



## **In Touch SMS Interface for MedTech-32 Release Notes**



These Release Notes contain important information for all MedTech Users. Please ensure that they are circulated amongst all your staff. We suggest that these notes are filed safely for future reference.

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For further information on this release, or any other queries regarding the Version 7.0.0 Update, please contact the MedTech Helpdesk on 1800 148 165  
→ Option 1 → Option 1, or email [ausupport@medtechglobal.com](mailto:ausupport@medtechglobal.com).

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## MedTech Pre Requisites

Please review the following MedTech prerequisites and ensure they are met prior to installation;

- ▶ Your practice MUST be on MedTech32 Version 7.0. If you ARE NOT on MedTech32 Version 7.0, please DO NOT continue.

**IMPORTANT:** These documentations contain valuable information that, if not read, could seriously affect the upgrade progress and/or possible down time of your network.

- ▶ Ensure you are ALWAYS logged onto Windows with administrative rights when performing ANY installation, update, or maintenance tasks.
- ▶ This setup MUST be run on the MedTech32 Server and all users must be logged out of MedTech.
- ▶ Your practice must have been allocated a User Name and Password for the In Touch SMS Interface.

## Technical Pre Requisites

Please review the following Technical prerequisites and ensure they are met prior to configuration and activation of the In Touch SMS Interface.

- ▶ **Data Direct ODBC Driver** must be installed from the \ODBC folder on the MedTech Installation CD. This is required to be installed on the Server and all Workstations that will be utilising the In Touch SMS Interface.
- ▶ **.Net Framework 2.0 (dotnetfx.exe)** must be installed from the \Extras\Options folder on the MedTech Installation CD. This is required to be installed on the Server and all Workstations that will be utilising the In Touch SMS Interface.
- ▶ **In Touch Client Security Update Batch File (InTouch\_csu.bat)** must be run from the \Extras\Options folder on the MedTech Installation CD. This is required to be installed on all workstations that will be utilising the In Touch SMS Interface.
- ▶ **Data Execution Protection Settings** on the server must be edited to allow exceptions for the In Touch Interface applications. This is required to be configured on the Server that will be utilising the In Touch SMS Interface (see below for configuration).
- ▶ **Mapped Drives** must be present on all Workstations pointing back to the MT32 folder on the Server. This is standard in all Client Installations and is usually pointed to an M:\ by default.

**Note:** Please install these components with the default options - no additional configurations are required during or after the installation.

### IMPORTANT NOTE

**MedTech recommends that all MedTech Upgrades and Database Back up & Restore Processes should be performed by a Certified Technician.**

**The current list of MedTech Channel Partners and Certified Engineers are available on our web site:**

**<http://www.medtechglobal.com/aus/medtech-online-au/support-3.html>**

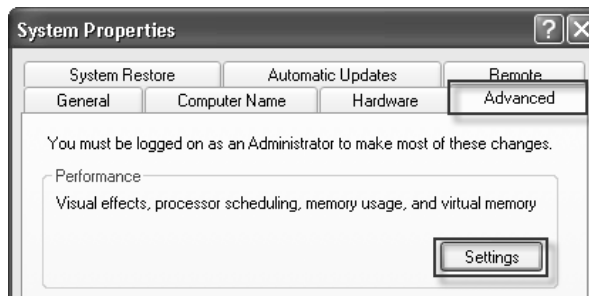
## Data Execution Prevention Settings

**Data Execution Protection Settings** on the server must be edited to allow exceptions for the In Touch SMS Interface applications. This is required to be configured on the Server that will be utilising the In Touch SMS Interface.

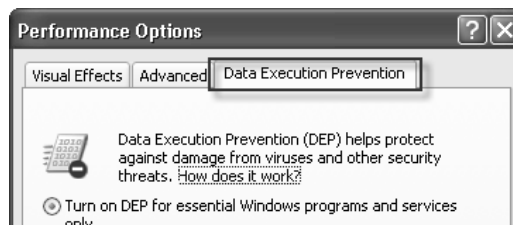
**Note:** The following settings are applicable to Windows XP Professional and Windows 2003 Server only.

