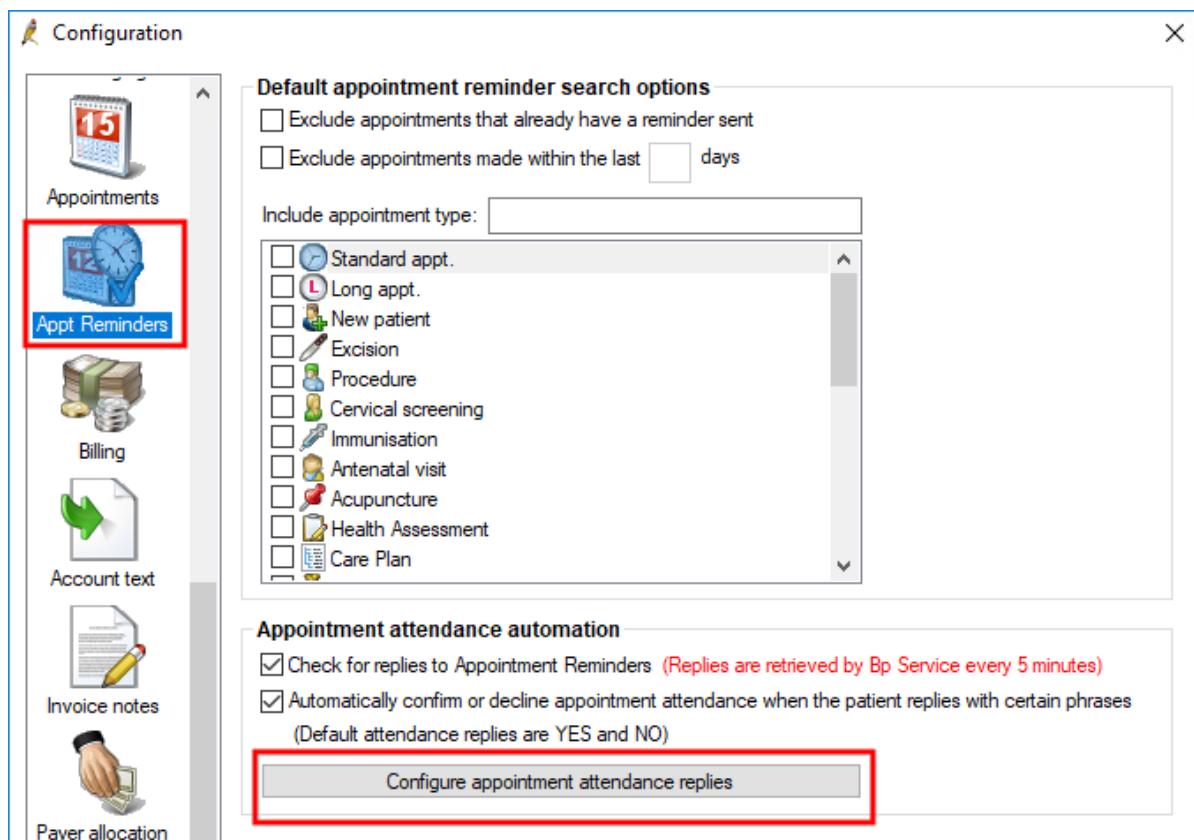
---

8. If you are creating a new 'Appointment' template, tick **Appointment template expects a reply** if the patient is expected to reply and update the appointment book.
9. Click **Preview** to view how the text will appear on a mobile device. If the message looks OK, click **Close** and **Save** to save the template.

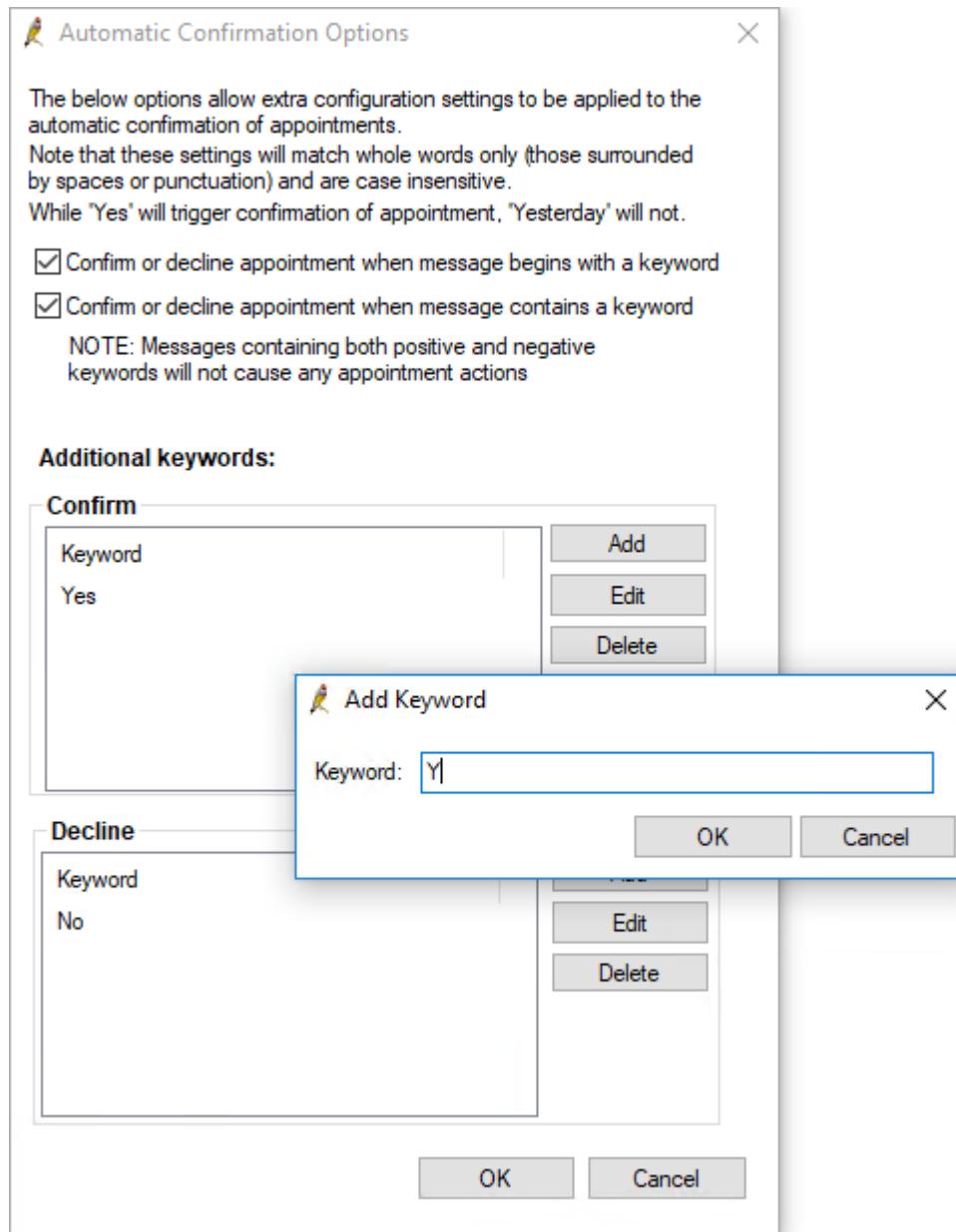
## Set up reply keywords

You can specify which keywords in a patient reply to an appointment reminder will automatically update the appointment book. This functionality is relevant for SMS replies only; Best Health App message reply text is not configurable.

1. From the main screen, select **Setup > Configuration > Appt Reminders** tab.



2. Both of the checkboxes under **Appointment attendance automation** must be ticked to enable appointment updates by SMS reply.
3. Click **Configure appointment attendance replies** to open the **Automatic Confirmation Options** window.



4. Tick **Confirm or decline appointment when message begins with a keyword**.
5. Tick **Confirm or decline appointment when message contains a keyword** if you want a keyword to be accepted if it appears anywhere in the reply.
6. Click **Add** next to the **Confirm** list of keywords. Type a new keyword and click **OK** to add the keyword to the list. Keywords are limited to 20 characters at most.
7. Add as many **Confirm** and **Decline** keywords as you need.

Keywords are only accepted as an exact match of whole words, even if you tick **Confirm or decline appointment when message contains a keyword**. For example, if you accept the keyword 'No', words like 'not' or 'nope' will **not** automatically update the appointment book. If a patient includes both Confirm and Decline keywords in a reply, the appointment will not be updated.

8. Click **Ok** to save your keywords and return to the **Configuration** window.

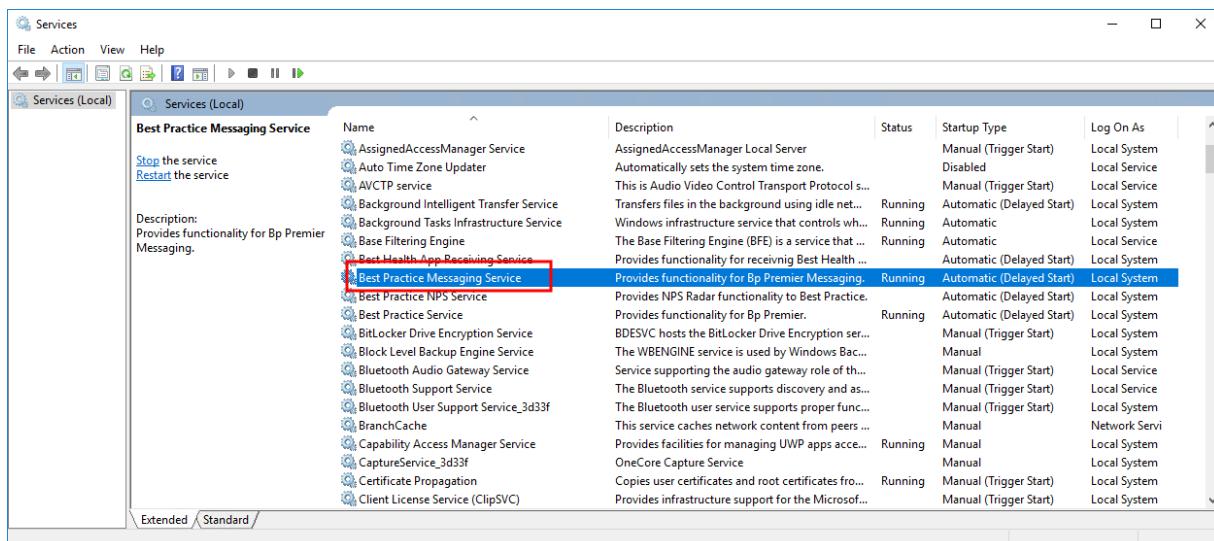
## Set up Bp Messaging Service

The Best Practice Messaging Service is used to manage Bp Comms communications between Bp Premier and external gateways. In the Jade release, its sole use is to be used to facilitate communication between Bp Premier and the Best Health App.

Most of the configuration for this service is automatically set up when you install the upgrade. However, you may need to engage your practice's IT support to ensure that any network firewalls allow incoming and outgoing connections to and from the Best Practice Messaging Service. You can also nominate one or more users to receive an internal Bp Premier message on login if the service is stopped.

### Enable firewall access

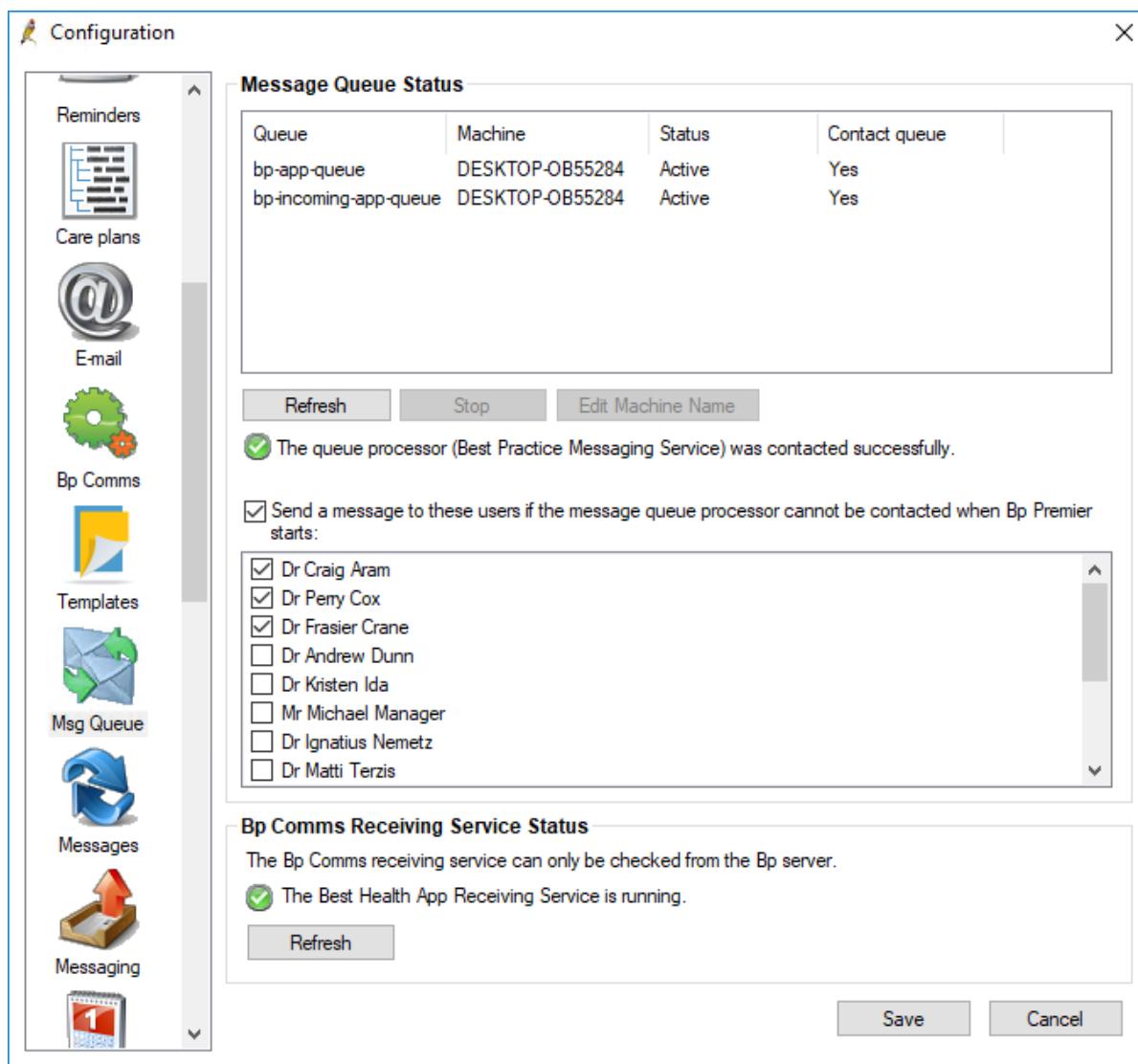
The **Best Practice Messaging Service** is visible in the Windows **Services** screen.



If this service appears in the list, and you have enabled Bp Comms in Bp Premier Configuration, but messages are not being forwarded, you may need to check that your network firewall is allowing the Best Practice Message Service to communicate through TCP/IP ports.

## Warn a user when the Messaging Service stops

- From the main screen of Bp Premier, select **Setup > Configuration > Msg Queue tab.**



- Tick **Send a message to these users....**
- Tick the users that you want to receive an internal Bp Premier message if the message service cannot be contacted.
- Click **Save** to save your configuration.

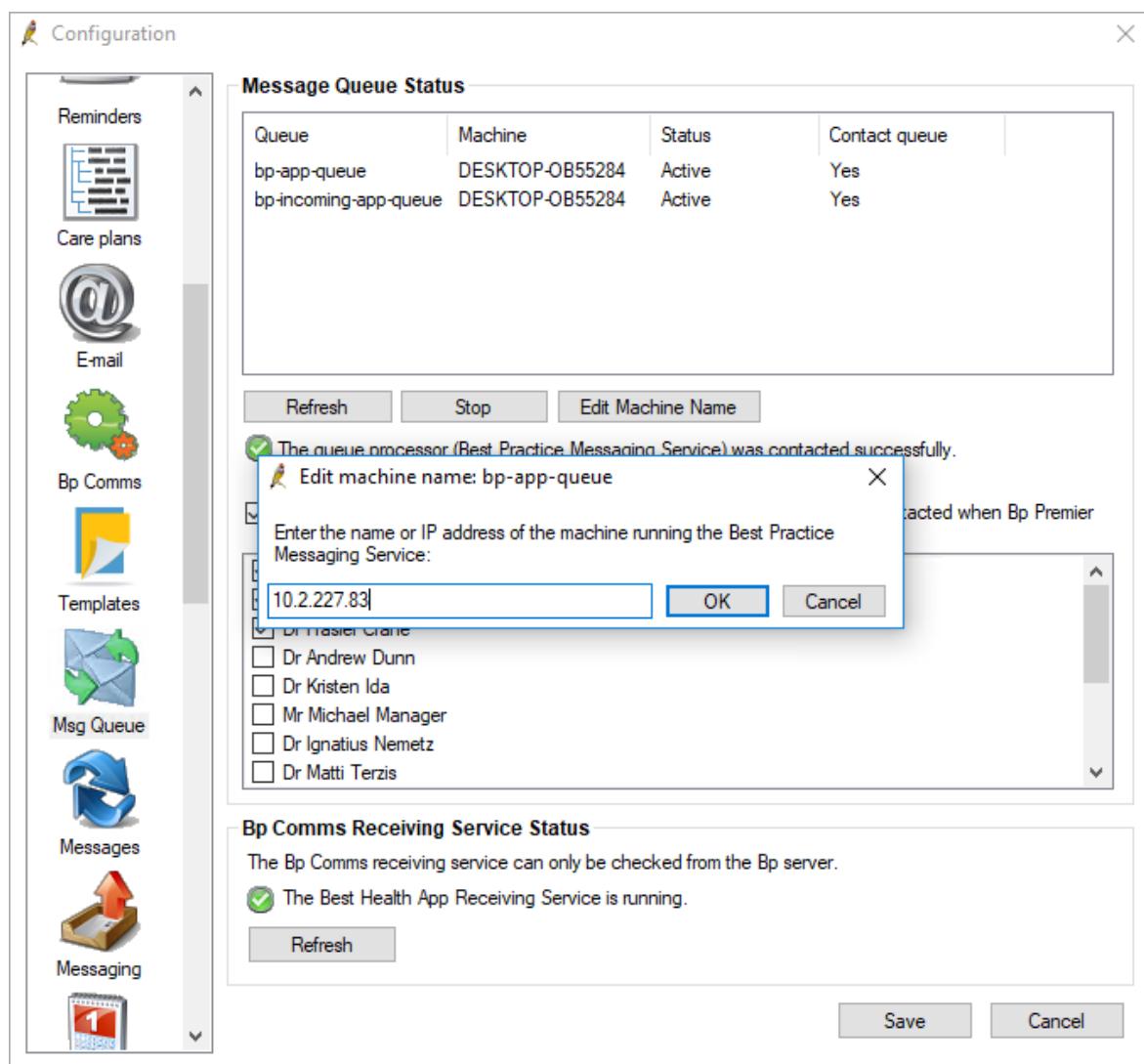
## Configure the Message Service Machine Name

The Best Practice Messaging Service is deployed by default on your Bp Premier database server machine. When the Messaging Service starts for the first time, the configuration setting that stores the location of the Messaging Service is updated to your server machine name; this allows client installs of Bp Premier know where to send messages.

If for some reason Bp Premier can not connect to your database server via machine name (for example, DNS issues on your network), you can configure the messaging service to connect via IP address.

