Text Reminders Guide

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Setting Up Text Reminders

This guide explains how to turn on the text reminders per patient available through ICANotes.

1. The Cell Phone number needs to be added to the Demographics.
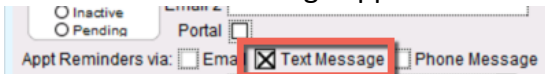
2. Activate Text Message appointment reminders.

Example Text Message

Kent has an appointment with Jane Moody, LMFT at 11:00 AM on 6/2/2017. Text back YES to confirm or NO to request cancellation of your appointment.

If the patient texts back YES, the Patient Reminder Status Report will show as confirmed.

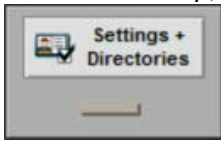If the patient texts back NO, the Patient Reminder Status Report will show as cancellation requested.

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Activate Portal Admin Function

1. To set this up, you need to go to Settings + Directories. A Security Administrator needs to click the

 drawer from the Chart Room.

2. Click the **Security Center** button on the bottom.

3. Enter your password.
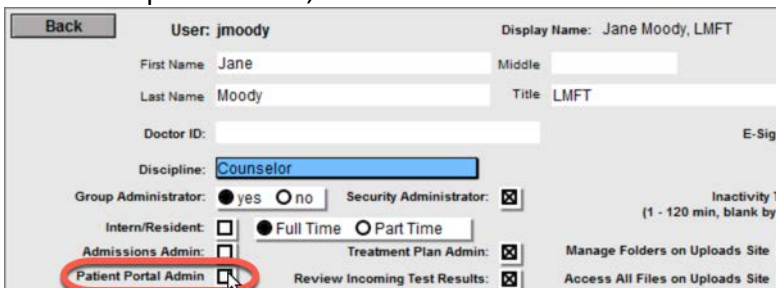

4. Click the **OK** button to continue.

5. In the Security Center, find the name of the person who will take the role of Patient Portal Admin and click the **Edit** button in the right column. (Note: If you are setting yourself to be the Patient Portal Admin, the **Edit** button will be purple.)

6. In the top left corner, click the 'Patient Portal Admin' checkbox to turn on the feature.

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7. Click the **Save** button to save the change.

This user is now ready for Patient Portal Admin functionality and will be able to customize text messages through the patient portal.

Customize Text Messages

1. As a Patient Portal Admin, go to https://patientonlineportal.com and log in using your User name and password. Click the **Sign In** button.

