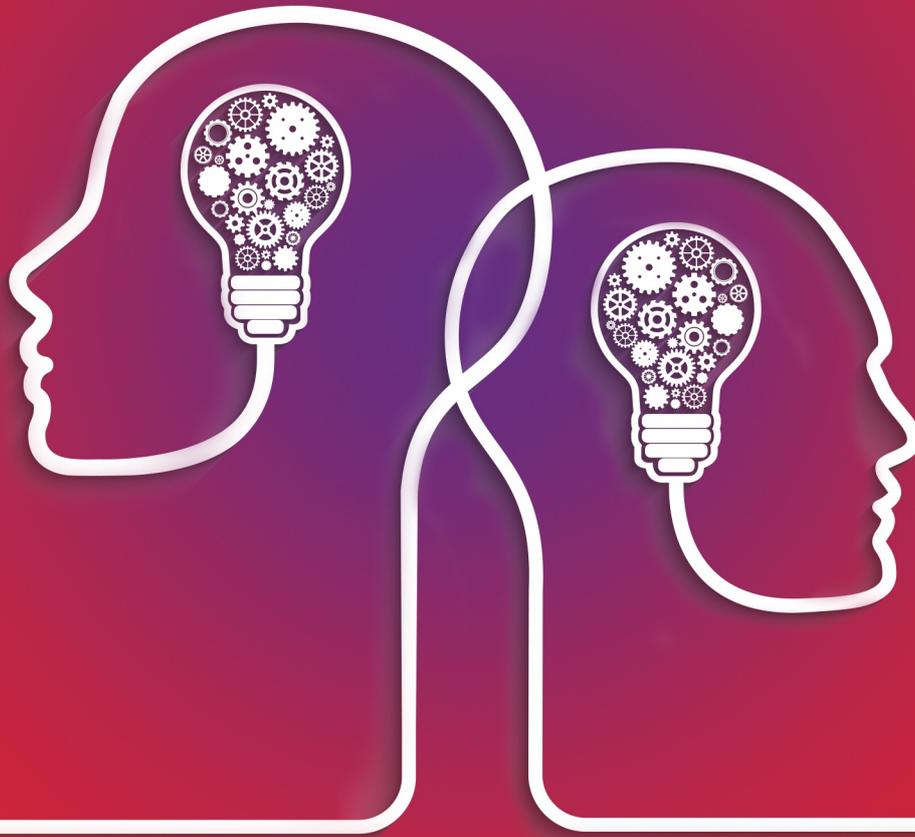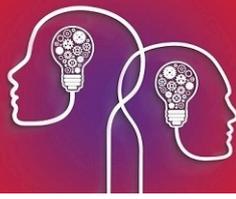# Best Practice
An evolution in medical software

Bp VIP.net

Bp SMS Guide

VIP.net knowledge base

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Last updated: 30 July 2019

This User Manual is sourced from the Best Practice Software Bp VIP.net Ruby **Knowledge Base**.
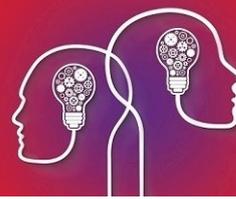
Set up and top up Bp SMS

Before you can start sending SMS messages to patients, you will need to obtain an activation code for an SMS messaging service from Best Practice Software, and enter the code in Bp VIP.net. To receive SMS messages from your practice, patient opt-in consent must be recorded in **Patient Details** (F3).

Switching to Bp SMS

When you switch to Bp SMS, you must switch at a time when your replies to text messages are minimal, because patient replies to messages sent using Memotxt will **not** be received into the appointment book after Bp SMS has been activated.

An example of a good time to switch to Bp SMS would be Monday morning, after clinics are underway. Most replies would have already been received to messages sent on the previous business day. Ensure you also switch to Bp SMS **before** your scheduled texts are sent out for the next day.

