

Patient Reminders: Set-Up and Sending

Including:

- Reminder Set-up**
- Communication Preference Set-up**
- Recording a Voice Message Greeting**
- Configuring the Patient Communicator**
- Reminder Confirmation Set-up**
- Sending Reminders and Individual Messages**
- Checking Reminder Status**

There are three types of Patient Reminders:

- **Appointment Reminders**
- **Preventive Care Reminders**
- **Individual Reminders**

HST partners with a third party to send automated reminders. RemindersCall.com is our reminder service. Their software communicates with the reminder information set up in PMP in order to contact the patient via their preferred method.

There is no set-up fee to enroll in RemindersCall. There is a \$.20 per message fee that will be billed to the practice for each electronic reminder (automated voice calls, text messages or emails). This fee will be on your HST statement.

Contact HST Customer Support to sign up for Reminders. **You will be issued a username/password** for the RemindersCall site.

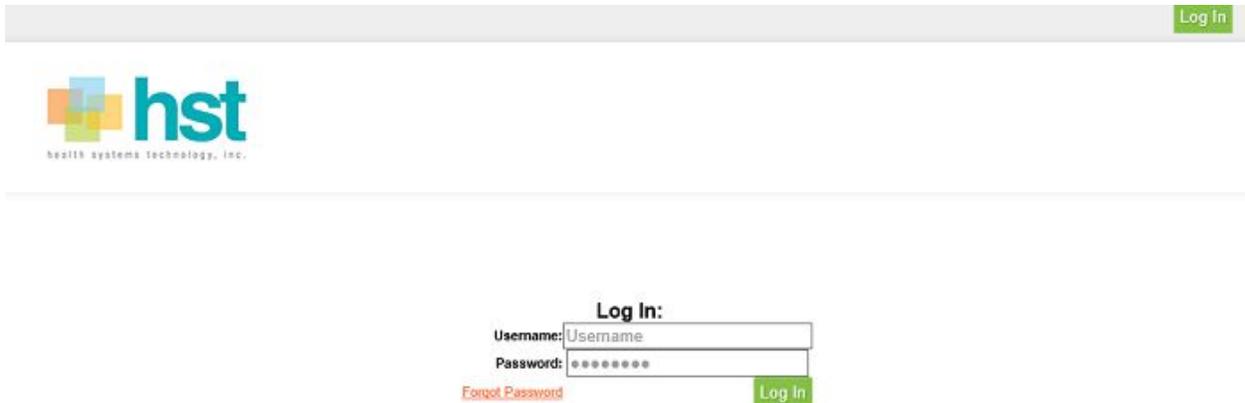
Please note that it may take 2-3 business days for HST to get a practice set up with RemindersCall.

Without RemindersCall, the only communication methods you can utilize are postcards and making manual phone calls off the reminder list.

Once you have received your username and password go to the RemindersCall site:

<https://reminders.hstcentral.com>

Ignore the web security certificate warning and continue by clicking on **Continue to this website**. Sign in



Log In

hst
health systems technology, inc.

