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.

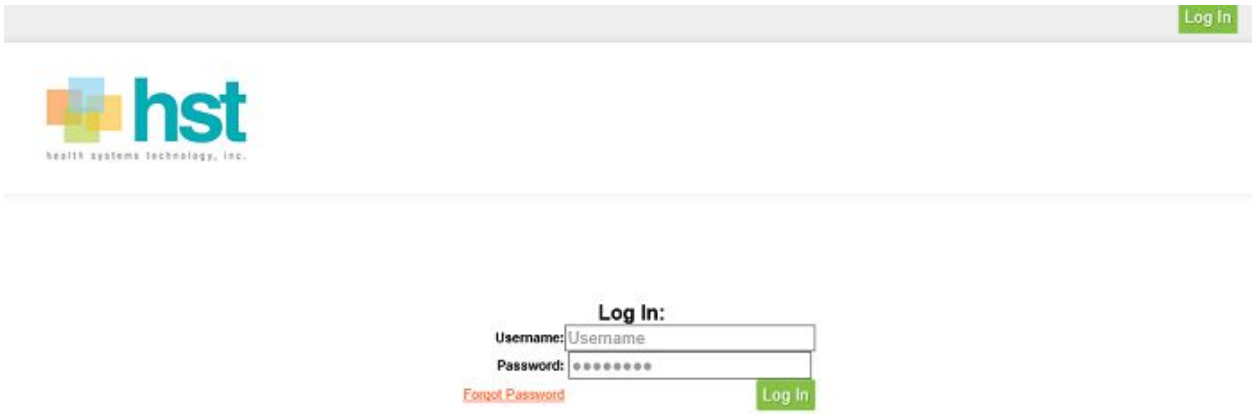
Please note that it may take 2-3 business days for HST to get a practice set up with RemindersCall.

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

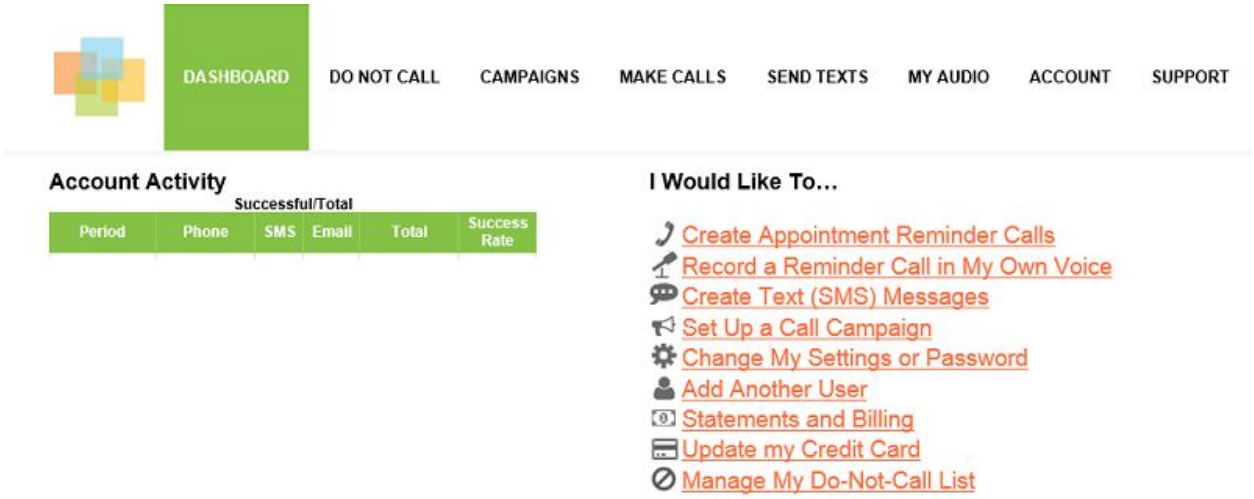
Once you have received your username and password go to the RemindersCall site:

https://reminders.hstcentral.com

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

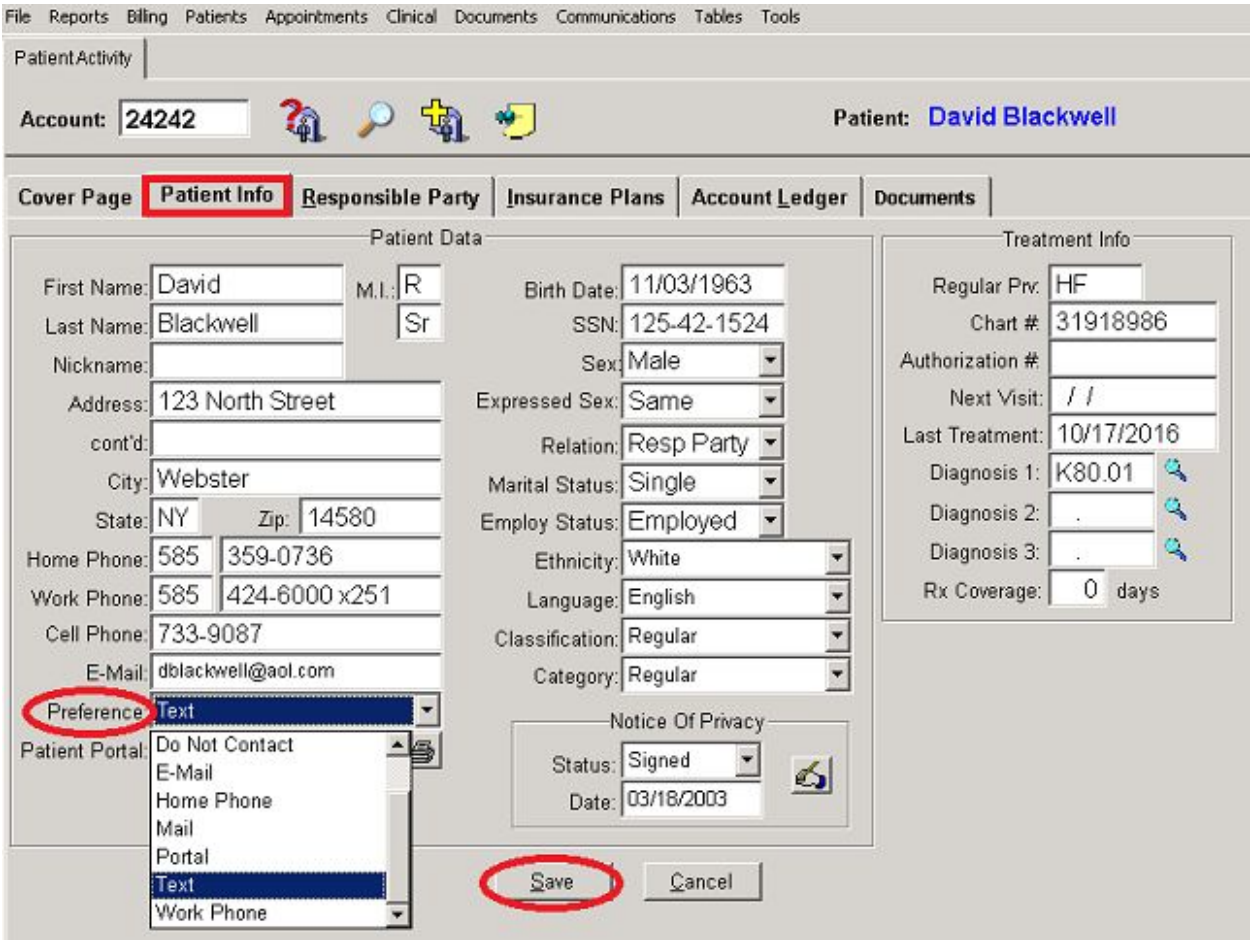


The Reminders **Dashboard** will open.



***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.



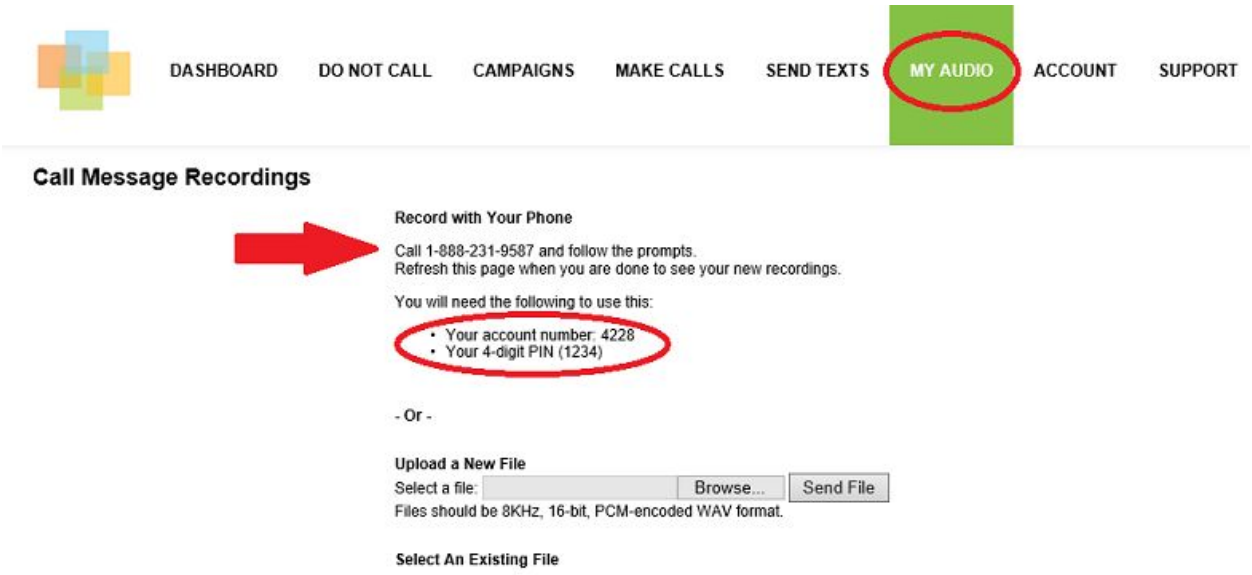
In the above example, the patient's communication preference is Text. Since he has a cell phone # entered, all reminders will be sent via SMS (text message) to his cell phone. If none is selected (i.e., Unspecified), the system will default to printing a postcard.