Follow the steps below to enable the necessary settings:

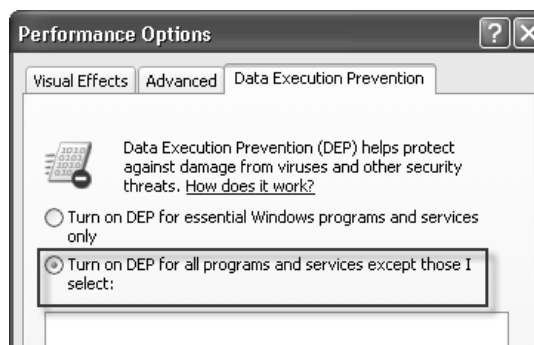
1. Navigate to *Start ▶ Settings ▶ Control Panel ▶ System*
2. In the System Properties screen click on the Advanced Tab
3. Click on the Settings button for the Performance options



4. In the Performance Options screen click on the Data Execution Prevention Tab

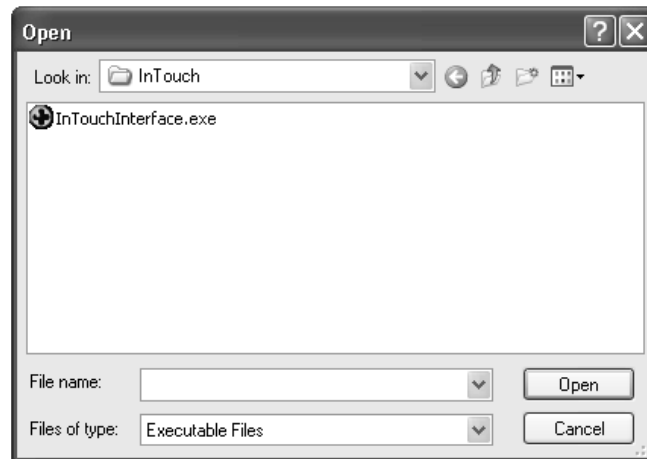


5. If not already selected select the second option in the screen "Turn on DEP for all programs and services except those I select:"

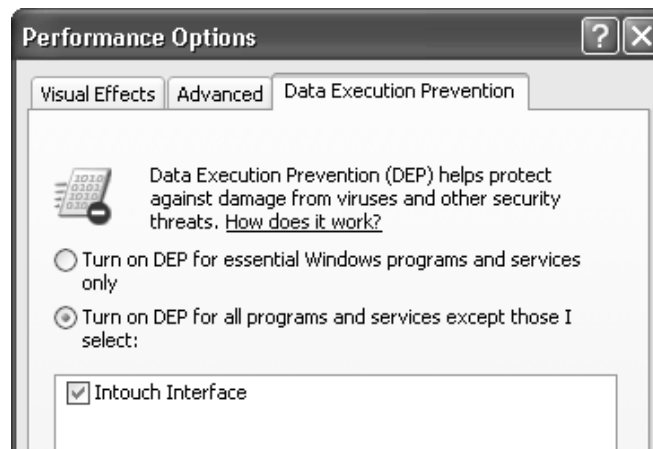


- Click on the Add button at the bottom of the screen and browse to the MT32 installation directory on the server MT32\Bin\Addins\InTouch folder.

[The installation directory is usually the C Drive. Ensure you are not browsing through a mapped network drive]



- Select and Add the **InTouchInterface.exe** application to the exclusion list.



- Click on Apply and OK to save the settings.
- The Server should now be rebooted to ensure that the setting changes take effect.

# In Touch SMS Interface for MedTech-32 Release Notes

This release notes will explain the new In Touch SMS Interface for MedTech-32 enhancements.

