

SMS confirmations & reminders

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Send patients SMS confirmations and reminders for their appointments. The reminders can be sent manually or scheduled to go out automatically.

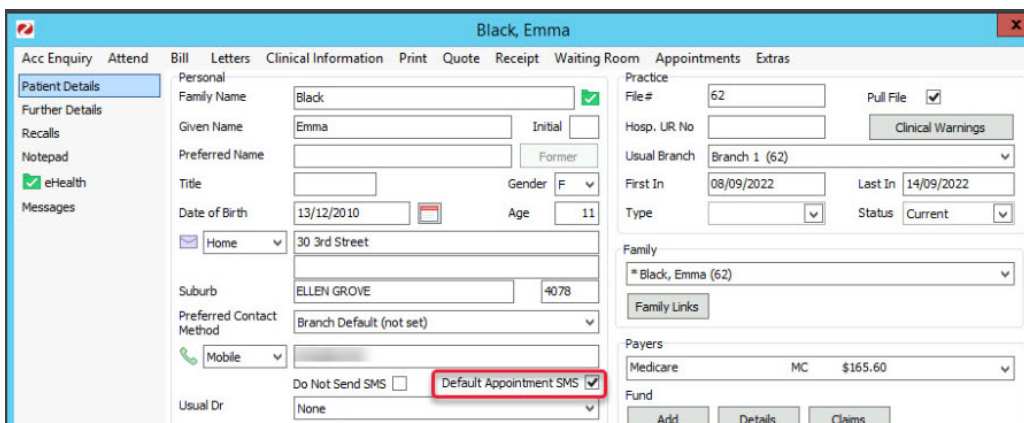
Requirements

Practice requirements

The [Set up SMS article](#) explains the following requirements: an account with ZedSMS and ZedSMS configured for the practice in Zedmed.

Patient requirements

A patient must have a mobile number in their patient record. For appointment reminders, they must also have **Allows SMS** is ticked on the **Appointment Details** screen for the appointment. **Allow SMS** is ticked by default if **Default Appointment SMS** is ticked in the patient's record.



The screenshot shows the Zedmed patient record for Emma Black. The 'Appointment Details' tab is active. In the 'Personal' section, the 'Default Appointment SMS' checkbox is checked and highlighted with a red box. Other visible fields include Family Name (Black), Given Name (Emma), Date of Birth (13/12/2010), and Gender (F). The 'Practice' section shows File # (62) and Usual Branch (Branch 1 (62)).

2-way SMS replies

Zedmed can be configured to allow patients to reply Y/Yes or N/No (not case-sensitive) to SMS reminders to confirm or cancel an appointment. Zedmed can auto-cancel appointments when an N or No is received. The Appointment Book will reflect the response with a phone icon and a cross or tick. If you have multiple reminders, they will all request 2-way confirmation. To learn more, see [Managing SMS messages](#).

Appointment confirmations

SMS confirmations for new bookings are sent if **Send Confirmation SMS** is ticked on the **Appointment Details** screen.

Send Confirmation SMS is ticked by default for Online Appointment (OLA) bookings, so SMS notifications are sent whenever a patient books online. For manual bookings, **Send Confirmation SMS** needs to be selected. It is not ticked by default.

The message's content is defined in the **Appointment Confirmation Message** field.

Appointment Details

Date: **Friday, 9 December 2022** Created by PD **Black, Emma**

Doctor: **Igor Fuller** on 09/12/22 at 12:38 File No 62 Pull File Yes DOB 13/12/2010

Resource Start Time 11:15 Clinic Branch 1 First in 8/09/2022 Last in 14/09/2022 Type

Duration 00:30 Status Current Contact Details

End Time 11:45 Type Std Consultation Phone (H) Work (W)

Mobile 0422803434 Address 30 3rd Street, ELLEN GROVE 4078

Notes

Reason for chosen date

Cancellation Waiting Priority

Hide Notes **Allow SMS** **Send Confirmation SMS**

Account Payers

Medicare	MC	\$165.60
Department of Veterans Affairs	DVA	\$141.60
Black, Emma	P1	\$71.30

Repeated booking

Print Label Booking rules Print Letter Find Patient Print Slip Close Cancel Help

Appointment reminders - scheduled

Schedule SMS reminders for selected appointment types to go out at a specified time and a set number of days before the appointment. The schedules are set up in the **Management** tab > **Practice setup** > **SMS Configuration** > **Schedule** tab

These automatic reminders are set up for the practice, and the steps are documented in the **Schedule reminders** guide.

Appointment reminders - manual

You can manually send out SMS reminders by selecting the criteria for who will receive the reminder then selecting send.