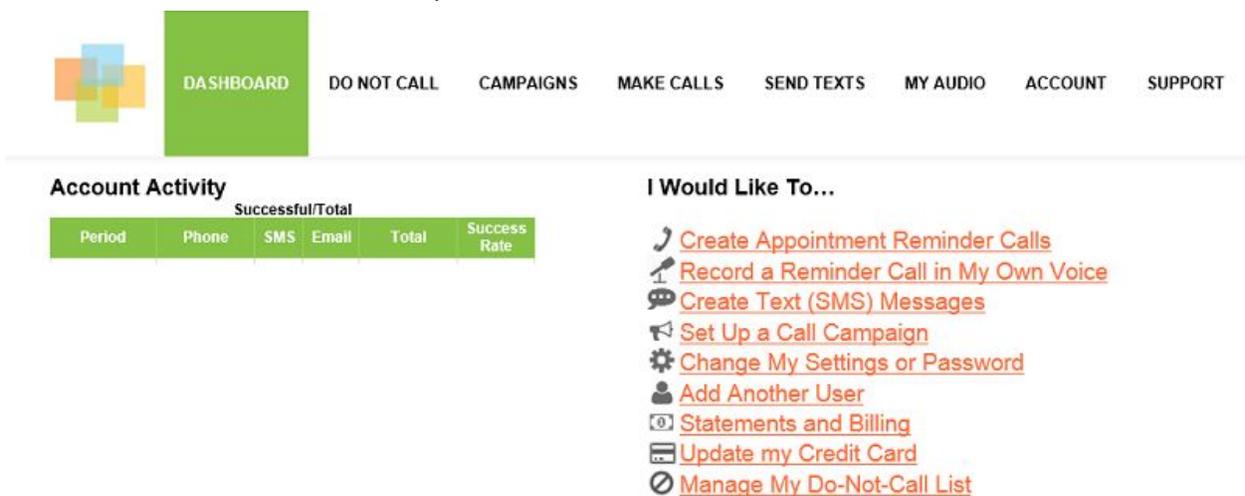
Log In:

Username: Username

Password: *****

[Forgot Password](#) [Log In](#)

The Reminders **Dashboard** will open.



DASHBOARD DO NOT CALL CAMPAIGNS MAKE CALLS SEND TEXTS MY AUDIO ACCOUNT SUPPORT

Account Activity

Period	Phone	Successful/Total		Total	Success Rate
		SMS	Email		

I Would Like To...

- [Create Appointment Reminder Calls](#)
- [Record a Reminder Call in My Own Voice](#)
- [Create Text \(SMS\) Messages](#)
- [Set Up a Call Campaign](#)
- [Change My Settings or Password](#)
- [Add Another User](#)
- [Statements and Billing](#)
- [Update my Credit Card](#)
- [Manage My Do-Not-Call List](#)

***Do not change your password even though you are given the option to do so from the above list. Only use the password given to you by HST. ***

Changing your password will cause reminders to fail.

Setting-Up Patient Communication Preference: Each patient has a communication preference that determines the type of reminder that is used.

Patient Activity, Patient Info Tab, Preference, Save.

The screenshot shows a software interface for patient management. At the top, there is a menu bar with options: File, Reports, Billing, Patients, Appointments, Clinical, Documents, Communications, Tables, Tools. Below this is a header area with 'PatientActivity' and 'Account: 24242'. The patient's name 'David Blackwell' is displayed. A navigation bar contains tabs: Cover Page, Patient Info (highlighted in red), Responsible Party, Insurance Plans, Account Ledger, Documents. The main area is divided into 'Patient Data' and 'Treatment Info'. The 'Patient Data' section includes fields for First Name (David), Last Name (Blackwell), Birth Date (11/03/1963), SSN (125-42-1524), Sex (Male), Address (123 North Street, Webster, NY 14580), and various phone numbers. A 'Preference' dropdown menu is open, showing options: Text (selected), Do Not Contact, E-Mail, Home Phone, Mail, Portal, and Work Phone. The 'Save' button at the bottom is circled in red. The 'Treatment Info' section includes Regular Prv (HF), Chart # (31918986), Authorization #, Next Visit (//), Last Treatment (10/17/2016), and Diagnosis 1 (K80.01).

In the above example, the patient's communication preference is Text. Since he has a cell phone # entered, all reminders will be sent via SMS (text message) to his cell phone. If none is selected (i.e., Unspecified), the system will default to printing a postcard.

Available methods of communication are Email, Call Home Phone, Call Cell Phone, Mail, Text and Portal.

Voice Message (Telephone) Reminder Set-up

- Record greeting in Dashboard.
- Enter the text that will be read by the system into the Patient Communicator in PMP.