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.



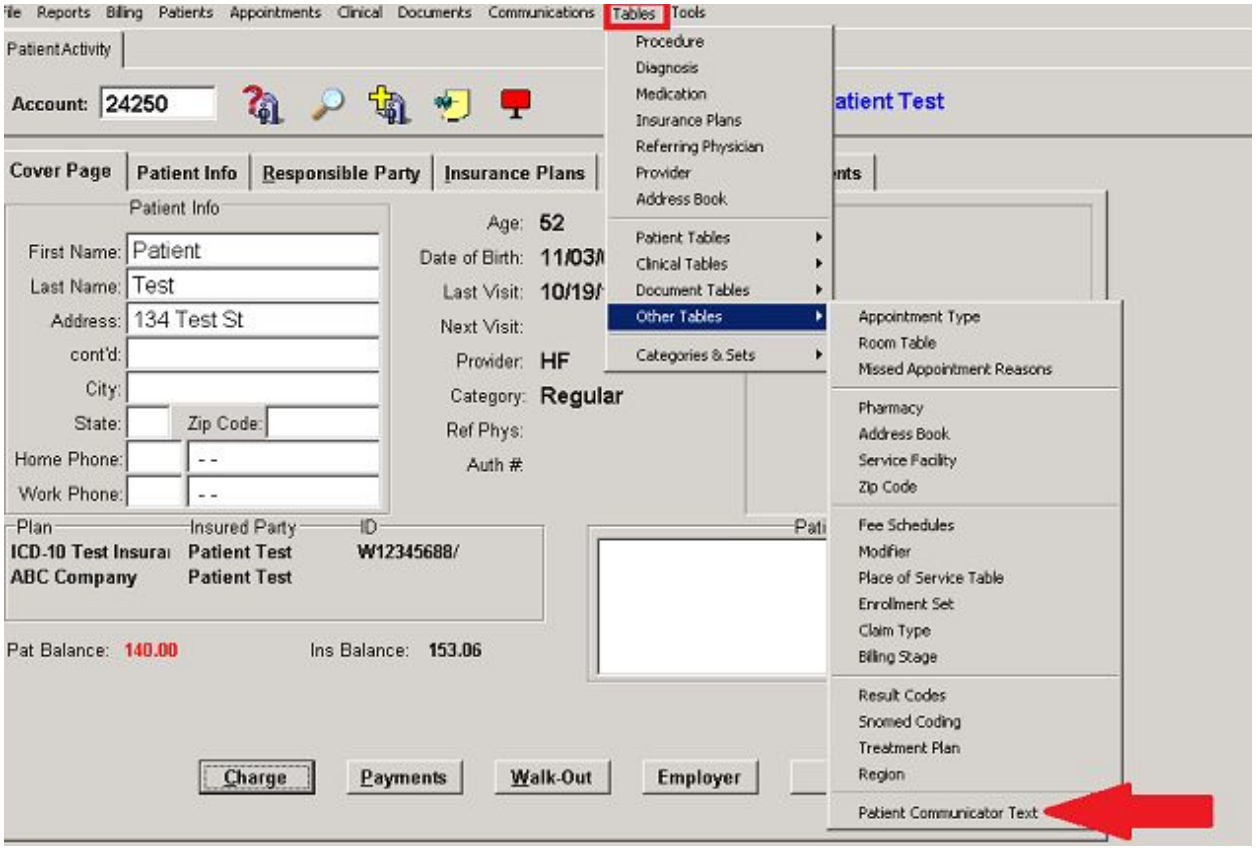
Once you have recorded and saved your greeting, call HST Support to to let us know this step has been done. HST will complete the process and notify you when the Greeting is ready to be utilized.

