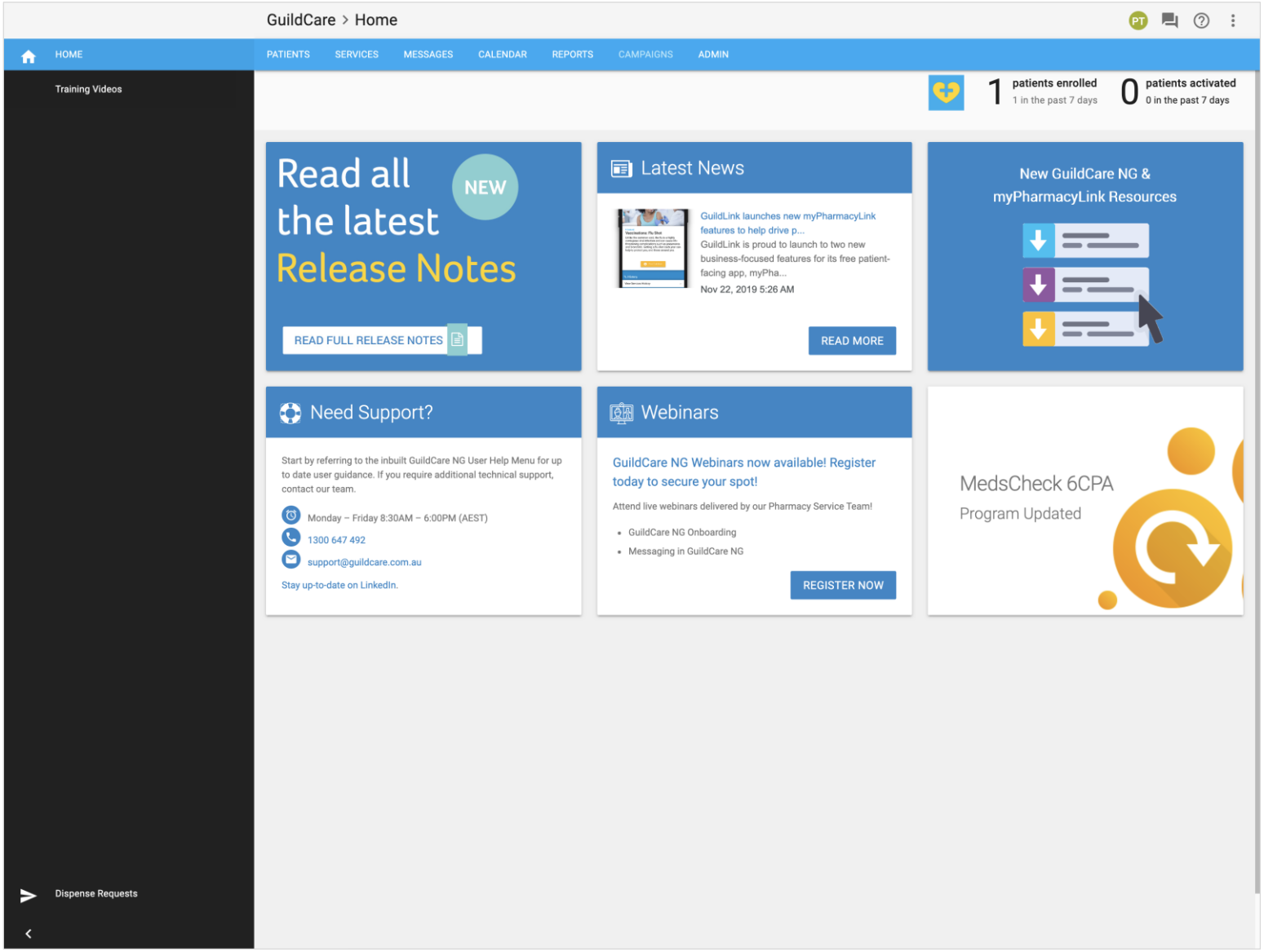
GuildCare NG User Guide:

How to Enrol a Patient into Messaging



December 2019

GuildCare NG

Driven by guildlink

Selecting a patient to enrol into Messaging

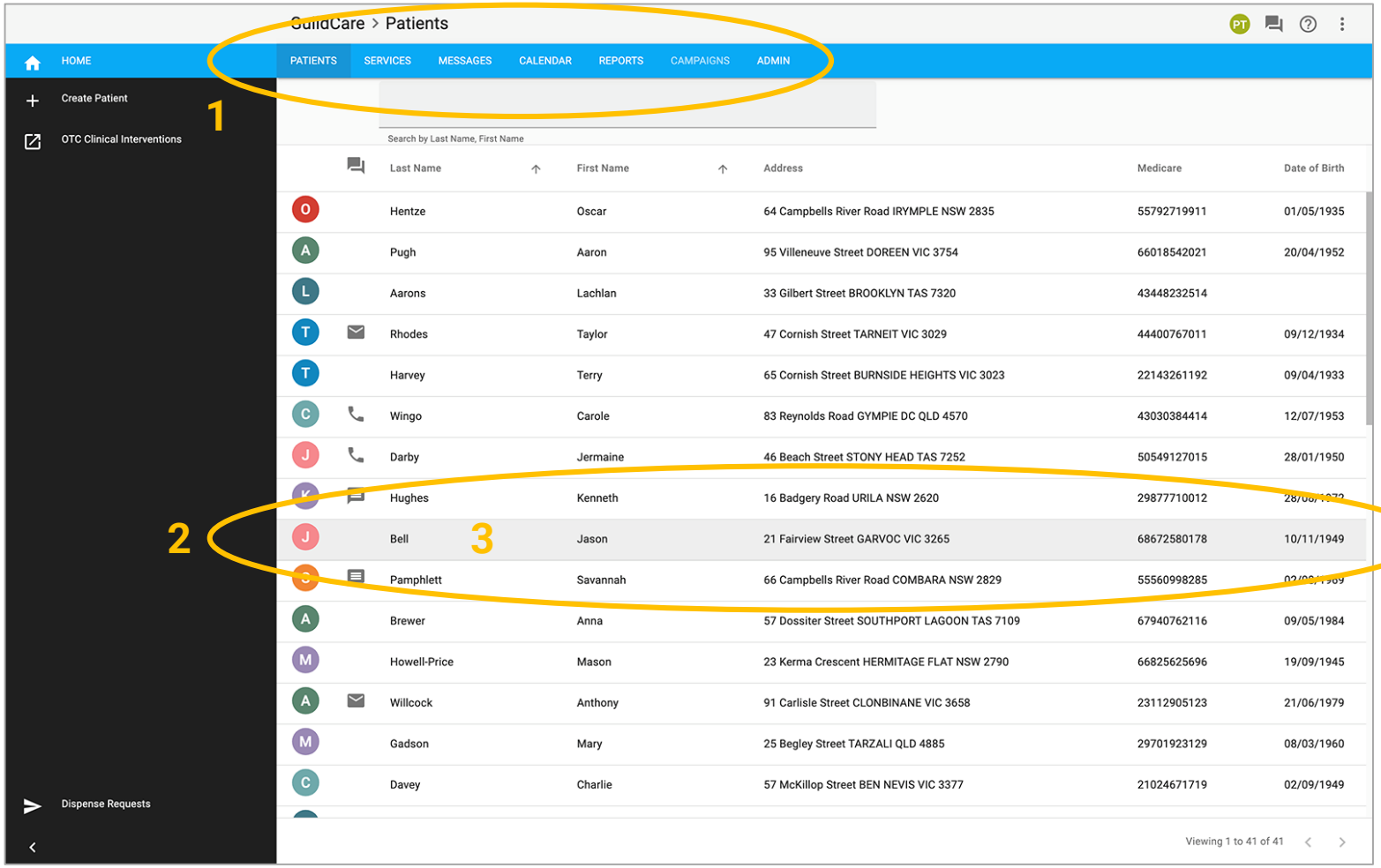
When enrolling a patient into **Messaging**, we are enrolling the patient into receiving messages via a selection of channels:

- SMS
- Email
- Voice messaging

We can select a patient from the **Patient List**, or search for a patient using the **Search** function.

To enrol a patient into Messaging:

1. Start by selecting **Patients** from the Top Menu
2. Select your patient from the **Patient List**
3. **Double click** on your selected patient



Review current patient information

1. When viewing the **Patient's Profile** page, ***first*** make sure all Patient Information presented is:

- Correctly spelt
- All fields filled

On this page, we can see:

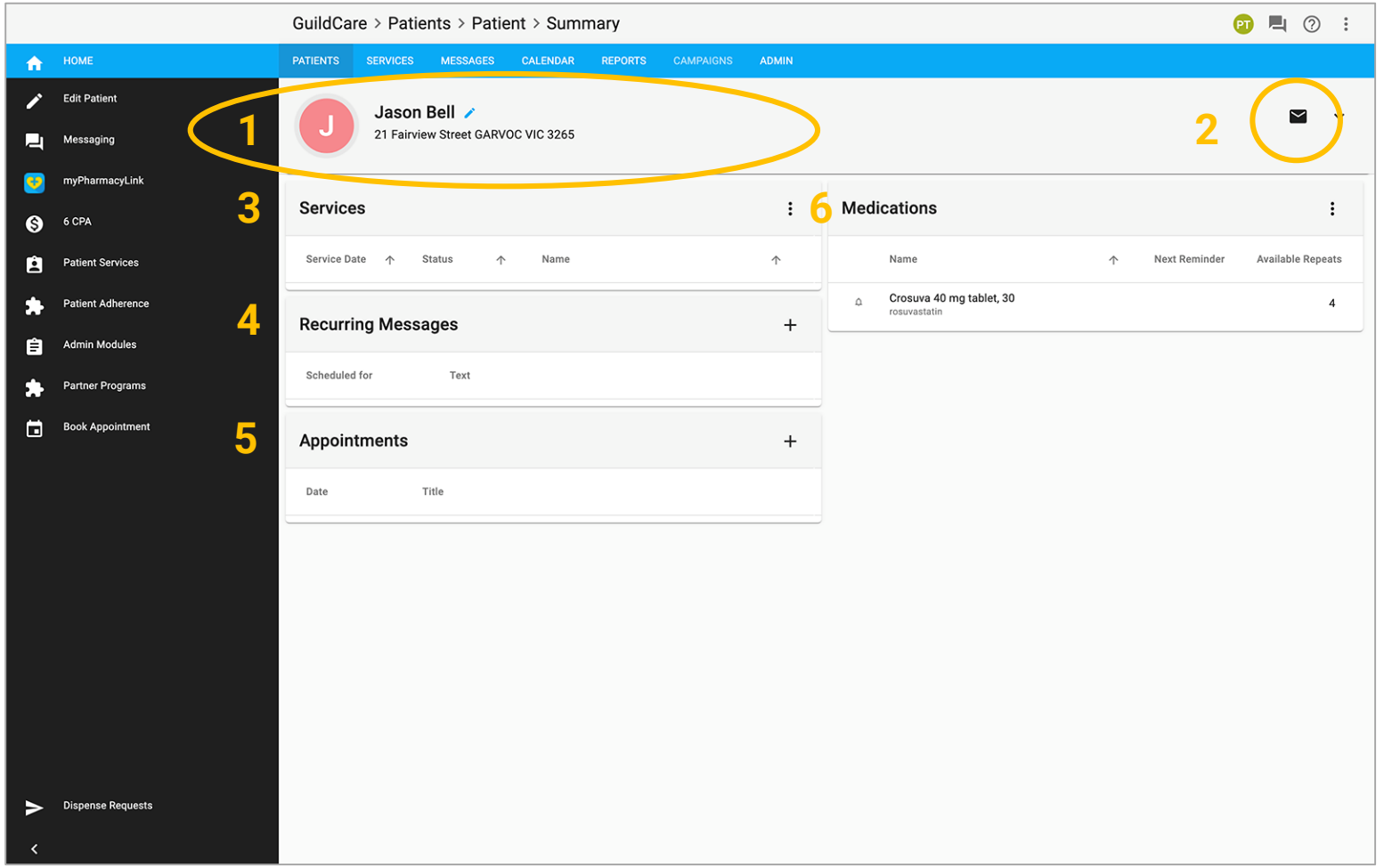
2. Which **Preferred Communication Channel** the patient has selected.