1. **Record Greeting:** From the Dashboard click on My Audio. Follow the instructions to record an introductory greeting. You are given a phone # to call and an account # with password.



The screenshot shows a navigation bar with the following items: DASHBOARD, DO NOT CALL, CAMPAIGNS, MAKE CALLS, SEND TEXTS, MY AUDIO (circled in red), ACCOUNT, and SUPPORT. Below the navigation bar is the 'Call Message Recordings' section. A red arrow points to the 'Record with Your Phone' section. The text in this section reads: 'Record with Your Phone', 'Call 1-888-231-9587 and follow the prompts. Refresh this page when you are done to see your new recordings.', and 'You will need the following to use this:'. A red circle highlights the list of requirements: 'Your account number, 4228' and 'Your 4-digit PIN (1234)'. Below this is the '- Or -' section, followed by the 'Upload a New File' section which includes a file selection field, 'Browse...' and 'Send File' buttons, and the note 'Files should be 8KHz, 16-bit, PCM-encoded WAV format.'. The 'Select An Existing File' section is also visible.

Once you have recorded and saved your greeting, call HST Support to let us know this step has been done. HST will complete the process and notify you when the Greeting is ready to be utilized.

2. **Enter text into Voice Message box of Patient Communicator.** See Below-Configuring the Patient Communicator.

Configuring the Patient Communicator

Text, Portal, Voice, E-Mail and Postcard Set-Up

Tables, Other Tables, Patient Communicator Text

The screenshot displays a medical software interface with a top navigation bar containing 'File', 'Reports', 'Billing', 'Patients', 'Appointments', 'Clinical', 'Documents', 'Communications', 'Tables', and 'Tools'. The 'Tables' menu is open, showing a list of options: Procedure, Diagnosis, Medication, Insurance Plans, Referring Physician, Provider, Address Book, Patient Tables, Clinical Tables, Document Tables, Other Tables (highlighted), and Categories & Sets. A secondary menu is open under 'Other Tables', listing various table types: Appointment Type, Room Table, Missed Appointment Reasons, Pharmacy, Address Book, Service Facility, Zip Code, Fee Schedules, Modifier, Place of Service Table, Enrollment Set, Claim Type, Billing Stage, Result Codes, Snomed Coding, Treatment Plan, Region, and Patient Communicator Text (indicated by a red arrow).

The main interface shows patient information for 'Patient Test' (Account: 24250). The 'Patient Info' tab is active, displaying fields for First Name, Last Name, Address, and contact information. The 'Responsible Party' and 'Insurance Plans' tabs are also visible. The 'Insurance Plans' section shows 'ICD-10 Test Insura' and 'ABC Company' with 'Patient Test' as the insured party. Financial balances are shown as 'Pat Balance: 140.00' and 'Ins Balance: 153.06'. At the bottom, there are buttons for 'Charge', 'Payments', 'Walk-Out', and 'Employer'.

From the **Patient Communicator Text** window, you can write standard messages/reminders as well as create new ones. Each message type (Text, Portal, Voice, E-Mail and Postcard) will autofill with a standard message. You can change or update any message by clicking into that textbox. *(If you are going to be using confirmations, please see Step 2 in Reminder Confirmation Set-Up below).*

Select a message from the **Text** drop-down box.

The **Type** drop-down box indicates whether this message is to be used for Preventive Care, Appointment Reminder or Individual Message.

The screenshot shows the 'Patient Communicator Text' window. At the top, a 'Text:' dropdown menu is set to 'Appointment Reminder'. Below this, there are several sections for different message types: 'Text Message', 'Portal Message', 'Voice Message', 'E-Mail Message', and 'Postcard Message'. Each section contains a text area with a pre-filled template. The 'Text Message' template includes fields for provider, day, date, time, and phone number. The 'Portal Message' template includes fields for first and last names, provider, day, date, and time. The 'Voice Message' template includes fields for day, date, time, and phone number. The 'E-Mail Message' template includes fields for first and last names, provider, day, date, and time. The 'Postcard Message' template includes fields for first and last names, provider, day, date, and time. At the bottom of the window, there are three buttons: 'Save', 'Delete', and 'Cancel'. The 'Save' button is highlighted with a red box.