To configure the Message Service Machine Name:

1. From the main screen of Bp Premier, select **Setup > Configuration > Msg Queue** tab.
2. From the top list, select a queue.
3. Click the **Edit Machine Name** button.



4. Enter the IP Address or machine name of your server.

---

**NOTE** If you are unsure how to obtain the IP Address of your server, contact your IT technician.

---

5. Click **OK**.
6. Repeat step 2 to 5 for each queue in the list.
7. Click **Save**.

## Bp Comms Patient Setup

Patient configuration for Bp Comms is done via the patient demographics window and involves recording communication consent and verifying and enrolling mobile phone numbers.

## Bp Comms Consent

You must enrol a patient's mobile phone number and record their consent before they can receive Bp Comms messages from your practice. If you have previously obtained Bp Comms consent for SMS, the same consent can be used for Best Health App enrolment.

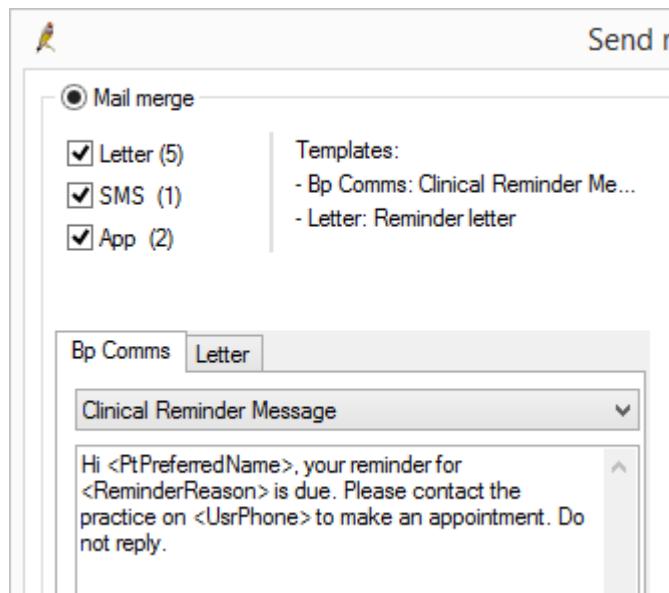
Because Bp Comms allows you to send more than just appointment reminders, Best Practice Software recommend that your practice review its consent process and determine any changes that may be required.

### How does Bp Premier handle consent when I run a mail merge?

When you run a bulk message sendout like clinical or appointment reminders, Bp Comms will default the message method for each patient based on:

- what the patient has consented to receive (set in demographics)
- the practice's preferred method (set in Configuration > Bp Comms).

After you select your schedule criteria, Bp Comms will show the breakdown of how many patients will receive messages of each type (for example 5 letters, 1 SMS and 2 App messages).



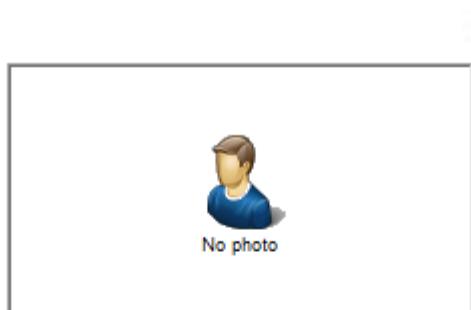
## Record patient consent and enrol in Bp Comms

1. Search for the patient using any of the patient search methods: **File > Open Patient**, **View > Patient**, or press **F2**.
2. Click **View details** to open the **Patient details** screen.
3. If the patient does not have a **Mobile Phone** number recorded, you must record a valid number before you can click **Bp Comms Consent**. Mobile numbers should start with a 0 and **not** include the country code prefix.

 Edit patient

Title:	Mrs		
Family name:	Aalbrecht		
Given name:	Kathleen		
Middle name:			
Preferred name:	Kathleen		
Date of Birth:	<input checked="" type="checkbox"/> 7/07/1965	Age:	53 yrs
Sex:	Female		
Ethnicity:			
Address Line 1:	707 Menner Cl		
Address Line 2:			
City/Suburb:	Darwin	Postcode:	0800
Postal Address:			
City/Suburb:		Postcode:	
Home phone:		Work phone:	
Mobile phone:	0452404111	Contact via:	
Consents to:			
E-mail:			

4. Click **Bp Comms Consent** on the right-hand side of the screen.



General notes:

Appointment notes:

Contact Notes

Bp Comms Consent

SMS: Not Enabled

Registered for CTG PBS Co-payment relief

Inactive       Deceased

5. The **Bp Comms Consent** window will appear.

#### Set consent

**Bp Comms Consent - Kathleen Aalbrecht**

<b>Consent Options</b> This patient consents to receive the following electronic reminders/messages (consent settings selected on the Bp Comms configuration screen are enabled)  <input checked="" type="checkbox"/> Appointments <input type="checkbox"/> Clinical Communication (Results & Clinical messages) <input checked="" type="checkbox"/> Clinical Reminders <input type="checkbox"/> Health Awareness (Leaflets & Database search)  <input type="button" value="Select All"/> <input type="button" value="Deselect All"/>	<b>Consent Status</b> Mobile Phone: <input type="text" value="0452404111"/>  SMS: Not Enabled  This patient cannot receive reminders/messages via SMS. <input type="button" value="Verify"/> <input type="button" value="Disable"/>
<b>Signed consent status:</b> Not Linked Import and link the signed patient consent form using the buttons below  <input type="button" value="Open Bulk Document Import"/> <input type="button" value="Link to signed consent"/>	<b>Best Health App:</b> Not Enrolled (patients need to enrol at each location)  <input type="button" value="Enrol"/> <input type="button" value="Cancel"/>

The patient cannot receive reminders/messages via the App from this location.

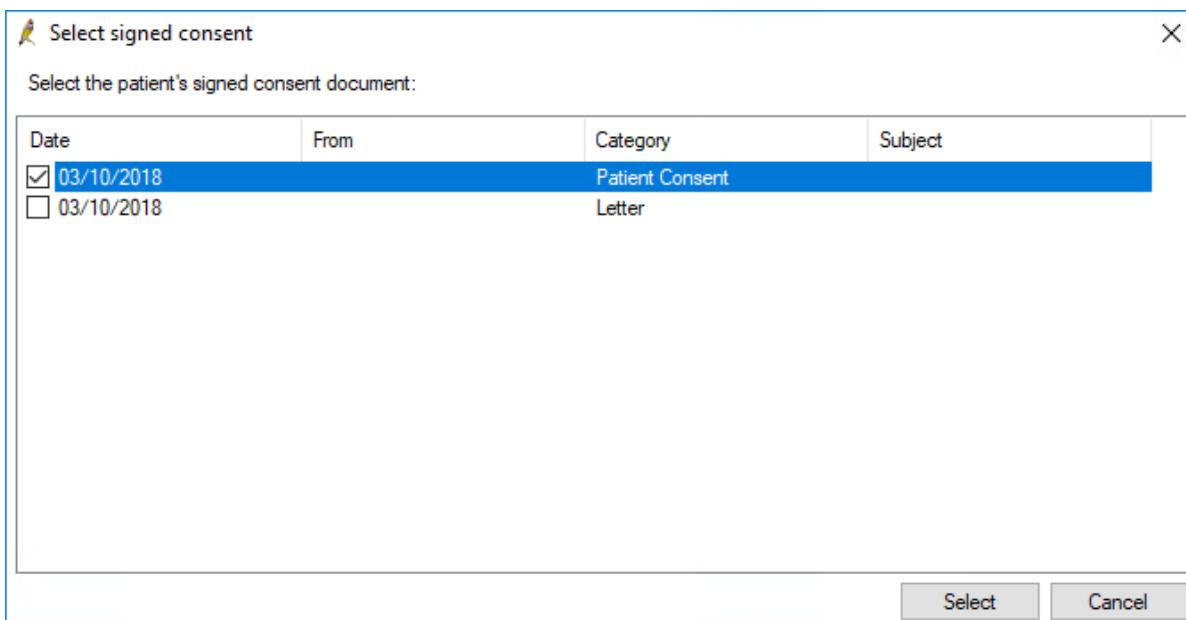
6. Under **Consent Options**, tick the Bp Comms message types that the patient consents to receive. Ticking a message type will enable other buttons in this window.
7. If you need to store a signed consent form for the patient, click **Open Bulk Document Import** to scan and import the signed consent form into Bp Premier.

---

**NOTE** A user will need permission to access the Bulk Document Import tool.

---

8. Click **Link to signed consent**. The **Select signed consent** window will appear.



9. Tick the form you want to link to as the most recent and correct consent and click **Select** to return to the **Bp Comms Consent** window.

## Enrol in SMS

1. Under **Consent Status**, you can change the Mobile Phone number.

The number must be in the Australian format of '0400 000 000' (with or without spaces). The number must not have a '+' or '61' prefix. Incorrectly formatted numbers will be rejected by the message provider service and will not be delivered.

2. Click **Enable** to verify the patient's mobile number. The action required by the patient will depend on your Consent/Enrolment settings in **Setup > Configuration**:

- If **Send patient SMS when enabling** and **Mobile number verification is required** are both unticked, the patient receives no enrolment message, no patient action is required, and SMS enrolment is complete.
- If **Send patient SMS when enabling** is ticked, the patient will receive an enrolment SMS message but no further action is required. SMS enrolment is complete.
- If **Mobile number verification is required** is ticked, the **Verification Required** window will appear, summarising the patient's Bp Comms consent. Click **Send** to send a validation code to the patient's mobile phone, and enter the code into the box that appears. Bp Premier will validate the code and SMS enrolment is complete.

---

**NOTE** Best Practice Software recommend mobile number verification to ensure that the intended patient receives messages from your practice.

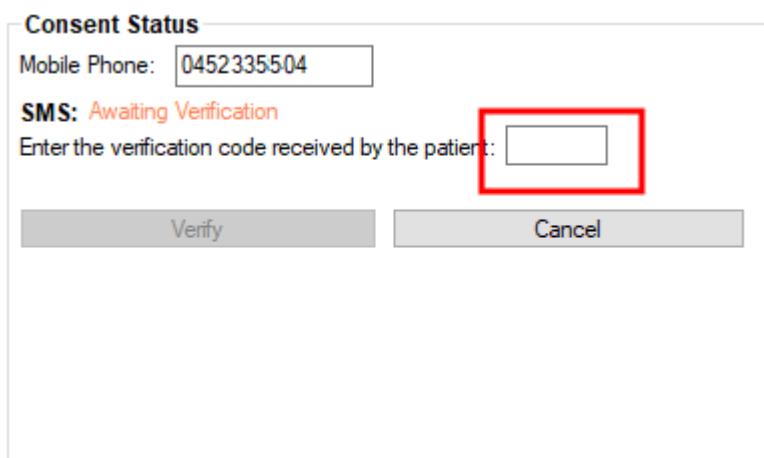
---

**Consent Status**

Mobile Phone:

**SMS: Awaiting Verification**

Enter the verification code received by the patient:



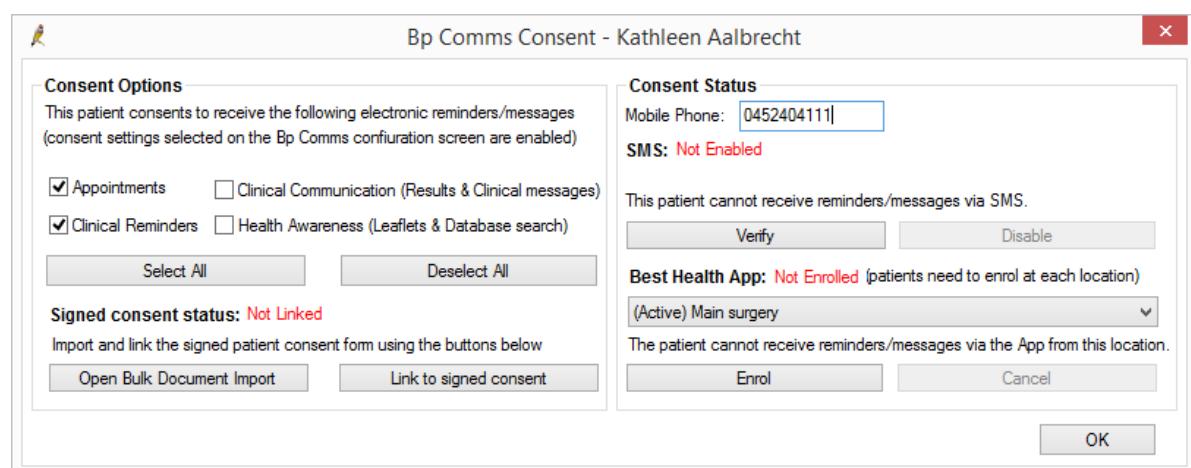
3. Click **Save**.

## Enrol in Best Health App

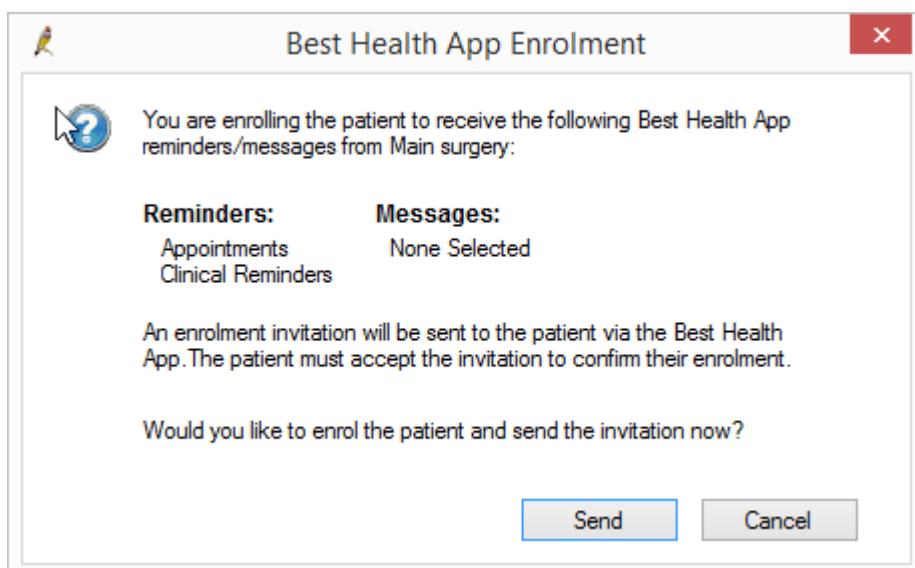
1. Open the Bp Comms Consent window via patient demographics > **Bp Comms Consent**
2. In the **Best Health App** drop-down list, select the location where the patient is enrolling. Click the **Enrol** button. The **Enrol** button becomes active when at least one **Consent Option** is chosen.

If the patient attends more than one of your locations and you want to enable them to use the Best Health App at those locations, you must enrol them using the above procedure but change the location selected in the **Best Health App** drop-down list.

Inside the Best Health App, the patient can filter messages, health summaries and other information by the location it was received.



3. A confirmation message displaying the chosen consent options is shown. Ensure the correct options are selected and click **Send**.



4. The **Best Health App** status in the patient demographics window displays 'Pending' after the invitation is sent.

Contact Notes

Bp Comms Consent

SMS: Not Enabled

Best Health App: Pending

5. The patient will receive an invitation to use the app including a link to download it from the appropriate store. Once downloaded they create their account, using the same mobile number as is recorded in Bp Premier. There will be a new Invitation to enrol message in their App Inbox which needs to be accepted.
6. When the patient has accepted the invitation to enrol, the status will change to 'Enrolled'. The change of state from 'Pending' to 'Enrolled' may take a few minutes to appear after the patient has accepted the invitation.

Contact Notes

Bp Comms Consent

SMS: Not Enabled

Best Health App: Enrolled

## Sending Bp Comms

When the practice and patient have been configured, you are ready to start sending Bp Comms.

### From where can I send Best Health App messages?

The following is a summary of Bp Premier functions where you can send SMS and/or Best Health App messages.

Bp Premier area	Menu	Description	Consent Required
Patient Window	Bp Comms > Send Patient Message	Send a single message to a patient.	As any text can be sent from this area, it is up to the user to discern if the communication they are sending has been consented to by the patient.
Patient Window	Bp Comms > Send Health Summary	Send a summary of the patient's health details stored in Bp Premier.	Clinical Communications.
MIMS CMI	File > Send Leaflet	Send MIMS Consumer Medicine Information to the patient.	Health Awareness
Patient Education	File > Send Leaflet	Send leaflets or brochures stored in Bp Premier to the patient.	Health Awareness
Reminders	Clinical > Reminders.	Send clinical reminders to a list of patients.	Clinical Reminders
Search	Utilities > Search.	Send a message to a list of patients produced by performing a database search.	Health Awareness
Inbox	View > Inbox.	Send a single message to a patient regarding an item in your Inbox.	Clinical Communications

Bp Premier area	Menu	Description	Consent Required
Follow up inbox	Clinical > Follow up inbox.	Send a single message to a patient regarding an item in your Follow Up Inbox.	Clinical Communications
Appointment Book	Utilities > Send Appointment Reminders	Send a list of appointment reminders.	Appointments
Appointment Book	Utilities > Send Message	Send a single message to a patient regarding an appointment.	Appointments

## Bp Comms from the patient record

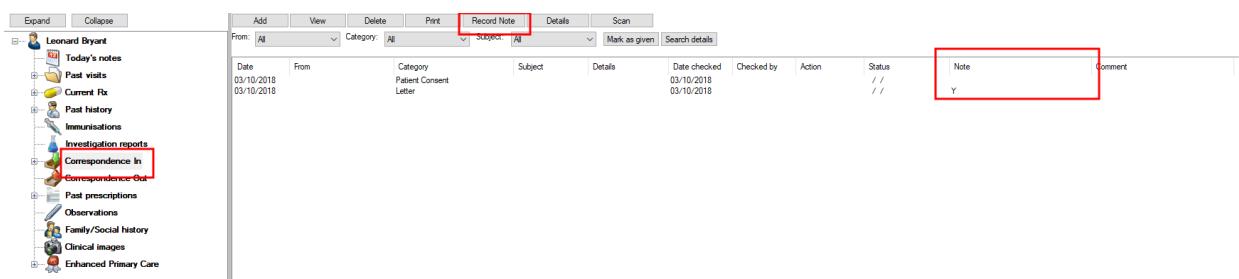
If you have upgraded to Jade, you can send SMS and Best Health App messages to patients from the patient record. You can also add or review contact notes associated with reports, correspondence, clinical images, and enhanced primary care.

You can use contact notes to record any attempted patient contact, whether successful or not. For example, if you have explained a care plan to a patient, a contact note can quickly record the details.

### How do I see contact notes in the patient record?

Notes are added automatically to Correspondence, Investigation reports, and Clinical images when a user carries out clinical actions, such as sending a reminder or following up an investigation result. You can also manually record a note in these sections and Enhanced Primary Care.

If a contact note is attached to an item in the record, a 'Y' will appear in the **Note** column:



The screenshot shows a software interface for managing patient records. On the left, there is a sidebar with a tree view of patient data, including sections like 'Today's notes', 'Past visits', 'Current Rx', 'Past history', 'Immunisations', 'Investigation reports', 'Correspondence In' (which is highlighted with a red box), 'Correspondence Out', 'Past prescriptions', 'Observations', 'Family/Social history', 'Clinical images', and 'Enhanced Primary Care'. On the right, there is a main panel with a grid of information. The grid columns include Date, From, Category, Subject, Details, Date checked, Checked by, Action, Status, Note, and Comment. A single row is visible in the grid, showing the date '03/10/2018', the category 'Patient Consent Letter', and the status '///'. The 'Note' column contains the letter 'Y', which is also highlighted with a red box. At the top of the main panel, there is a toolbar with buttons for Add, View, Delete, Print, Record Note (which is highlighted with a red box), Details, and Scan.