If you cannot switch over at a time when there are no replies expected, ensure that all expected replies have been accounted for using Bp SMS or any other method your practice uses to communicate with patients.

If you switch your SMS messaging provider from MemoTxt to Bp SMS, your existing Autotext templates and scheduled appointment reminders will not be affected.

⚠️ *Important: After you change your SMS service to BP SMS, you will not be able to revert your SMS messaging service to MemoTxt.*

Activate Bp SMS
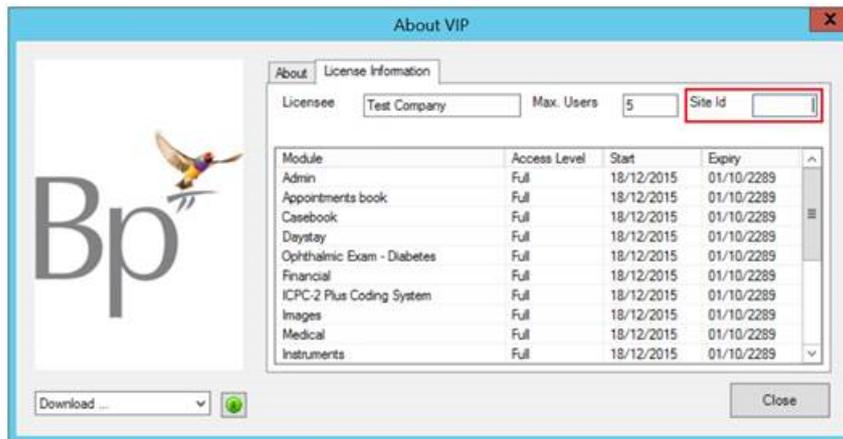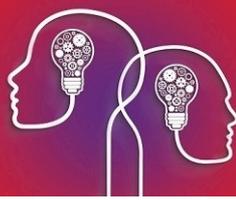
Obtain your activation code

1. Ring the Best Practice Software customer enablement team on 1300 40 1111 (Australia) or 0800 40 1111 (New Zealand). Press 1 and Press 2.
2. Best Practice Software will send you an email with an agreement and the pricing model. Complete and send back the form with your payment preference.

   Credit card payments can be made over the phone. Bank transfers can also be arranged.

3. When the funds have cleared, Best Practice Software will activate your SMS service and email your User ID and Activation Code, which includes the initial credit you purchased for your text messages.
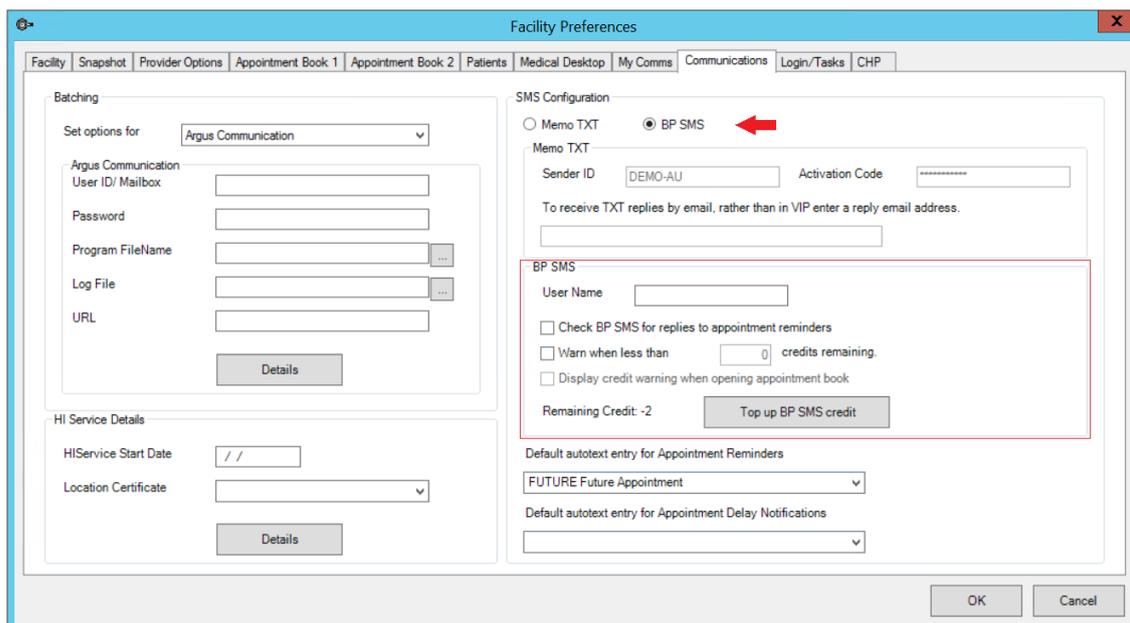
Enter your Site ID