To create a **New Message**, select "Add Message Text" from Text drop-down box. You will be prompted to add a description. This description will also appear in the Text field for future use. Choose type.

The screenshot shows the 'Patient Communicator Text' window with the 'Text:' dropdown menu open. The dropdown menu lists several options: 'Appointment Reminder - Text', 'Appointment Reminder - Voice', 'Diabetic Exercise', 'Labs Abnormal - Urgent', 'Labs Abnormal, non-urgent', 'Labs Normal', and '*** Add Message Text ***'. The '*** Add Message Text ***' option is highlighted with a red oval.

Please note the following regarding Message Set-up:

- When entering **Voice message**, keep in mind that voicemail messages are usually cut off after 60 seconds. Time must also be allowed for you pre-recorded greeting to play along with the message.
- **Text** message has a limit of 160 characters including spaces.
- Variables are a very important part of the message. The program replaces them with the appropriate data when they are used. Available variables are:

[first] - patient's first name

[last] - patient's last name

[provider] - a shortened form of the provider's name (e.g., "Dr. smith")

[date] - date of next appointment (e.g., May 21)

[day] - day of week of next appointment (e.g., "Thursday")

[time] - time of next appointment

[phone] - practice phone number

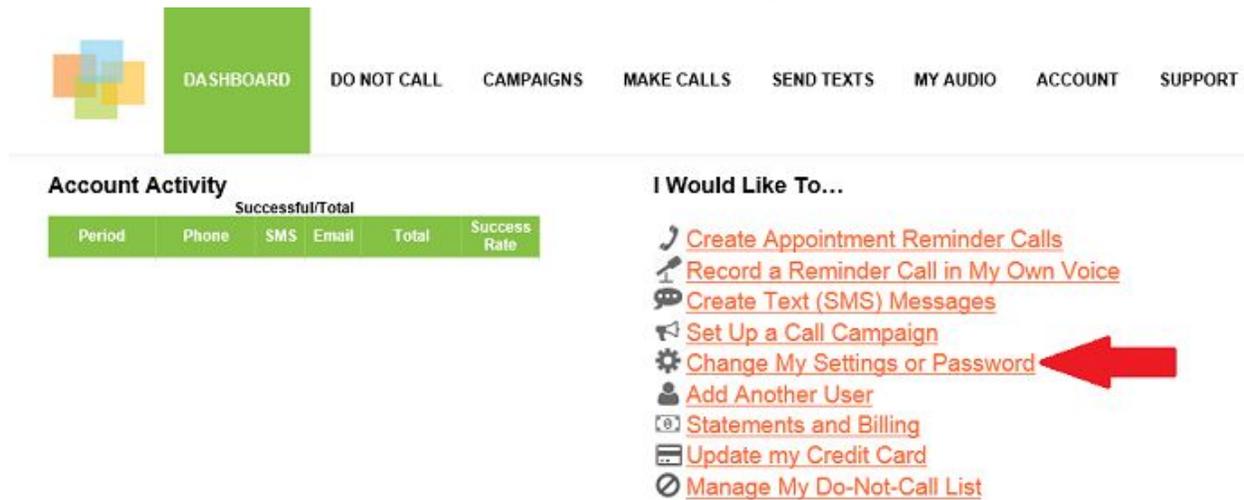
*Make sure when using variables, they are typed exactly as above, enclosed in brackets.

- The text of an Appointment Reminder should provide the patient name, day of week, date and time of the scheduled appointment and possibly the doctor's name.
- The text of a Preventive Care Reminder should provide the patient name and possibly the name of the doctor for patients who are overdue to schedule an appointment.
- Both should include the office phone number.