Select the item and click **Record Note** from the row of buttons to view all attached notes, or to record a new contact note.

### What happens to notes when I move a document?

When you move a document from one section to another, all contact notes attached to the document are also moved. The contact note **Reason** is updated to reflect the new section.

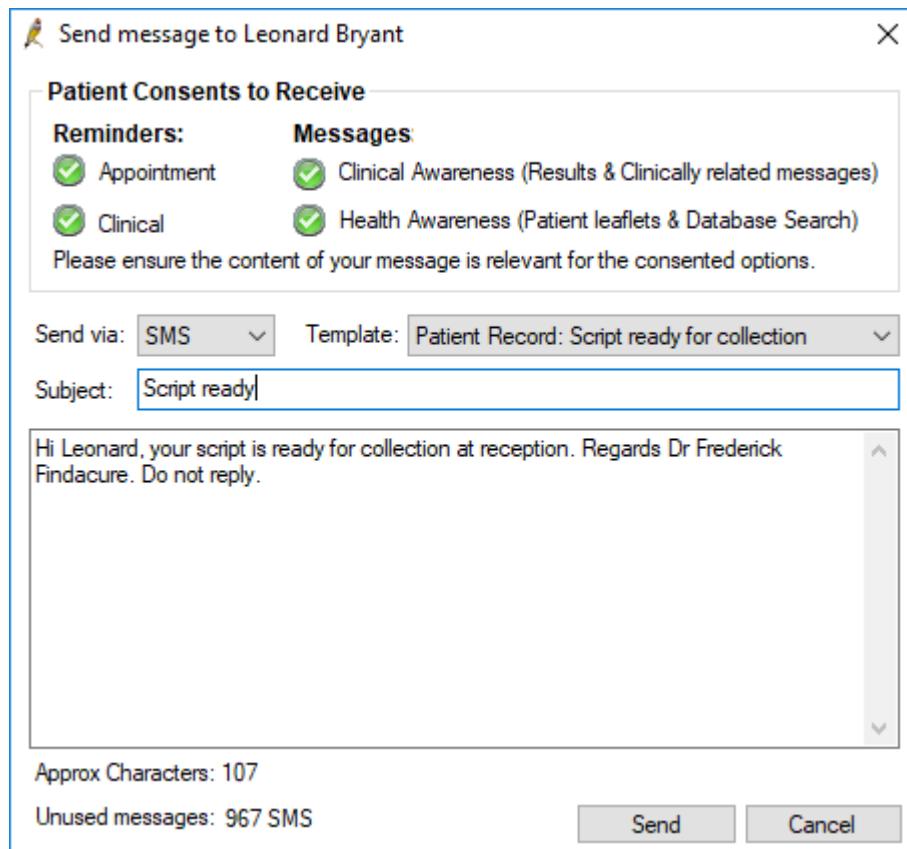
### How do permissions affect contact notes?

To view and create contact notes, a user needs the **Send Bp Comms Messages** permission set to 'Allowed'.

In addition, the ability to view and modify contact notes in the patient record is determined by the corresponding permission. For example, to view **Correspondence in** contact notes, the user must have the **Correspondence In** permission set to 'View only' or greater. To delete a contact note linked to an investigation report, the user must have the **Investigation reports** permission set to 'Add / Edit / Delete'.

## Send a Bp Comms message to a patient

1. Select **Bp Comms > Send patient message** from the menu. The **Send message** window will appear.



2. Review the patient consent (green checkboxes) and ensure that the patient has consented to receive the type of message you are about to send.
3. Select whether to **send via** SMS or App. App will only be available if you have upgraded to Bp Premier version Jade SP1 and the patient has enrolled for the Best Health App with your practice location. SMS is available if the patient has enrolled for SMS messages. The default **Send via** selection is based on your practice's **Preferred Practice contact method** configuration setting.
4. Select the **Template** you want to use.
5. Modify the text if the template permits and click **Send**. The message will be forwarded to the messaging service.

### Patient consent

The **Patient Consents to Receive** section shows the message types to which the patient has consented, if any. Consent displayed here provides guidance only to the provider. You can send a Bp Comms message from the patient record even if the patient has consented to receive only appointment reminders. Providers must use their discretion in determining whether a Bp Comms message is appropriate regarding the patient's consent.

Best Practice Software recommend creating specific Bp Comms templates for any standard messages sent from the patient record and indicating this in the template name.

## Send Bp Comms appointment reminders

Before patients can receive appointment reminders:

- The practice must enable appointment reminders in Setup > Configuration > **Bp Comms**
- The patient must consent to receive appointment reminders and enrol in SMS and/or Best Health App in demographics > **Bp Comms Consent**.

When you create an appointment for a patient enrolled for the Best Health App, a sync is performed between your location's appointment book and the patient's Best Health App installation; there is no charge for this message. The patient sees their appointment listed in the **Appointments** section within the Best Health App. A notification will appear on the patient's mobile device when the start time of the appointment is within 30 minutes. As the notification only appears within 30 minutes of the starting time of the appointment, you can also send an appointment reminder earlier (for example: the day or week before) using the methods described below.

### How do I check for replies?

You can check for replies to appointment reminders in two ways:

- From the appointment book, select **Utilities > Check Appointment Reminder Replies**.
- From the main screen, select **View > Contact Notes > View > View replies** to review patient replies associated with a contact note.

### Send Bp Comms message reminders in bulk

1. From the appointment book, select **Utilities > Send Appointment Reminders**. The **Appointment Reminders** screen will appear.

**Appointment Reminders**

Select the parameters for searching for appointments

Date span:

Date range:  to

Search appointments by time between  and

Exclude appointments that already have a reminder sent

Exclude appointments made within the last  days

Include doctors' appointments:

Dr Craig Aram

Include appointment types:

Standard aptt.  
 Long aptt.  
 New patient  
 Excision  
 Procedure  
 Cervical screening  
 Immunisation  
 Antenatal visit  
 Acupuncture

Include locations:

Main surgery  
 Hospital

Template:

Allow sending via:  SMS  App

Hi <PtPreferredName>, your appointment with <DrName> is on <ApptDate> at <ApptTime>. Reply YES if you can attend and NO if you cannot attend.

Select which appointments to send reminders for:

Date	Type	Patient	Send Via	Doc
<input checked="" type="checkbox"/> 19/03/2019 10:05 am	Standard appt.	Kathleen Aalbrecht	App	Dr C
<input checked="" type="checkbox"/> 19/03/2019 11:00 am	Standard appt.	Merlin Adkins	SMS	Dr C

Messages will be sent via:

Unused messages 24916 SMS/ 49832 App

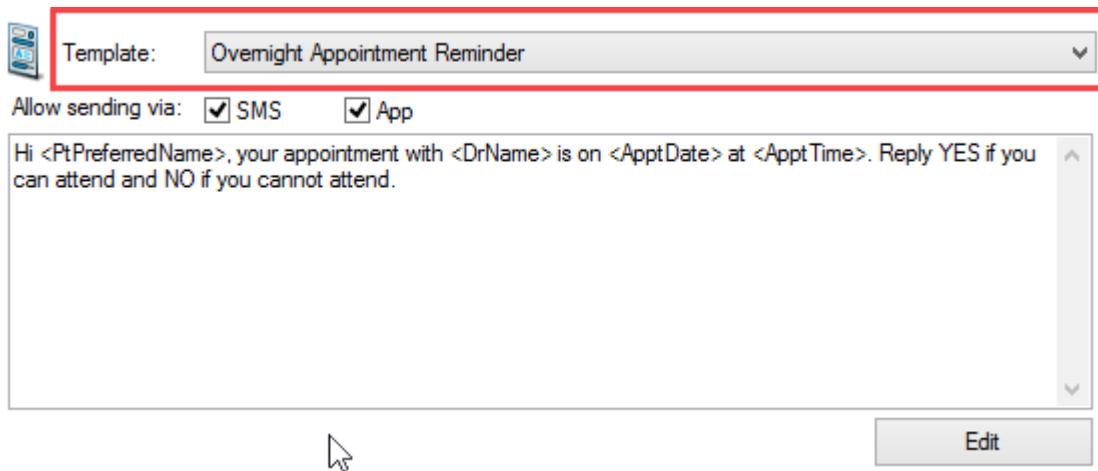
2. Complete the fields on the left hand side to generate a list of applicable appointments:

Field	Description
By date span	Select a default period to search for appointments.
By date range	Specify a date range to search for appointments.
Search appointments by time between	Select only appointments between the specified times.
Exclude appointments that already have a reminder sent	Do not select appointments that have been included in previous appointment reminder sendouts.

Field	Description
Excluding appointments made within the last n days	Do not select appointments if booked in the prior specified number of days.
Include doctors' appointments	Select appointments with the specified doctors.
Include appointment types	Select appointments of the specified types.
Include locations	Select appointments at the specified locations.

Appointments that meet the criteria will appear on the right hand side of the screen.

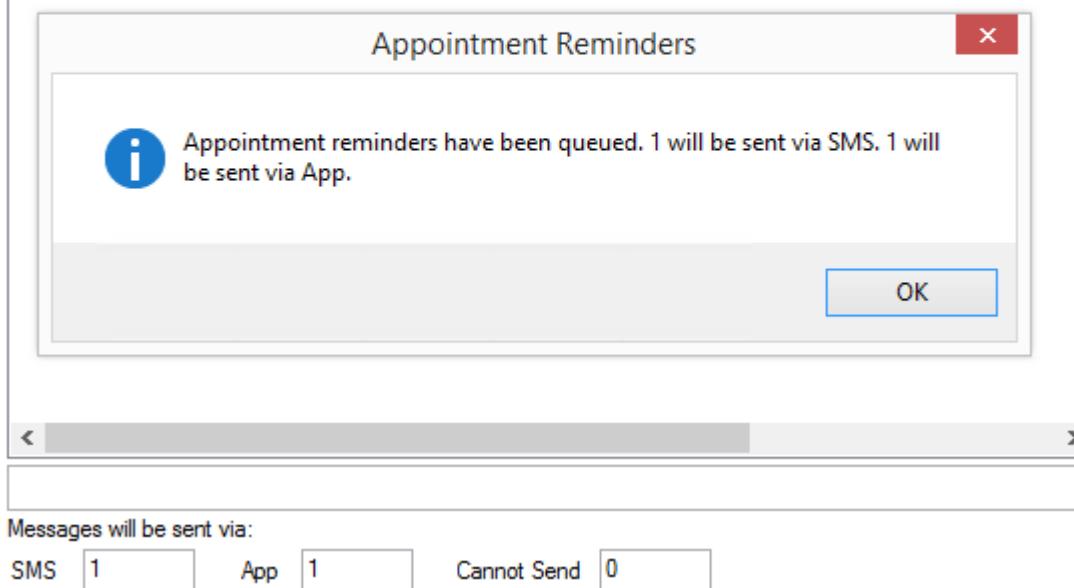
3. Check or uncheck the **SMS** and **App** options in the **Allow sending via** checkboxes to disable or enable a Bp Comms method for this batch. This will change the list of appointment reminders that will be sent, either removing them from the list or changing the **Send Via** column to **SMS** or **App** depending upon what the patient has enrolled with.
4. Select a **Template** appropriate for this batch of appointment reminders.



5. The **Edit** button will be disabled if the template is not configured to allow editing before sending. If editing is allowed for this template, click the **Edit** button and make any required changes to the message text before sending.
6. In the **Select which appointments to send reminders for** list, untick any appointments you do not want included in the reminder sendout.
7. Click **Send all n Reminders** at the bottom right. If there are no duplicate reminders, the messages will be sent. Appointments will be updated with a green tick in the list if a reminder was sent.

Select which appointments to send reminders for:

Date	Type	Patient	Send Via	Doc
<input checked="" type="checkbox"/>  19/03/2019 10:05 am	Standard appt.	Kathleen Aalbrecht	App	Dr C
<input checked="" type="checkbox"/>  19/03/2019 11:00 am	Standard appt.	Merlin Adkins	SMS	Dr C



Messages will be sent via:

SMS  App  Cannot Send

Bp Premier will:

- Queue appointment reminders for sending.
- Deduct message credits from your Bp Comms credit.
- Create a contact note of type 'appointment' against each patient with an appointment.

### Duplicate Reminders

Where a patient has multiple appointments in the selected range or there are multiple patients who have the same mobile phone number, a **Duplicate Appointment Reminders** screen will appear. This screen shows each appointment that would generate a duplicate message.

 Duplicate Appointment Reminders X

Select which appointments to send reminders for:

Date	Type	Patient	Send via	Doctor	Mobile
<input checked="" type="checkbox"/>  16/10/2018 3:30 pm	Health Assess...	Alan Abbott	SMS	Dr Frederick Findacure	04199
<input type="checkbox"/>  16/10/2018 8:45 am	Immunisation	Benjamin Abbott	SMS	Dr Frederick Findacure	04199
<input type="checkbox"/>  16/10/2018 9:30 am	Standard appt.	Madeline Abbott	SMS	Dr Frederick Findacure	04199
<input checked="" type="checkbox"/>  16/10/2018 1:15 pm	Recall	David Allen	SMS	Dr Frederick Findacure	04199
<input type="checkbox"/>  16/10/2018 9:45 am	Standard appt.	Raymond Bartholomew	SMS	Dr Frederick Findacure	04199
<input checked="" type="checkbox"/>  16/10/2018 8:30 am	Standard appt.	Kathleen Costello	SMS	Dr Frederick Findacure	04199
<input checked="" type="checkbox"/>  16/10/2018 4:00 pm	Standard appt.	Leonard Bryant	SMS	Dr Frederick Findacure	04199
<input type="checkbox"/>  16/10/2018 9:00 am	Long appt.	Maree Ackermann	SMS	Dr Frederick Findacure	04199

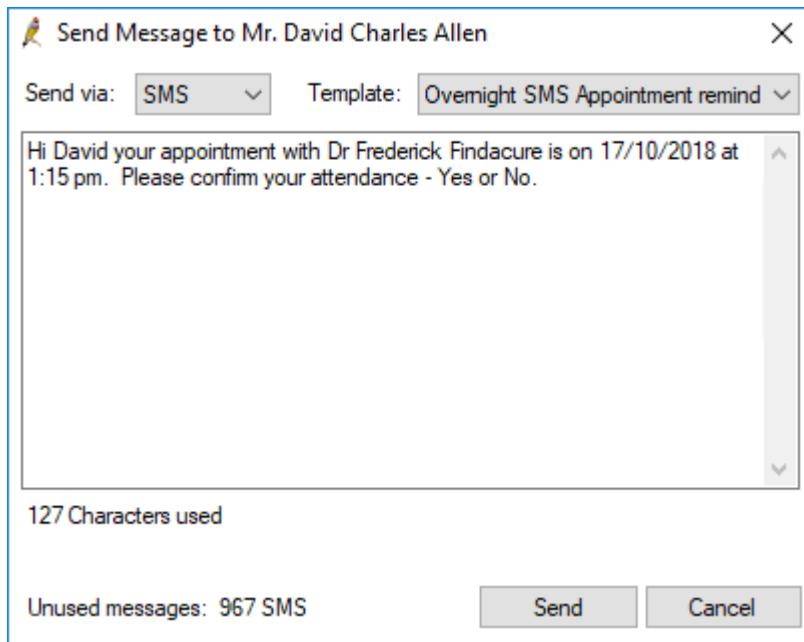
[Send Reminders](#) [Select All](#) [Deselect All](#) [Cancel](#)

Untick the appointments that you don't want messages sent for and click the **Send Reminders** button.

### Send a single appointment reminder

To send a patient a single Bp Comms reminder, the patient must have an appointment in the appointment book.

1. Open the appointment book. Select the patient's appointment and click **Utilities > Send message** from the menu. The **Send Message** screen will appear.



2. Select a **Template** other than the default if you need to. The message box will be populated with the selected template and field information. You can edit the message if required.
3. Click **Send**.

## Appointment Notices

Appointment notices are sent to a patient enrolled at your location for the Best Health App to notify when their appointment has been added, moved or cancelled. An Appointment Notice displays a message in the Best Health App inbox as well as update the appointment schedule in the app.

Appointment Notices differ from appointment reminders in that they are sent at the time the appointment changes are made. In contrast, appointment reminders send on a schedule, for example, the day before, to remind the user to attend.

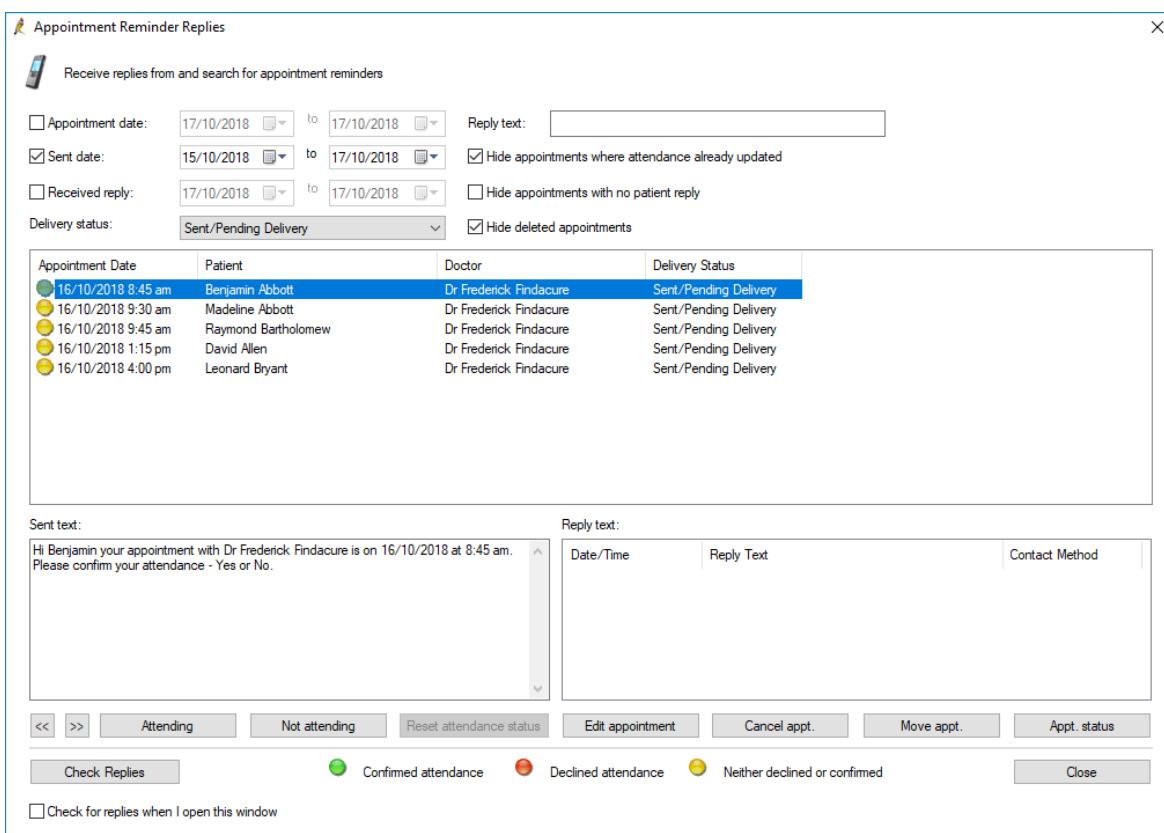
A user can reply Yes Or No to Appointment Reminders to confirm or decline appointment attendance. You can not respond to Appointment Notices. You are not charged for Appointment Notices.