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

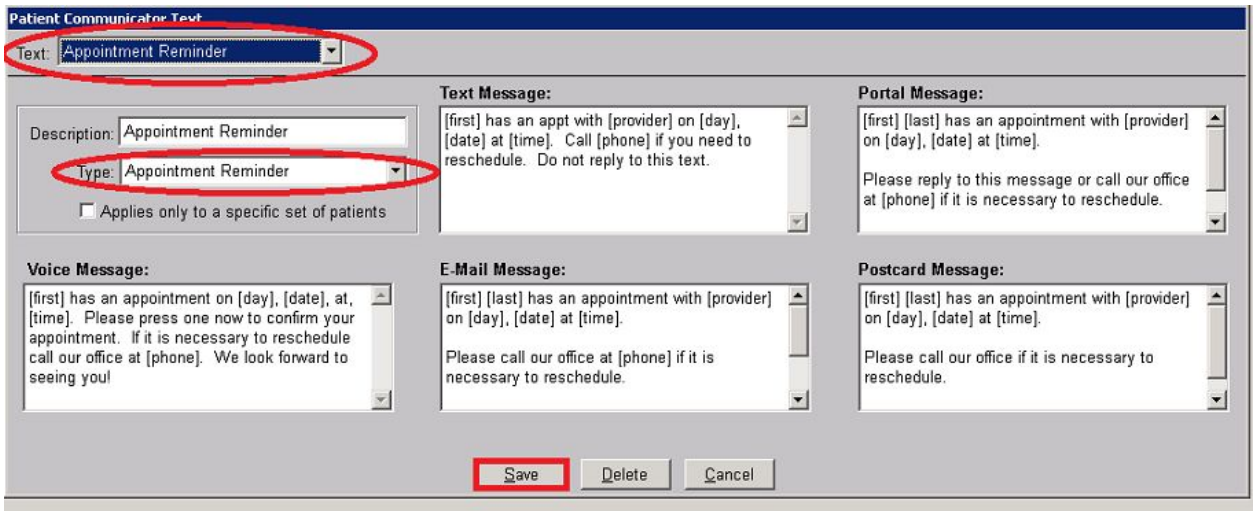
Configuring the Patient Communicator

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

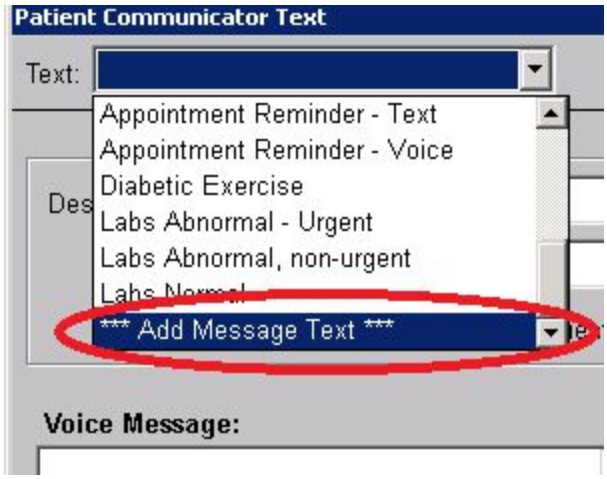
Tables, Other Tables, Patient Communicator Text



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 of Individual Message.



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.



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

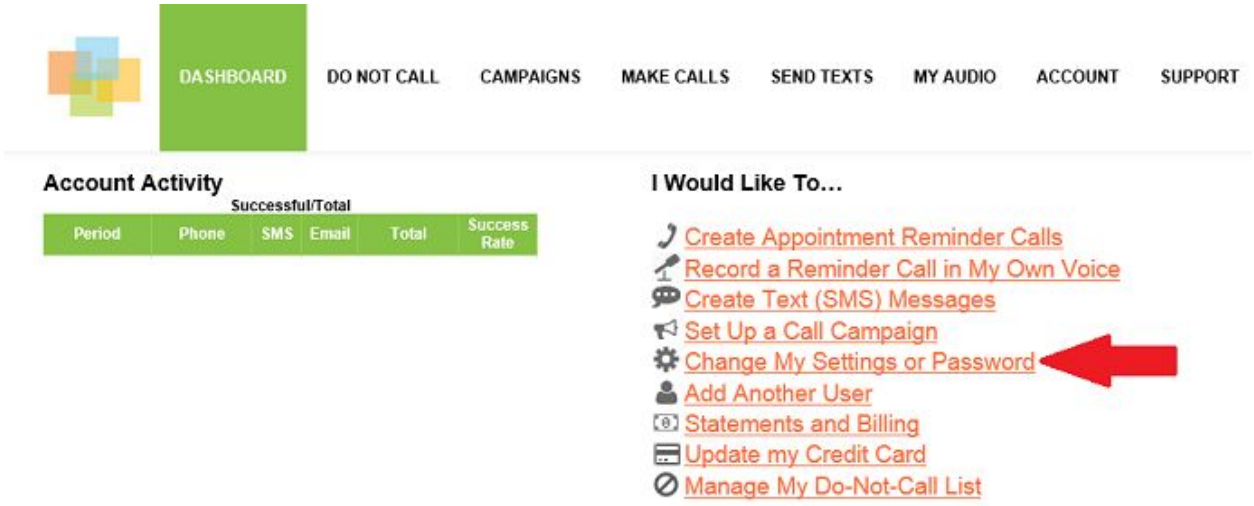
*Make sure when using variables, they are typed exactly as above, enclosed in brackets.

