

## PATIENT MESSAGING – YOUR CONNECT SYSTEM

### Your personal guide to finding your way around your new system

Welcome to your new Connect system from iPLATO, in this guide we will show you where all your favourite features now live, all the great functionality from PCM remains.

This document will help guide you through your new system.

If you have any technical queries, our Support team are always at hand and you can email them at [help@iplato.com](mailto:help@iplato.com)

You can also view our video training guides on our [Video Tutorials](#) page.

### Getting Started – Log on

This is a nice quick section as nothing has changed. Simply go to <https://connect.iplato.com>

We suggest using Google Chrome to access the site, as this is the most compatible web browser when using the system.

All your usernames and passwords still work the same and nothing needs to be updated.

If you have forgotten your password, click on 'Forgot Password?' on the log in page to reset it.

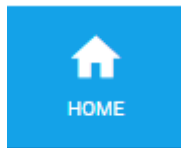
### SUMMARY HOME PAGE

After logging in, the first difference you will see will be your landing page which is now the Summary screen. This information was there for you before, but it lived under the REPORTS tab.

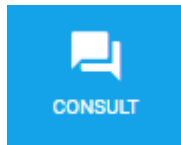
On this page you will be able to see:

- Credit balance – Credits given to your practice by your CCG
- Last Replication – The date your clinical system and your Connect system last synced
- Text message traffic – All types of text messages sent to your patients
- Data message traffic – All types of data message sent to your patients who have myGP app
- PAS / PCM - Your total patient list and number of patients registered with a mobile

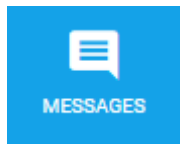
We have made your CONNECT system simple to navigate for you. All the menus to any section of the system live on the left-hand side of your screen and will always be visible regardless of what section you click on.



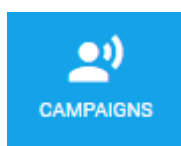
**Summary Home page (If FFT pro purchased you will find your monthly reports here)**



**Allows clinicians to do video consults with patients (Additional Purchase)**



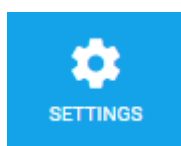
**Has the Inbox, Outbox and Sent box where messages to and from patients are stored**



**Where you send out Manual messages and Health Campaigns.**

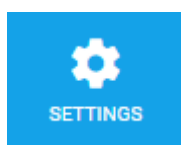


**Will show your patients at your practice registered with a mobile number**



**Allows you to control settings on your system for appointment reminders and myGP**

## SETTINGS – EVERYTHING YOU NEED TO MANAGE YOUR APPOINTMENT REMINDERS



All the sections under the SETTINGS menu work in the same way as their PCM counterparts, some have just been renamed, some like Custom Reminders, have been given their own section.

When we click on Settings the full menu will appear. You can see that myGP Appointments and preGP – Care Navigation appear at the top (if purchased).

For now, we are interested in the section directly below these options, which will all look very familiar. The below shows you what these options relate to in Connect.

## Setting menu part 1

<b>Automatic Reminders:</b>	Template for automatic reminders.
<b>Reminder Settings:</b>	Rules of the system, when are reminders sent out.
<b>Cancellation:</b>	Shows you the trigger word, the Confirmation message when a patient cancels an appointment and the Summary report.
<b>Reminder Exclusions:</b>	How to stop an appointment reminder being sent out to patients booked under certain Session Holders, Session Clinics or Slot Types.
<b>Custom Reminders:</b>	How to tailor your appointment reminder to give specific information to patients
<b>Read Code:</b>	Standard read codes for SMS sent and SMS received

## Settings menu part 2

If you use our free Patient Surveys, you will see this listed in the Settings menu. If you use our FFT Pro service this information will be found under the home tab.

<b>Users:</b>	Add staff to the system with different user permissions. All Access / High Level / Standard Level / Clinician. <b>Top Tip: Only All Access users can add new users to the system.</b>
<b>Practice Information:</b>	Basic details about your practice, e.g. location and opening times.
<b>Contacts:</b>	A personal phone book that all users can use.
<b>Blacklist:</b>	Ability to block all communication in the system between your practice and a patient.
<b>Messaging Alerts:</b>	Provides an Undelivered report which will let your practice know about any Failed or Expired messages.
<b>Gateway:</b>	Shows you your unique gateway number and whether your Automated Reminders and Manual Messages are Enabled.