1. Select **Help** > **About**.
2. Select the **License Information** tab.
3. Enter your site ID in the **Site Id** field in the top right.

4. Click **Close** to save the site ID.

Enter your activation code in Bp VIP.net

1. In Bp VIP.net, select **Setup** > **Facility Preferences** > **General Preferences** from the menu.
2. Select the **Communications** tab.

3. In the SMS Configuration section, select **Bp SMS**.
4. In the BP SMS section, enter the User ID you received from Best Practice Software into the **User Name** field.
5. Select the options you want to enable from this section:
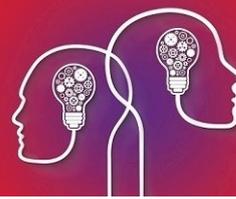
Field	Description
Check BP SMS for replies to appointment reminders	Tick if you intend to update the appointment book automatically based on patient replies to SMS appointment reminders.
Warn when less than n credits remaining	Tick and enter the threshold value if you want Bp VIP.net to alert the user when SMS credits fall below a certain value.
Display credit warning when opening appointment book	Tick if you want Bp VIP.net to automatically display the current SMS credit value when the appointment book is opened.

6. Click **Top up BP SMS Credit**.

7. Copy and paste the activation code you received from Best Practice Software and click **Validate Code**.

8. The **Remaining Credit** value on the **Communications** tab will be updated with the new credit amount.

Top up SMS Credit

1. Ring the Best Practice Software customer enablement team on 1300 40 1111 (Australia) or 0800 40 1111 (New Zealand). Press 1 and Press 2.

2. Request to top up your existing SMS credit. Best Practice Software will supply you with an activation code for the updated credit amount.

3. In Bp VIP.net, select **Setup** > **Facility Preferences** > **General Preferences** from the menu.

4. Select the **Communications** tab.

5. Click **Top up BP SMS Credit**.
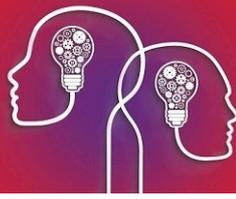
6. Copy and paste the activation code you received from Best Practice Software and click **Validate Code**.

7. The **Remaining Credit** value on the **Communications** tab will be updated with the new credit amount.

Check your SMS credit

Your remaining SMS credit is shown at the top of the appointment book:

When you send a single SMS message to a patient, the available credit is also shown at the top of the **Send TXT Messages** window.

If you have ticked the Communications preference **Warn when less than n credits remaining**, Bp VIP.net will show the following popup when the appointment book is opened.
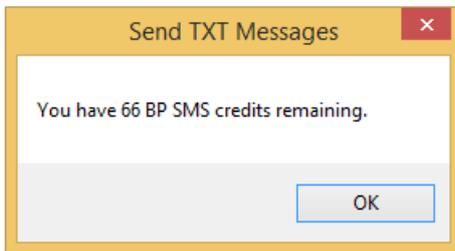
Set up SMS Appointment Reminders

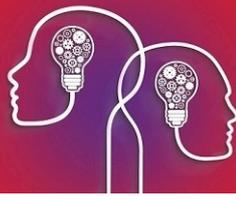## Set up a scheduled bulk appointment reminder

A Bulk Appointment Reminder **profile** is a rule that tells Bp VIP.net to send a text message to all patients that fit specified criteria. For example, you could set up a profile to:

- Send messages to patients with outstanding debts older than three months.
- Send messages to patients with upcoming medication renewals.
- Send practice promotional messages to patients.