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2. You will be logged into the Patient Portal. Go to **🔧 Admin Tools** on the top right.
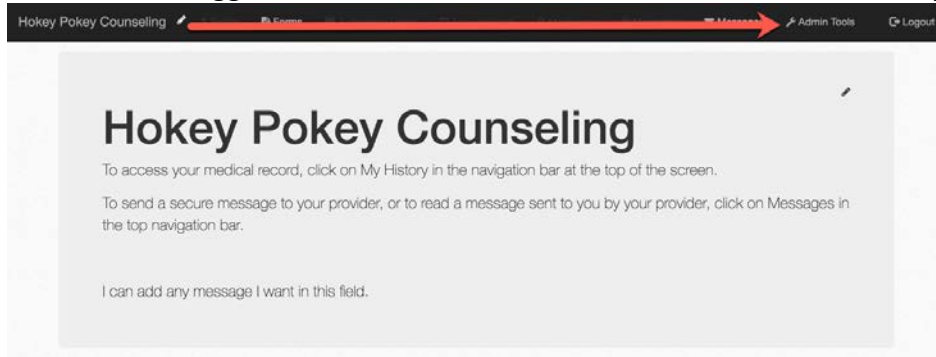
3. On Admin Tools, click the **SMS Reminder Settings** button.
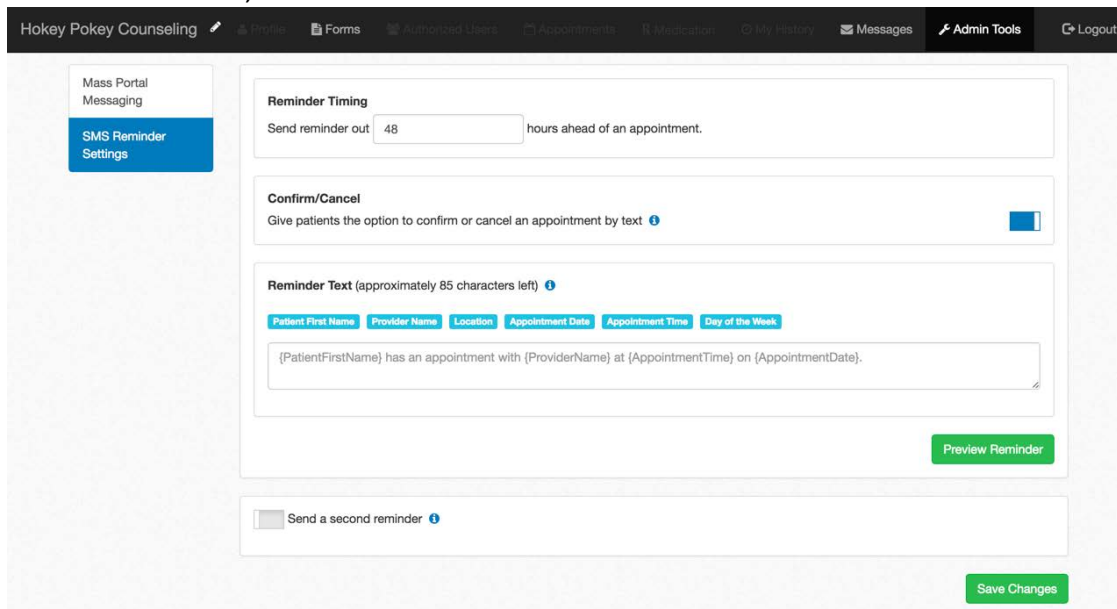
4. This area is split into three areas. The Reminder Timing, second Reminder Timing, and Notification Timing. The Reminder Timing is default and will be sent out, the other two can be turned on/off. Let's look at these individually.

5. The Reminder Timing is default and will be sent out within 48 hours of the appointment. You have three areas that you can control.
- when to send the reminder
- confirm/cancel by text
- reminder text

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Reminder Timing

Send reminder out [2] hours ahead of an appointment.

Confirm/Cancel

Give patients the option to confirm or cancel an appointment by text ⓘ

Reminder Text (approximately 85 characters left) ⓘ

[Patient First Name] [Provider Name] [Location] [Appointment Date] [Appointment Time] [Day of the Week]

{PatientFirstName} has an appointment with {ProviderName} at {AppointmentTime} on {AppointmentDate}.

[Preview Reminder]

5a. You can change the hours ahead to send the reminder by using the arrows ⇕ in the field.

[24 ⇕]

5b. Change the option to confirm/cancel by text by clicking the slider ▭ located on the right side.

5c. Reminder Text can be created in the Reminder Text field. You can use the buttons
[Patient First Name] [Provider Name] [Location] [Appointment Date] [Appointment Time] [Day of the Week] to pull in data from the ICANotes calendar.

The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).

Reminder Text (approximately 85 characters left) ⓘ

[Patient First Name] [Provider Name] [Location] [Appointment Date] [Appointment Time] [Day of the Week]

{PatientFirstName} has an appointment with {ProviderName} at {AppointmentTime} on {AppointmentDate}.

5d. The ⓘ icon can be clicked for help.

Reminders should try to be limited to 160 characters to avoid paging. Enabling confirm/cancel reduces the amount of possible characters. Click the tags to insert a placeholder into the reminder.

5e. Click the **Preview Reminder** button to see what your text will look like.

John has an appointment with Dr. Jane Doe at 12:00 PM on 6/3/2017. Text back YES to confirm or NO to request cancellation of your appointment.

