

SMS Survey Tutorial - Setup an SMS Survey Reminder

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[Creating an SMS Survey](#)

We'll now setup a reminder so that the survey will only be sent to mothers who have been flagged by the CHW as needing to visit the clinic. This messages will also be setup to repeat on a weekly basis until either the CHW or mother indicates she has visited the clinic. We'll schedule the message to send on Tuesdays in the evening (so that the mother can respond after visiting the clinic).

1. Add another reminder to the project (go to the Messaging tab, then choose Reminders and then click on the + Reminder button).
2. We'll now configure which pregnant mothers will receive this reminder. Give the reminder a name (ex. Clinic Visit Check) then scroll to the Start Section.
 - **Send for Case Type:** We want to choose *pregnancy* from this list as the message will be sent to pregnant mothers.
 - **Send Reminder For:** This will control which cases receive the reminder. We want to choose *Only Cases in the Following State*. Then set the reminder to send when the case property *send_clinic_visit_reminder* equals *yes*
 - **Day of Reminder and Time of Reminder:** This controls what day and time of day that the mother will begin to receive this reminder. Our clinic day occurs on Tuesdays. So we want to send the mother a reminder on Tuesday evening to check if she visited the clinic. For *Day of Reminder* choose *Specific Day of the Week* and *Tuesday*. This option will send the message on the next upcoming Tuesday after the pregnant mother is flagged for a clinic visit. For *Time of Day* choose at a *Specific Time* and *18:00*.

The 'Start' section contains the following configuration options:

- Choose what will cause this reminder to be sent**
- Send For Case Type:** pregnancy
- Send Reminder For:** Only Cases in Following State
- When Case Property:** send_clinic_visit_reminder equals yes
- Day of Reminder:** Specific Day of Week, Tuesday
- Time of Day:** At a Specific Time, 18:00:00

3. The next step is to choose who will receive the reminder. We want this reminder to go to the health worker who registered the case (the case owner), so choose *Case Owner*.

The 'Recipient' section contains the following configuration option:

- Recipient*:** Case Owner

4. In the Message Content section, instead of sending an SMS Message, we want to send an *SMS Survey*. We can now choose which form we want to send as the survey. Use the dropdown to choose *Clinic Attendance Survey*.

The 'Message Content' section contains the following configuration options:

- Send*:** SMS Survey
- Survey:** SMS Surveys > Pregnancy Surveys > Clinic Attendance Survey

5. We will also configure to reminder to Repeat every week until the mother visits the clinic. Choose the *Indefinitely* option and specify that the reminder should repeat every 7 days. Remember, the reminder will stop sending as soon as the Start condition becomes false (i.e. if *send_clinic_visit_reminder* is not equal to *yes*).

The 'Repeat' section contains the following configuration options:

- Repeat Reminder:** Indefinitely
- Repeat Every:** 7 day(s)

6. We can also look at and update some Advanced options for this reminder.

- **Stop Condition:** This provides another way to stop the reminder. Since we are just changing the start condition to stop the reminder, we can leave this as it is.
- **Timeouts:** With SMS Surveys, sometimes the user may not respond to a particular question. We can use timeouts to re-send the question if the user does not respond after a certain amount of time. We can specify a set of time intervals on which the survey will be sent out again. The last number represents when we will close the survey (and stop allowing responses). For example, specifying 30, 60, 120 will resend a question at 30 minutes and 60 minutes after initially sent, and close it at 120. Set the timeout to *30, 60, 120*.
- **Submit Partial Forms:** If a survey is partially filled out (user only responded to some of the questions), this controls whether we will save those partial answers. For now, we can leave this off for this reminder.

Advanced Options

? Stop Condition (none) ▼

? Timeouts e.g. 30,60,180

? Submit Partial Forms

7. Our reminder is now setup so we can click on Create Reminder

We can now view the scheduled reminder in the calendar and test out how it works.

Next:

[Test and Verify the Survey](#)