Reminder Confirmation Set-Up

Confirmations may be set up to confirm Appointment reminders sent via voice, text or email.

1. From the Dashboard on Reminders site, click **Change My Settings or Password**



The screenshot shows the dashboard of the Reminders site. At the top, there is a navigation bar with the following links: DASHBOARD, DO NOT CALL, CAMPAIGNS, MAKE CALLS, SEND TEXTS, MY AUDIO, ACCOUNT, and SUPPORT. Below the navigation bar, there are two main sections. The left section is titled "Account Activity" and contains a table with columns for Period, Phone, SMS, Email, Total, and Success Rate. The right section is titled "I Would Like To..." and contains a list of actions: Create Appointment Reminder Calls, Record a Reminder Call in My Own Voice, Create Text (SMS) Messages, Set Up a Call Campaign, Change My Settings or Password, Add Another User, Statements and Billing, Update my Credit Card, and Manage My Do-Not-Call List. A red arrow points to the "Change My Settings or Password" link.

Period	Phone	SMS	Email	Total	Success Rate
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- [Create Appointment Reminder Calls](#)
- [Record a Reminder Call in My Own Voice](#)
- [Create Text \(SMS\) Messages](#)
- [Set Up a Call Campaign](#)
- [Change My Settings or Password](#)
- [Add Another User](#)
- [Statements and Billing](#)
- [Update my Credit Card](#)
- [Manage My Do-Not-Call List](#)

From **Account Settings** page, click on **Voice Reminders** under **Preferences**.

Account Settings

— Preferences

- [Account Profile](#)
- [Contact & Invoicing](#)
- [Campaigns](#)
- [Voice Reminders](#)
- [SMS Reminders](#)
- [Missed Queue Reminders](#)
- [Statistics Emails](#)
- [Secure Opt-In Portal](#)

In **Voice Reminder Preferences**, you may enable confirmation feature and/or the ability for a patient to connect with your office if they wish to reschedule.

Confirmation: Set Recipient Appointment Confirm Key to **1**

Reschedule: Set Call Reconnect Key to **9**, enter your **office phone #** on the next line.

Voice Reminder Preferences	
CallerID Number: <i>Numbers only. 10 digits.</i>	<input type="text" value="585"/>
Maximum Simultaneous Calls: <i>Maximum 40. Default 40. Number of calls to be delivered simultaneously.</i>	<input type="text"/>
Default Area Code: <i>For queuing calls from CSV files.</i>	<input type="text"/>
Text-to-Speech Voice:	English - Female (New) ▼
Text-to-Speech Voice Speed: <i>Speed at which the text-to-speech voice reads.</i>	[Unset/Default] ▼
Recipient Appointment Confirm Key:	1 ▼
Recipient Appointment Cancel Key:	[Unset/Default] ▼
Recipient Callback Request Key:	[Unset/Default] ▼
Record Message Key:	[Unset/Default] ▼
Repeat Message Key:	* ▼
Call Reconnect Key: <i>Keypress to connect the call to specified number.</i>	9 ▼
Call Reconnect Number: <i>Number to connect calls to upon keypress set for "Call Reconnect Key".</i>	<input type="text" value="585"/>
Custom Key #1:	[Unset/Default] ▼

Click on **Update Preferences** on bottom of page.

2. Update Patient Communicator text for confirmations.

From Patient Communicator, make sure you include the confirmation verbiage in the appropriate box.

Patient Communicator Text

Text: Appointment Reminder

Description: Appointment Reminder

Type: Appointment Reminder

Applies only to a specific set of patients

Text Message:
[first] has an appt with [provider] on [day], [date] at [time]. Press C to confirm or call [phone] to reschedule.

