



Compliance Reminders

New Feature Documentation

What does it do?

Compliance Reminders allows the practice to keep in better contact with clients and assisting them in keeping compliant with the application of medication such as wormers and flea treatment. This subsequently reminds the user to come back into the practice for more medication when they have none remaining.

Please note:

This feature requires the SMS and emailing modules in order to be used, please contact our admin team to arrange for these to be activated if not already active for your system.

If you have previously enquired about using SMS or emailing from Vet Space and did not buy the module, then please speak to Vet Space sales about the advantages of SMS and our new pricing structure.

Please call 0845 2000 725 or email sales@vetspace.com

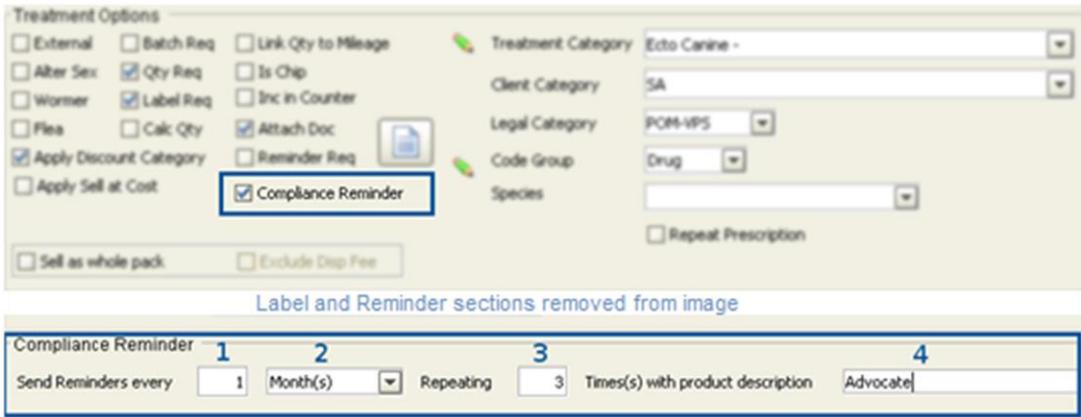
After configuration the system will create and automatically send SMS and emails to clients on a schedule.

How do I set it up?

Setup of this module is in 2 stages

1 Code Entry

Within the code entry screen find the code that requires the Compliance Reminder, and navigate down to Treatment Options and Compliance Reminders as shown in the screen shot below.



Compliance Reminder	1	2	3	4
Send Reminders every	1	Month(s)	Repeating 3	Times(s) with product description Advocate

In order to activate Compliance Reminders for this code, begin by ticking the Treatment Option “Compliance Reminder”

This will activate the Compliance Reminder menu which will allow entry of data, the numbers in the image relate to the descriptions below.

Frequency

Points 1 and 2 sets the frequency of the reminders, such as 1 Month or 2 weeks or 4 days.

Occurrence

Point 3 is the occurrence multiplier; this establishes how many reminders are created for a single quantity of product. For example, 3 pipette of advocate would have 3 for the repeating multiplier as they are applied on 3 different occasions.