3. Any **Services** which may have been provided

4. Whether any **Recurring Messages** have been set

5. If the Patient has any upcoming or previous **Appointments**

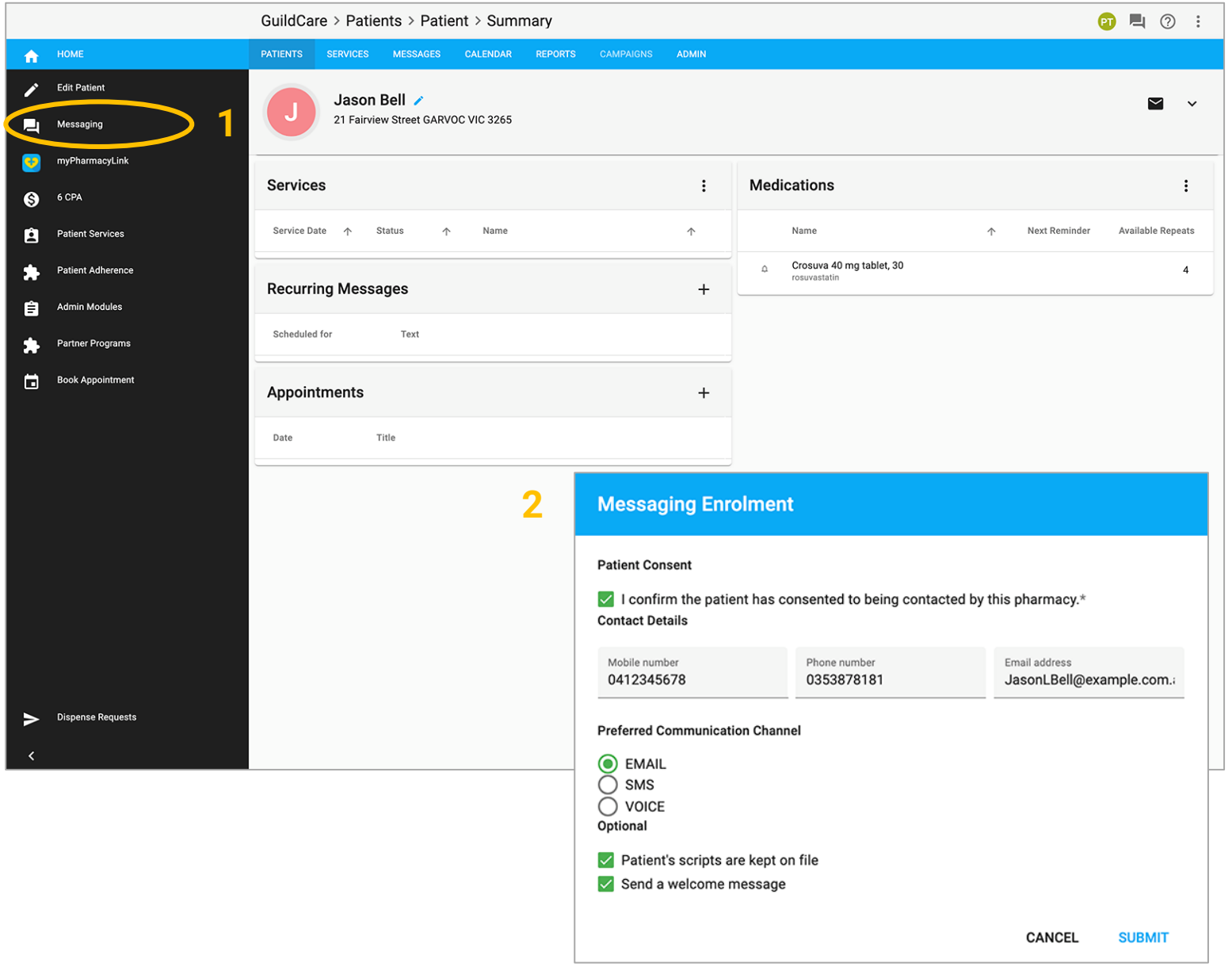
6. **Medications**



Enrolling a patient into Messaging

1. To enrol the patient, click on **Messaging** in the sidebar menu on the left hand side of the screen.

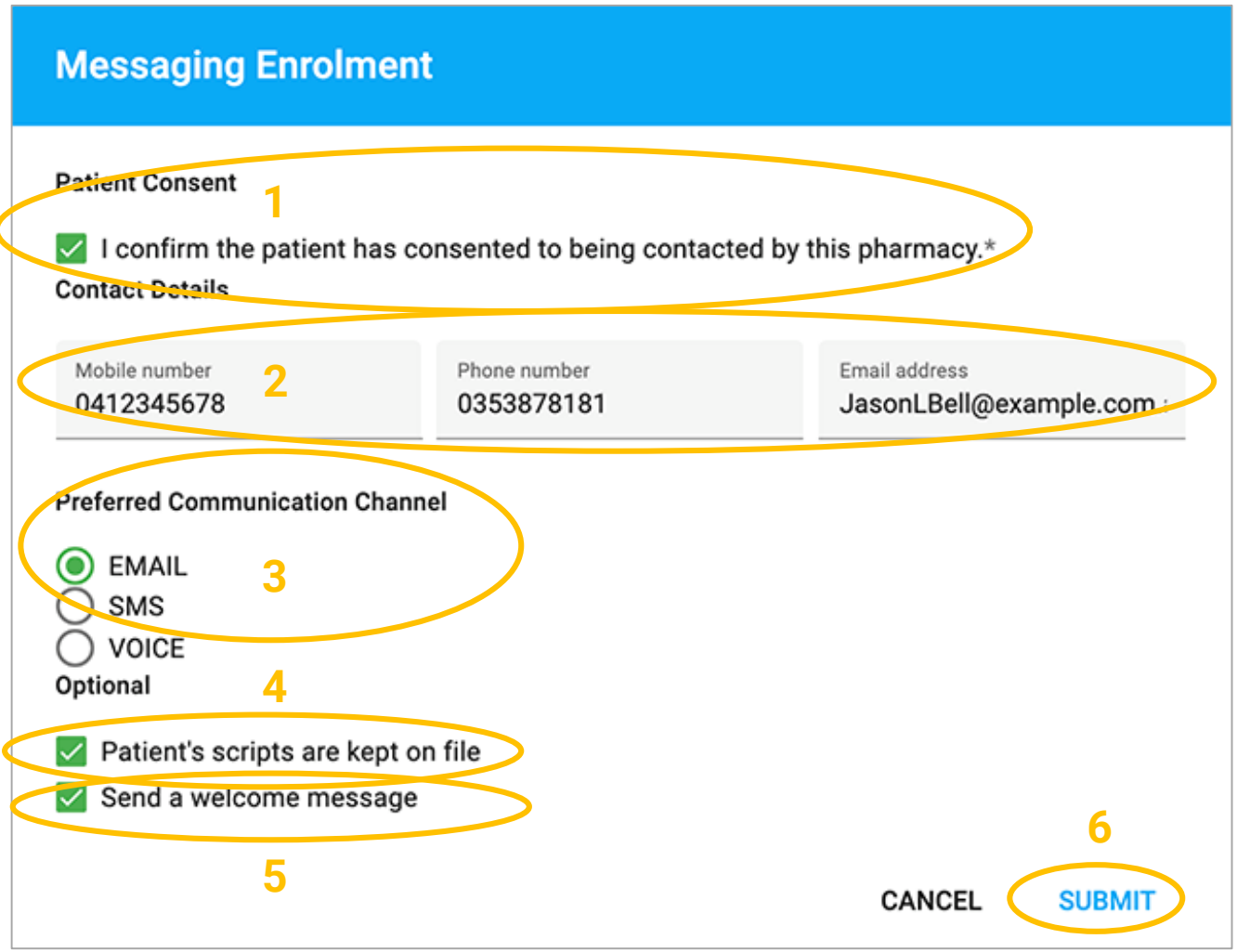
2. The **Messaging Enrolment** dialogue box will appear on-screen.



