

# Patient Reminders Manual Run

24/07/2025 1:45 pm BST

## Summary

Email and SMS messages can be sent to clients via the Patient Reminders screen. (Comms > Reminders)

## Details

After running Patient Reminders there are options to either Email or Print the reminders.

## Viewing All Patients Reminders - From the Reminders Screen

1. To view reminders for all patients within a specific period, select Comms > Reminders.
2. The 'Patient Reminders' tab is displayed.

Reminders

SMS Template

Print Labels (A4)

Print List

Print Letters

Export to CSV

Manually Send

Automatic Schedule List

Patient Reminders

Reminders Success Rate

Compliance Reminders

Appointment Reminders

Run Criteria

Work Site: 

Esher SA

Client Site: 

All

Reminder: 

All

Due From: 

24/07/2025

Treatment Type: 

All

Species: 

All

Breed: 

All

Date To: 

24/08/2025

Client Category: 

All

Patient Category: 

All

Run

Reset

☒ Merge into one Letter

☒ Include 2nd Reminder (24/06/2025 00:00 To 23/07/2025 23:59)

☒ Include 3rd Reminder (24/05/2025 00:00 To 23/06/2025 23:59)

This screen has several filters to help refine your reminder search.

Work Site = Location the reminder was created (i.e. where the treatment was given).

Client Site = Clients registered site.

Reminder = Reminder type (i.e. Annual Vaccinations).

Due From = The date you want to run your reminders from.

Treatment Type = Treatment type of the item that created the reminder (i.e. Consultations).

Species = Species of the patient

Breed = Breed of the patient

Date To = The date you want to run your reminders to.

Client Category = Category of the Client (i.e. Farm).

Patient Category = Category of the patient (i.e. Small Animal)

3. You can also specify whether you want to include 2nd/3rd Reminders.

2nd Reminders = Outstanding Reminders for the previous month

3rd Reminders = Outstanding Reminders for the month previous to the previous month.

☒ Include 2nd Reminder (24/06/2025 00:00 To 23/07/2025 23:59)

☒ Include 3rd Reminder (24/05/2025 00:00 To 23/06/2025 23:59)

4. Once you have specified all your criteria, select 'Run'.

5. All Patient Reminders which meet the specified criteria are displayed.

Reminders																				Activities	Administration
<div>SMS TemplatePrint Labels (A4)Print ListPrint LettersExport to CSVManually SendAutomatic Schedule List</div>																					
<div>Patient RemindersReminders Success RateCompliance RemindersAppointment Reminders</div>																					
<div>Run Criteria</div>																					
<div>Work Site: Esher SATreatment Type: AllClient Category: AllRunReset</div>																					
<div>Client Site: AllSpecies: AllPatient Category: All</div>																					
<div>Reminder: AllBreed: All</div>																					
<div>Due From: 24/07/2025Date To: 24/08/2025</div>																					
<div><input checked="" type="checkbox"/> Merge into one Letter</div>																					
<div><input checked="" type="checkbox"/> Include 2nd Reminder (24/06/2025 00:00 To 23/07/2025 23:59)</div>																					
<div><input checked="" type="checkbox"/> Include 3rd Reminder (24/05/2025 00:00 To 23/06/2025 23:59)</div>																					
Client Name	Patient	Speci...	Description	Work Site	Client SL...	Remin...	Address1	Address2	Town	County	Postcode	Type	Animal ...	Home P...	Business...	Mobile P...	Fax	Home E...	Business...		
Mrs K Moore...	Lola	Canine	Booster and Health ...	Esher	Guildford	16/07...	Bubwith Close		Epsom	Surrey	GU7 3RP	Vaccina...									
Mr K J Salter	Max	Canine	Vaccination Booster ...	Esher	Esher	07/07...	Mounts Hill Cottages		Virginia ...	Surrey	GU13 8SX	Vaccina...									
Miss Charlott...	Purdey	Equin...	booster and hc2	Esher	Esher	22/07...	North House Nosterf...		Bedale		YO7 5GS	Dog Bo...									
Mrs M Smith	Mylo	Canine	Booster and Health ...	Esher	Esher	16/07...	Elm Cottage Main St...		Epsom	Surrey	GU9 7AL	Vaccina...	01/12/2...								
Mrs P Smith	Timber	Canine	Vaccination Booster ...	Esher	Guildford	10/08...	14 Greenpaths		Esher	Surrey	GU20 4...	Vaccina...									
Mrs Helen Ta...	Pip	Canine	Vaccination Booster ...	Esher	Esher	20/0...	6 Main Street		Leeds		LS25	Vaccina...									
Mrs Admin Te...	Bork	Canine	1.5 X TIMM CORT SC...	Esher	Esher	28/0...	46 46 Boole Heights		Bracknell	Berkshire	RG12 7G...	sub	01/02/2...								
Mrs Test Test3	ctcut...	Hams...	Booster health check	Esher	Esher	09/0...	Uuhuh		Leeds		PA4 8ZB	Flea3	05/11/2...								
Mrs Test Test1...	Marley	Canine	Kennel cough	Esher	Esher	27/07...	1 Cloud Street		Filey		YO23 4TY	Vaccina...									
Mrs Test Test1...	Charlie	Canine	Vaccination Booster ...	Esher	Esher	15/04...	1 Cloud Street		Filey		YO23 4TY	Vaccina...	29/04/2...								
Mrs Tester Te...	Cat	Feline	Recall Set By Recept...	Esher	Esher	09/0...	1 Cloud Road	Sherburn In Elmet	Leeds		LS25 4DG	Vaccina...	04/05/...								
Page 1 of 1																				Displaying 1 - 31 of 31	

