

# Messaging to Patients

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# Learning Objectives

Participants will learn how to:

1. Utilize PCC's outreach **Tools**
2. Configure Notify for optimal success
  - a. Improve and maintain routine patient care
  - b. Minimize no-show and cancellation rates with frequent reminder messages
3. Capitalize on outreach **Strategies** for specific patient groups using
  - a. Broadcast Messaging
  - b. Send Text
4. Comply with Industry **Regulations**

# PCC's Outreach Tools

## Notify:

- Daily Appointment Reminders
- Account Balance Notifications
- Notification Method Used

## Broadcast Messaging:

- Send large batches of messages to specific patient groups via text or email

## Send Text:

- Send a text message to a specific patient

# Notify Setup and Configuration

- Ways to set up for text-only (phone # field, PCCP)
- How many notifications do you need? What's the frequency?
- Who is most likely to miss?
- Setting up notifications for frequent no shows
  - Use a patient flag and set up an addition notify batch to run

```
Add Notification - Review Details

The next scheduled contact for this notification is on 10/20/22.

The estimated patient, guarantor, and custodian counts for the 10/20/22 notification are:

    0 Patients
    0 Guarantors associated with Patients
    0 Custodians associated with Patients

Schedule: Daily
Start Date: 10/20/22
End Date: 10/20/23
Contact Hrs: 6:00pm to 9:00pm

Delivery Method:
Use Patient Confidential Communication Preference (Primary)
Call Custodian Phone "Home Phone" (Alternate)
None (Second Alternate)
None (Third Alternate)

Message: Appointment Reminder - Location and Provider

This message includes:
* Patient First Name
* Appointment Date and Time
* Appointment Provider
* Appointment Location

Criteria:
Build a list of patients based on the following criteria:
Include by Appointment: Date, Visit Reason, Provider, Location
and Exclude by Flag - Patient Flag
and Include by Flag - Patient Flag

Selections:

Include by Appointment: Date, Visit Reason, Provider, Location
remind patients 7 days in advance of their appointment
all visit reasons
all providers
all scheduling locations

Exclude by Flag - Match any ONE Patient Flag
2001-Transferred Inactive
Referred by Another Physician Unborn

Include by Flag - Match any ONE Patient Flag
Missed Appointments
```

# Broadcast Messaging

## Broadcast Messaging

- Flexible messaging to your patients and families via the Report Library
- Broadcast references numbers and emails in the chart:
  - Home accounts
  - Portal accounts
  - Confidential communication preferences

Settings **Hours**

Always display location banners

Display "All Locations" scheduling option

Present Patient Details when scheduling appointments

**Broadcast Messaging**

Messages will be sent to the selected contact methods.

Text (SMS) Contact Methods

Home Account: Home Phone

Home Account: Mom's Work Phone

Home Account: Dad's Work Phone

Home Account: Mom's Cell Phone

Patient Confidential Communication Preferences: Phone

Portal User: Phone

# Send Text

- On-demand messaging to patients and families.
- Numbers are selected via drop-down when generating a message.
- Numbers added to the send text drop down come from both the demographics in the EHR, and from manual entry.
- Numbers cannot be removed at this time. This is in consideration as a future enhancement.

9:00am Benes Elaine "Lanev" 06/12/07 F 12v 11m Sick Call

### Send Text

Text messages should not contain PHI.  
Replies from the recipient will not be displayed.

Phone #: 202-838-2342 (Cell Phone)

Message:

Hi Judy! The exam room (#5) is ready for Alice. Please wear protective masks in the building.

Include Footer

This text is from Beagle Peds. This # does not receive replies.

157/160

Cancel Send

2:00pm James Diana 06/19/14 F 5y 10m Zyr Well V

Choose from phone numbers associated with the patient, or enter any number

# Best Practices

- Frequency: Consider how often you communicate with families
- Content: Is the messaging related to medical practice info?
  - Changes to your hours/availability/location
  - Availability of vaccines
  - Reminders that they are due for an appt
- Batch Size: Smaller batches mean a better acceptance rate by cellular carriers

# Regulatory Compliance

- Opting in & Re-subscribing
- Avoiding the Blacklist
- Spam
- Reports & Logs





# Opting In & Re-subscribing

- Broadcast and send text (and portal notifications) use the same email and SMS platforms.
- When a family opts-out or unsubscribes from one, they do so for all three message types
- We cannot send additional messages after a patient or family has unsubscribed, so they will need to log into their Patient Portal and resubscribe to messaging.
- Notify - Restoring opt-in requires texting a code to 622-622

[Back](#) [Edit Account](#)

Email portal notifications cannot be delivered.

Verify your email address below. Correct the address to enable email notifications.

If a notification was marked as "Spam" or "Junk", you must reverse this before clicking the Invite button below to send an email invitation. When you receive the email invitation click the Opt In button.

First Name  
Fred

Last Name  
Flintstone

Sign In  
fredflintstone@pcc.com  
Email Address or Mobile Phone Number

**Portal Notifications**

Email  
fredflintstone@pcc.com

Mobile Phone

[Save](#)

# Avoiding the Blacklist

- Too many messages to a single number in a short period could be a red flag
- Content that is personal and not professional could be a flag
- Large batches can be a warning of potentially spammy traffic
- Shortened URL redirects (bit.ly, tinyurl, etc.) are being clocked. Do not use URL shorteners. Downtime can range from a few hours to a few days until the number becomes unblocked by carriers and messaging providers.

# Spam Regulations

- By virtue of the CAN-SPAM Act, the FCC is enforcing stricter guidelines for email and SMS/text messaging.
- Mobile carriers and SMS intermediary companies use a complex algorithm to determine what meets the criteria of a spam message.
- Mobile carriers require 10 digit-long code (10DLC). PCC registers all broadcast and single text source numbers via this process.

# Broadcast Messaging Limits

- Carriers and intermediaries impose some volume limitations on large broadcasts.
- There is no specific number of messages that cause a restriction; rules vary by carrier and are not public knowledge.
- When those limitations are reached, PCC works with our vendor to increase the threshold.

# Reports & Logs

- Notify Logs
- Report Library

```
Notification Name: Daily Appt Remindr P
Messages Sent: 66

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Ineligible Messages Not Sent (1)
Reason          Patient          Appt Date      T
Partial Text #  ████████████████  05/26/23      8:

-----
Email Messages Sent (0)

-----
Phone Messages Sent (0)
```

Search Filter:

Name	Description
Broadcast Message Log custom	email only
Broadcast Message Details	View detailed results of all attempted messages from a single broadcast message run.
Broadcast Message Log	View message counts per broadcast message run. Message status counts may take a day to become accurate.
Inbound Messages	View replies to email and SMS messages sent by your practice.
Inbound Messages Custom	last 60 days
Single Text Log	View single patient text messages sent by your practice.
Single Text Log - Custom	last 90 days

# Key Takeaways

1. Notify's automatic reminders will save you time and reduce no-shows
2. Broadcast messaging is a simple and powerful tool to reach your patients and families at scale
3. Send text allows you to send direct messages to your patients and families
4. PCC provides guardrails to help you comply with regulations when using these tools

# What Questions Do You Have?

Reach out to your Client Advocate for help with any these tools

# References

- <https://learn.pcc.com/help/batch-messaging-through-pcc-ehrs-report-library/>
- <https://learn.pcc.com/help/send-a-text-message-directly-to-a-patient-or-family/>
- <https://learn.pcc.com/task/back-office/contactpatients/>
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# Later Viewing

This and all other UC2023 course recordings will be available for later viewing through the app.