Enrolling patients into Messaging

To complete the enrolment details for the patient:

1. Within the **Patient Consent** section: **Select the checkbox to confirm the patient has consented** to being contacted by the pharmacy –
   This is a mandatory field, as indicated by the asterisk*.
2. Fill out the **Contact Details**.
3. Select a **Preferred Communication Channel**: Email, SMS, or Voice.
4. Within the **Optional** section: The **Patient's scripts are kept on file** checkbox is selected by default - This option refers to all of the Patient's Medications.
   NOTE: If the patient doesn't want to keep their scripts on file, they may still wish to receive Medication Reminders.
5. You can select to **Send a welcome message** to the Patient, as a way of confirming with them that the service is active.
6. Then click **Submit**.

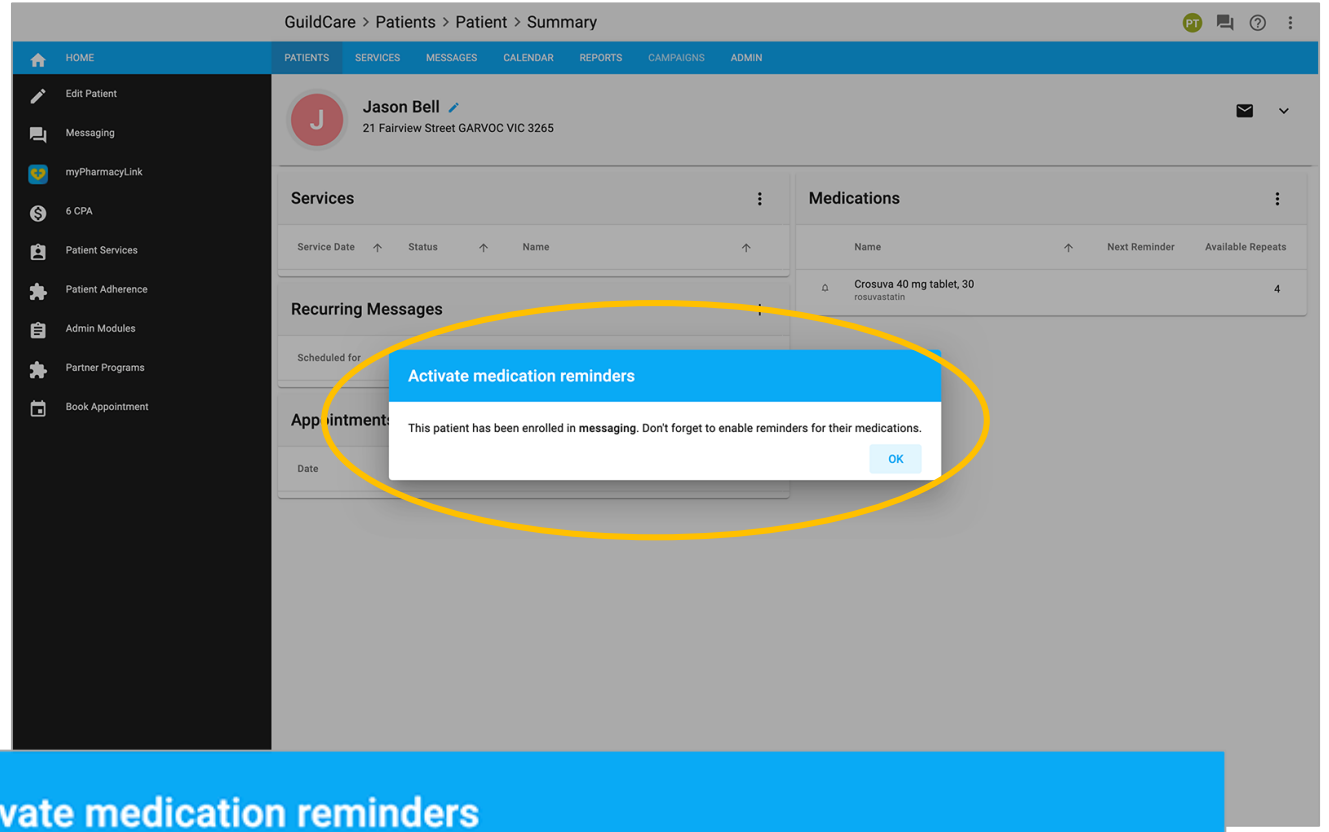


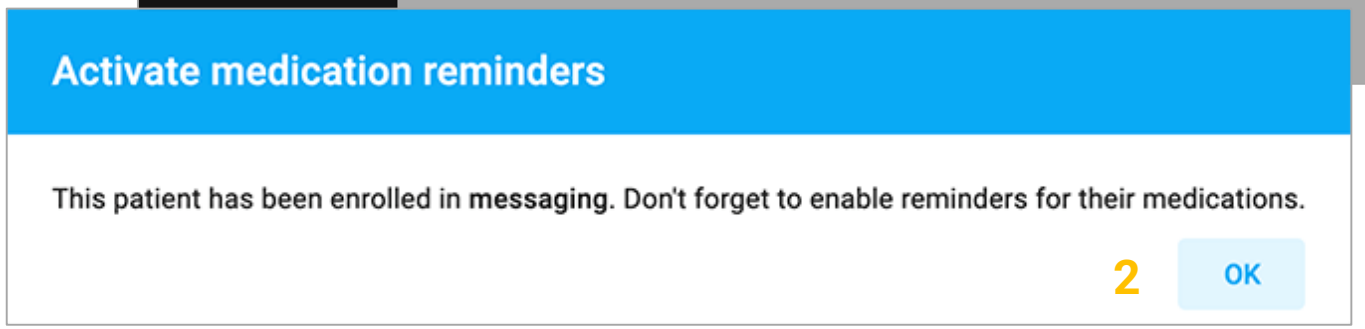
Having enrolled the patient into Messaging

1. The patient is now enrolled for messaging within GuildCare NG and the **Activate Medication Reminders** pop up will appears on the screen to remind you to activate medication reminders for the patient.

2. Click **Okay** to close.

*** For more information, please refer to the How to Activate Medication Reminders for Patients video for more details.*





Having enrolled the patient into Messaging

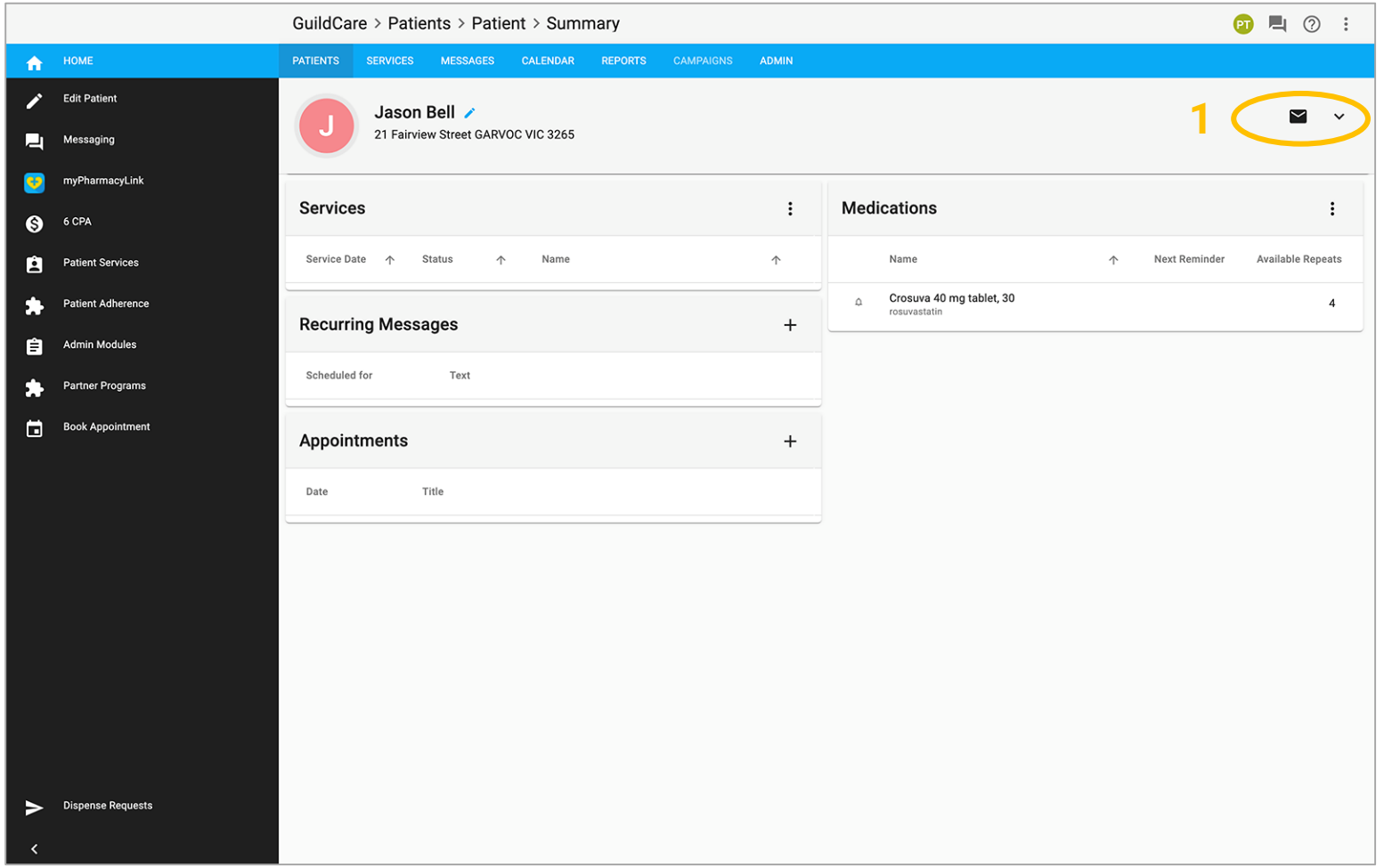
1. In the Patient's Profile, they now have a **Messaging Channel icon** visible in the top right corner of the patient's profile page.

