

Quick Guide – System Setup

Your system has been preconfigured with default settings by iPLATO. The following guide will show you how to review and change the 3 most important settings.

iPLATO will not “switch” your system on until you have confirmed that you have reviewed and if appropriate changed the following system settings.

- Open Internet Explorer (recommended browser) and go to: www.pcm.nhs.uk
- Login using your default Username and Password that will have been given to you by iPLATO.
- Go to the **SETTINGS** tab on the main menu.


Setting 1 – Edit the message that will be sent to the patients

To review and change the default message template proceed as follows:

- A. Go to Sub Tab **Template**.
- B. Click the “Edit” button next to the box in the Automatic Reminder Message section.



- C. On the “Edit Reminder Message” page change the default message as appropriate.
- D. To confirm your changes press the “Save” button.



- NOTE: words surrounded by < > symbols are special variable fields which relate to information extracted from your PAS.

Setting 2 – Edit the rules for sending the Appointment Reminders

You need to specify how far in advance of the appointment the patient will receive a text message.

You are able to specify different delivery rules depending on how far in advance the appointment was booked. To review and change the default message delivery rules proceed as follows:

- Go to Sub Tab Rules.
- Change the message delivery options as appropriate.
 - Note:** It is possible to send a max of 2 reminder messages for each type of appointment. Appointments are split into 3 different categories. They are split with reference to how far in advance of the actual appointment they are booked. This is referred to as the appointment lead-time. You must have at least 1 value set for each of the 3 different lead-times.
- Click the “Save” button under the table.



Appointment Leadtime [?]	First Message [?]	Second Message [?]
0 - 7 Days:	None Day(s)	01 Day(s)
8 Days - 1 Month:	03 Day(s)	01 Day(s)
More Than 1 Month:	14 Day(s)	01 Day(s)

Save

If after following this process you still require assistance, please contact the iPLATO support team in the usual way: support@iplato.net.