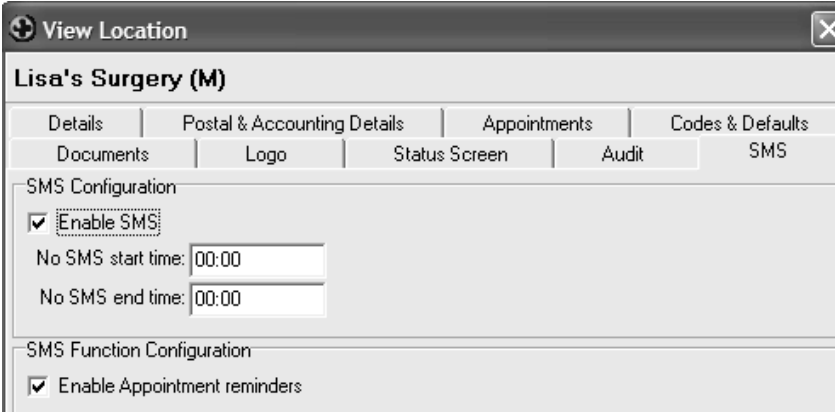
## Setup

### Location

*Setup ▶ Location ▶ Location Settings*

A new tab has been added in the *Setup ▶ Location ▶ Location Setting* to enable the SMS functionality.

The Enable SMS check box and Enable Appointment Reminders check box need to be ticked so that the user can activate the SMS functionality.



View Location				
Lisa's Surgery (M)				
Details	Postal & Accounting Details	Appointments	Codes & Defaults	
Documents	Logo	Status Screen	Audit	SMS
SMS Configuration				
<input checked="" type="checkbox"/> Enable SMS				
No SMS start time: 00:00				
No SMS end time: 00:00				
SMS Function Configuration				
<input checked="" type="checkbox"/> Enable Appointment reminders				

The **No SMS Start Time** and **No SMS End Time** can be used to configure a time period where no SMS Messages will be processed and sent out from the interface. This can be used for example to set that no messages will be sent from 11.00pm to 9.00am to avoid disruption to patients.

The SMS engine details need to be filled in and will be provided by MedTech and the Proxy settings need to be entered if the Practice has a Proxy Server enabled on site.

SMS Engine Proxy

Engine URL:

Practice:

Username:

Password:

Once the Location is configured the Appointment Reminder SMS1 and SMS2 will be enabled and ticked respective of the Staff Setup and Patient Register.

**View Attendance**

**SALES Sherry (1)**

Attendance Details Audit

Patient:  Priority0:

Appointment:

Expected Consult Duration:

Arrival:

Complaint:

Note:

Referral:

Provider:

Consult Start:

Consult Completed:

Room:

Location:

Reminder SMS 1

Reminder SMS 2

Appointment  Arrived

If the user manually un-ticks the Reminder SMS 1/2 values, then the SMS Messages will not be Lodged for Sending, or if already pending, they will be Cancelled.

If the Location is not configured for SMS then the functionality remains the same as existing functionality. The Appointment Reminder SMS1 and SMS2 checkboxes in the View Attendance screen will be disabled.

## Staff Members

Setup ▶ Staff ▶ Members

A new tab SMS has been added to the Setup ▶ Staff ▶ Members to enable the staff to send out the Appointment Reminders for the Appointment made in their Appointment Book as text messages, if the Patient has a mobile number in the Patient Register.

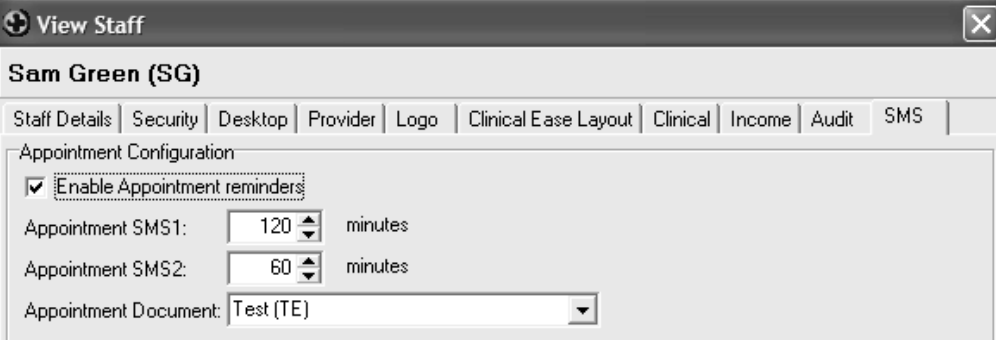
The Appointment SMS 1 and SMS 2 need to be setup so that it automatically generates reminder 1 and reminder 2 for the appointments made for that staff.