If EMAIL has been selected, a Mail icon will be displayed.

If SMS has been selected, a Messaging icon will be displayed

If VOICE has been selected, a Phone icon will be displayed

If the Patient has been enrolled into myPharmacyLink, the app icon will also be displayed.



Amending Messaging Settings

1. Having enrolled the patient, when you click on Messaging:

2. The Messaging Settings box will now appear, allowing you to adjust the messaging settings.

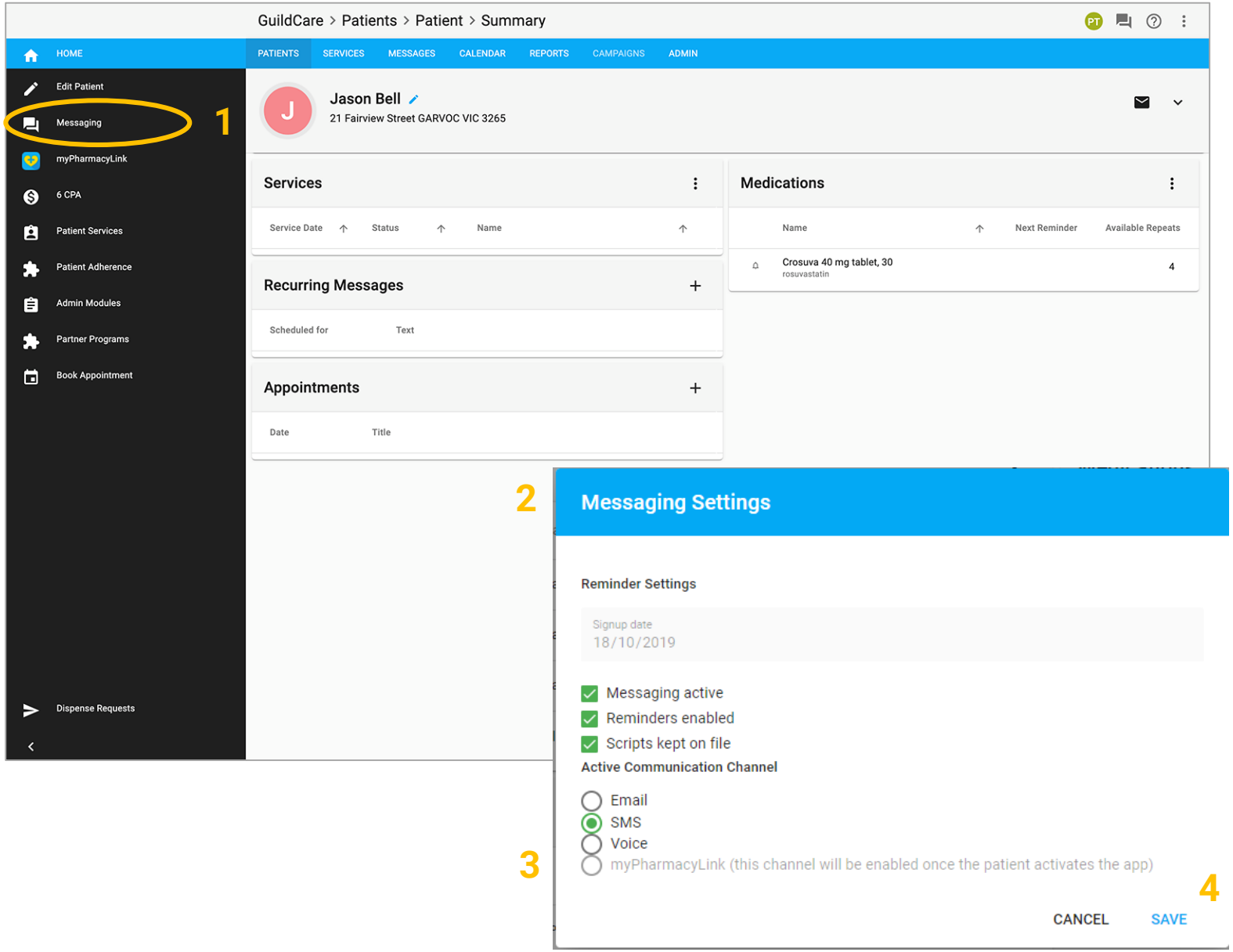
- *To unsubscribe the patient from Messaging*: Untick the **Messaging Active** checkbox.
- *To disable Reminders*: Untick the **Reminders Enabled** checkbox.
- *If the patient does not want the pharmacy to keep their scripts on file*: Untick the **Scripts kept on file** checkbox

*** Within this Settings box, you can change the Active Communication Channel if the patient would prefer a different option.*

3. Patients enrolled in myPharmacyLink will have the myPharmacyLink channel enabled.

*** Refer to the video "How to enrol a patient into myPharmacyLink" for more details.*

4. Click **Save** to save the Messaging Settings.



Conclusion

Thank you.