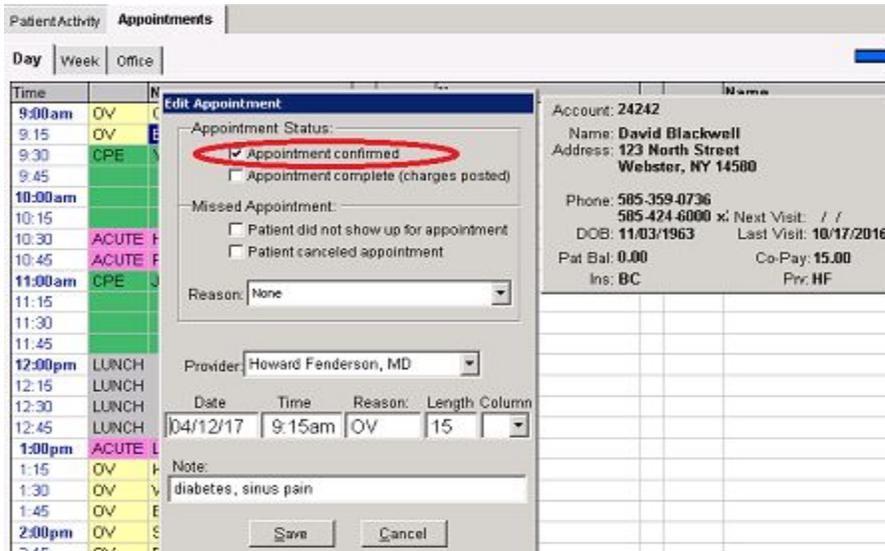
Voice Message:
[first] has an appointment on [day], [date] at [time]. To confirm, press 1. To be connected to the office to reschedule, press 2. We look forward to seeing you.

E-Mail Message:

Save Delete Cancel

Appointment Reminder Confirmation Set-up is complete.

Confirmation information will be sent back to RemindersCall and HST.
 If patient has confirmed appointment via one of these methods, the system will update it to confirmed . Click on patient on the schedule from Appointments tab.



Sending Reminders

Appointment Reminders: Can be generated from the Appointment Manager itself, or from an Appointment report.

From the **Appointment Manager**, Other, Send Reminders.



From Appointment Reminders window, select a single provider or All Providers. OK



The 'Appointment Reminders' dialog box features a title bar with the text 'Appointment Reminders'. Below the title bar, there is a 'Date:' label followed by a text input field containing '04/12/17'. Underneath, a 'Provider:' label is followed by a dropdown menu currently set to 'All Providers'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

This method allows you to send reminders for one day at a time.

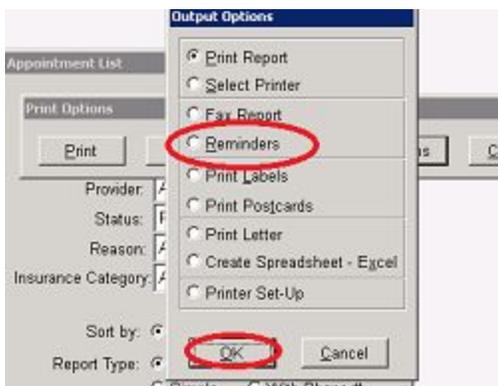
To run Reminders from the **Appointment Report**, go to Reports tab, Appointments, Appointment List.



The 'Appointment List' dialog box has a title bar 'Appointment List'. It includes a 'Period: from' field with '04/12/17' and a 'thru' field with '04/12/17'. Below these are four dropdown menus: 'Provider' (All Providers), 'Status' (Regular Appointments), 'Reason' (All Reasons), and 'Insurance Category' (All Insurances). There are two sections of radio buttons: 'Sort by' with options 'Name', 'Time', and 'Reason'; and 'Report Type' with options 'Standard', 'With Ref Phys', 'Simple', and 'With Phone #'. 'OK' and 'Cancel' buttons are at the bottom.

Fill in appropriate criteria such as date range, provider, etc. OK.