## Check appointment reminder replies

While checking for replies to Bp Comms appointment reminders you can cancel, move, edit, or change the status of related appointments.

If you have set up appointment confirmation, you should not need to manually update the appointment book based on patient replies. However, if a patient has replied with a non-standard response, you can use the **Appointment Reminder Replies** window to review such replies.

- From the appointment book, select **Utilities > Check Appointment Reminder Replies**. The **Appointment Reminder Replies** window is displayed.



- Search for replies using the fields at the top left:

- Appointment date range
- Sent date range
- Date range during which reply was received
- Delivery status

- Filter the appointments shown using the checkboxes at the top right:

- Type text in **Reply text** to search for replies containing that text
  - **Hide appointments when attendance already updated** will only show appointments which have not been confirmed or declined
  - **Hide appointments with no patient reply** only shows appointment reminders that have been replied to by a patient
  - **Hide deleted appointments** removes deleted appointments from display.
4. The middle section of the screen shows the appointment reminders that have been sent and the status. Select a message to see the **sent text** of the reminder and the **reply text**, if any.
  5. Click **Check Replies** to check for any new replies that have been received. Bp Premier will show all replies received, with the most recent at the top of the list.
  6. Tick the checkbox **Check for replies when I open this window** to check for replies automatically.

#### Action appointments

If the patient has replied 'Yes' or 'No' (or any acceptable reply that has been configured in **Setup > Configuration > Appt Reminders**), appointment attendance status is automatically updated. Other responses will require manual update of appointment attendance status.

7. To update the appointment associated with a reply, select the SMS reply from the list and click one of the action buttons along the bottom.

Button	Description
Attending	Mark the appointment as attendance confirmed.
Not attending	Mark the appointment as attendance declined.
Reset attendance status	Reset attendance to neither confirmed nor declined.
Edit appointment	Edit appointment details. Not all details can be changed.
Cancel appt	Cancel the appointment and supply a reason.
Move appt	Move the appointment to another slot.
Appt status	Change the status of the appointment, such as to 'Did not attend'.

8. Click **Close** to close the reminder replies screen.

## Set up an appointment reminder schedule

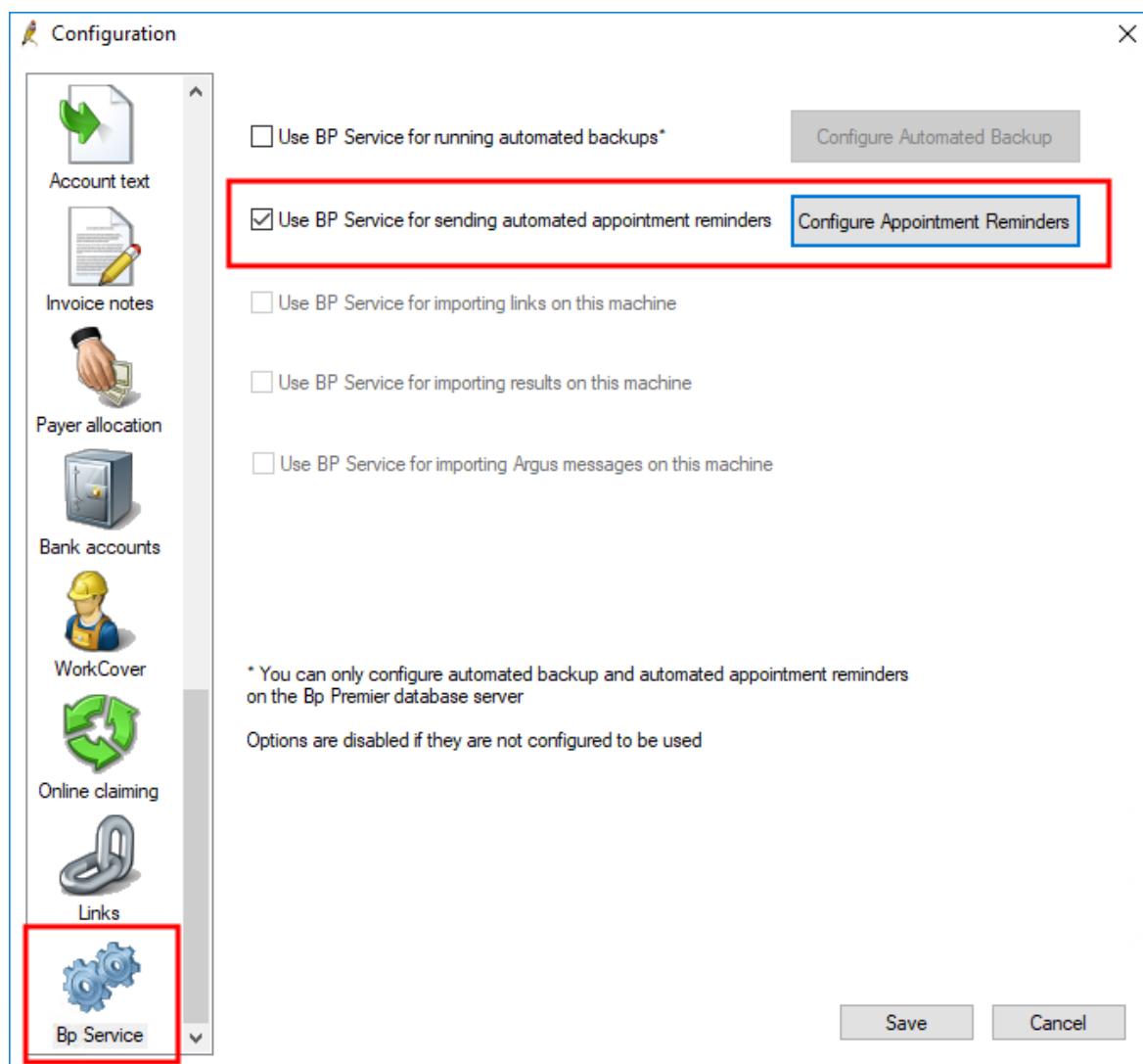
Reminder schedules must be set up on the Bp Premier server.

---

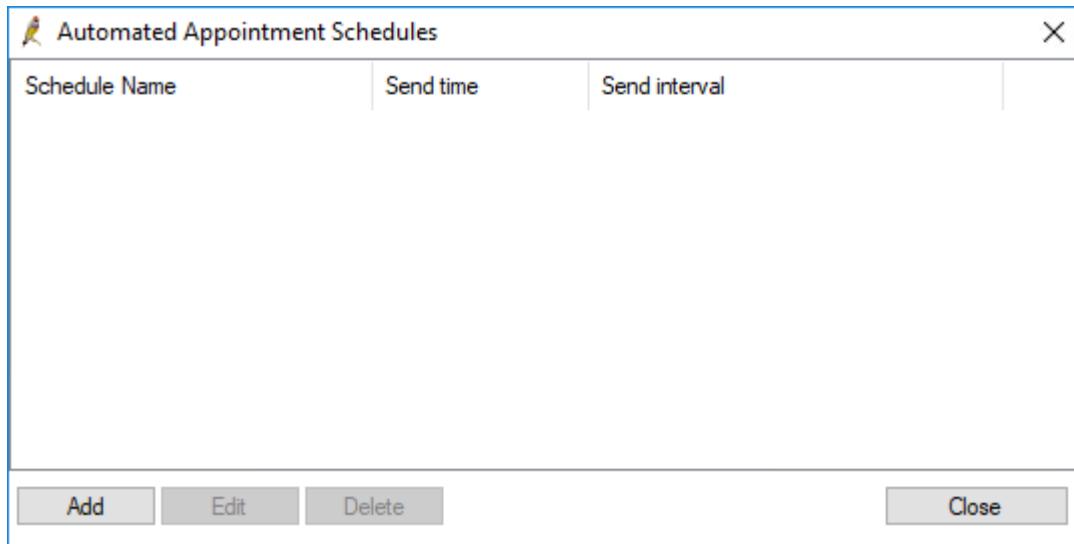
**IMPORTANT** A known issue in Indigo SP1 and later exists. If your practice does **not** wish to send SMS appointment reminders by schedule, you must delete all defined SMS schedules from the **Automated Appointment Schedules** screen. Refer to the Known Issues for Indigo SP2 for more information.

---

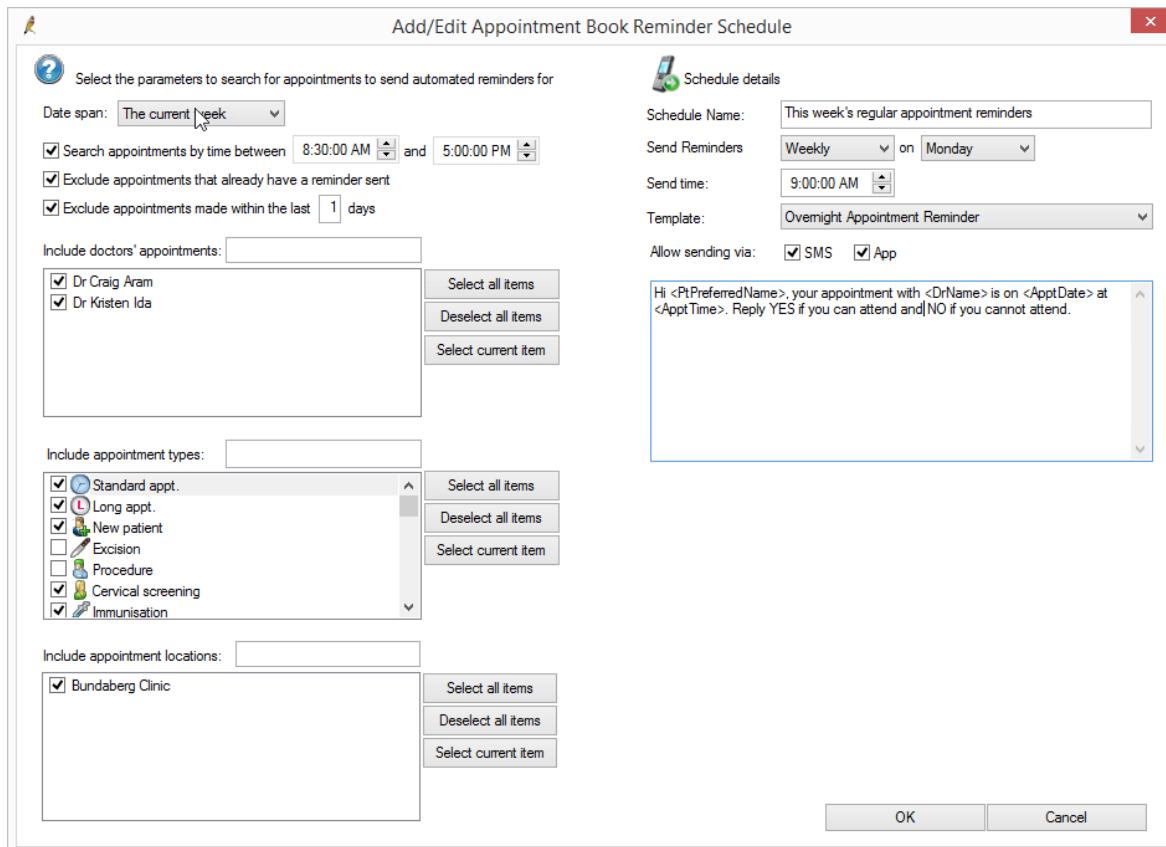
1. Log in to the Bp Premier server. Select **Setup > Configuration > Bp Service**.



2. Tick Use BP Service for sending automated appointment reminders and click **Configure Appointment Reminders**.
3. The **Automated Appointment Schedules** screen shows a list of your current schedules.



4. Click **Add**. The **Add/Edit Appointment Book Reminder Schedule** screen will appear.



5. The options on the left-hand side set the criteria to select appointments: how far into the future to look, and which doctors, appointment types, and locations to include. This screen is very similar to the Appointment Reminders screen used to send reminders to bulk patients.

The options on the right hand side determine when you want the reminders to be sent out, and which appointment reminder template to use.

In the example, reminders will be sent out for appointments in the current week for two providers, excluding appointment types 'Excision' and 'Procedure', for appointments at the Bundaberg Clinic. Reminders will be sent out 9am each Monday using the 'Reminder: Regular appts for coming week' template.

6. Press **OK** to confirm the schedule. Reminders will be automatically sent out at the next specified time.

## Send clinical communications

Clinical communications include communications to the patient from the Inbox, Follow up Inbox, and the patient record.

Before patients can receive clinical communications:

- The practice must enable clinical communications in Setup > Configuration > **Bp Comms**
- The patient must consent to receive clinical communications and enrol in SMS or the Best Health App in their demographics > **Bp Comms Consent**.

You can send communications to patients in two ways from the **Followup Inbox**, depending on how your practice handles clinical reminders:

- Send single SMS or Best Health App messages to patients, or contact a patient and record a contact note
- Send messages in bulk by SMS, Best Health App and letter by running a mail merge.

For example, a staff member works through the list of patients in the Follow up Inbox and contacts each patient by phone. A contact note is recorded for each contact attempt. Or a mail merge is run that sends a bulk message to all patients with results to action by SMS, Best Health App or letter, based on patient preference.

## Send a single message

- From the main screen, select Clinical > Follow up Inbox.

Screenshot of the Bp Premier Follow up inbox window. The window title is "Follow up inbox". The menu bar includes File, Utilities, View, Help. The toolbar contains icons for New, Open, Save, Print, etc. Filter options at the top include "Reports checked since: 16/10/2014", "Filter by action: All unactioned", "Filter by status: All", "Checked by: All". Buttons below the filters include "Mark as contacted", "Mark result as given", "Record note", "Send Message", "Make appointment", "Reminder". A sorting dropdown says "Sort by: Date checked". The main table lists follow-up items:

Date checked	Patient	Phone	Report name	Date performed	Action	Comment	Status
17/03/2017	Allen, David Charles	08 99905050(H), 0419913102(M)	SE-ROUTINE CHEMISTRY	20/11/2009	Reception to advise	Normal	
17/03/2017	Allen, David Charles	08 99905050(H), 0419913102(M)	THYROID FUNCT. TEST	27/10/2008	Reception to advise	Normal	
27/04/2017	Barefoot, Jennie	0419913102(M)	Clinical photograph	05/08/2009	Urgent appointment	Being treated	
27/04/2017	Limbrick, Sandeshni	0452404111(M)	LT SHOULDER	09/02/2007	Nurse to advise	Abnormal	
27/04/2017	Limbrick, Sandeshni	0452404111(M)	SE-SEROLOGY	19/05/2010	Reception to advise	Abnormal	
27/04/2017	Limbrick, Sandeshni	0452404111(M)	SE-HIV SEROLOGY ARC	19/05/2010	Doctor to advise	Abnormal	
27/04/2017	Limbrick, Sandeshni	0452404111(M)	ED-GLYCOSYLATED HB A1C	05/10/2010	Nurse to advise	Stable	

At the bottom, it says "Preferred Communication Method: Phone Letter SMS APP" and "Message Status: Not Contacted Unsuccessful/Failed Sent Read/Delivered Unused messages: 976 SMS". The date is "Tuesday 16/10/2018 09:49:37 AM".

Screenshot of the Bp Premier Follow up inbox window. The window title is "Follow up inbox". The menu bar includes File, Utilities, View, Help. The toolbar contains icons for New, Open, Save, Print, etc. Filter options at the top include "Reports checked from: 24/07/2014" to "24/07/2019", "Filter by action: All unactioned", "Filter by status: All", "Checked by: All". Buttons below the filters include "Mark as contacted", "Mark result as given", "Record note", "Send Message", "View appointments", "Make appointment", "Reminder". A sorting dropdown says "Sort by: Date checked". The main table lists follow-up items:

Date checked	Patient	Phone	Report name	Date performed	Action	Comment	Status	Complete	Checked by
22/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(DISCHARGE SUMMARY	17/05/2005	Non-urgent appointment	Acceptable		No	Dr K. Ida
22/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(Chol, Trig, HDLc (LDL, Ratio	17/06/2009	Nurse to advise	Normal. All within limits		Yes	Dr C. Aram
22/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(PSA	09/03/2011	Doctor to advise	Stable Prostate Inspectus		Yes	Dr C. Aram
23/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(Chol, Trig, HDLc (LDL, Ratio	17/06/2009	Non-urgent appointment	Unacceptable Heartski is a bit Risky		Yes	Dr C. Aram
23/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(PSA	28/09/2009	Doctor to advise	Abnormal Colonski Inflamedski		Yes	Dr C. Aram
24/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(SE-ROUTINE CHEMISTRY	05/07/2010	Nurse to advise	Seeing specialist		Yes	Dr K. Ida
24/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(PAP	25/09/2009	Nurse to advise	Normal Smearing Papping		Yes	Dr C. Aram
24/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(PSA	26/05/2011	Doctor to advise	Abnormal Laring Prostating		Yes	Dr C. Aram
24/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(HDL	26/05/2011	Doctor to advise	Being treated Fitting up the Arting		Yes	Dr C. Aram
25/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(PSA SMEAR	09/03/2011	Reception to advise	Abnormal Inspecto Recto		Yes	Dr C. Aram
25/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(PAP SMEAR	23/07/2009	Urgent appointment	Abnormal Pappo Smearo		Yes	Dr C. Aram
25/12/2014	Concepts, HL Patient 01 HL	078054515(H), 0404054646(M)	(HDL	28/09/2009	Non-urgent appointment	Seeing specialist Fatto of the HDL Typo		Yes	Dr C. Aram
17/05/2019	Allbright, Kathleen			17/05/2019	Reception to advise	Abnormal		Yes	Dr C. Aram

At the bottom, it says "Contact Method: Phone Letter Email SMS APP" and "Message Status: Not Contacted Unsuccessful/Failed Sent Read/Delivered Unused messages: 0 SMS". The date is "Wednesday 24/07/2019 02:01:39 PM".

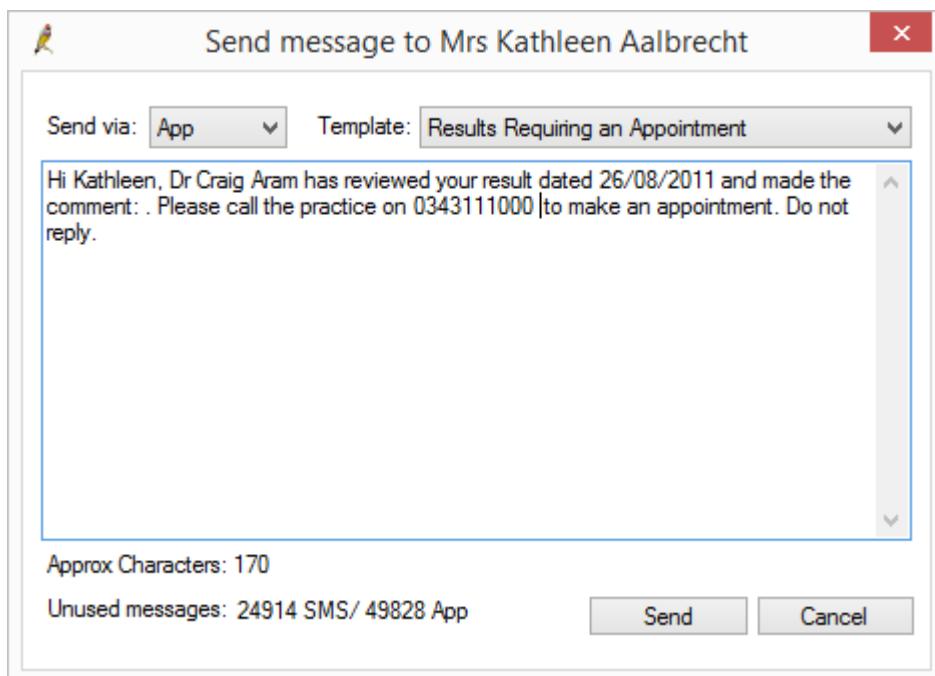
- Use the **Filter by...** and **Checked by** options to show only those results you want to work with. For example, if you are a nurse, you might filter on an action of 'Nurse to Advise', or 'All unactioned', so that you are only working with applicable reminders.