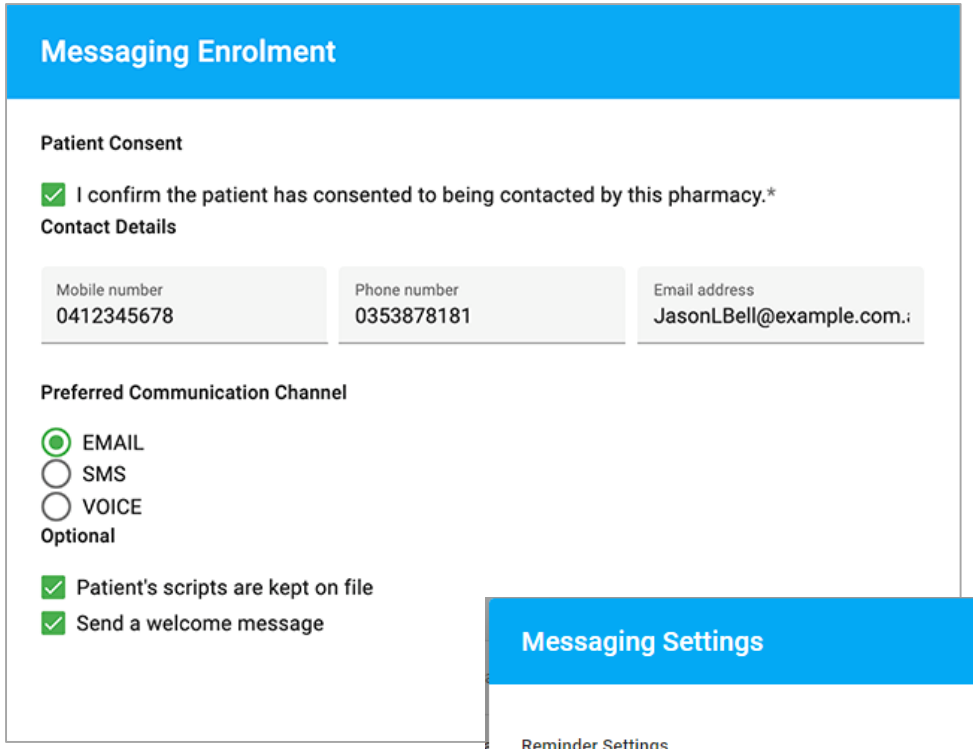
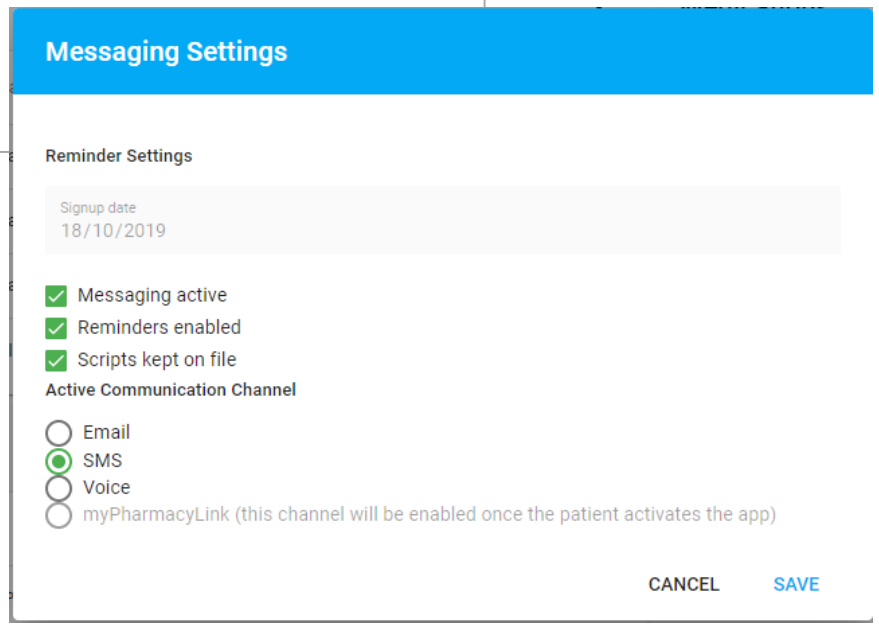
Now you know **How to Enrol a Patient into Messaging** and adjust other related settings within GuildCare NG.

Make sure you watch our other GuildCare NG training videos available at:

https://ng.guildcare.com.au/training-videos

If you have any further questions,
please contact your GuildCare State Manager.

If you experience any issues with GuildCare NG,
please contact GuildCare Support on:

1300 647 492

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