The message's content is updated using the **Modify SMS Text** button.

To manually send SMS reminders:

1. Go to Zedmed's **Reception** tab.
2. Select **Daily reports** then **Appointments**.

The **Appointment Report** screen will open.

3. Select **Send Appointments via SMS**.

This will update the screen so it can be used to configure and send SMS reminders.

4. Use the following criteria to determine who is to receive the reminder:
 - a. Set the **Date from** and **To**. Reminders are sent to all patients with appointments in this date range.
 - b. Select the **Branch** the appointments are at. The default is the branch you're logged in at.
 - c. Select the **Doctor** or **Resource** (not both) the appointments are booked under. The default is all doctors.

- d. Select the **Appointment Type** that the reminders will be for. The default is all appointment types.
5. When you're satisfied with the message's criteria, select the **Send SMS** button.

The screenshot shows the 'Appointment Report' dialog box. It is divided into several sections:

- Style:** Contains radio buttons for 'Appointments Only', 'Appointments and Available Slots', and 'Cancelled/Missed'. Under 'Cancelled/Missed', there are checkboxes for 'Cancelled Only' and 'Missed Only'. The 'Send Appointments via SMS' option is selected and highlighted with a red box. A 'Modify SMS Text' button is next to it.
- Criteria:** Contains date and time filters. 'Date from' and 'To' are both set to 15/07/2021. 'Time from' is 06:00 and 'To' is 22:00.
- Report / Mail Merge:** Contains 'Display Options' with checkboxes for 'Addresses', 'Referral Details' (checked), 'Separator Lines', and 'Preferred Name'. There is also an 'Include History' checkbox. A 'Send SMS' button is highlighted with a red box. Other buttons include 'Screen' and 'Export'.
- Filters:** Includes dropdown menus for 'Branch' (Branch 1), 'Doctor' (All), 'Resource' (All), and 'Appointment Type' (All).
- Buttons:** A 'Close' button is at the bottom right.

If you get the message "No appointments match the criteria you have selected" when selecting **Send SMS** or **Screen**.

One of the following may apply:

- o SMS messages have already been sent for appointments matching the selected criteria.
- o There are no appointments matching the criteria.
- o The appointments that match the criteria are not set to **Allow SMS**.
- o The patients do not have a mobile phone number in their patient records.

The **Appointment Report** can also be used to modify the text used in the messages. The modifications are made using the **Report** and **Mail Merge** tabs and the **Send Appointments via SMS** option.

Check if notifications were sent.

You can check if SMS reminders were sent using both the **Message Manager** and the **Appointment Listing** report.

Message Manager

The Message Manager allows you to filter all SMS communications by specific criteria, including **Confirmed** or **Cancelled** responses to messages sent to the patient.

To learn more, see the [Message Manager guide](#).

Appointment Listing report.

To check SMS notifications:

1. Go to Zedmed's **Reception** tab.
2. Select **Daily reports** then **Appointments**.
The **Appointment Report** screen will open.
3. Select the branch.
4. Select the date range you want to check.

5. Select the **Screen** button.

The **Appointment Listing** report will open, showing all appointments in that date range.

6. Review the report.

The **SMS** column will have a tick for each patient sent a reminder.

Branch 1 Page 1

Appointment Listing

Dr WARREN HEDRICK Wednesday 9 Mar 2022 From 06:00 To 22:00 Branch 1

Time	Type	Dur	File#	PF	FP	Name	DOB	Home Phone	Work Phone	Mobile	SMS
11:15	C15	15	7		Y	BLAIR, Ms KYM	20/08/1968			0409 211 060	<input checked="" type="checkbox"/>
Cancellation Waiting Appointment Notes							Referred By	Referral Start Date	Referral Validity		
Priority							Support Zedmed	8/12/2021	12 Months		
12:00	C15	15	4		Y	Hollaway, Mr Knut	19/05/1995			0418701000	<input checked="" type="checkbox"/>
							Brenda Reed	6/10/2021	12 Months		

Number of Appointments : 2

Page 1 of 1

7. Select **Close** to save and exit.

You can also check what message a patient was sent by **opening their patient record** and selecting the message tab.

Hollaway, Knut

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Date/Time	Sent By	To/From	Status	Category	Response
21/07/2021 05:14 PM	Dr P Davis	0478 701 007	Failed	Reminder	
You have an appointment on 22/07/2021 at 2:45 PM with Dr Phillip Davis at Apostro'sand. Please ring 99999999 if you cannot attend.					
09/06/2021 09:56 AM	ZEDMED	0478 701 007	Failed	Direct	
test					

Messages