- The leftmost column contains an icon that indicates one of:

- the patient's preferred contact method
- the contact method of the last contact note for this reminder, if one exists.

The legend along the bottom of the screen explains the different icons and colours that can apply.

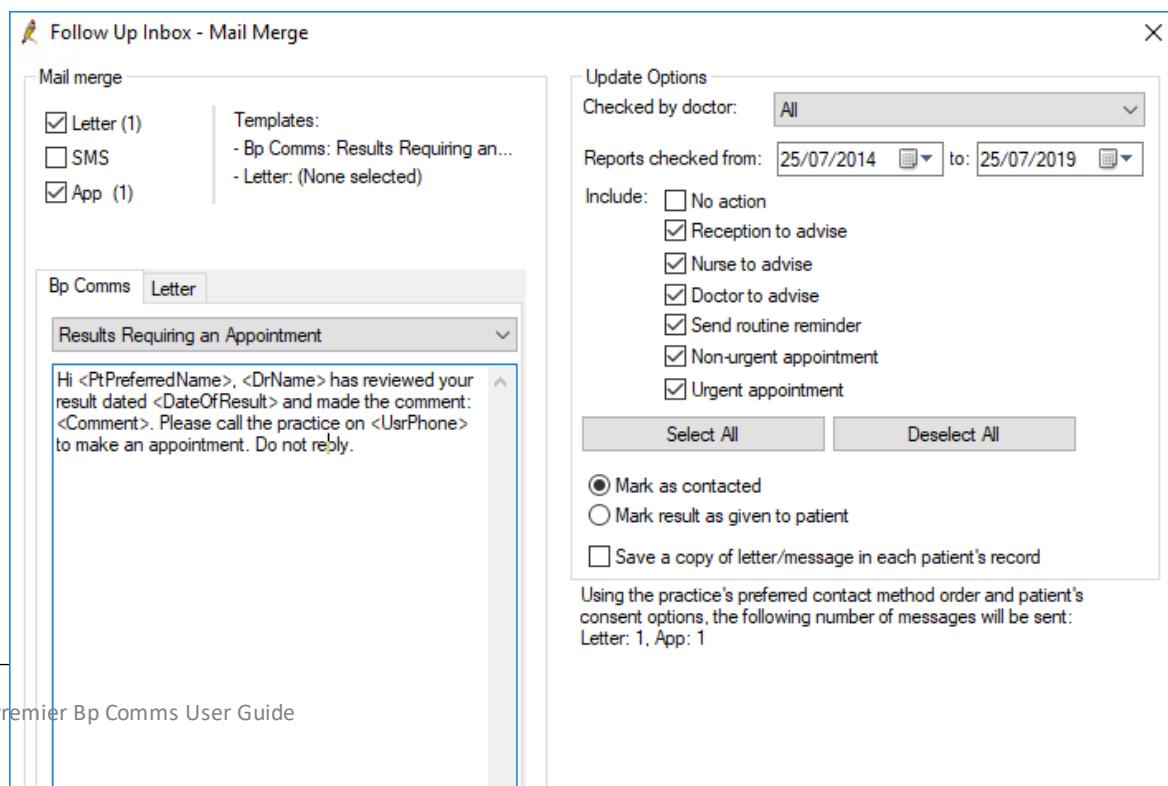
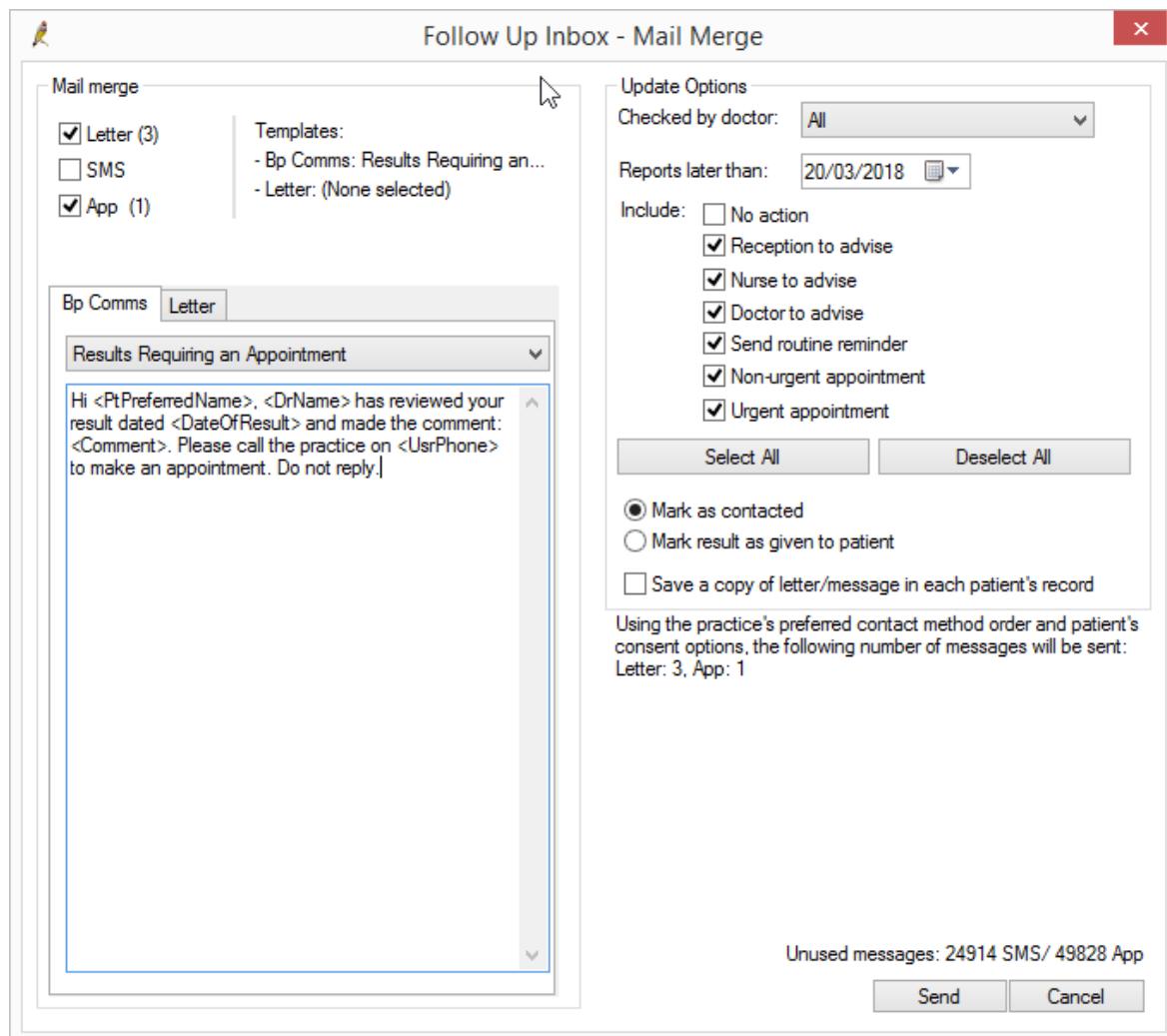
- If the icon colour indicates that a patient has been contacted about this reminder, click **Record note** to view the contact notes associated with that reminder, such as a phone attempt with no reply, or an appointment has already been booked.
- If the patient preferred contact is SMS or App, click **Send message** to open the **Send message** screen. You can only select templates of type 'Result' if you open this screen from the **Follow up Inbox**.



- Review the message text and click **Send**. The message will be sent and a contact note automatically created to record the message send.
- Action the reminder according to your practice's guidelines, such as marking as contacted.

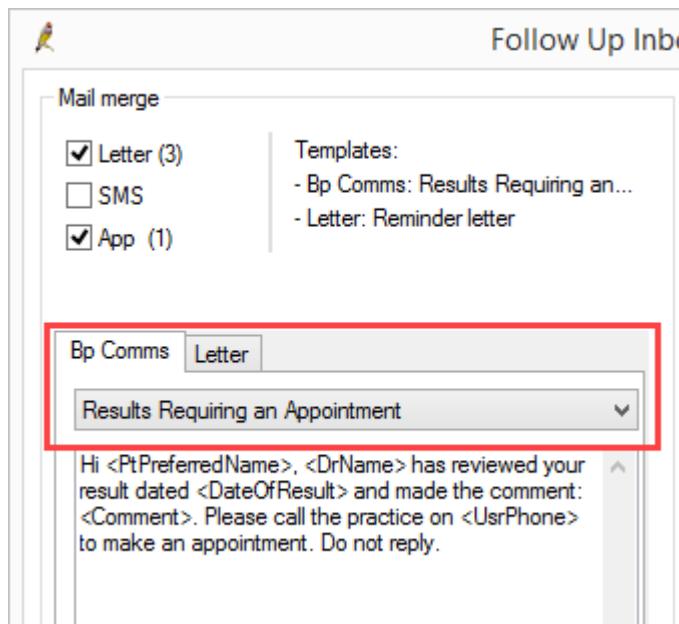
## Send bulk clinical communications with a mail merge

- From the main screen, select **Clinical > Follow up Inbox**.
- Use the **Filter by...** and **Checked by** options to show only those results that you want to send in bulk, to make it easy to visualise what will be sent. You can also action any results now that you do not want to send in bulk.
- Select **File > Mail Merge** to open the **Follow up Inbox - Mail Merge** window.

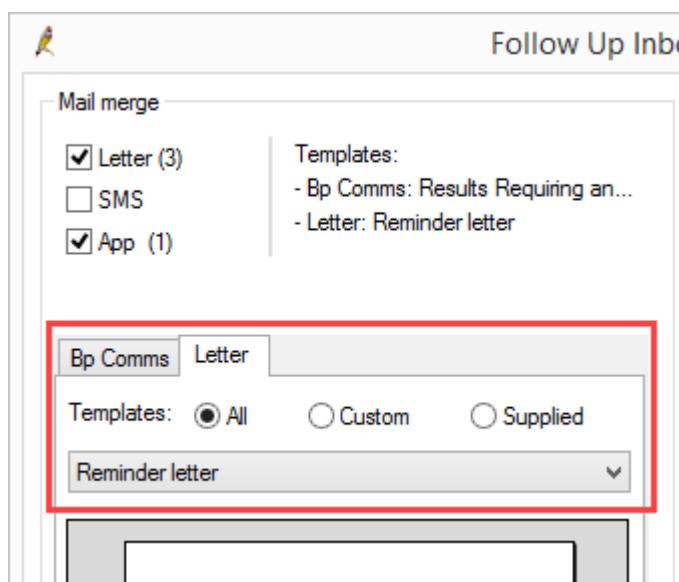


Bp Premier will check if each patient has consented to receive SMS or Best Health App messages of type 'Clinical Communication'. Patients who have consented and enrolled will be added to the **SMS or App** total; patients who have not consented will be added to the **Letter** total.

4. In the **Bp Comms** tab, select the clinical communication template you want to use.



5. If some patients will receive a letter, select the **Letter** tab and select the clinical communication letter template to use.



6. Set the **Update options** on the right hand side to apply.

### Update Options

Checked by doctor:

All

Reports later than:

20/03/2018



Include:  No action

Reception to advise

Nurse to advise

Doctor to advise

Send routine reminder

Non-urgent appointment

Urgent appointment

Mark as contacted

Mark result as given to patient

Save a copy of letter/message in each patient's record

Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
Letter: 3, App: 1

### Update Options

Checked by doctor:

All



Reports checked from: 25/07/2014



to: 25/07/2019



Include:  No action

Reception to advise

Nurse to advise

Doctor to advise

Send routine reminder

Non-urgent appointment

Urgent appointment

Mark as contacted

Mark result as given to patient

Save a copy of letter/message in each patient's record

Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
Letter: 1, App: 1

If you filtered the list on the **Follow up Inbox** screen, the filters will be already set correctly. If not, filter the final list to be included in the list of results:

- **Checked by doctor** filters the list to results checked only by the selected provider.
- **Reports later than** filters the list to reports checked after the selected date. **Reports checked from** filters the list to reports checked between the selected dates.
- **Include** determines the results to include based on the assigned **Action**. For example, you could untick all boxes except **Urgent** appointment to follow up urgent results by SMS or Best Health App.

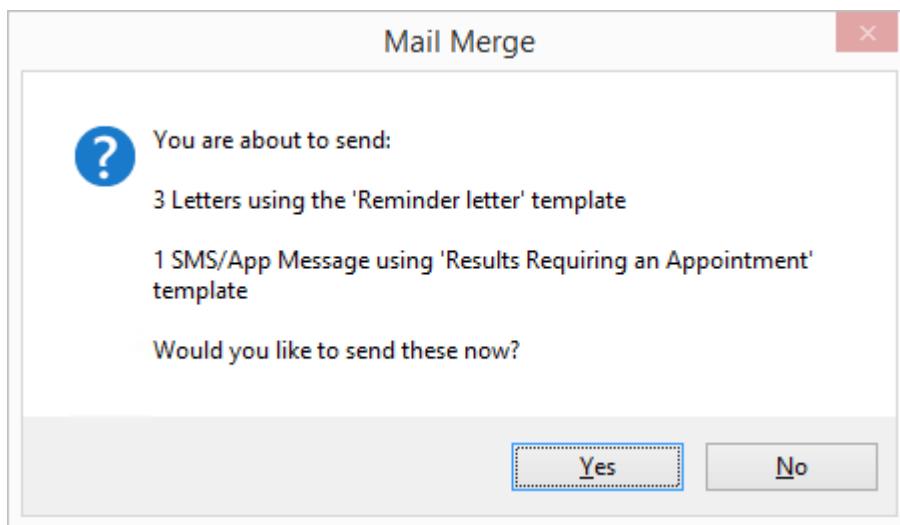
---

**NOTE** Make sure the options you select here follow your practice's procedures for following up results.

---

- **Mark as contacted** will mark each investigation result as contacted and remove the result from the Follow up Inbox.
- **Save a copy in each patient's record** places a copy of the clinical communication into the **Correspondence Out** section of the patient's record.

7. Click **Send** from the **Mail Merge** window. Bp Premier will confirm that you want to send the selected clinical communications.



8. Click **Yes** to confirm. Bp Premier will:

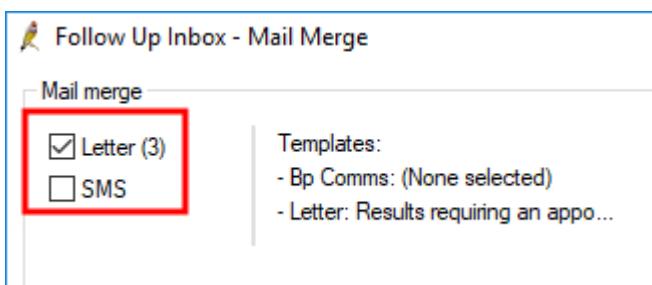
- Queue clinical communications for sending.
- Send letters to the designated printer.
- Deduct message credits from your Bp Comms credit.
- Mark results as contacted (if this update option was ticked).
- Create message and letter records in patient record > Correspondence out (if this update option was ticked).
- Create a contact note of type 'clinical communication' against each followed-up result.

Sending results followup communications is complete.

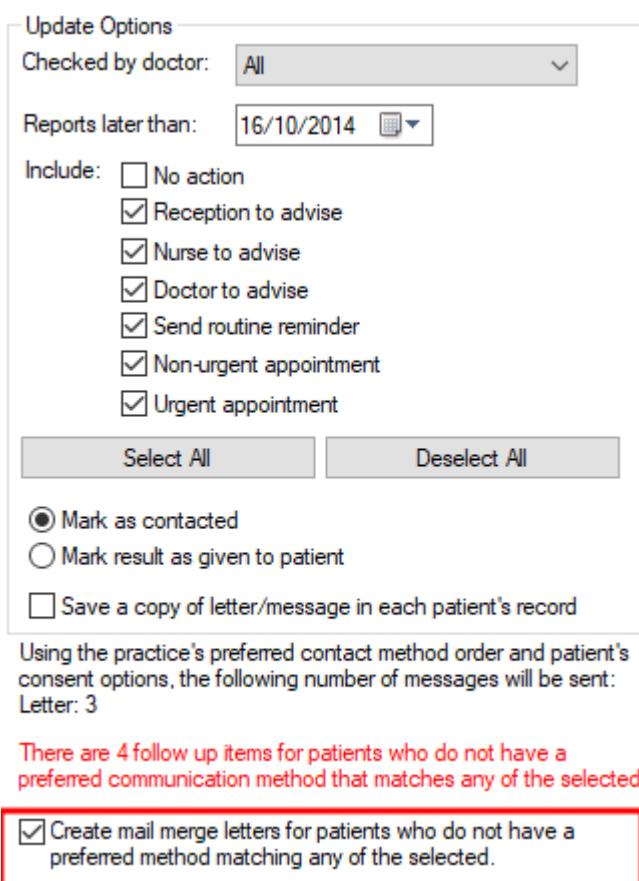
## I don't want to use the default communication methods

You may not wish to use the patient's default method for sending clinical communications. For example, your practice may prefer to send out letters instead of SMS.

1. From the **Mail Merge** window, untick the option you do not want to use.



2. The right side of the window will display a checkbox allowing you to send a letter instead of the patient's default communication method.



The screenshot shows the 'Update Options' window. It includes fields for 'Checked by doctor' (set to 'All'), 'Reports later than' (set to '16/10/2014'), and a list of 'Include' items with checkboxes: 'No action' (unchecked), 'Reception to advise' (checked), 'Nurse to advise' (checked), 'Doctor to advise' (checked), 'Send routine reminder' (checked), 'Non-urgent appointment' (checked), and 'Urgent appointment' (checked). Below these are 'Select All' and 'Deselect All' buttons. Under 'Mark as contacted', the radio button for 'Mark as contacted' is selected. There is also a checkbox for 'Save a copy of letter/message in each patient's record'. A note at the bottom states: 'Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent: Letter: 3'. A red box highlights the note and the checkbox for creating mail merge letters for patients without a preferred method.

Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
Letter: 3

There are 4 follow up items for patients who do not have a preferred communication method that matches any of the selected.

Create mail merge letters for patients who do not have a preferred method matching any of the selected.

Update Options

Checked by doctor:

Reports checked from:   to:

Include:

No action  
 Reception to advise  
 Nurse to advise  
 Doctor to advise  
 Send routine reminder  
 Non-urgent appointment  
 Urgent appointment

Mark as contacted  
 Mark result as given to patient

Save a copy of letter/message in each patient's record

Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
Letter: 1

There are 1 follow up items for patients who do not have a preferred communication method that matches any of the selected.

Create mail merge letters for patients who do not have a preferred method matching any of the selected.

3. Click **Send** to send the reminders.

## Send health awareness communications

Health awareness communications are sent in two steps: generate the list of applicable patients from a database search, and choose the communication method (SMS, Best Health App or letter).

Before patients can receive health awareness communications by SMS or Best Health App:

- The practice must enable Health Awareness communications in Setup > Configuration > **Bp Comms**
- The patient must consent to receive Health Awareness communications and enrol in SMS or Best Health App in their demographics > **Bp Comms Consent**.