You can create as many manual profiles as you need, but you can only create one profile that is 'Automatic'. A manual profile requires a practice staff member to run the message sendout from the Appointment Book. An automatic profile runs every day at a scheduled time.

1. Open the Appointment Book.
2. Click the SMS icon on the Appointment Book toolbar. This icon is only visible if you have entered your SMS activation code.
3. Select **Bulk Appointment Reminders**. The **Send Bulk Appointment Reminders** screen will appear.
4. Create or modify a bulk appointment reminder profile.

Field	Description
Booking date	Defaults to the date of the Appointment Book page you were on, but can be changed. All patients with appointments on this date who have opted in will receive the message.
Page Owners	Select the page owners you wish to send reminders for. Patients with appointments with the selected providers will be messaged.
Appointment types	Select the appointment types to include in the message sendout. Patients with appointments of the selected type will be messaged.
Locations	Select the practice locations to send messages for. Patients with appointments at the selected locations will be messaged.
Message to be sent	Defaults to the Autotext entry for appointment reminders set up in your General Preferences. You can change the Autotext entry, or enter a custom message, using fields, in the text box.
Enable Automatic Reminders	Select to save the profile as a scheduled bulk appointment reminder.
At what time should the reminders be sent?	By default, messages are sent when you click **OK** from this screen. Otherwise, select a time to send the messages.

Field	Description
Profiles	You save a combination of Page Owners, Appointment types, Locations, and Message as a **profile**, so you do not have to recreate common reminders.

If you save a new profile, messages will be sent for that profile at the specified time the next day only. If you want messages to be sent every day, you must set up an automatic profile. |

5. Select 'Automatic' from the **Profiles** drop-down.

6. Tick **Enable Automatic Reminders**.

7. Select a value for **At what time should the reminders be sent?**.
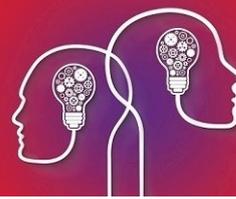
8. Click **Ok**.

Appointment reminders will be sent out daily at the specified time for patients that fit the profile. If a patient has more than one appointment on a day, Bp VIP.net will only send a reminder for the first.

Update the appointment book when a patient replies by SMS

Bp VIP.net can update the appointment book automatically if a patient accepts or declines an appointment by SMS reply.

You need to enable appointment book updates in preferences:

1. Select **Setup** > **Facility Preferences** > **General Preferences** > **Appointment book 1** tab.

2. Tick **Automatically cancel Appointments declined by TXT**.

3. If you also select **Show cancelled bookings in strikeout font**, cancelled appointments will be indicated with a strikeout font in the Appointment Book.

4. Click **Ok** to save changes.
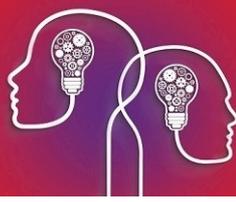
SMS messaging and auto texts

SMS messages can be created on the fly, if you are manually sending a message to a single patient for example, or created from a Bp VIP.net Autotext template. For example, an 'appointment reminder' message might be constructed from an Autotext template that populates the message with the patient's name and address, the doctor being seen, and the appointment time.

## Standard Autotext names used by Bp VIP.net

In a number of screens, Bp VIP.net will look to see if Autotext codes with specific names exist. If the Autotext code exists, Bp VIP.net will populate a drop-down menu or field.