## PATIENTS MENU



One above the Settings menu is the Patients tab, this is where you will find all your patients registered at your practice with a mobile number. When you click on the Patient tab you will need to select the Patient List. The layout of the patient data has not changed.

### Edit patients

If you need opt-out a patient from SMS reminders look up your patient in the search bar.

To the right of the patient details will be the edit button.

Click this bring up the Edit Patient box.

Select Opt-Out, click 'Save' and that's it, you patient will not receive any more SMS messages from your practice.

You can search for patients by selecting a specific term, or by using the search box by any of the following; Patient ID, First name, Last name, NHS number or Mobile number and then click 'Apply'.

### Status

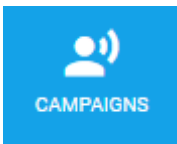
The symbol you will see in the Status column will depend on if the last message sent to the patient was delivered, failed or expired. Delivered messages are nice and straight forward, lets recap what failed and expired messages mean.

**Failed:** If a message has failed it means that this phone number no longer exists or has been logged in error. This could be if a patient decides to switch from one mobile phone provider to another and does not take their number with them.

**Expired:** If a message has expired the phone number exists but the message was unable to get through over the course of 72hrs. Reasons for this can the phone was switched off or the patient was out of the country.

**Top Tip:** *You can get a daily report of failed and expired messages if you want to, go to the Settings menu, click on Messaging Alerts and set for Daily.*

## CAMPAIGNS – SENDING A HEALTH CAMPAIGN



In this section, we will look at the steps you need to take in order to send out a health campaign.

First, you need to decide what campaign you want to send out, e.g. sending out an Asthma review, or invite for a Flu jab. Once you have decided what campaign you are sending.

- Run a patient search or report within your clinical system
- Export/ Save into Excel spreadsheet
- Prepare any read codes that you would like to feedback into your patient record

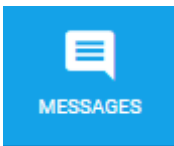
Once this is done go to your Connect system and select Campaigns on the left-hand side.

The below table shows the menu options under Campaigns and their functions

<b>New Message:</b>	Sending out targeted health campaigns or individual manual messages in three simple steps: select the recipient list, compose the text message or select the template and then customise the sending options.
<b>Groups:</b>	Where you can create groups for targeted health campaigns. This is where you would add the Patient ID/NHS number for your patients from your search in your clinical system.
<b>Templates:</b>	Creating templates for recurring health campaigns.
<b>Trigger Words:</b>	Creating a trigger word with automatic read coding.
<b>Call/Recall:</b>	Sending a health campaign with the ability to book an appointment related to the campaign in the myGP app.

**Note:** Call / Recall can only be used if the myGP App is enabled on the system. If you need to enable the app, please contact our support team on [help@iplato.com](mailto:help@iplato.com)

## MESSAGES – YOUR INBOX, OUTBOX AND SENT BOX



The Messages tab holds all your text and data messages in the Inbox, Outbox and Sent box.

### Inbox

Stores messages received from patients.

- You will be able to see the Message Received (e.g. CANCEL)
- You will be able to search by date
- You can use the Filter search to do a more detailed search looking for messages by Patient name or NHS number

### Outbox

Holds all messages before they are due to be sent out. E.g. upcoming appt reminders for the next few days. This would also hold any Campaign messages you were about to send.

- You would be able to search by date
- You would be able to Edit a message before it is sent by clicking on the Edit button.
- You would be able to delete a message before it is sent by selecting it using the tick box and clicking the Delete button at the bottom of the page.

### Sent

Stores messages sent to patients, whether that is by automated reminder or a manual/campaign message.

In the Sent box you can search by:

- Date
- Messages in the last 7 days
- Failed last month
- Auto Cancelled Appointment

**Top Tip: Auto Cancelled Appointment will give you a list of all the patients who text back Cancel to their appointment reminders in the time frame you selected. These will appear with a 'tick' in the Cancelled column.**