- 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.

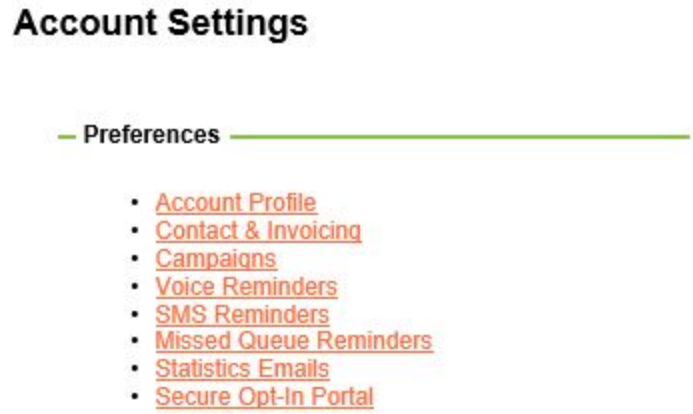
Reminder Confirmation Set-Up

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**



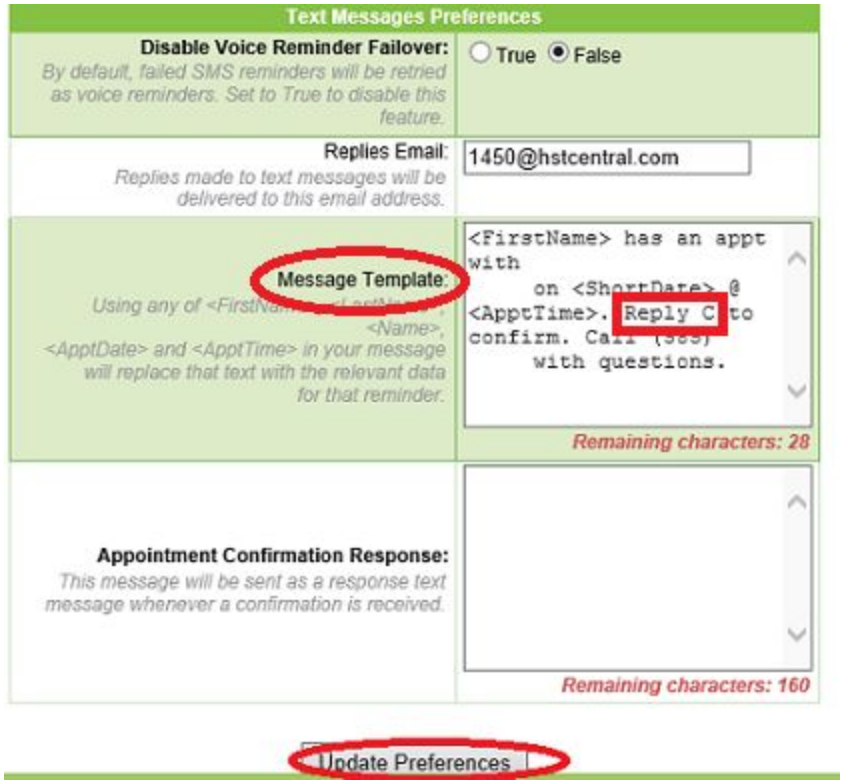
From **Account Settings** page, click on **Voice Reminders** under **Preferences**.



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.