Auto-text Code	Used in
WSNAP	The **Warning** field on the Information Bar displays warning information about the current patient by default, **unless** an Autotext called 'WSNAP' exists. If this Autotext exists, Bp VIP.net will populate the Information Bar Warning field with the results of the WSNAP autotext instead. For example, you could insert a patient's health insurer in this field.
Txt Appt Rem	This is the default appointment reminder text message Autotext. If an Autotext with this name exists, Bp VIP.net will make this Autotext available for selection from the drop-down menu **Facility Preferences** > **Communications** > **Default autotext entry for Appointment Reminders**. You can over-ride the default appointment reminder Autotext when sending a manual or scheduled appointment reminder.
Txt ApptLate	This is the default delayed appointment message Autotext, such as when a provider is running late. If an Autotext with this name exists, Bp VIP.net will make this Autotext available for selection from the drop-down menu **Facility Preferences** > **Communications** > **Default autotext entry for Appointment Reminders**. You can over-ride the default delayed appointment Autotext when sending messages to patients.

Set default Autotexts for appointment reminders

After you have created or imported your AutoText entries, you need to select which Autotext you will use for appointment reminders and patient delay notifications:

1. From the main Bp VIP.net screen, select **Setup** > **Facility Preferences** > **General Preferences** > **Communications** tab.
2. Select the **Default autotext entry for Appointment Reminders**. The autotext entry selected here will be used when manual or scheduled appointment reminder messages are sent to patients.
3. Select the **Default autotext entry for Appointment Delay Notifications**. The entry selected here will be used when delay notification messages are sent to patients.
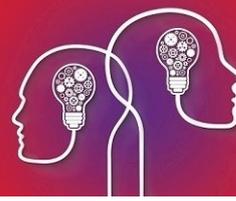
4. If your practice prefers to receive patient replies as emails rather than VIP messages, enter an email address in the **If you prefer to receive TXT replies...** field.

    Note: *Best Practice Software do not recommend selecting this option. Patient replies received as emails will not automatically update the appointment book.*

5. Click **Ok** to save changes.
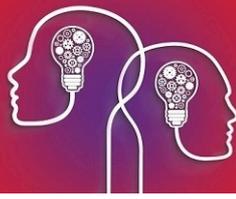
Check for patient SMS replies

After you've set up Bp SMS or MemoTxt as an SMS messaging provider, and enabled appointment book updates, you can check for replies by looking at individual appointments, or check for replies from all patients over a date range.

Note: Unlike MemoTxt, replies to Bp SMS messages sent from Bp VIP.net can only be received into the appointment book. Email replies are not available when using Bp SMS.

View a reply from the appointment book

When a reply to a Bp SMS appointment reminder is received, the appointment will be updated with an icon:

| Icon	Description
	Patient has replied 'Yes' and confirmed the appointment.
	Patient has replied 'No ' and declined the appointment.
	An appointment reminder has been sent to the patient from Bp VIP.net.
	Patient has replied with a message that cannot be understood as Yes or No. Attendance has not been confirmed or denied. Use the right-click menu to view the actual message.

The following example shows a cancellation of a 4.45pm appointment through Bp SMS, with cancelled booking strikeout font enabled:

Staff can allocate the free slot to other patients.

Reply from the appointment book

Right-click on the icon to open a menu and select one of the options:

1: Mrs Anthea Mary BAKER

View Conversation
Send/Re-send Reminder
Reply
Change Status ▶
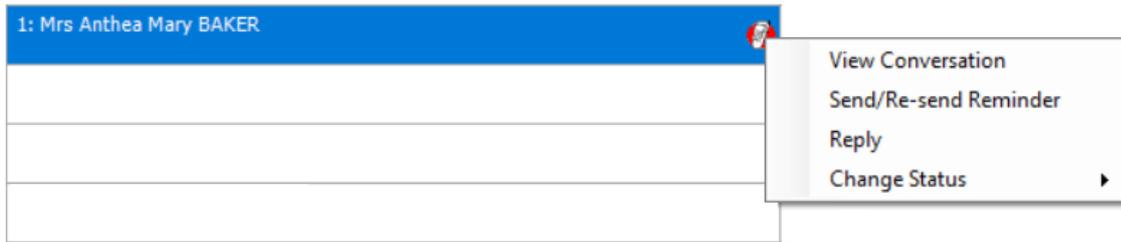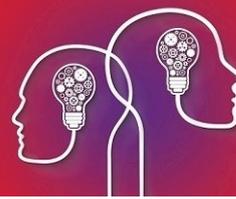
- ▨ **View conversation** — View the message history, including the original appointment reminder and the patient reply.
- ▨ **Send/Re-send Reminder** — Send or resend the original appointment reminder.
- ▨ **Reply** — Manually send a reply message by SMS. You can use an Autotext or free text.
- ▨ **Change Status** — Manually change the appointment reminder status.

For example, if an appointment shows the ₋ icon, you could **View Conversation** to see the patient's SMS reply, and if the reply confirmed appointment attendance but did not include 'Yes', you could manually **Change Status** to ₋ to indicate attendance has been confirmed.

Check replies for multiple patients

1. Click the ✕ button toward the left hand side of the main toolbar.
2. In the window that appears, untick **Current Patient Only** to see all patients' texts.
3. Click in the **From** date field and click CTRL+D to enter today's date.
4. Click in the **To** date field and click CTRL+D to enter today's date, or manually select a date.
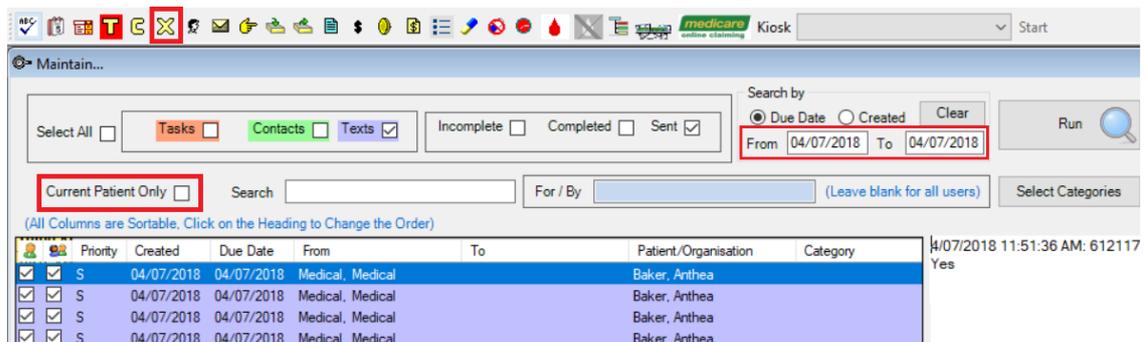
5. Click **Run**. The screen will display all text messages sent on the days specified in the From and To dates.
6. Click on a text line to view the conversation on the right hand side of the screen.
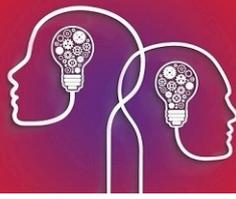
Send SMS messages to patients

You can send a message:

- Manually to a single patient
- Manually to multiple patients according to selection criteria
- Automatically to multiple patients, such as a daily appointment reminder for patients with an appointment in three days' time.

Before you begin

Before you can send text messages to patients, you need to set up SMS Messaging in Bp VIP.net.

You must also define or import Autotexts to use in SMS Messaging. Autotexts are snippets of template text with placeholders that can be substituted with database values, such as a a patient's name, next appointments date, and the appointment doctor.

*Note: Patients need the **TXT Opt In** checkbox ticked on the **Patient Details** screen (F3) to send and receive SMS messages from Bp VIP.net.*

Sending Emails that Exceed 160 Characters

Bp VIP.net will display the following warning if the 160 character limit is exceeded by any text message sent from Bp VIP.net.

