

How to Engage Patients Like it's 2025

Jim Leahy

featuring Batman

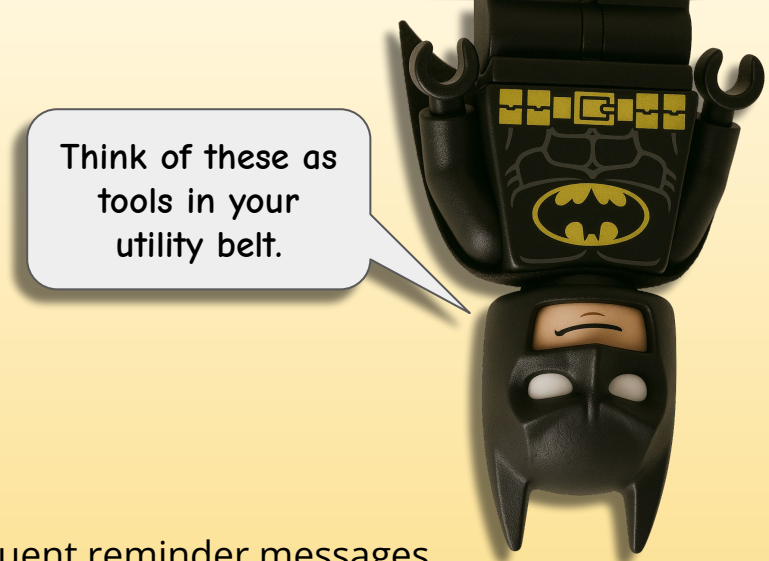


Hey! That's me!

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



Think of these as
tools in your
utility belt.

PCC's Outreach Tools

Notify:

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

Broadcast Messaging:

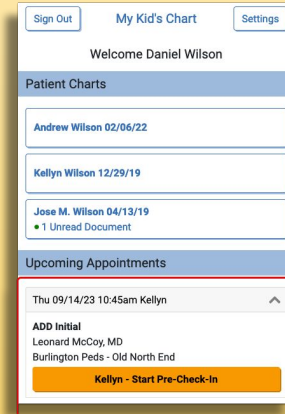
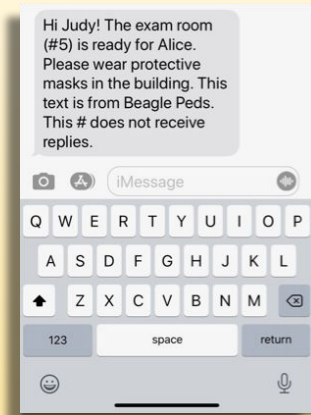
- Send large batches of messages to specific patient groups via text or email

Send Text:

- Send a text message to a specific patient

Patient Portal:

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



Don't even try to use the Batphone for this.



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

Notification	Message	Next Contact	Recurrence	End Contact
Appt Reminder	Appt: Loc & Prov	07/11/24	Daily	07/11/25
PE Overdue	Due: Phone & Reason	07/11/24	Daily	07/11/25
Overdue \$ 90 & 120	Overdue	07/15/24	Monthly	07/11/25

Buttons: Add, Edit, Review Details, Make Inactive, View Inactive, View Log



Someone should notify Alfred that his cooking needs some work.

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



Is Broadcast
like a Bat
Signal?

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

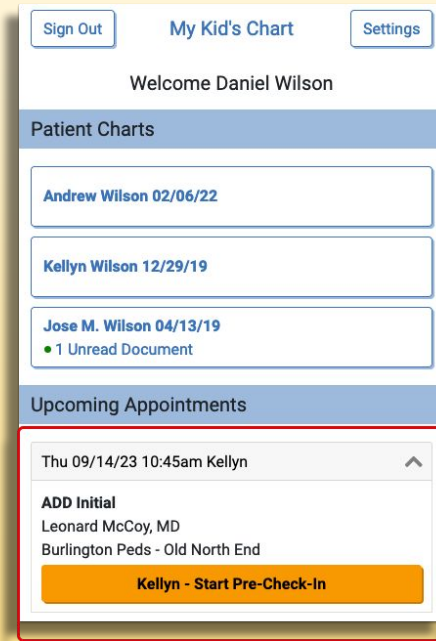
Choose from phone numbers associated with the patient, or enter any number



Now no one will recognize me.

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.



Hear me out. What if you called it the "Bat Portal" instead? It's a catchy title, I know.



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 as needed)

You can't
spell
"batch"
without
"bat".



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

Ok, I texted
"BAT" to 622-622.
Now what?



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.

Please don't
text shortened
URLs.



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.

A LEGO Batman figure is positioned on the right side of the slide. It is wearing its iconic black suit with a yellow bat symbol on the chest and a black cape. The figure has a determined, slightly angry expression with its mouth open, showing white teeth. A white speech bubble with a black outline extends from the figure's mouth towards the center of the slide.

Batman has no limits.
Broadcast does.

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

Just send the signal and we can help.



Reports & Logs

- Notify Logs
- Report Library

Notification Name: Daily Appt Remindr			
Messages Sent: 66			

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

Email Messages Sent (0)			

Phone Messages Sent (0)			

Text Messages Sent (66)			

Search Filter: <input type="text"/>	
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

I still think "Bat Portal" is an idea worth looking into. Or what about "Bat Check-in"? I really should be on retainer.



What Questions Do You Have?

I have a question:
Did anyone see
where I parked
the Batmobile?



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/>

Commissioner
Gordon is my
reference.