6. A second reminder can be sent after the initial reminder to allow reminders to be sent further. This option can be turned on/off by using the slider located in the top left of the Send a second reminder box.

Send a second reminder ⓘ

Reminder Timing
Send reminder out 12 hours ahead of an appointment.

Confirm/Cancel
Give patients the option to confirm or cancel an appointment by text ⓘ

Reminder Text (approximately 160 characters left) ⓘ

Patient First Name   Provider Name   Location   Appointment Date   Appointment Time   Day of the Week

{PatientFirstName} has an appointment with {ProviderName} at {AppointmentTime} on {AppointmentDate}.

Preview Reminder

6a. You can change the hours to send the reminder by using the arrows ⇕ in the field.

2

6b. Change the option to confirm/cancel by text by clicking the slider located on the right side.
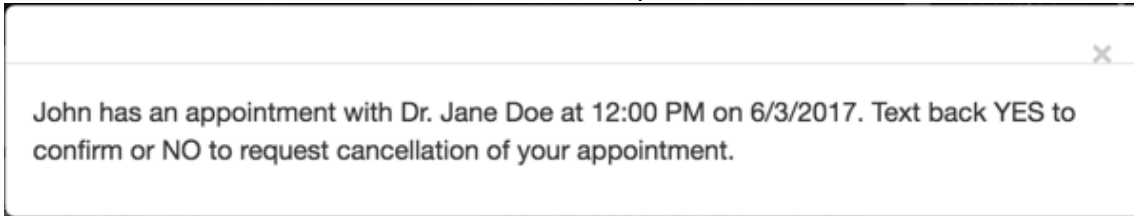
6c. Reminder Text can be created in the Reminder Text field. You can use the buttons Patient First Name Provider Name Location Appointment Date Appointment Time Day of the Week to pull in data from the ICANotes calendar.

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The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).

Reminder Text (approximately 29 characters left) ⓘ

| Patient First Name | Provider Name | Location | Appointment Date | Appointment Time | Day of the Week |

> Second reminder: You, {PatientFirstName}, have an appointment coming up at {AppointmentTime}. Don't forget to bring your insurance card(s)!

6d. Click the **Preview Reminder** button to see what the text will look like.

> Second reminder: You, John, have an appointment coming up at 12:00 PM. Don't forget to bring your insurance card(s)!

7. A Notification Timing can be sent after the second Reminder Timing to allow reminders to be sent further. This option can be turned on/off by using the slider located in the top left of the Send a notification box.

Send a notification ⓘ

Notification Timing

Send notification out 1 hours ahead of an appointment.

Notification Text (approximately 13 characters left) ⓘ

| Patient First Name | Provider Name | Location | Appointment Date | Appointment Time | Day of the Week |

> Hey sleepy head! If you miss your {AppointmentDate} appointment with {ProviderName} at {Location} you'll be sorry. {PatientFirstName}, I'm talking to you.

Preview Notification

7a. You can change the hours to send the reminder by using the arrows ⬍ in the field.

1

7b. Notification Text can be created in the Notification Text field. You can use the buttons **Patient First Name** **Provider Name** **Location** **Appointment Date** **Appointment Time** **Day of the Week** to pull in data from the ICANotes calendar.

The message located in the field is the default message. You can change this message by clicking in the field and typing the new message (don't forget to use the buttons to insert data).

7c. Click the **Preview Reminder** button to see what the text will look like.

8. Once all of your texts are set, click the **Save Changes** button.

9. Look for the Settings Saved notification in the bottom right to verify all settings saved.
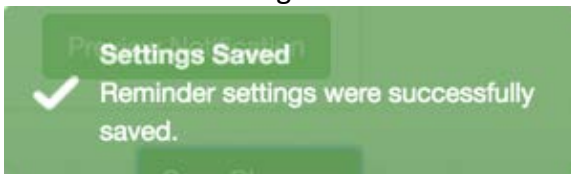
Using the Portal Reminder Status Report
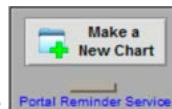
1. Click on the **Portal Reminder Service** link from the **Portal Reminder Service** drawer from the Chart Room to go to the Patient Reminder Status Report.