Edit the affected messages to ensure they comply to the character limit.

Send a single message to a patient

1. Find and select the patient you want to message. Open the Appointment Book.
2. From the Appointment Book toolbar, click the SMS icon and select **Send SMS Message** . The **SMS messaging** screen will appear.
3. Click **Send Txt Message**.
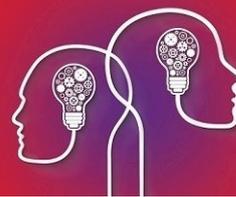
4. If the patient does not have a mobile phone number or 'TXT opt in' recorded in patient details, the **Send TXT Message** screen appears. If you have obtained patient consent to receive text messages from your practice, tick **TXT Opt In**, tick **Save these details...**, enter the patient's phone number, and click **OK**.

5. An SMS popup will appear with the selected patient. Type in a message to send, or select a message from the Autotext drop-down list and click **Send**.
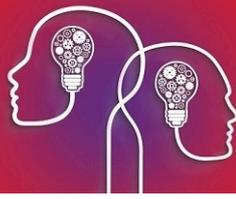
Send an appointment delay notification to a patient

1. Find and select the patient you want to message. Open the Appointment Book.

2. From the Appointment Book toolbar, click the SMS icon and select **Send Delay Notification**. The **SMS messaging** screen will appear.

3. Click **Send Txt Message**.

4. If the patient does not have a mobile phone number or 'TXT opt in' recorded in patient details, the **Send TXT Message** screen appears. If you have obtained patient consent to receive text messages from your practice:

    1. Tick **TXT Opt In**.

    2. Tick **Save these details...**.

    3. Enter the patient's phone number.

    4. Click **OK**.

5. An SMS popup will appear with the selected patient. Type in a message to send, or select a message from the Autotext drop-down list and click **Send**.

Send appointment reminders to multiple patients

1. From the Appointment Book toolbar, click the SMS icon and select **Bulk Appointment Reminders**. The **Send Bulk Appointment Reminders** screen will appear.

2. Complete the lists and fields in this screen:

Field	Description
Booking date	Defaults to the date of the Appointment Book page you were on, but can be changed. All patients with appointments on this date who have opted in will receive the message.
Page Owners	Select the page owners you wish to send reminders for. Patients with appointments with the selected providers will be messaged.
Appointment types	Select the appointment types to include in the message sendout. Patients with appointments of the selected type will be messaged.
Locations	Select the practice locations to send messages for. Patients with appointments at the selected locations will be messaged.

Field	Description
Message to be sent	Defaults to the Autotext entry for appointment reminders set up in your General Preferences. You can change the Autotext entry, or enter a custom message, using fields, in the text box.
Enable Automatic Reminders	Select to save the profile as a scheduled bulk appointment reminder.
At what time should the reminders be sent?	By default, messages are sent when you click **OK** from this screen. Otherwise, select a time to send the messages.
Profiles	You save a combination of Page Owners, Appointment types, Locations, and Message as a **profile**, so you do not have to recreate common reminders. If you save a new profile, messages will be sent for that profile at the specified time the next day only. If you want messages to be sent every day, you must set up an automatic profile.

3. Click **OK**. A confirmation screen **Preview TXT Messages** will appear, showing all the messages that will be sent.

4. Untick any messages on this screen you do not wish to send and click **Ok**.

View a patient's message audit trail

All SMS communications between practice and patient are stored in the database and can be viewed from the appointment book or the menu.

From the Appointment Book toolbar, click the SMS icon and select **View Conversation**. The **Message Thread screen** will show the most recent conversation by MemoTxt. You can also reply to messages from this screen.

Or, from the main Bp VIP.net menu, select **Patient** > Texts or press Ctrl+F3. The **Maintain...** screen will appear with **Texts** selected, showing the complete history of SMS messages sent to and from the patient. From this screen you can perform a complex search for messages and use the command buttons along the bottom of the screen to action messages.