When the Print Options window opens, click Options and then choose Reminders.



This image shows the 'Appointment List' dialog box with the 'Print Options' window open. The 'Print Options' window has a 'Print' button and a list of options: 'Print Report', 'Select Printer', 'Fax Report', 'Reminders', 'Print Labels', 'Print Postcards', 'Print Letter', 'Create Spreadsheet - Excel', and 'Printer Set-Up'. The 'Reminders' option is circled in red. Below the list are 'OK' and 'Cancel' buttons, with the 'OK' button also circled in red. The background 'Appointment List' dialog box is partially visible, showing its title bar and some fields.

From **Patient Reminders-Batch Patient Communications** window, fill in appropriate criteria such as provider and choose **Appointment Reminder** from Reminder Text drop-down box.

Patient Reminders - Batch Patient Communications

Patient Count: 19 of 19

Provider: All Providers

Reminder Text: Appointment Reminder

Communication Method: All Methods

Subject: Appointment Reminder

Message:

[first] [last] has an appointment with [provider] on [day], [date] at [time].

Please call our office at [phone] if it is necessary to reschedule.

Process Print Report Exit

The different **Communication Methods** can be processed all at once or one at a time. By default, the window opens with All Methods selected. This is recommended.

Preventive Care Reminders:

Preventive Care reminders are sent from the Patient Query report.

Reports, Clinical Reports, Patient Query

File Reports Billing Patients Appointments Clinical Documents Communic

Pat Dashboard

Ac Daily Reports

Co Billing Reports

Periodic Reports

Electronic Reports

Patient Reports

Insurance Reports

Appointment Reports

Clinical Reports

Referral Reports

Table Lists

Other Reports

Specialized Reports

City:

State: Zip Co

Home Phone: -

Responsible Party Insurance PI

Age:

Print Cover Sheets

Print Medication Lists

Specialist Referrals

Undosed Visits Report

Unsigned Notes Report

Patient Query

Disease Management Report

Medication Management Report

Open Orders Report

The typical method of processing these reminders is to:
Select **Patient Reminders** on the General tab of the Patient Query



Select a Preventive Care item on the **Preventive** tab.

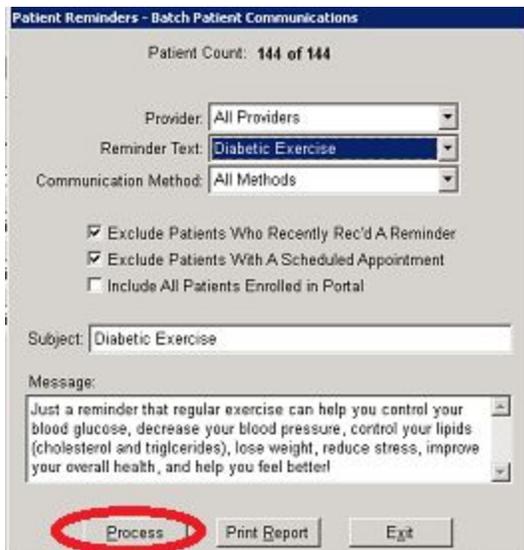


You may also select a **Diagnosis** from the **Clinical** tab if you wish to send preventive reminders based on a patient's diagnosis (e.g. Diabetes).

Once you have entered the data needed to select the list of patients, you will want to save the query by clicking **Save Query** button on bottom of window. Give your query a name. This will later appear on the menu of Clinical Reports.

Click OK from the Patient Query window.

