

# Engaging with Your Patients

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PCC  
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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**
5. Consider how the use of the Patient Portal & Pre-Check-In may change some strategies

# PCC's Outreach Tools

## Notify:

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

## Broadcast Messaging:

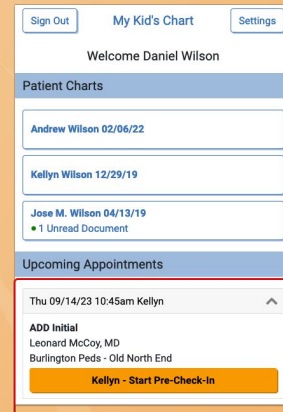
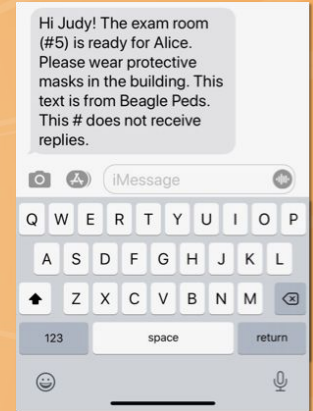
- Send large batches of messages to specific patient groups via text or email

## Send Text:

- Send a text message to a specific patient

## Patient Portal:

- Direct patient messaging and communication with the family
- Patient Pre-Check-In



# Notify

## Setup and Configuration

- Ways to set up for text-only (phone # field, PCCP fields)
- 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 for just those patients

Patient Notification Center – Active Notifications

Notification	Message	Next Contact	Recurrence	End Contact
<input checked="" type="checkbox"/> Appt Reminder	Appt: Loc & Prov	07/11/24	Daily	07/11/25
<input type="checkbox"/> PE Overdue	Due: Phone & Reason	07/11/24	Daily	07/11/25
<input type="checkbox"/> Overdue \$ 90 & 120	Overdue	07/15/24	Monthly	07/11/25

# Broadcast Messaging

- Flexible messaging to your patients and families via the Report Library
- Broadcast Messaging 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

**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

Well  
Vell V  
- 13y  
o We  
- 11y  
Call  
Call  
Call  
Call  
Call  
Call

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

# Patient Portal

- The Portal is yet another way practices communicate with patients and families.
- Pre-Check-In notification serves as a reminder of the patient's appointment, 48 hours in advance of the visit.
- Some practices are adjusting their notification processes to account for this additional reminder to families.

The screenshot displays a patient portal interface. At the top, there are three buttons: "Sign Out", "My Kid's Chart", and "Settings". Below these is a welcome message: "Welcome Daniel Wilson". The main content is divided into two sections: "Patient Charts" and "Upcoming Appointments".

**Patient Charts**

- Andrew Wilson 02/06/22
- Kellyn Wilson 12/29/19
- Jose M. Wilson 04/13/19
  - 1 Unread Document

**Upcoming Appointments**

- Thu 09/14/23 10:45am Kellyn
- ADD Initial**
- Leonard McCoy, MD
- Burlington Peds - Old North End
- Kellyn - Start Pre-Check-In**

# Best Practices for Broadcast and Send Text

- 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 (caveat: PCC & our third party monitor and increase limits as needed)



# Regulatory Compliance

- Opting in & Re-subscribing
- Avoiding the Blacklist
- Complying with Industry Regulations
- Reports & Logs



# Opting In & Re-subscribing

## Broadcast, Send Text, and Portal

- 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 emails after a patient or family has unsubscribed, so they will need to log into their Patient Portal and resubscribe to messaging.
- To re-subscribe to SMS they will text 'START' to the practice's SMS phone number.

## 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

- Mobile carriers and SMS intermediary companies use a complex algorithm to determine what meets the criteria of a spam message.
- 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 blocked. 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.

# 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.

# Complying With Industry Regulations

- There are federal regulations including CAN-SPAM Act, FCC TCPA
- PCC Does Not Provide Legal Advice: If your practice has concerns about the legal rules around sending communication to your patients and families, you should consult your practice's attorney.
- [We do have a best practices document to help with these and other industry requirements or guidelines](#)
- We are happy to assist in getting things set up accordingly

# Reports & Logs

- Notify Logs
- Report Library

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

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

-----
Email Messages Sent (0)

-----
Phone Messages Sent (0)

-----
Text Messages Sent (66)
```

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. The Patient Portal provides some built-in appointment reminders now that Pre-Check-In is available.
5. PCC provides some guardrails to help you comply with regulations when using these tools

# What Questions Do You Have?



# 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/>
- <https://learn.pcc.com/help/best-practices-communications/>