The Appointment SMS 1 field should be set to the number of minutes prior to the Patient's appointment time you would like to the initial reminder to be sent.

The Appointment SMS 2 field should be set to the number of minutes prior to the Patient's appointment time you would like the second reminder to be sent.

For example; Patient has an appointment for 01:00pm. Based on the settings below in the screen shot, the initial reminder will be sent 120 minutes before the appointment time at 11:00am and the second reminder will be sent 60 minutes prior to the appointment time at 12:00pm.

The Appointment Document template need to be setup in the Setup ▶ In/Outbox ▶ Outbox document in SMS format and the document need to be attached in the Setup ▶ Staff ▶ Members.



The screenshot shows a window titled "View Staff" for "Sam Green (SG)". It features a tabbed interface with the following tabs: Staff Details, Security, Desktop, Provider, Logo, Clinical Ease Layout, Clinical, Income, Audit, and SMS. The "SMS" tab is selected, displaying the "Appointment Configuration" section. This section includes a checked checkbox for "Enable Appointment reminders". Below this, there are two spinners: "Appointment SMS1" is set to 120 minutes, and "Appointment SMS2" is set to 60 minutes. At the bottom, there is a dropdown menu for "Appointment Document" currently showing "Test (TE)".

Once the Location is configured the Appointment Reminder SMS1 and SMS2 will be enabled and ticked respective of the Staff setup and Patient register.

**View Attendance**

**SALES Sherry (1)**

Attendance | Details | Audit

Patient: SALES Sherry (1) ... Priority0:

Appointment: 10 Feb 2009 2:30 pm

Expected Consult Duration: 0:30

Arrival:

Complaint:

Note:

Referral:

Provider: Sam Green (SG)

Consult Start:

Consult Completed:

Room:

Location: Lisa's Surgery (M)

Reminder SMS 1 ...

Reminder SMS 2 ...

Appointment  Arrived

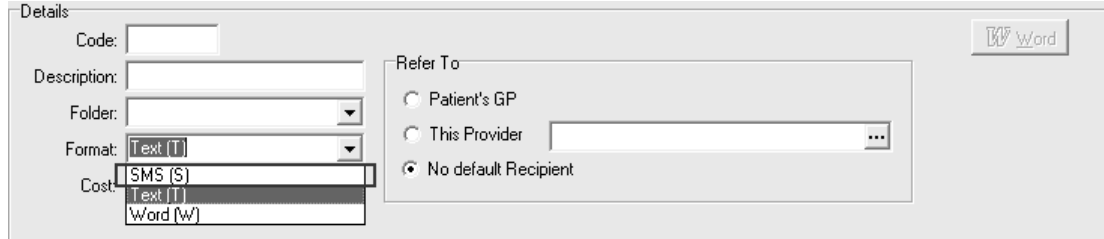
OK Cancel Help

If the SMS is not configured then the functionality will remain as it is currently and the Appointment Reminder SMS1 and SMS 2 Checkboxes in the View Attendance screen will be disabled.

## Outbox Documents

### Setup ▶ In/Outbox ▶ Outbox Documents [Format]

A new option called SMS has been added to the Format drop down list called SMS.



The screenshot shows a 'Details' window for configuring an Outbox Document. The 'Format' dropdown menu is open, showing three options: 'SMS (S)', 'Text (T)', and 'Word (W)'. The 'SMS (S)' option is selected. Other fields include 'Code', 'Description', 'Folder', 'Cost', and 'Refer To' (with radio buttons for 'Patient's GP', 'This Provider', and 'No default Recipient'). A 'Word' button is visible in the top right corner.

