

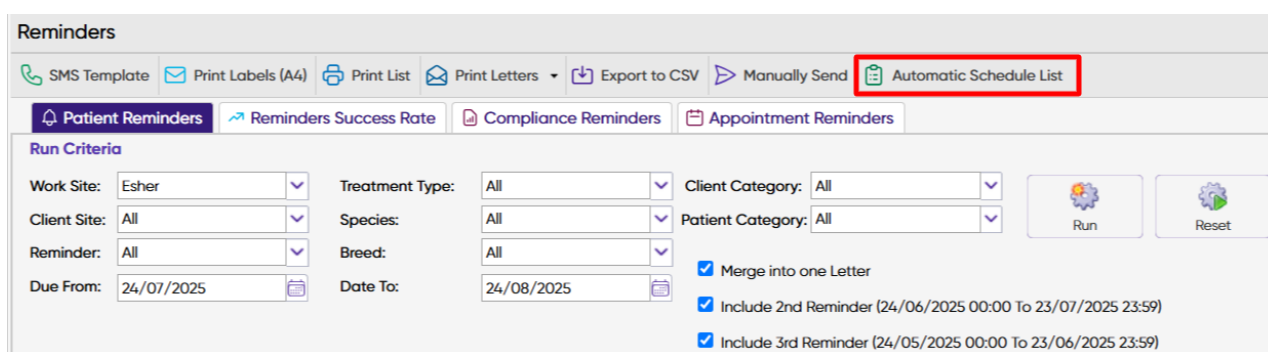
# Patient Reminders Automatic Schedule

24/07/2025 1:53 pm BST

## Using the Patient Reminder Scheduler for Reminders due

For the Patient Reminders to automatically send, you need to setup your schedule and filters.

1. Navigate to the Reminders screen (Comms > Reminders > Patient Reminders tab).
2. Select 'Automatic Schedule List'.



The screenshot shows the 'Reminders' interface. At the top, there is a navigation bar with several options: 'SMS Template', 'Print Labels (A4)', 'Print List', 'Print Letters', 'Export to CSV', 'Manually Send', and 'Automatic Schedule List'. The 'Automatic Schedule List' option is highlighted with a red box. Below this, there are tabs for 'Patient Reminders', 'Reminders Success Rate', 'Compliance Reminders', and 'Appointment Reminders'. The 'Patient Reminders' tab is selected. Under this tab, there is a 'Run Criteria' section with various filters: 'Work Site' (Esher), 'Treatment Type' (All), 'Client Category' (All), 'Client Site' (All), 'Species' (All), 'Patient Category' (All), 'Reminder' (All), 'Breed' (All), 'Due From' (24/07/2025), and 'Date To' (24/08/2025). There are also checkboxes for 'Merge into one Letter', 'Include 2nd Reminder (24/06/2025 00:00 To 23/07/2025 23:59)', and 'Include 3rd Reminder (24/05/2025 00:00 To 23/06/2025 23:59)'. On the right side, there are 'Run' and 'Reset' buttons.

3. The 'Patient Reminder Schedule List' window will display.
4. To create a new schedule, select 'Add'.
5. The Create/Edit Schedule window appears.
6. Type in the Schedule Name.
7. Set how often you would like the specific Patient Reminder to send, what time they will send and also a start date.
8. 'for reminders due between the next X and X day(s)' - This is how much notice you wish to give to clients. In the screenshot example below, an SMS and email will automatically send to the client 14 days before their pets vaccine is due.

Create / Edit Schedule

Schedule Name
Annual Vaccination


Send Reminder
every
1
day(s)
at
11:00
starting on
19/12/2024

for reminders
Due
between
the next
14
and
14
day(s)

and match the following filtered criteria.

Work Site	Esher	Client Category	[All]
Client Site	[All]	Patient Category	
Reminder Type	Annual Vaccination	Species	[All]
Treatment Type	[All]	Breed	[All]


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

overdue 180 days  
overdue 60 days  
overdue 90 days  
Patient Reminder Template.docx

Communication Type
Vaccination Reminders

Save Schedule

Save As New

Cancel

9. There are 8 filters available in this scheduler.

- Work Site - This will default to the site you are logged in as. Please note - if you are a multi-site practice, a Patient Reminder Schedule for each Reminder Type will require setting up per site.
- Client Site - This allows you to filter down to the clients registered site for the schedule. It is advised to keep as 'All' to capture all relevant reminders.
- Reminder Type - It is important to tie the correct Reminder Type to the Schedule you are creating.
- Treatment Type - This allows you to select a specific treatment type from code entry for the schedule

i.e. Vaccines, Tablets etc. It is advised to keep as 'All' to capture all relevant reminders.

- Client Category - This allows you to filter down to the clients registered category for the schedule. It is advised to keep as 'All' to capture all relevant reminders.
- Patient Category - This allows you to filter down to the patients registered category for the schedule. It is advised to keep as 'All' to capture all relevant reminders.
- Species - This allows you to filter down to the species for the schedule. It is advised to keep as 'All' to capture all relevant reminders.
- Breed - This allows you to filter down to the breed for the schedule. It is advised to keep as 'All' to capture all relevant reminders.

10. Select the Communication Type and templates you wish to use. For more information on Communication Types, please see Reception > Client & Patient Registration > Client Data Consent.

Send via SMS = Tick the checkbox and select the [SMS Template](#) you want to use.

Send via Email = Tick the checkbox and select the [Document Template](#) you want to use.

11. Select 'Save Schedule' to create the scheduled task.

Note: Once reminders are sent, a log will automatically be entered into the clients communication tab.

## Using the Patient Reminder Scheduler for overdue Reminders

1. Follow steps 1-7 in 'Using the Patient Reminder Scheduler for Reminders due'.
2. 'for reminders Overdue between the last X and X day(s)' - This is how much notice you wish to give to clients. In the screenshot example below, an SMS and email will automatically send to the client 30 days after their pets vaccine was due.

Create / Edit Schedule

Schedule Name
Overdue Boosters

Send Reminder
every
1
day(s)
at
15:30
starting on
28/02/2024
for reminders
Overdue
between
the last
30
and
30
day(s)
and match the following filtered criteria.

Work Site
Esher

Client Site
[All]

Reminder Type
Annual Vaccination

Treatment Type
[All]

Client Category
[All]

Patient Category

Species
[All]

Breed
[All]

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.  
Hi \${ClientName} , \${AnimalName} is overdue their vaccination. Please contact us on \${SitePhone} to make an appointment.

Send via Email

☒

Select Template

Kennel Cough Reminders
LA Reminder Due.docx
overdue 180 days
overdue 60 days

Communication Type
Vaccination Reminders
Save Schedule
Save As New
Cancel

3. Select the Communication Type and templates you wish to use:

Send via SMS = Tick the checkbox and select the SMS Template you want to use.

Send via Email = Tick the checkbox and select the Document Template you want to use.

11. Select 'Save Schedule' to create the scheduled task.

## Editing a Scheduled Task

1. Open the The 'Automatic Schedule List' window.
2. Select the task you wish to edit.

3. Select 'Edit'.
4. The Create/Edit schedule window appears, which allows you to modify the existing task.
5. Once modified, select 'Save Schedule'

## **Deleting a Scheduled Task**

1. Open the The 'Automatic Schedule List' window.
  2. Select the task you wish to delete.
  3. Select 'Remove'.
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