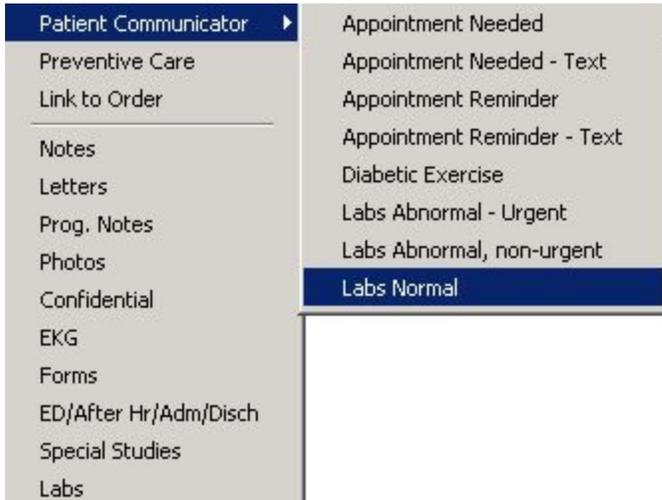
From **Patient Reminders-Batch Patient Communications** window, fill in appropriate criteria such as provider and choose desired message from Reminder Text drop-down box. You can also edit the message by clicking in the box.



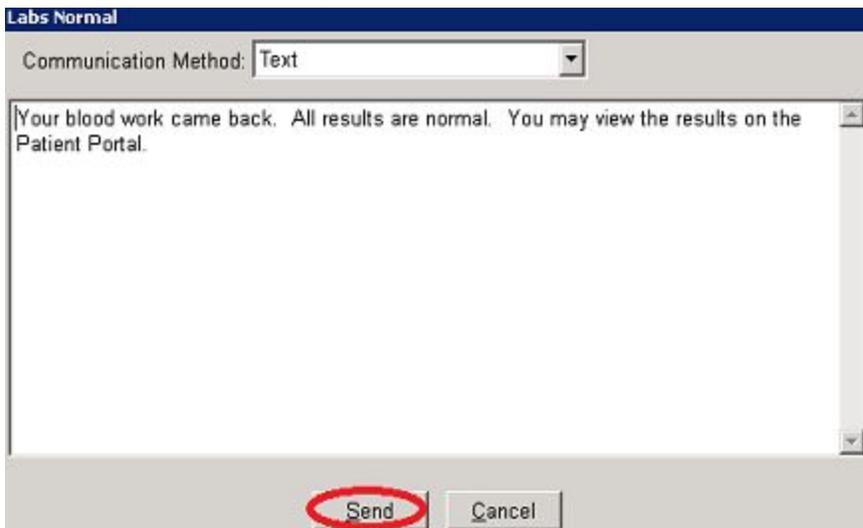
Sending Individual Messages:

Individual messages are sent from the patient's chart by right-clicking on blank grey space or when view a document in the chart, by right clicking on the document.

Choose Patient Communicator and choose from your drop down list.



The Patient Communicator window will open. It will automatically select the patient's preferred method of communication. You may override this by selecting another method from the drop-down box. You may edit the text as appropriate for this particular patient.



Checking Reminder Status:

Check the Dashboard at RemindersCall site to check activity and reminder status. There is a legend for call status icons. Scroll down for further detail on each call.

Activity for Wed Apr 12 2017

[Reschedule/Cancel](#) [Download Statistics](#)

Overview	Feedback	Icon Legend
Total Reminders: 1	Phone Keypresses	Call Successful
Total Successful: 1	1 (Confirm): 0 2: 0	Left Message
Total Failed: 0	3: 0 4: 0	Call Failed
Phone Reminders: 1	5: 0 6: 0	No Answer
Phone Successful: 1	7: 0 8: 0	Sent to Gateway (Awaiting Status)
Phone Failed: 0	9 (Reconnect): 0 0: 0	New Call (Awaiting Delivery)
SMS Reminders: 0	* (Repeat): 0 #: 0	
SMS Successful: 0		
SMS Failed: 0		
Email Reminders: 0		
Email Successful: 0		
Email Failed: 0		

Type	Recipient	Name	Group	Appt.	Delivery	Duration	Tries/Status	Reply	Details
Phone	(585)	N/A	N/A	N/A	11:11:42 AM	00:00:33	0/3	None	