Outcome

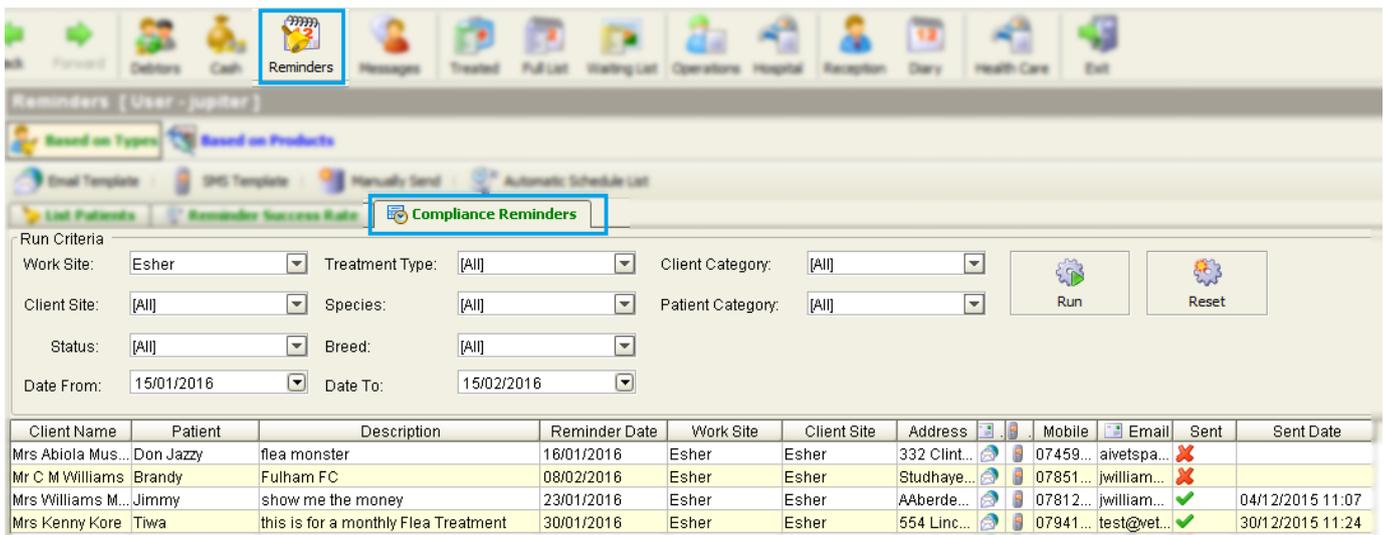
The combination of Frequency and Occurrence are used to calculate the date from treatment when a reminder should be sent.

This table shows an example output

Treatment Date	Quantity	Frequency	Occurrence	Reminders Due
24 Jan	1	1 Month	3	24 Feb 24 Mar 24 Apr
24 Jan	2	1 Month	3	24 Feb 24 Mar 24 Apr 24 May 24 Jun 24 July
24 Jan	1	1 Week	2	31 Jan 7 Feb

2 Scheduler

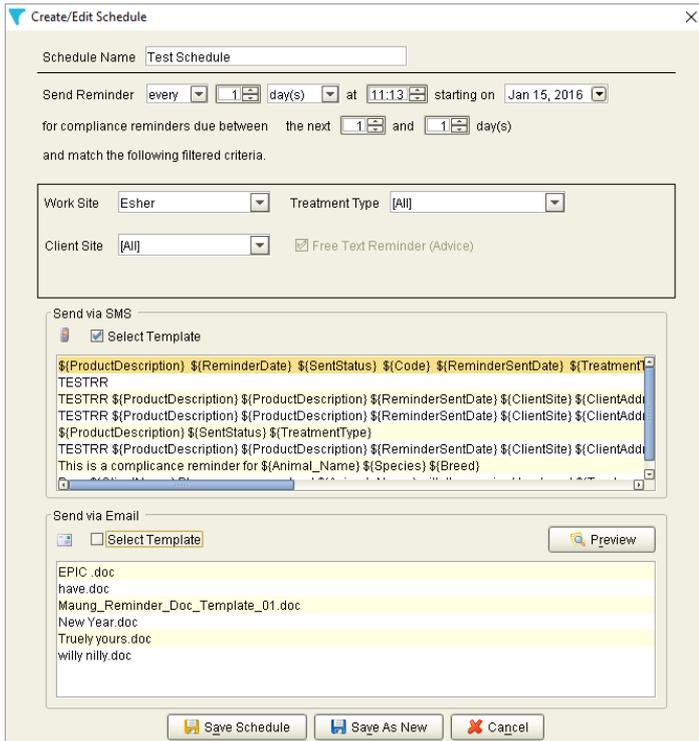
For the Compliance Reminders to automatically send you need to setup your schedule and filters, this is available from the Reminders screen under the Compliance Reminders tab as shown in the image below.



