

# Patient Reminders Administration

04/08/2025 1:09 pm BST

## Summary

This page documents the configuration of automated Patient Reminders. This functionality allows you to send SMS/Emails on an automated schedule to clients regarding their pet's treatment requirements.

## Details

There are three stages to configuring Patient Reminders: Creating Reminder Types, Code Entry configuration and Scheduled task configuration.

## Reminder Types

Reminder Types are used to group reminders to then tie them to items within Code Entry.

To add a new Reminder Type, navigate to: Administration > Reminders > Reminder Types.

The Name and Description should be completed in the top blank row and the Treatment Type reflects which treatment types the new Reminder Type should be available for. This could either be a specific type (e.g. Consults, Vaccines, etc) or can be left as available for all Treatment Types.

If 'Always show in Summary' is ticked, the Reminder Type will display in the patient's summary side panel.

Please note - It is important to keep the Reminder Type of 'Vaccinations' separate from 'Kennel Cough' as these Reminder Types can cancel each other out. For example, if a dog visits the practice and a DHP and L4 vaccine are added as treatment, that will kick in the Kennel Cough reminder even though the dog hasn't received it as it's under the same Reminder Type.

Reminder Types				
<div><input type="text"/></div> <div> Search</div> <div> Refresh</div> <div> Delete</div> <div> Paragraphs</div>				
Name	Description	Treatment Type	View Order	Always show in Summary
		All	0	<input type="checkbox"/>
Vaccinations	Vaccinations	All	0	<input type="checkbox"/>
Kennel Cough	Kennel Cough	All	1	<input type="checkbox"/>
Rabies	Rabies	All	1	<input type="checkbox"/>

## Reminder Code Setup

1. Navigate to Code Maintenance (Administration > Code Entry > Code Maintenance).
2. Select an item and select 'Edit'
3. Select 'Reminder Options'.
4. Select the 'Reminder Req' button to enable reminders for this code. Once enabled, this will turn green.
5. Enter the details for the reminder.

Code Entry

Code Details

Edit 2022

Site

Esher SA

Cancel

Save

Configurations

Reminder Options

Code Details

Pricing

Treatment Options

Label Options

Product Alert

Reminder Options

Discount Category

Send To

Notes

Composite

Reminder Req

Create reminder of type

Vaccinations

to send a reminder in

12

Month(s)

next reminder code

Compliance Reminder

Send Reminders every

0

Day(s)

Repeating

0

Times(s) with product description

Type(Vaccine),Code(2022),Description(Vaccination Booster Dog)

Reminder Type = Type of reminder. For example, 'Vaccinations'

Send a reminder in = The period of time after the item is dispensed. i.e 12 months

Next reminder code = The next item required, if it differs from this one.