This option should be selected for all documents that are setup to be SMS Templates for the In Touch SMS Interface.

You will need to configure and setup the document content as a Text Document. You will have the ability to use any number of merge fields for the Appointment Reminder text.

A document with the Format of SMS selected will be made available in the Setup ▶ Staff ▶ Members – SMS Tab for the Appointment Document list to select from.

## Patient Register

A new checkbox **No SMS** has been added in the Patient Register. If the Patient has **No SMS** ticked then the Patient will not be sent any text messages for Appointment Reminders even if they have mobile number entered.

Postal Address

Separate Postal Address

Street: 499 Welcome Bay Road

Suburb: RED HILL ...

State: NSW Post Code: 6056

Building:

Email: email address

Fax/Mobile: no / 61405 140 677 ?

Date Added: 12 Oct 2000 No SMS:

Date Deceased: No Contact:

When entering a Mobile Phone number into the Patient Register the user has the ability to validate the number format to ensure that it meets the necessary requirements of the In Touch SMS Interface.

There is now a ? icon next to the Mobile Phone Number field.

When pressed it will validate the number entered to ensure it is correctly entered.

Patient Register

SALES Sherry (12345678)

Name Account More Next of Kin/Employer Family Members/Notes Au

Postal Address

Separate Postal Address

Street: 499 Welcome Bay Road

Suburb: RED HILL ...

State: NSW Post Code: 6056

Building:

Email: email address

Fax/Mobile: no / 61405 140 677 ?

Date Added: 12 Oct 2000 No SMS:

Date Deceased: No Contact:

Various

El

C

F

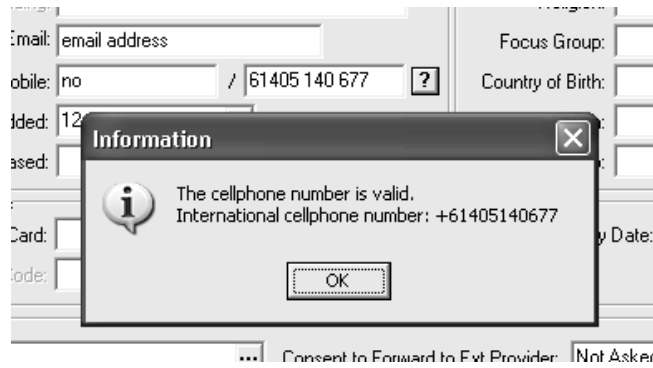
Focus

Country

Country o

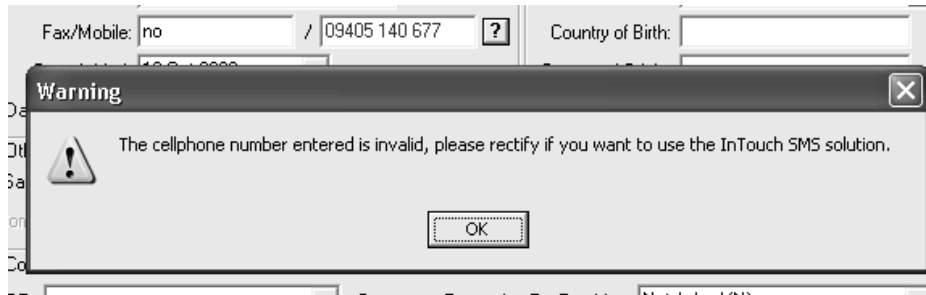
Blood

When the mobile number is valid the following message will be displayed:



A valid mobile number should be preceded with 04 for the mobile prefix and be up to 10 digits in total. For complete validation it would be preferred to enter the numbers in full international format of +614....

