Adding SMS templates

Do you regularly SMS patients? If so, you can create custom SMS templates to save time typing up the message every time and to send tailored messages, complete with the patient's name, appointment time, serving doctor, and more.

To begin, first go to **Settings**.



Then click on **SMS Templates** under the templates menu.



This reveals the SMS templates currently available. By default, an **Appointment Reminder** template will be available to you.

Adding a new SMS template

To add a new SMS template, click on the Add SMS Template button.

Add SMS Template

Then, select the SMS **Type**, enter the template **Name**, and type out the SMS content in the **Description** field.

ID	4				
Туре	Appointments	*			
Name Description	Appointment Reminder				
	Hi < <pre>cpatfirstn>>, this is a reminder of your appointment at the <<listlocname>> breast screening clinic on <<listdate>> at <<listtime12h>>.</listtime12h></listdate></listlocname></pre>				

SMS Tokens

You can use 'SMS tokens' which are commands that look like: <<*patfirstn>>* to send tailored SMS messages. The aforementioned token for instance dynamically pulls the patient's first name.

There are SMS tokens for patient details, appointment details, doctor/ practice details, referral details, and more.

For a full list of tokens, click the link below:

https://wiki.fydo.cloud/?s=tokens

Once you're happy with the contents of your SMS template, click **Save** and you're done! Your new SMS template will be available next time you wish to send a custom SMS message.

Save

For some SMS Template ideas see our helpful wiki page https://wiki.fydo.cloud/sms-template-examples/

Making a Referring Doctor Inactive

Need to delete or remove an existing referring doctor? Read ahead to find out how we can make them **Inactive**.

1. Click on Settings



2. Then, Referring Doctors

> Referring Doctors

This will display a list of all the referring doctors you currently have.

3. Select the doctor you wish to make **Inactive** by clicking anywhere on their row in the list of doctors.

4. You will now see the details for this doctor, now click on **Edit** on the top right hand corner of the page. Simply untick the **Active** box next to **Status** as shown below.

					Edit
Туре	Specialist		~	?	
Speciality	Other		~	•	
Email					
Mobile					
Created On	12/03/2020				
Birthdate		iii			
Status	Active				

Now the doctor has been made **Inactive**; you will not find them when searching for them, and they will not appear on the list of **Referring Doctors**.

If you wish to view the doctor again, or make them **Active** again, simply tick the **Show Inactive** box from the **Referring Doctors** screen.



You will now be able to see the doctor, and you can edit them as per normal, including making them **Active** again.

Referring Doctors

To access a list of the referring doctors you have added into Fydo simply follow the below steps:

1. Click on Settings



2. Then, Referring Doctors

> Referring Doctors

This will display a list of all the referring doctors you currently have.

To **add** a referring doctor, click the yellow **Add Referring Doctor** button on the top right hand corner of your screen:

Add Referring Doctor

To **Edit** the details of an existing doctor, simply click **anywhere** along the row for that doctor, and you will be taken to the edit screen:

To get started editing, click on the **Edit** button on the top right hand corner of the page.



Whether you decided to **Add** a new Referring Doctor, or **Edit** an existing one, you will be met with the same screen:

Referring Doctor Deta	ails					
Number	13	Number	123456AF			
Title	Dr					
First Name	Test					
Surname	Doctor					
Practice Name	The ACSS Test Practice					~
Address	123 ACSS Street					
Suburb	HOMEBUSH		NSW		2140	
Mailing Address						
Mailing Suburb						
Practice Phone	(04)1234-5678	Practice Fax	0-			
Practice Email	test.dr@test.com.au					1.

Туре	GP			× ?	
Speciality				~	
Email	test.dr@test.com.au				
Mobile	0412-345-678				
Alternate Phone1	() -		Alternate Phone2	() -	
Created On	30/10/2023				
Birthdate	01/01/1990				
Status	Active				

Simply fill out, or change the fields as needed.

Remember, the required fields for a referring doctor are:

- Provider Number You can put a 0 if you do not have the number. Please note that you will need to enter it before submitting your claims, or you will run into rejections.
- First Name and Surname
- Type (GP or Specialist) This affects the length of the referral, GP: 12 months, Specialist: 3 months.
- Speciality (If Specialist is selected)

While there are a few other fields, they are optional. You can also upload any Doctors files that may be applicable such as APHRA, Drivers Licence, etc.

Once you are happy with your changes, click the green **Save** button to lock them in.

Save

You are also able to **Create** and **Edit** referrals from within the **Patient Details**, should you wish to do so, please see our <u>Creating a Patient</u> wiki page.