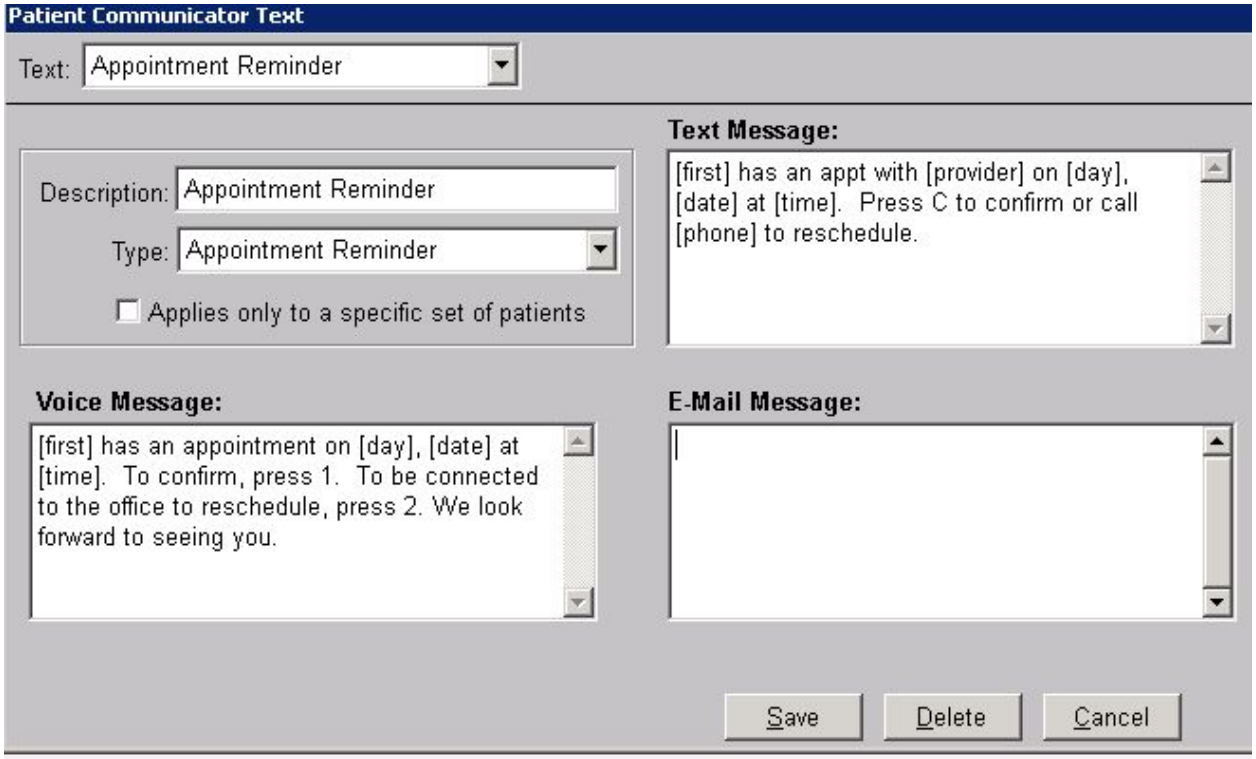
Click on **Update Preferences** on bottom of page.

To set up **Text confirmations**, go back to **Account Settings** page and click on **SMS Reminders** under **Preferences**.
Fill in appropriate fields on the Text Messages Preferences page.
Do not change "Reply C" to confirm. This line must be in there that way.



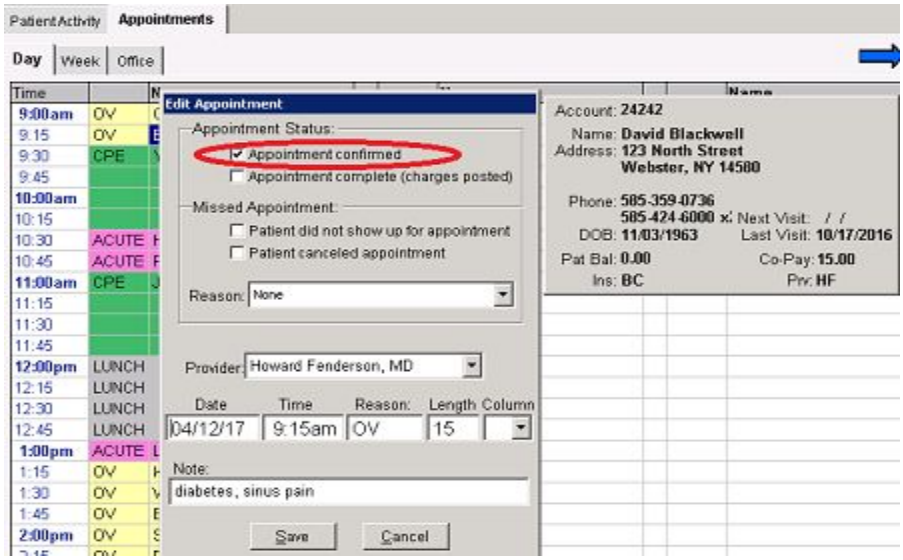
2. Update Patient Communicator text for confirmations.

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



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.

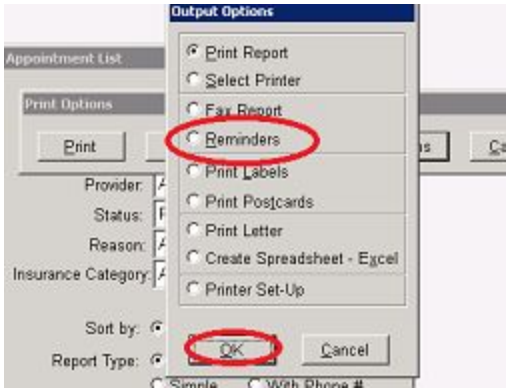
From the **Appointment Manager**, Other, Send Reminders.