Client Name	Patient	Description	Reminder Date	Work Site	Client Site	Address	Mobile	Email	Sent	Sent Date
Mrs Abiola Mus...	Don Jazzy	flea monster	16/01/2016	Esher	Esher	332 Clint...	07459...	aivetspa...	✗	
Mr C M Williams	Brandy	Fulham FC	08/02/2016	Esher	Esher	Studhaye...	07851...	jwilliam...	✗	
Mrs Williams M...	Jimmy	show me the money	23/01/2016	Esher	Esher	AAberde...	07812...	jwilliam...	✓	04/12/2015 11:07
Mrs Kenny Kore	Tiwa	this is for a monthly Flea Treatment	30/01/2016	Esher	Esher	554 Linc...	07941...	test@vet...	✓	30/12/2015 11:24

Columns have been compressed for the image, this is not representative of the useable screen.

From this screen select the 'Automatic Schedule List' button which opens the list of current schedules, to add a new schedule click on the Add button available on the right hand side.



Create Schedule

To compile your schedule, add a name for the schedule and follow the configuration flow, additional

Field	Description
Schedule Type	Allows “every” or “once”. Defines if it is a reoccurring schedule or a one off.
Frequency	Combination of number and type, this allows configuration by number of days or weeks.
Run Time	The time the schedule will start to run during day that the schedule runs.
Start Date	The schedule will only start to run on and after the selected date.
Catchment Day(s)	The number of days from the running date to send reminders for. Example: Setting both values to 1 and the scheduler runs today, will send reminders due tomorrow.

guidance has been provided below:

From this menu you will select the templates required for SMS and Email if required, you must select at least SMS or Email by ticking “Select Template” if neither is selected the schedule will not send any reminders. The schedule can send both communication types at the same time therefore selecting both options and the relevant template is allowed.

Templates

The SMS templates and Email Templates are created from the Reminders then Compliance Reminder tab, there are 2 buttons available, “Email Template” and “SMS Template”. Any templates added here are selectable from the Scheduler.

Save Options

To save your schedule click the Save Schedule button, if you now want to make a similar schedule to the one just created, open the schedule by selecting Edit from the schedules window, rename the schedule and make any changes such as another work site and select “Save As New”. This will create an almost identical schedule.

Please note:

This feature requires that the scheduler service “Voyager Comms Service” is configured by our engineers before the schedules will automatically run. If you are unsure that this has been setup, then please contact support.

It is possible to run Compliance Reminders manually without this service.

How do I use it?

Using compliance reminders could not be easier, there are 4 sections to consider, Treating, Viewing and Editing, Processing Reminder and Returns.

Treating

When a treatment has Compliance Reminders activated then when the treatment has been saved the compliance reminders are automatically created and show in the bottom half of the patient summary in the treatment screen.

The number of reminders created are in proportion to the quantity dispensed and is rounded up to the next full number. Therefore, selling a quantity of 1.9 or 2 of an item will create twice as many reminders as the quantity of 1.

Viewing and Editing one patient

You can view the compliance reminders in the patient details screen under the Reminders tab, the bottom half of the screen shows the compliance reminders for this patient.

It is possible to edit the reminders by double clicking or selecting and clicking the edit button.

This allows you to change the reminder date or change the description; changing the description also has an option to update the description on just this code, all reminders on this patient for the same code or all reminders on the same code and treatment date.

If you need to remove a compliance reminder, then you can right click the record and select delete reminder.

This screen also has other filters for the grid and will automatically only show you reminders which have not yet been sent, to view sent reminders select the status drop down menu and change to All or Sent.

This grid also automatically only shows you the reminders for the next 12 months, use the date filter to see a larger date range.

Processing Compliance Reminders

It is possible to send compliance reminders manually by navigating to Reminders then selecting the Compliance Reminders tab.

Enter the required criteria and select run, then select the Manually Send button to select the SMS and Email templates to use and click send.

This will display a list of invalid SMS numbers and allow you to print and check, then select the Ignore button to continue sending SMS messages.

Return of Products

When an item has been returned to stock either via Refund or Credit Return (not monetary credit) then all compliance reminders for this product are no longer active. If the Refund or Credit is deleted, then the reminders return to active.

I don't want to use this feature yet.

Don't worry, the feature is not automatically activated; when the practice is ready to start using this feature follow the previous steps.