### What templates can I use for health awareness communications?

Health awareness communications from a database search are not intended to replace clinical reminders, which can also be sent by SMS or Best Health App from the **Reminders** window. Communications from a database search allow a practice to send out messages about a health-related campaign. However, you can choose to create a clinical reminder automatically when a health awareness communication is sent, so that campaign messages can be tracked.

If you tick the option **Create a reminder for each patient**, any Bp Comms or Letter template you select should not contain Clinical Reminder detail fields. Clinical Reminder fields will not be populated with any data when the template is converted into message text. Best Practice Software recommend that you create a specific template for each health awareness campaign rather than re-use supplied templates.

### Patient opt-out

Patients must be able to contact your practice if they wish to opt out of health awareness communications after they have initially provided consent.

The template field <optout> inserts the text 'opt out' into the message. The default Search Utility template supplied contains the fields '<optout><usrphone>' to indicate that the recipient can contact the phone number to opt out of receiving future messages.

 Edit Bp Comms Template X

Name:  Type:

Hi <PtPreferredName>, <UsrLocation>, will now open until 7pm on Monday and Thursday evenings. **<Optout>** <UsrPhone> Do not reply.

**<PtSurname>**  
**<PtFirstName>**  
**<PtPreferredName>**  
**<PtFullName>**  
**<UsrPhone>**  
**<Practice>**  
**<UserName>**  
**<UsrLocation>**  
**<Optout>**

Approx characters: 127

Set as default template for this template type    Template text can be edited before sending

Appointment template expects a reply

---

**IMPORTANT** In Australia, the Spam Act 2003 prohibits the sending of unsolicited commercial electronic messages. Every commercial electronic message must contain a functional 'unsubscribe' facility. Best Practice Software strongly recommend that all **Search Utility** templates contain the phrase 'opt out' and your practice number to comply with the requirements of the Spam Act 2003.

---

To remove a patient from future health awareness communications, untick the **Health Awareness** option in the patient demographics > **Bp Comms Consent**. The *Spam Act 2003* requires that the request to unsubscribe be honoured in a specific time period (currently five working days).

## Bp Comms Consent - Leonard Bryant

### Consent Options

This patient consents to receive the following electronic reminders/messages (consent settings selected on the Bp Comms configuration screen are enabled)

Appointments       Clinical Communication (Results & Clinical messages)

Clinical Reminders       Health Awareness (Leaflets & Database search)  

Select All

Deselect All

Signed consent status: Not Linked

Import and link the signed patient consent form using the buttons below

[Open Bulk Document Import](#)

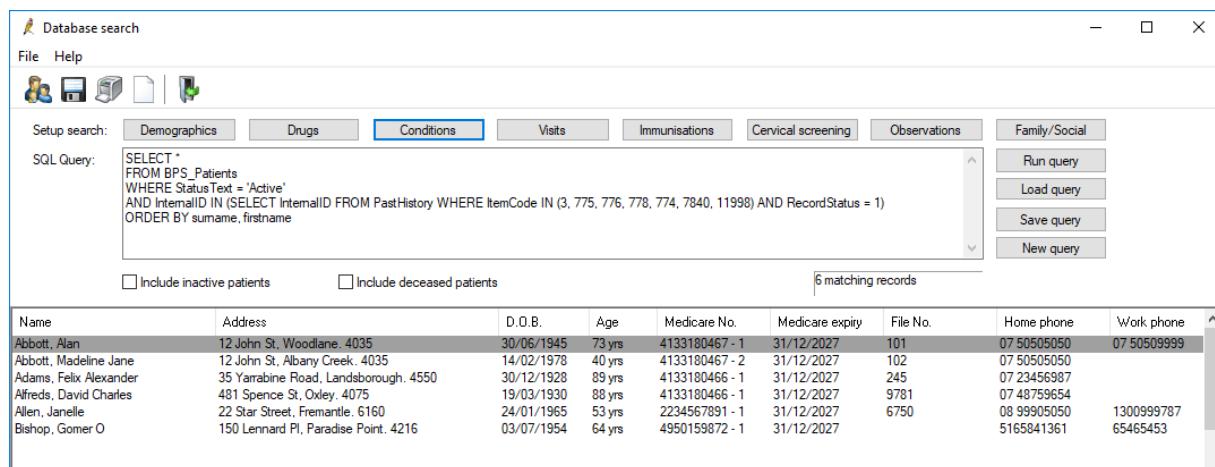
[Link to signed consent](#)

## Select patients for communications

Press Ctrl+S or select **Utilities > Search** from the main screen to run a database search, using criteria to select patients that you want included in the communications. For example, you may want to search for all patients with diabetes for a health awareness campaign, or search for all patients with asthma, or who are 65 years old or over.

Running a search for Bp Comms is exactly the same as any other database search.

The example below shows a search by **Conditions** for patients with 'Diabetes' in past history.



Database search

File Help

Setup search:  Demographics  Drugs  Conditions  Visits  Immunisations  Cervical screening  Observations  Family/Social

SQL Query:

```
SELECT *
FROM BPS_Patients
WHERE StatusText = 'Active'
AND InternalID IN (SELECT InternalID FROM PastHistory WHERE ItemCode IN (3, 775, 776, 778, 774, 7840, 11998) AND RecordStatus = 1)
ORDER BY surname, firstname
```

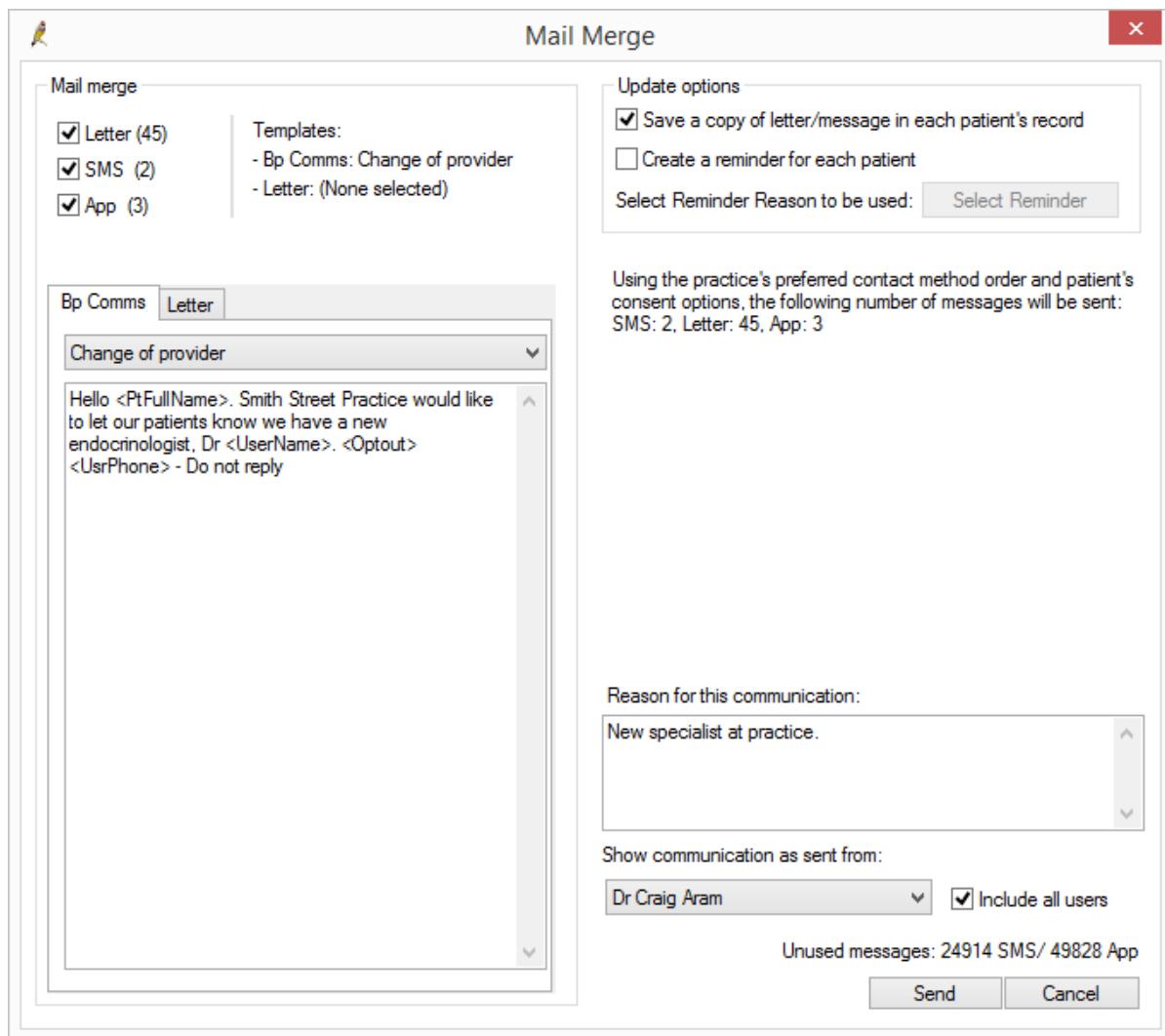
Run query  Load query  Save query  New query

Include inactive patients  Include deceased patients 6 matching records

Name	Address	D.O.B.	Age	Medicare No.	Medicare expiry	File No.	Home phone	Work phone
Abbott, Alan	12 John St, Woodlane, 4035	30/06/1945	73 yrs	4133180467 - 1	31/12/2027	101	07 50505050	07 50509999
Abbott, Madeline Jane	12 John St, Albany Creek, 4035	14/02/1978	40 yrs	4133180467 - 2	31/12/2027	102	07 50505050	
Adams, Felix Alexander	35 Yarabine Road, Lansborough, 4550	30/12/1928	89 yrs	4133180466 - 1	31/12/2027	245	07 23456987	
Alfreds, David Charles	481 Spence St, Oxley, 4075	19/03/1930	88 yrs	4133180466 - 1	31/12/2027	9781	07 48759654	
Allen, Janelle	22 Star Street, Fremantle, 6160	24/01/1965	53 yrs	2234567891 - 1	31/12/2027	6750	08 99905050	1300999787
Bishop, Gomer O	150 Lennard Pl, Paradise Point, 4216	03/07/1954	64 yrs	4950159872 - 1	31/12/2027		5165841361	65465453

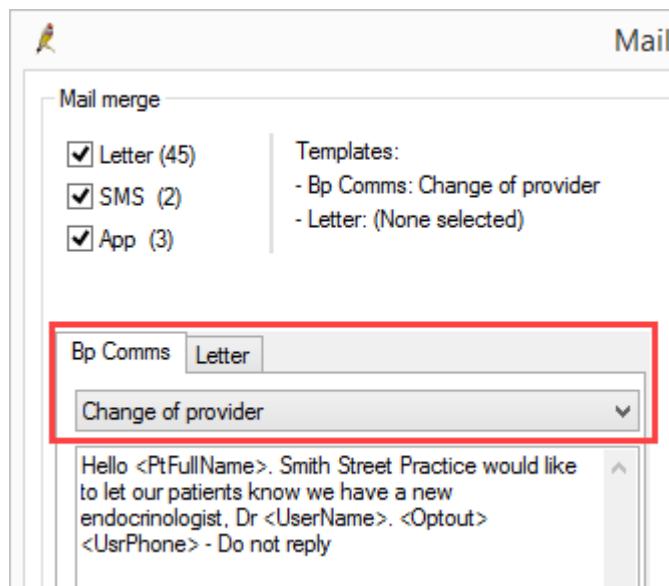
## Send communications

- After you have generated a list of patients from a database search, select **File > Mail Merge**. The **Mail merge** screen appears.

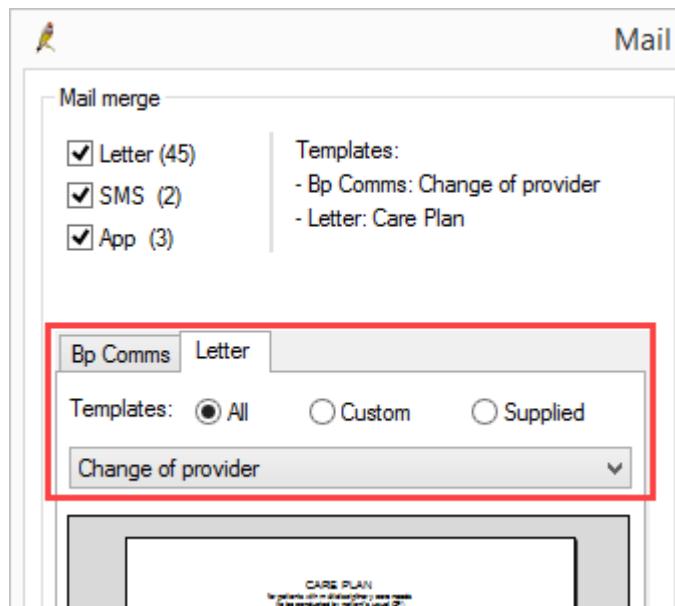


Bp Premier will check if each patient has consented to receive SMS or Best Health App messages of type 'Health Awareness'. Patients who have consented and enrolled will be added to the **SMS or App** total; patients who have not consented will be added to the **Letter** total.

2. In the **Bp Comms** tab, select the health awareness SMS template you want to use.



3. If there are patients who will receive a letter, select the **Letter** tab and select the health awareness letter template to use.



4. Tick the **Update options** to apply:

- **Save a copy in each patient's record** places a copy of the health awareness communication into the **Correspondence Out** section of each patient's record.
- **Create a reminder for each patient** adds a new reminder to each patient in the search results. The reminder will be marked as 'Sent' so you can monitor responses from the patient from the **Follow up reminders** screen. If you tick this option, you cannot include any reminder reason fields in the message sent.

5. Click **Select Reminder** to choose the reminder.

Update options

Save a copy of letter/message in each patient's record

Create a reminder for each patient

Select Reminder Reason to be used:

Reminder

Reminder Reason: Diabetes review  
Provider to see: Dr Craig Aram  
Location: Bundaberg Clinic  
Due date: 20/03/2020

Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
SMS: 2, Letter: 45, App: 3

6. If you are not creating reminders from this communication, enter text in the **Reason for this communication** text area. This text will not be included in the message or letter to the patient, but allows the contact note that is automatically created to be identified.

Reason for this communication:

New specialist at practice.

Show communication as sent from:

Dr Craig Aram



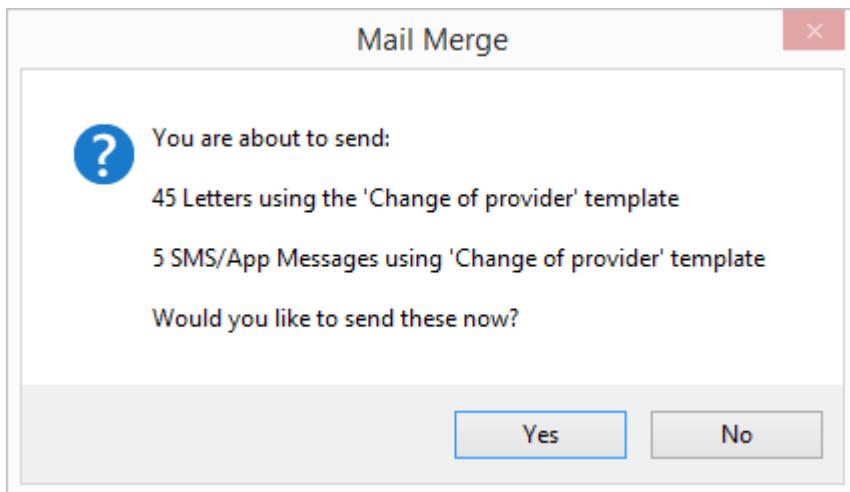
Include all users

Unused messages: 24914 SMS/ 49828 App

7. If you are not creating a reminder, or are creating a reminder for 'any doctor', select a user from the **Show communication as sent from** dropdown. This dropdown shows only providers, unless **Include all users** is ticked.

**Show communication as sent from** identifies who a communication is being sent on behalf of, and appears in the contact note that is created. This information is not included in the message or letter.

8. Click **Send** from the **Mail Merge** window. Bp Premier will confirm that you want to send the selected health awareness messages.



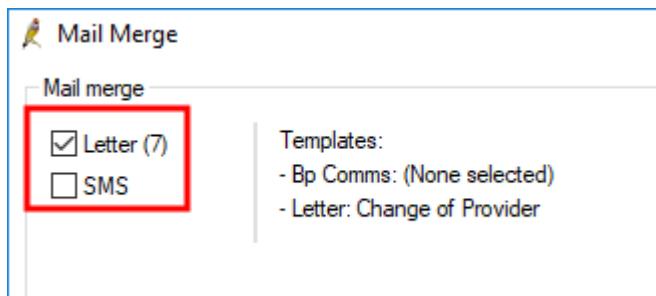
9. Click **Yes** to confirm. Bp Premier will:
  - Queue SMS reminders for sending.
  - Send letter reminders to the designated printer.
  - Deduct message credits from your Bp Comms credit.
  - Create reminders in patient records (if this update option was ticked).
  - Create message and letter records in patient record > Correspondence out (if this update option was ticked).
  - Create a contact note of type 'Reminder' against each patient if **Create a reminder for each patient** was ticked; otherwise, create a contact note of type 'Utilities search'.

Sending reminders is complete.

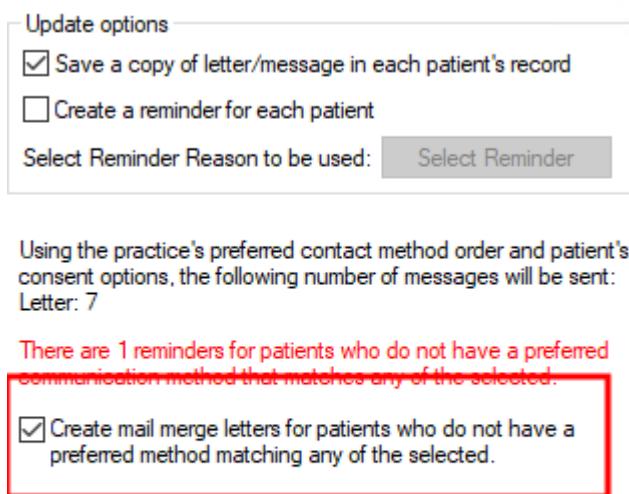
#### I don't want to use the default communication methods

You may not wish to use Bp Premier's default methods for sending health awareness messages. For example, your practice may prefer to send out letters instead.

1. From the **Mail Merge** window, untick the option you do not want to use.



2. The right side of the window will display alternate options for those patients affected. Tick the alternate option you want to use.



Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
Letter: 7

There are 1 reminders for patients who do not have a preferred communication method that matches any of the selected.

Create mail merge letters for patients who do not have a preferred method matching any of the selected.

3. Click **Send** to send the reminders.

## Send health information to a patient's app

You can send a summary of a patient's record to their Best Health App, and also send MIMS consumer information and patient education leaflets.

All of the following instructions begin from the patient record.

### Send Health Summary

To send a health summary, the patient must consent to receive messages of type **Clinical Communication**.

The Health Summary sent to a patient's app is a subsection of the clinical information from the patient's record. It is not related to any Health Summaries uploaded to a patient's My Health Record. Only one copy of a health summary is stored in the patient's app per location. If you send a new health summary for a location, the new version will overwrite the current version.