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

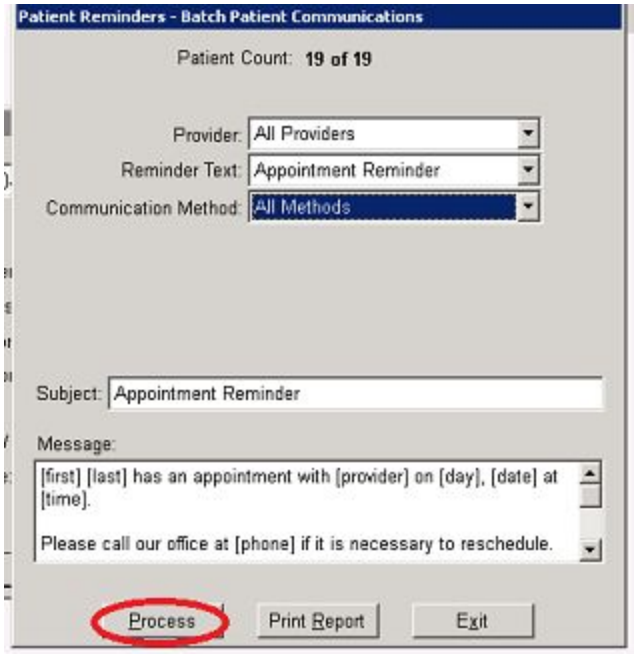
This method allows you to send reminders for one day at a time.

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

Fill in appropriate criteria such as date range, provider, etc. OK.
When the Print Options window opens, click Options and then choose Reminders.



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

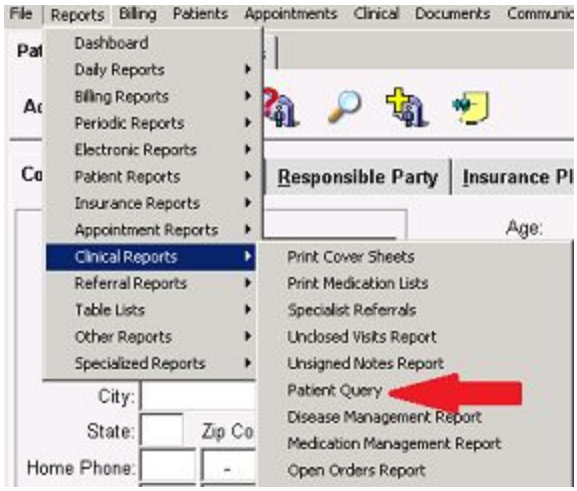


The different **Communication Methods** can be processed all at once or one at a time. By default, the window opens with All Methods selected. This is recommended.

Preventive Care Reminders:

Preventive Care reminders are sent from the Patient Query report.

Reports, Clinical Reports, Patient Query



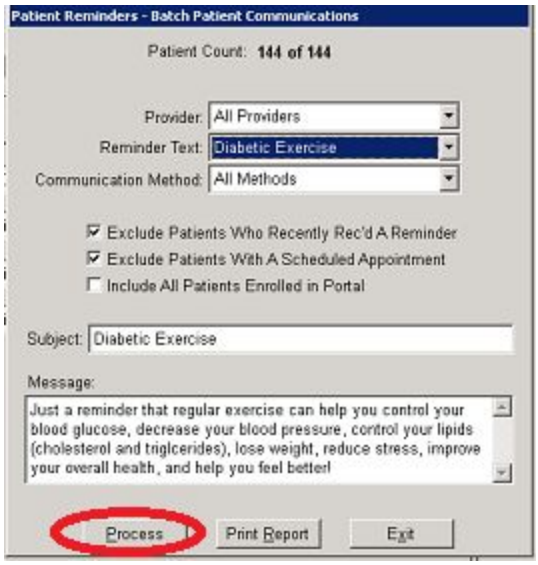
The typical method of processing these reminders is to:
Select **Patient Reminders** on the General tab of the Patient Query

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.

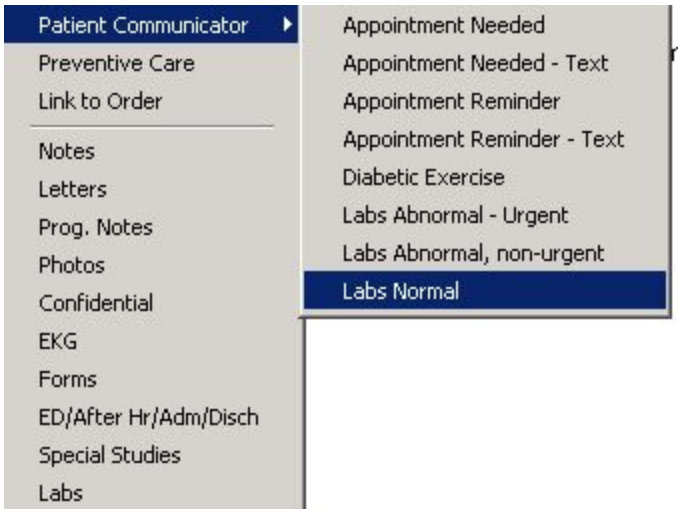
Click OK from the Patient Query window.
From **Patient Reminders-Batch Patient Communications** window, fill in appropriate criteria such as provider and choose desired message from Reminder Text drop-down box. You can also edit the message by clicking in the box.