## Reminders Options

After you have run the Reminders, you have the following options:

Reminders							
SMS Template	Print Labels (A4)	Print List	Print Letters	Export to CSV	Manually Send	Automatic Schedule List	

### SMS Template

This will open a window named SMS Template Editor, whereby you can view and edit existing SMS templates, or create new ones.

### Print Labels (A4)

Selecting this will produce sheets of name and address labels on a laser printer.

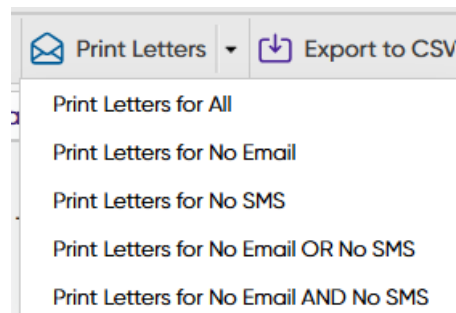
The label sheets required are of the Avery Standard L7163 which contain 14 labels per sheet.

### **Print List**

Clicking this will print the list that you have produced on screen, so that you have a paper copy of the reminders due to be sent.

### **Print Letters**

Clicking this will produce a printable letter from the templates created.



Print Letters for All - Print letters for all reminders

Print Letters for No Email - Print letters if client has no/invalid email address

Print Letters for No SMS - Print letters if client has no/invalid mobile number

Print Letters for No Email OR No SMS - Print letters if client has no email or mobile number saved in their client record.

Clicking any of the above options will bring up the list of available reminder templates to be sent as a letter.

Select the letter you wish to create for all the clients on the list and click 'Generate'.

Document Management

Search
Create Blank

File Name	
Dog Vaccine Reminder Template 2.docx	DOCX
Dog Vaccine Reminder Template.docx	DOCX
Kennel Cough Reminders	HTML
LA Reminder Due.docx	DOCX
overdue 180 days	HTML
overdue 60 days	HTML
overdue 90 days	HTML
Patient Reminder Template.docx	DOCX
Vac Reminder Template.docx	DOCX
Vaccine reminders.docx	DOCX

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Displaying 1 - 10 of 10


Preview
Communication Type
Contractual
Generate
Cancel

## Manually Email, SMS or Print

1. Navigate to Comms > Reminders.
2. Enter your criteria and select 'Run'.
3. Select 'Manually Send'.
4. Tick the email checkbox.
5. Select the email and/or SMS templates you wish to send.

Send Patient Reminders

Send via SMS



☒

Select Template

Hi \${ClientName}, \${AnimalName} is now due their booster on \${CV\_Date}. Please call us on 123456789 to get booked in.

\${AnimalName} is now due their booster. Please call the surgery on \${SitePhone} to make an appointment.

Send via Email


☐

Select Template

Dog Vaccine Reminder Template.docx

Kennel Cough Reminders

LA Reminder Due.docx

overdue 180 days

Communication Type

Contractual

▼

Send Reminders

Exit

6. Select 'Send Reminders'.
7. Any clients without a registered mobile number will be displayed. Select 'Print' to print a copy of the document or 'Ignore' to proceed.
8. The Client Communication tab will keep an audit of communications sent.

Clients with invalid mobile numbers...

The following client(s) have invalid mobile numbers to send. Please print the list to correct the numbers in reception. Please select Ignore Option to carry on sending text to rest of the clients. Please select Cancel Option to cancel sending text process.

No.	ContactId	Client	Mobile
1	12904	Mrs A Henry	
2	1217343	Mrs T Jupiter	
3	1217793	Mr/Mrs Y E Jupiter	
4	1218203	Miss O Long	
5	4686	Mr D. A. Miller	
6	1218215	Mr/Mrs I Newton	
7	1218010	Mr/Mrs J Smith	
8	1217988	Mr/Mrs L Smith	
9	1218235	Mr/Mrs M Smith	
10	12900	Mrs G. White	

Print

Ignore

Cancel

## Schedule SMS Reminder

The schedule SMS Reminder option allows you to automate the sending of Patient Reminders. For more information, see the [Patient Reminders Automatic Schedule](#)