1. Select **Bp Comms > Send Health Summary**. The **Health Summary** window will appear.

**Health Summary - Ms Katrina BA**

Note: Data sent in this Health Summary will replace any previous Health Summaries sent to this patient

Medications:				Allergies		
Drug name	Strength	Directions	Reason for	Item	Reaction	Severity
<input checked="" type="checkbox"/> Allopurinol 300mg Tablet	300mg	1 Tablet In the morning ...		<input checked="" type="checkbox"/> Anaesthetic gases	Disorientation	Moderate
				<input checked="" type="checkbox"/> Aluminium containing compounds	Rash	Mild

Medical History:				Immunisations:		
Date	Item	Status	Severity	Date	Vaccine	Against
<input type="checkbox"/> 30/01/2018	Ulcer, gastric	Inactive	Mild	<input checked="" type="checkbox"/> 22/08/2018	Tet-Tox	Tetanus

2. In each section, click the ... button to send the Health Summary to the background and go back to the patient record, where you can add additional items.
3. Bring the focus back to the Health Summary and click **Refresh** to see any changes.
4. Untick any items in each section you do not want included in the health summary sent to the patient's app. In the example above, the item from Medical History has been unticked and will not be included in the health summary.
5. Click **Send**.

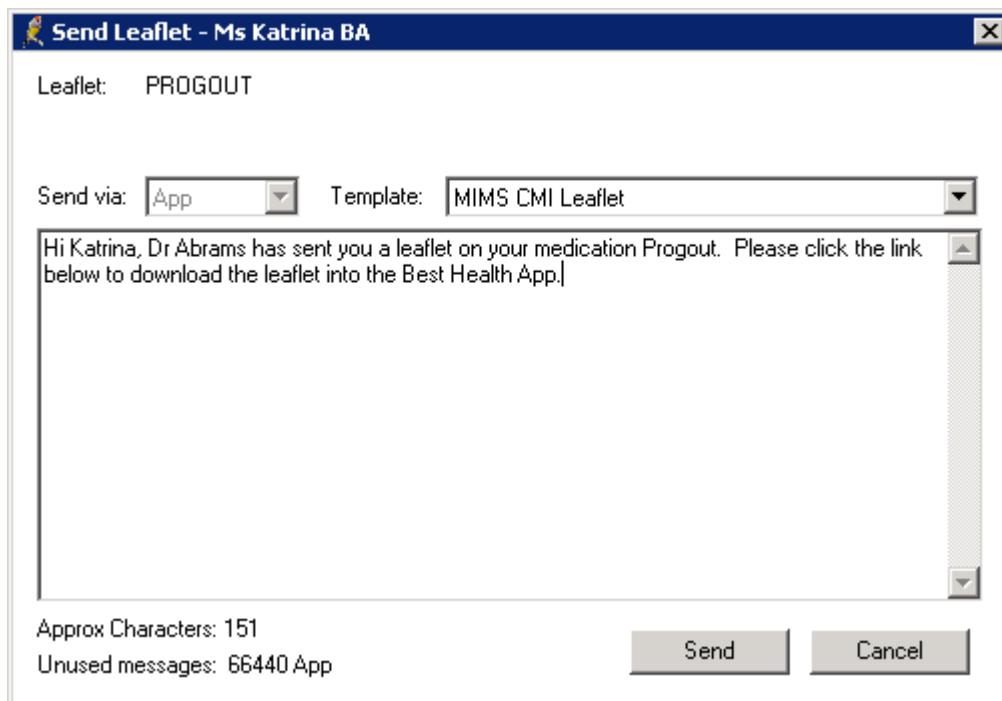
## Send MIMS Consumer Medicines Information

To send MIMS Consumer Medicines Information, the patient must consent to receive messages of type **Health Awareness**.

1. Select **View > MIMS Consumer Medicines Information** or press Shift+F12.
2. From the **MIMS CMI viewer**, search for a medication.



3. Select **File > Send Leaflet** or click the Send Leaflet icon from the taskbar.
4. Update the message if the SMS template allows.



5. Click **Send**. A message is sent to the patient's app with a link to download the leaflet.

## Send patient education leaflets

To send patient education leaflets, the patient must consent to receive messages of type **Health Awareness**.

1. Select **View > MIMS Consumer Medicines Information** or press Shift+F12.
2. From the **MIMS CMI viewer**, search for a medication.
3. Select **File > Send Leaflet** or click the Send Leaflet icon  from the taskbar.
4. Update the message if the SMS template allows.
5. Click **Send**. A message is sent to the patient's app with a link to download the leaflet.

## Send clinical reminders

Clinical reminders are sent in two steps: generate the list of patients with reminders, and choose the reminder method (SMS, Best Health App or letter, or output to print, file, or label).

### Select patients for reminders

1. Select **Clinical > Reminders** or click the envelope icon  on the main screen of Bp Premier. The **Reminders** screen will appear.

Name	Reminder Reason	Comment	Due	Doctor	Location	Address	D.O.B.	Age
Abbott, Madeline Jane	Skin check		18/08/2018	Dr F. Findacure	Bundaberg Clinic	12 John St, Albany Creek, 4035	14/02/1978	40 yrs
Abbott, Madeline Jane	Cervical screening (Clinically Significant)		18/08/2018	Dr F. Findacure	Bundaberg Clinic	12 John St, Albany Creek, 4035	14/02/1978	40 yrs
Abbott, Madeline Jane	Breast check	Had tenderness in previous test	18/08/2018	Dr F. Findacure	Bundaberg Clinic	12 John St, Albany Creek, 4035	16/02/1933	85 yrs
Alfreds, Gwenda Elizabeth	Care plan		18/08/2018	Dr F. Findacure	Bundaberg Clinic	481 Spence St, Odey, 4075	24/01/1965	53 yrs
Allen, Janelle	Pap smear		18/08/2018	Dr F. Findacure	Bundaberg Clinic	22 Star Street, Fremantle, 6160	11/04/1984	34 yrs
Amos, Tegan	Care plan		18/08/2018	Dr F. Findacure	Bundaberg Clinic	1/235 Rode Road, Chemsidge, 4032	07/10/1954	64 yrs
Ashley, Christopher R	Custom reminder reason		18/08/2018	Dr F. Findacure	Bundaberg Clinic	491 Dalys Gr, Mermaid Waters, 4218	07/10/1954	64 yrs
Ashley, Christopher R	ADF Post Discharge GP Health Assessme		18/08/2018	Dr F. Findacure	Bundaberg Clinic	491 Dalys Gr, Mermaid Waters, 4218	07/10/1954	64 yrs
Bartholomew, Raymond	Influenza Vaccination		18/08/2018	Dr F. Findacure	Bundaberg Clinic	354 Main Road, Bridgemere Downs, 4035	27/11/1928	89 yrs
Bishop, Gomer O	Tetanus Immunisation		18/08/2018	Dr F. Findacure	Bundaberg Clinic	150 Lennard Pl, Paradise Point, 4216	03/07/1954	64 yrs
Bishop, Gomer O	Pneumovax Immunisation		18/08/2018	Dr F. Findacure	Bundaberg Clinic	150 Lennard Pl, Paradise Point, 4216	03/07/1954	64 yrs
Bishop, Gomer O	Influenza Immunisation		18/08/2018	Dr F. Findacure	Bundaberg Clinic	150 Lennard Pl, Paradise Point, 4216	03/07/1954	64 yrs
Bryant, Leonard	Care plan		18/08/2018	Dr F. Findacure	Bundaberg Clinic	32 Lonely Lane, Bankstown, 2200	06/06/1956	62 yrs
Coleman, Jessica M	Faecal Occult Blood		18/08/2018	Dr F. Findacure	Bundaberg Clinic	312 Joseph Avenue, Dumbore, 4407	14/02/1939	79 yrs
Allen, Janelle	Ruvax Immunisation		23/10/2018	Dr F. Findacure	Bundaberg Clinic	22 Star Street, Fremantle, 6160	24/01/1965	53 yrs

Currently logged in: Dr Frederick Findacure (Bundaberg Clinic)

Monday 08/10/2018 08:13:52 AM

This screen displays reminders that have **not yet been sent**. If a reminder is 'marked as sent' from anywhere in Bp Premier, the reminder will not be displayed on this screen.

Clinically significant reminders are indicated in the **Action** column.

2. Click **Select Patients** to display the **Select patients for reminders** screen.

 Select patients for reminders X

Select reasons:  Clinically significant only

Filter by type:

<b>Reason</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> ADF Post Discharge GP Health Assess...</li> <li><input checked="" type="checkbox"/> Asthma review</li> <li><input checked="" type="checkbox"/> Breast check</li> <li><input checked="" type="checkbox"/> Care plan</li> <li><input checked="" type="checkbox"/> Cervical screening (Clinically Significant)</li> <li><input checked="" type="checkbox"/> Custom reminder reason</li> <li><input checked="" type="checkbox"/> Faecal Occult Blood</li> <li><input checked="" type="checkbox"/> Fluvax Immunisation</li> <li><input checked="" type="checkbox"/> Hepatitis B Immunisation</li> <li><input checked="" type="checkbox"/> Immunisation</li> <li><input checked="" type="checkbox"/> Influenza Immunisation</li> <li><input checked="" type="checkbox"/> Influenza Vaccination</li> <li><input checked="" type="checkbox"/> Pap smear</li> <li><input checked="" type="checkbox"/> Pneumovax Immunisation</li> <li><input checked="" type="checkbox"/> Prostate check (Clinically Significant)</li> <li><input checked="" type="checkbox"/> Skin check</li> <li><input checked="" type="checkbox"/> Tetanus Immunisation</li> </ul>	<b>Select users:</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"><b>User</b></td> </tr> <tr> <td style="padding: 5px;"> <input checked="" type="checkbox"/> Not specified  <input checked="" type="checkbox"/> Dr I. Cure  <input checked="" type="checkbox"/> Dr F. Findacure         </td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="button" value="Select all"/></td> <td style="text-align: center; padding: 5px;"><input type="button" value="Deselect all"/></td> </tr> <tr> <td style="padding: 5px;"><b>Location</b></td> </tr> <tr> <td style="padding: 5px;"> <input checked="" type="checkbox"/> Bundaberg Clinic         </td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="button" value="Select all"/></td> <td style="text-align: center; padding: 5px;"><input type="button" value="Deselect all"/></td> </tr> </table>	<b>User</b>	<input checked="" type="checkbox"/> Not specified <input checked="" type="checkbox"/> Dr I. Cure <input checked="" type="checkbox"/> Dr F. Findacure	<input type="button" value="Select all"/>	<input type="button" value="Deselect all"/>	<b>Location</b>	<input checked="" type="checkbox"/> Bundaberg Clinic	<input type="button" value="Select all"/>	<input type="button" value="Deselect all"/>
<b>User</b>									
<input checked="" type="checkbox"/> Not specified <input checked="" type="checkbox"/> Dr I. Cure <input checked="" type="checkbox"/> Dr F. Findacure									
<input type="button" value="Select all"/>	<input type="button" value="Deselect all"/>								
<b>Location</b>									
<input checked="" type="checkbox"/> Bundaberg Clinic									
<input type="button" value="Select all"/>	<input type="button" value="Deselect all"/>								

Due between:   and:

Include overdue reminders.  
 Include inactive patients

3. Select from the fields to search for patients with reminders to send:

Filter	Action
Clinically significant only	Filters the Reminder reasons to only show those marked as Clinically significant.
Filter by type	Filters the Reminder reasons to only show those that are linked to the selected type. Reminder types can be created in Setup > Configuration > <b>Reminders</b> .
Reason	Select one or more reminder reasons to send, or click <b>Select all</b> .
Due between / and	Select patients with reminders due between the dates only.
Select users	Select patients assigned a reminder by the selected doctors only.

Filter	Action
Location	Select reminders sent from the selected locations only.
Include overdue reminders	Include patients with reminders that are overdue in the selected time period.
Include inactive patients	Include patients marked as inactive in their patient demographic.

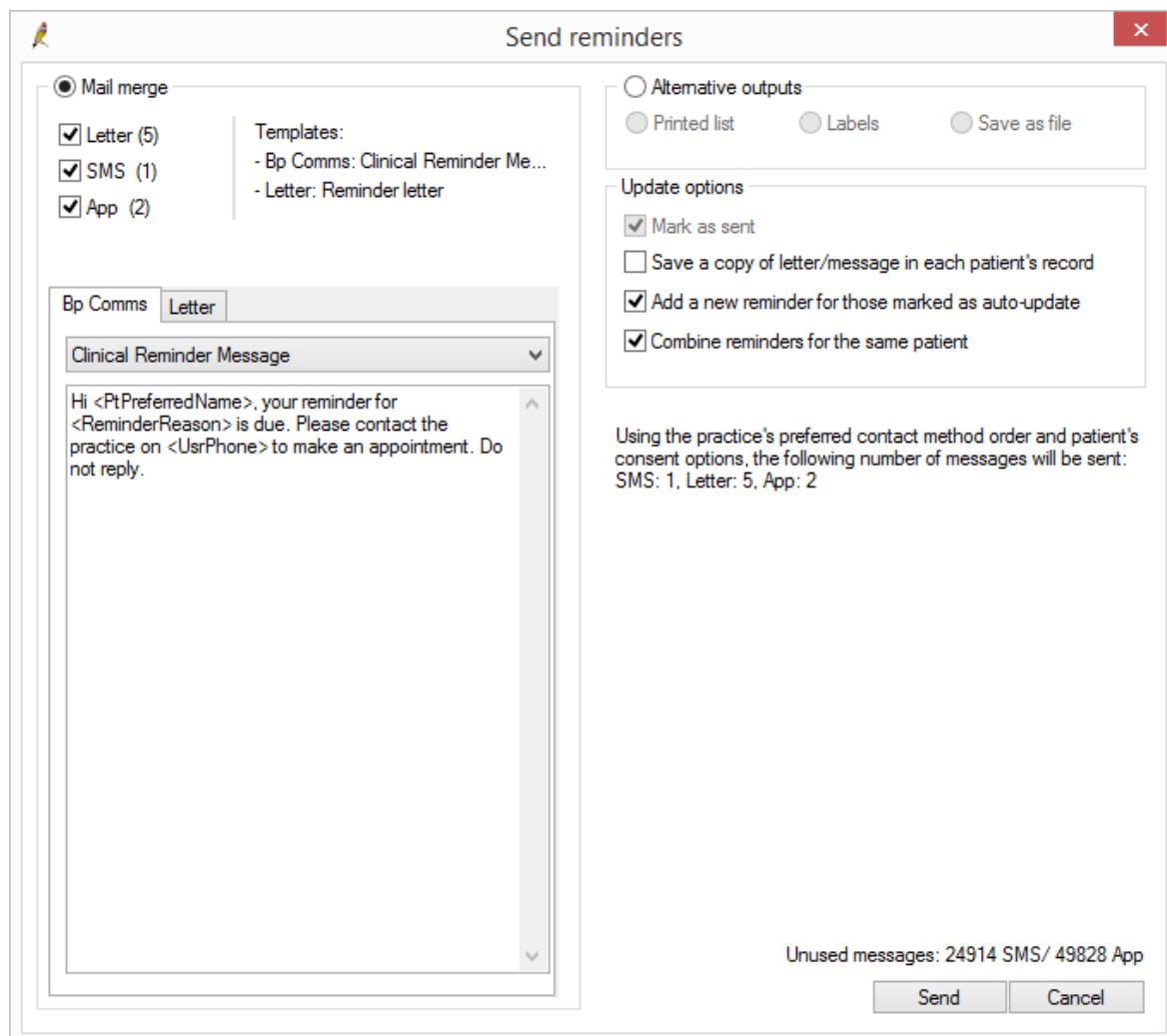
4. Click **Ok** to return to the **Reminders** screen. The following actions are available using the top buttons:

- To remove a single reminder, select the reminder and click **Remove from list**. The Reminder in the patient record will be unaffected.
- To delete a reminder from the list and the patient record, select the reminder and click **Delete Reminder**. The Reminder will be deleted from the patient's record.
- To view the appointments for a patient (to see if a future appointment might already be booked), click **View appointments**.

You can now send reminders using a suitable method for each patient.

## Send reminders

- From the Reminders screen, click **Send reminders** to open the **Send reminders** window.



Bp Premier will check if each patient has consented to receive SMS or Best Health App messages of type 'Clinical reminder'. Patients who have consented and enrolled will be added to the **SMS or App** total; patients who have not consented will be added to the **Letter** total.

---

**NOTE** Your practice must have enabled SMS Clinical Reminders in **Setup > Configuration**.

---

- In the **Bp Comms** tab, select the clinical reminder template you want to use.

Mail merge

Letter (5)      Templates:  
 SMS (1)      - Bp Comms: Clinical Reminder Me...  
 App (2)      - Letter: Reminder letter

Bp Comms Letter

Clinical Reminder Message

Hi <PtPreferredName>, your reminder for <ReminderReason> is due. Please contact the practice on <UsrPhone> to make an appointment. Do not reply.

3. If there are patients who will receive a letter reminder, select the **Letter** tab and select the clinical reminder letter template to use.

Mail merge

Letter (5)      Templates:  
 SMS (1)      - Bp Comms: Clinical Reminder Me...  
 App (2)      - Letter: Reminder letter

Bp Comms Letter

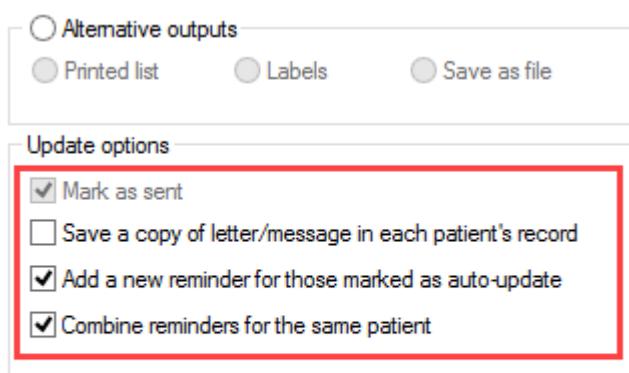
Templates:  All  Custom  Supplied

Reminder letter

Dear Dr [PatientName],  
 Your reminder letter has been sent to [PatientName] on [Date].  
 Could you please ring the practice on [UsrPhone] to make an appointment.  
 Thank you,  
 [PracticeName]

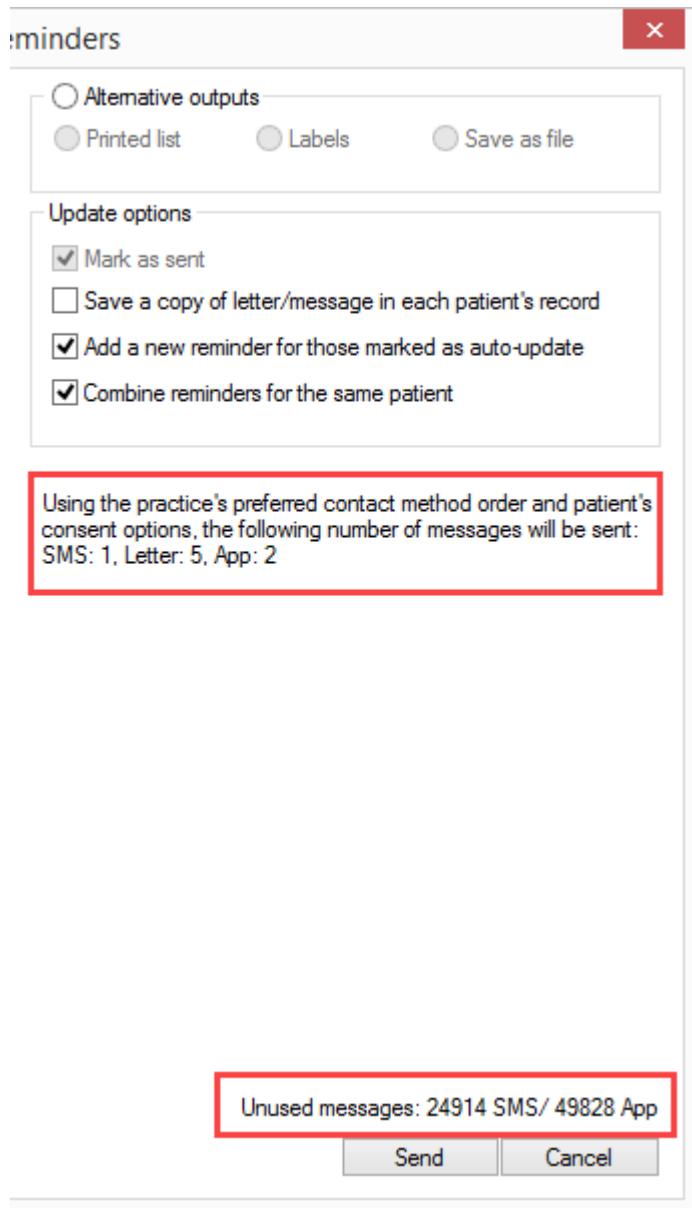
4. Tick the **Update options** to apply:

- **Mark as sent** marks the reminder on the patient's record as 'Sent'. This option is selected by default for **Mail Merge** options (Letter, SMS, App) and cannot be changed. If you select to send by an **Alternative output** (Print, Label, File), **Mark as sent** can be edited.
- **Save a copy in each patient's record** places a copy of the reminder letter or message into the **Correspondence Out** section of the patient's record. The name of a letter will be 'Reminder letter'.
- **Add a new reminder for those marked as auto-update** creates a new reminder in patient records where the reminder is configured to auto-update.
- **Combine reminders for the same patient** combines multiple reminders in the Reminders list intended for the same patient into a single SMS or Best Health App message or reminder letter. The resulting message may exceed the character limit and require multiple credits to send.