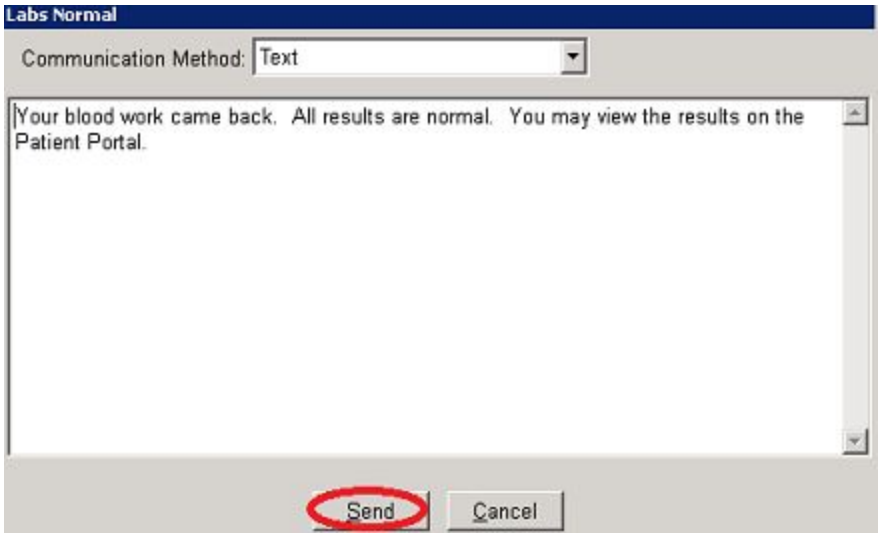
Sending Individual Messages:

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.

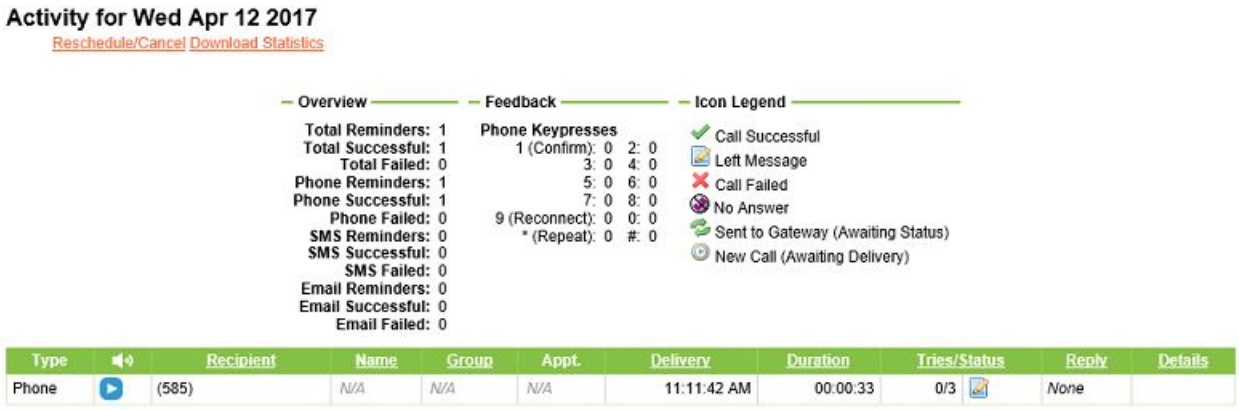


The Patient Communicator window will open. It will automatically select the patient's preferred method of communication. You may override this by selecting another method from the drop-down box. You may edit the text as appropriate for this particular patient.



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

Total Reminders: 1
Total Successful: 1
Total Failed: 0
Phone Reminders: 1
Phone Successful: 1
Phone Failed: 0
SMS Reminders: 0
SMS Successful: 0
SMS Failed: 0
Email Reminders: 0
Email Successful: 0
Email Failed: 0

Feedback

Phone Keypresses
1 (Confirm): 0 2: 0
3: 0 4: 0
5: 0 6: 0
7: 0 8: 0
9 (Reconnect): 0 0: 0
* (Repeat): 0 #: 0

Icon Legend

Call Successful
Left Message
Call Failed
No Answer
Sent to Gateway (Awaiting Status)
New Call (Awaiting Delivery)

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	