# Messaging to Patients

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# Learning Objectives

#### Participants will learn how to:

- 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
he next scheduled contact for this notification is on 10/20/22.
he estimated patient, guarantor, and custodian counts for the 10/20/22
otification are:
              0 Guarantors associated with Patients
              O Custodians associated with Patients
  Schedule: Daily
 Start Date: 10/20/22
 End Date: 10/20/23
ontact Hrs: 6:00pm to 9:00pm
elivery 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
   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
   Referred by Another Physician
                                         Unborn
  Include by Flag - Match any ONE Patient Flag
   Missed Appointments
```

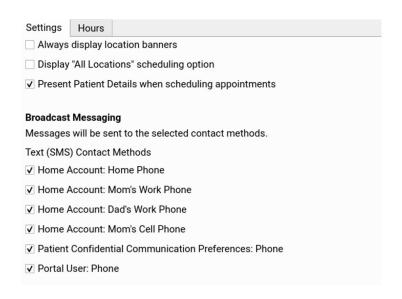




## Broadcast Messaging

#### **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

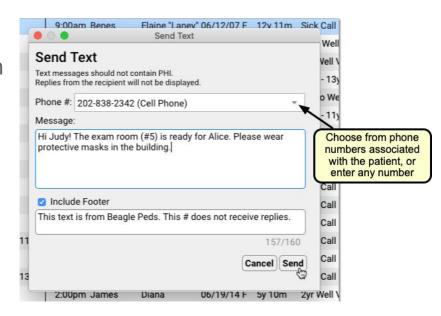






#### Send Text

- 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.







## **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

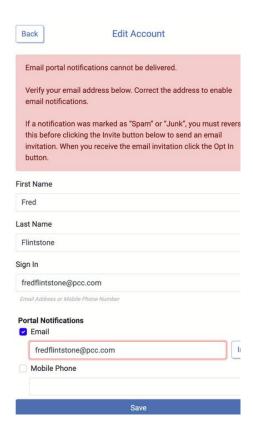






### Opting In & Re-subscribing

- 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







# 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



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

- 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/





## Later Viewing

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