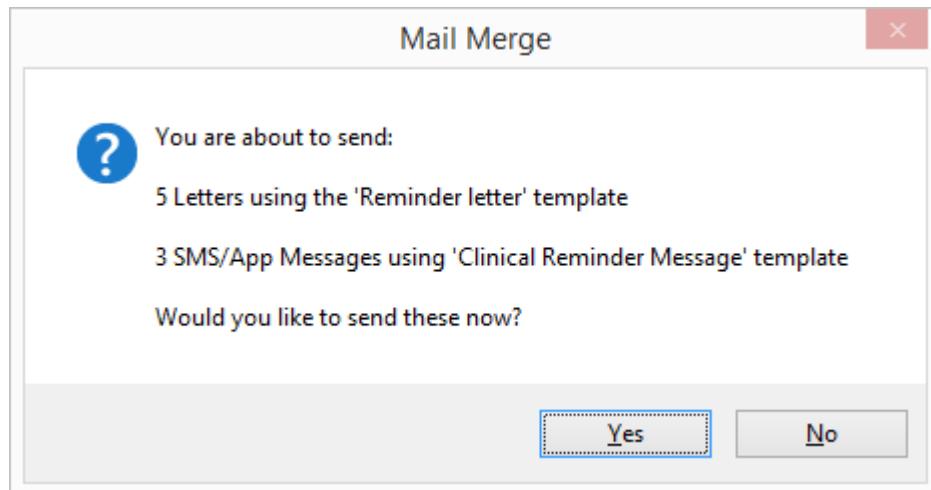


Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
SMS: 1, Letter: 5, App: 2

5. The right side of the **Send reminders** window will show a summary of the message methods and the SMS credits available.



6. Click **Send**. Bp Premier will confirm that you want to send the selected reminders.



7. Click **Yes** to confirm. Bp Premier will:

- Queue reminder messages for sending.
- Send Letter reminders to the designated printer.
- Deduct message credits from your Bp Comms credit.
- Create reminder records in Patient record > Correspondence out (if this update option was ticked).
- Create contact note records of type 'Reminder' for all reminders sent.

Sending reminders is complete.

### Follow up sent reminders

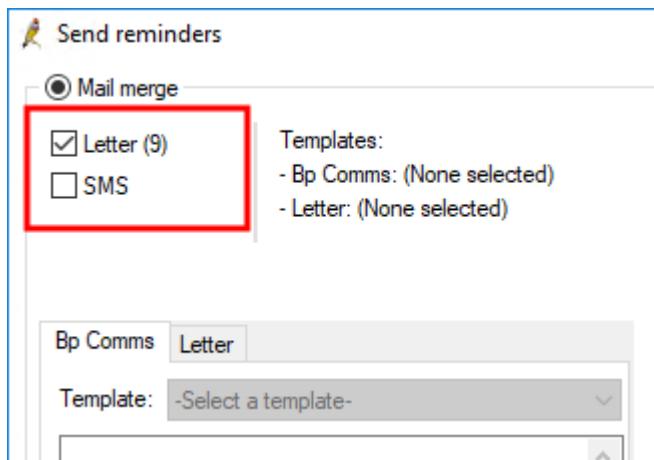
If you recently upgraded to Jade, you can no longer untick the option **Mark as Sent** on the **Send Reminders** window. This allowed you to mark a reminder as sent at a later time, based on a practice's workflow instead (for example, marking as sent only when the appointment has been booked). In Jade, when sending mail merge clinical reminders, all included reminders will be marked as sent.

If you want to review the reminders that have been marked as sent, and action or remark those reminders, you can do this from the **Follow Up Reminders** window. Select **View > Follow up reminders** from the **Reminders** window.

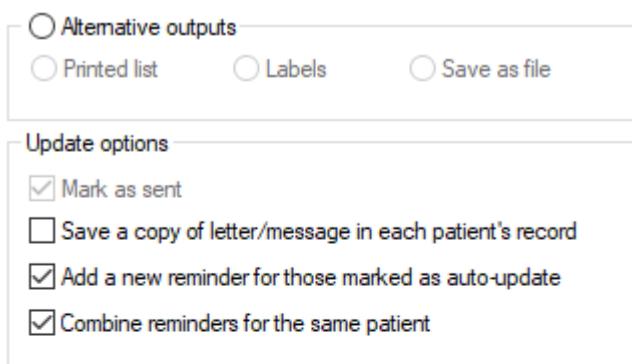
### I don't want to use the default reminder methods

You may not wish to use Bp Premier's default methods for sending reminders. For example, your practice may choose not to send specific clinically sensitive reminders by SMS and prefer to use letters instead.

- From the **Send reminders** window, untick the **Mail merge** option you do not want to use.



- The right side of the window will display alternate options for those patients affected. Tick the alternate option you want to use.



Using the practice's preferred contact method order and patient's consent options, the following number of messages will be sent:  
Letter: 8

There are 1 reminders for patients who do not have a preferred communication method that matches any of the selected.

Create mail merge letters for patients who do not have a preferred method matching any of the selected.

- Click **Send** to send the reminders.

You can also still send reminders to print, label, or file as in previous versions of Bp Premier.

## Send reminders to print, label, or file

Sending reminders to a printed list, a label mail merge, or to file is still available. This functionality is unchanged from previous versions of Bp Premier.

From the **Send reminders** window, tick Alternative outputs, and select the alternate method from the radio buttons. Follow the instructions in [Send reminders on page 82](#).

Alternative outputs

Printed list       Labels       Save as file

Update options

Mark as sent

Save a copy of letter/message in each patient's record

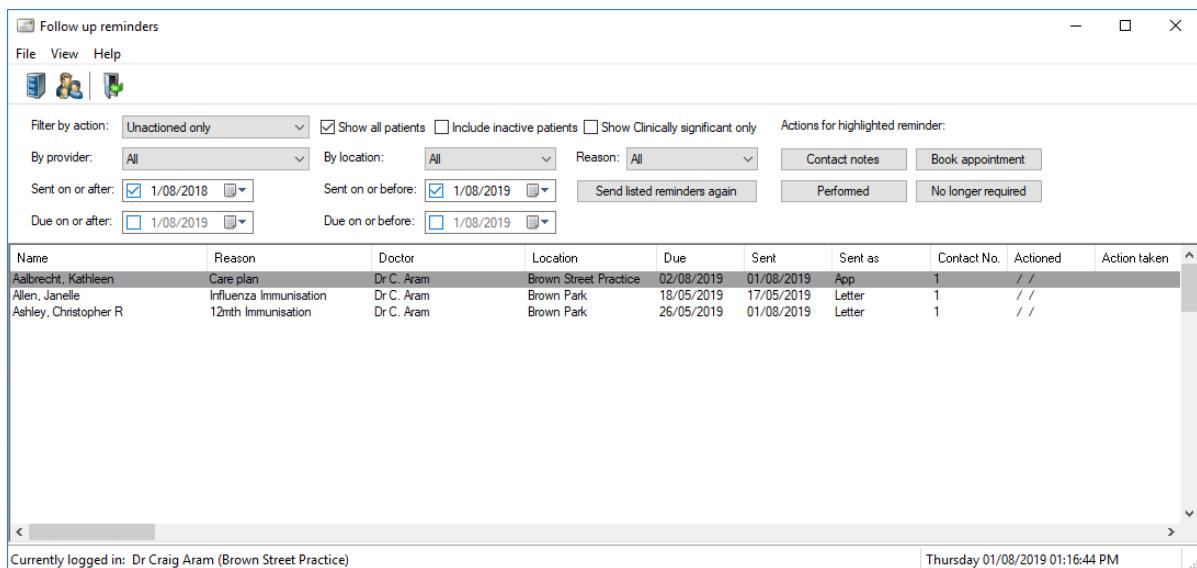
Add a new reminder for those marked as auto-update

Combine reminders for the same patient

## Follow up sent reminders

From the **Follow up Reminders** window you can view the contact notes associated with a reminder, which can demonstrate a history of patient contact attempts regarding a clinically significant reminder.

1. From the **Reminders** screen, select **View > Follow up reminders** or click the **Follow up reminders** button at the top. The **Follow up reminders** screen is displayed.



The screenshot shows the 'Follow up reminders' window. At the top, there are filters for 'Unactioned only', 'Show all patients' (checked), 'Include inactive patients' (unchecked), 'Show Clinically significant only' (unchecked). Below these are filters for 'By provider' (All), 'By location' (All), 'Reason' (All), and buttons for 'Contact notes' and 'Book appointment'. Further down are date filters: 'Sent on or after' (1/08/2018), 'Sent on or before' (1/08/2019), 'Due on or after' (1/08/2019), and 'Due on or before' (1/08/2019). The main area displays a grid of reminder details:

Name	Reason	Doctor	Location	Due	Sent	Sent as	Contact No.	Actioned	Action taken
Aalbrecht, Kathleen	Care plan	Dr C. Aram	Brown Street Practice	02/08/2019	01/08/2019	App	1	/ /	
Allen, Janele	Influenza Immunisation	Dr C. Aram	Brown Park	18/05/2019	17/05/2019	Letter	1	/ /	
Ashley, Christopher R	12mth Immunisation	Dr C. Aram	Brown Park	26/05/2019	01/08/2019	Letter	1	/ /	

At the bottom, it says 'Currently logged in: Dr Craig Aram (Brown Street Practice)' and 'Thursday 01/08/2019 01:16:44 PM'.

By default, the screen will display all reminders sent during the past year that are still marked as 'Unactioned'. Clinically significant reminders are indicated in the **Reason** column. This screen does **not** include reminders that were marked as performed without being sent.

2. Select from the filters at the top of the screen to limit the sent reminders that are shown:

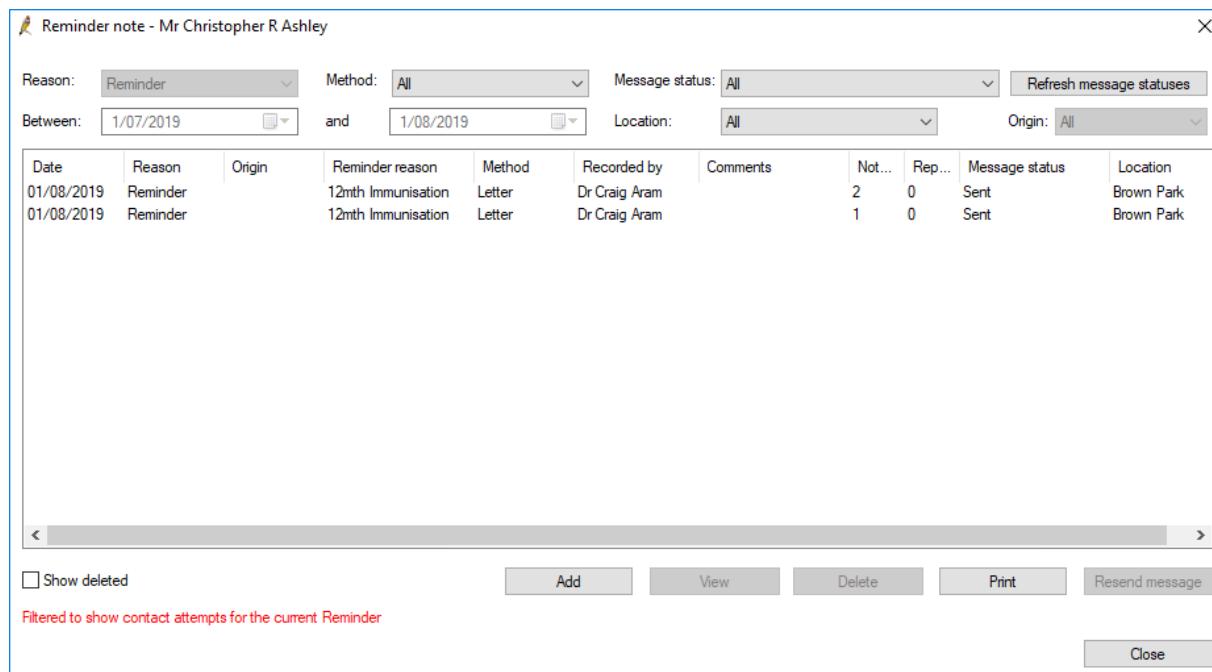
Filter	Action
Filter by action	Change to 'All' to show all sent reminders, or select an action to filter by that action.
By provider	Show reminders that have been assigned to patients by the selected doctor only.
Sent on or after / before	Show reminders sent between these dates. Check and uncheck to include these dates in your filter.
Due on or after / before	Show reminders that are due between these dates. Check and uncheck to include these dates in your filter.
Show all patients	Untick to display the <b>Select patient</b> screen to search for an individual patient.

Filter	Action
Include inactive patients	Include reminders sent to patients marked as inactive in their patient demographics.
Show Clinically significant only	Show only reminders that have <b>Clinically significant</b> checked in the reminder reason definition in the <b>Configuration</b> screen.
By location	Show sent reminders that are marked for the selected location only.
Reason	Show reminders for the selected reminder reason only. The list is automatically filtered to show only reasons for reminders sent during the selected time period.

**TIP** To quickly show only the sent reminders for a single patient, right-click a sent reminder and select **Show single patient**. Tick **Show all patients** at the top to show reminders for all patients again.

## Review the contact history

Select a reminder and click **Contact notes** from the list of buttons at the top. The **Reminder note** window will show all of the contact notes linked to the reminder.



The screenshot shows the 'Reminder note' window for Mr Christopher R Ashley. The window has various filters at the top: Reason (Reminder), Method (All), Message status (All), Refresh message statuses, Between (1/07/2019 and 1/08/2019), Location (All), and Origin (All). Below the filters is a table displaying contact notes:

Date	Reason	Origin	Reminder reason	Method	Recorded by	Comments	Not...	Rep...	Message status	Location
01/08/2019	Reminder		12mth Immunisation	Letter	Dr Craig Aram		2	0	Sent	Brown Park
01/08/2019	Reminder		12mth Immunisation	Letter	Dr Craig Aram		1	0	Sent	Brown Park

At the bottom of the window, there are buttons for Show deleted, Add, View, Delete, Print, Resend message, Close, and Filtered to show contact attempts for the current Reminder.

Double-click a contact note in the list or click **View** to open the note details.

 Reminder note - Mrs Janelle Allen X

<b>Patient contact details</b>			
Patient name:	Mrs Janelle Allen	DOB (age):	17/05/1966 (53 yrs)
Home phone:	0899905050	Work phone:	1300999787
Preferred contact via: _____			
<b>Other contact's details</b>			
Contact type:	<input type="text"/>		
Home phone:	<input type="text"/>	Work phone:	<input type="text"/>
Mobile phone: <input type="text"/>			
<b>Communication details</b>			
Contact reason:	Reminder	Contact method:	Letter
Contact date:	17/05/2019	Reminder reason:	Influenza Immunisati
Contact attempt no.:	1	Mark reminder as:	Sent
User comments:	Message details: Reminder Reason: Influenza Immunisation Doctor to see: Dr Craig Aram Date sent: 17/05/2019 10:24:39 AM Sent to: 1 Brown Street Bundaberg 4670 Sent by: Dr Craig Aram Location: Location 1		
<input type="button" value="Add"/> <input type="button" value="Print"/> <input type="button" value="View reminder"/>		<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Each time a contact note is created from a reminder (whether by a user or automatically by Bp Premier), the **Contact attempt no.** is incremented.

### Add a contact note

A practice would not normally need to create a contact note to follow up a reminder that has been sent out and actioned, but you can add a contact note from the **Follow up Reminders** screen if staff need to contact a patient. You can also add comments to an existing note in the **User comments** field.

1. Select a reminder and click **Contact notes** from the list of buttons at the top. The **Reminder note** window will show all of the contact notes linked to the reminder.
2. To add comments to an existing note, select the note and click **View**. Enter your comments under **User comments** and click **Save**.

To follow up an existing note, select the note and click **Add**. A new **Reminder note** window will appear and the **Contact attempt no.** will be incremented.

 Reminder note - Raymond Bartholomew X

<b>Patient contact details</b>			
Patient name:	Raymond Bartholomew	Age:	89 yrs
Home phone:	07 62576666	Work phone:	
Preferred contact via: _____			
Mobile phone: 0419913102			
<b>Other contact's details</b>			
Contact type:			
Home phone:	Work phone:	Mobile phone:	
<b>Communication details</b>			
Contact reason:	Reminder	Contact method:	Phone
Contact date:	18/10/2018	Reminder reason:	Influenza Vaccinatio
Contact attempt no.:	2	Mark reminder as:	Performed
User comments: Contacted Mr Bartholomew by mobile phone. Booked appointment for next week. Patient received letter but threw out unopened.			
<span style="border: 1px solid red; padding: 2px;">Message status: Successful</span>			
<a href="#">View reminder</a>		<a href="#">Save</a>	<a href="#">Cancel</a>

3. The patient contact details are populated from the patient demographics. If you spoke to a person other than the patient, complete the **Other contact's details**.
4. Complete the **Communication details** and add relevant **User comments**.
5. Update the **Mark reminder as** dropdown according to your role and your practice workflow for actioning reminders.
6. Set the **Message status** and click **Save**.

### Resend reminders

Click **Send listed reminders again** from the list of buttons at the top. The **Send Reminders** window will open for all reminders displayed in the **Follow up reminders** window. Select the templates you want to use for the reminders and click **Send** to resend.

### Action Reminders

The **Performed** and **No longer required** buttons in the toolbar at the top will mark a reminder as 'Performed' and 'No longer required'. Use these buttons according to your practice's guidelines on actioning reminders.

## Book an appointment

Select a reminder and click **Book appointment** from the list of buttons at the top. The **Review appointment** window will open for the intended patient. Fill out the appointment details and click **Save**.