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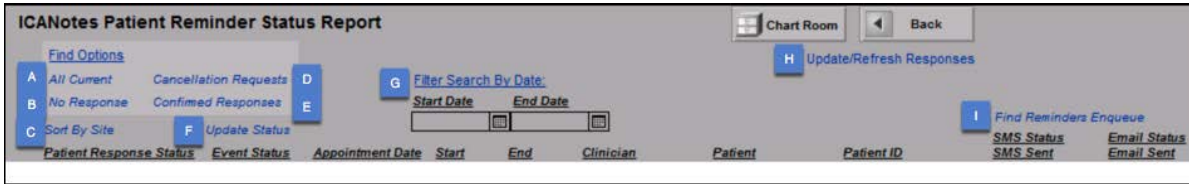A. **All Current** - Displays all current notifications or will display all notifications set within the search by date filter.

B. **No Response** - Displays all no responses from patients or will display all no responses set within the search by date filter.

C. **Sort By Site** – Displays reminders by site.

D. **Cancellation Requests** – Requests received from patients to cancel appointment. Appointments will not be cancelled until marked cancelled by staff.

E. **Confirmed Responses** – Response received from patients confirming appointment.

F. **Update Status** – A method to update status of records by bundle.

G. **Filter Search By Date** – Dates that can be filled in before performing a query for a specific time period.

H. **Update/Refresh Responses** – Updates the screen.

I. **Find Reminders Enqueue** – Performs find for all requests in queue. This exists for a special case where a patient may receive two reminders in a small-time period. Thus, a response in text will only result as a response for one reminder. The system is set up so that queued reminders can be tracked.

A. A green check will show when the patient response status and event status fields match.

B. **Patient Response Status** – This shows the patient's response.

C. **Event Status** – This is the status shown on the ICANotes appointment book/calendar.

D. **Appointment Date** – The date of the patient's appointment.

E. **Start** – The appointment start time.

F. **End** – The appointment end time.

G. **Clinician** – The clinician assigned to appointment.

H. **Patient** – The patient's name.

I. **Patient ID** – The patient's ID number.

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J. **SMS Status / SMS Sent** – Text message status and the date that the text message was sent.

K. **Email Status / Email Sent** – Email message status and the date that the email message was sent.

How to Update the Patient Reminder Status Report

1. After the patient responds via email or text, the Patient Response Status will update on the report.

Patient Response Status	Event Status	Appointment Date	Start	End	Clinician	Patient	Patient ID	SMS Status SMS Sent	Email Status Email Sent
Patient Confirmed 5-31-2017 4:21:01 PM	Scheduled	6/2/17 Friday	Initial Assessment 11:00 AM	12:00 PM	Jane - Clinic Hokey Pokey Counseling	Kent Brockman	2004684333	Sent 5-31-2017	

2. Click the Scheduled button to open the dropdown menu choices to update the event status.

Event Status

- Block Out
- Cancelled
- Rescheduled
- Available
- No Show
- Attended
- ✔ Scheduled
- Confirmed

3. When the Event Status is changed to match the Patient Response Status, a green check mark will populate in the left column.

Patient Response Status	Event Status	Appointment Date	Start	End	Clinician	Patient	Patient ID	SMS Status SMS Sent	Email Status Email Sent
Patient Confirmed 5-31-2017 4:21:01 PM	Confirmed	6/2/17 Friday	Initial Assessment 11:00 AM	12:00 PM	Jane - Clinic Hokey Pokey Counseling	Kent Brockman	2004684333	Sent 5-31-2017	

Note: When the Event Status is changed in the Portal Reminder Status Report, the status also changes in all areas of ICANotes (Clinician Reminder Sheet, Event Details, and Calendar Quick View).