When the mobile number is in-valid the following message will be displayed:



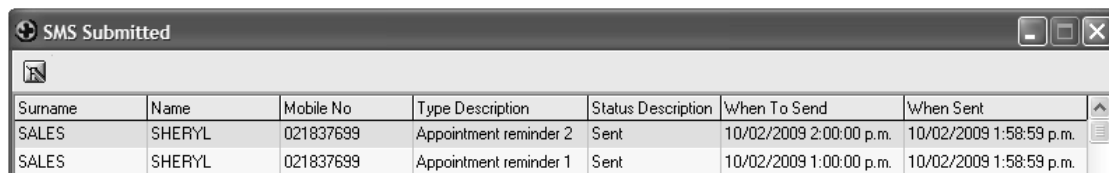
Along with the above message, the mobile number will also be displayed in Red Text to alert the user to in the invalidity of the number entered.

# InTouch SMS

## Module ► InTouch SMS ► Outgoing SMS

Once the SMS reminder is generated it will be displayed in the Module ► InTouch SMS ► Outgoing SMS. The SMS reminders will be displayed in the descending order on the When To Send time.

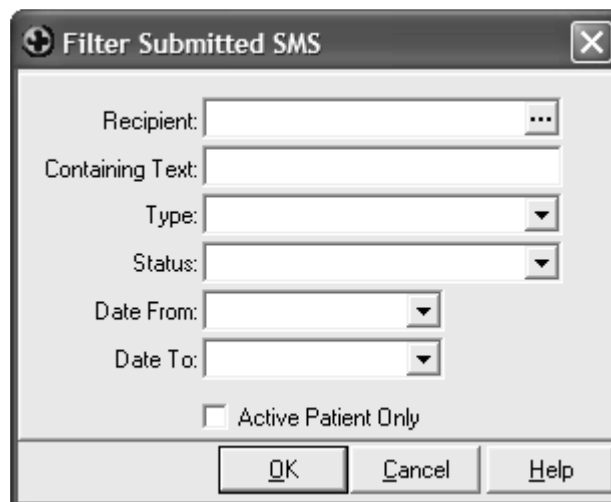
The Status description will display **“To be sent”** and will be changed to **“Sent”** once the InTouch Interface is processed and will display as **“Delivered”** once the SMS has been delivered to the Patient Mobile and will be **“Cancelled”** if the Appointment has been cancelled.



Surname	Name	Mobile No	Type Description	Status Description	When To Send	When Sent
SALES	SHERYL	021837699	Appointment reminder 2	Sent	10/02/2009 2:00:00 p.m.	10/02/2009 1:58:59 p.m.
SALES	SHERYL	021837699	Appointment reminder 1	Sent	10/02/2009 1:00:00 p.m.	10/02/2009 1:58:59 p.m.

This will always display the SMS Reminders for the active Patient on the palette. If the Palette is blank then it will display the SMS reminders for the entire patient set.

The user can also filter for different statuses. The Recipient field will default to the active Patient on the palette or it will be blank if there is no patient on the palette.



Filter Submitted SMS

Recipient:

Containing Text:

Type:

Status:

Date From:

Date To:

Active Patient Only

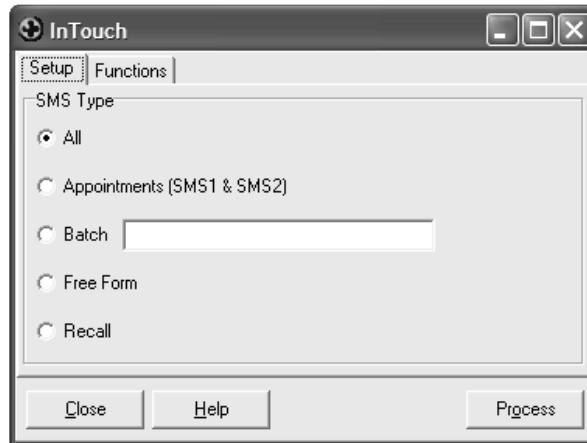
OK Cancel Help

# Utilities

## In Touch Interface

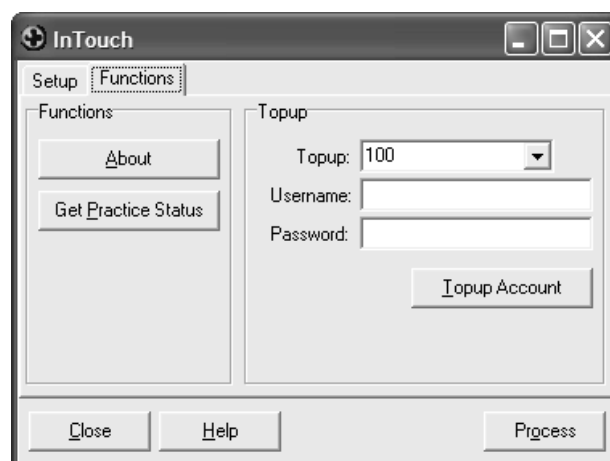
### Utilities ► In Touch ► In Touch Interface

The SMS is processed using the In Touch Interface utility. Once you click on process the SMS will be sent to the Patients Mobile Phone numbers.



Ensure that the SMS Type is always set to ALL. Other options within this screen will be available in the future as additional functionality is added to the In Touch SMS Interface.

In order to update the status at the practice whether the SMS has been delivered or not, user need to click on Get Practice Status menu and the status will be updated in the Module ► InTouch ► Outgoing SMS.

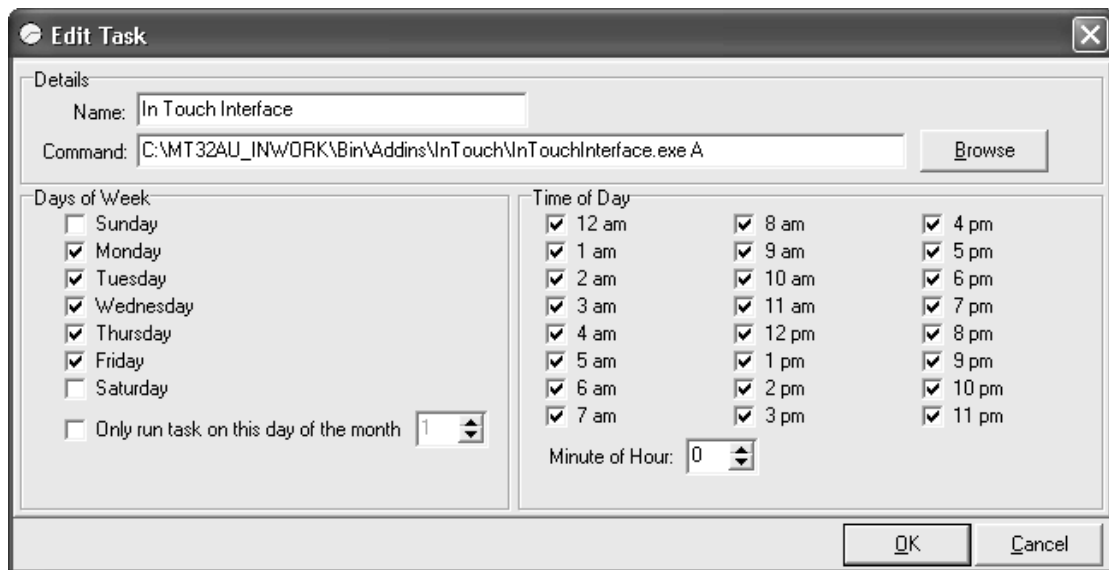


# Scheduler

## MedTech Scheduler

### Utilities ► Scheduler

The MedTech Scheduler can be configured to automatically process the In Touch SMS Messages on a regular basis to avoid the user having to manually process via the In Touch Interface Utility.



For help to configure the MedTech Scheduler to run the In Touch Interface automatically please contact MedTech Support.

Should you require any assistance, please do not hesitate to contact the MedTech Helpdesk on 1800 148 165 → Option 1 → Option 1.