

Text Reminders Guide

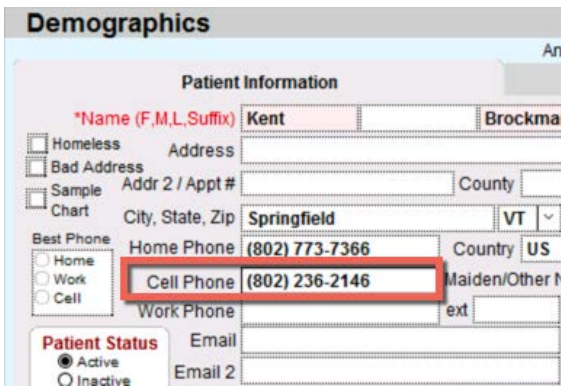
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Setting Up Text Reminders

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.



Demographics

Patient Information

*Name (F,M,L,Suffix) Kent Brockman

Homeless Address

Bad Address

Sample Addr 2 / Appt # County

Chart City, State, Zip Springfield VT

Best Phone Home Phone (802) 773-7366 Country US

Home

Work

Cell Cell Phone (802) 236-2146 Maiden/Other N

Work Phone ext

Patient Status

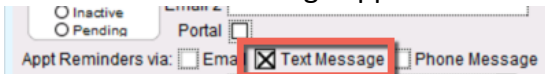
Active

Inactive

Email

Email 2

2. Activate Text Message appointment reminders.



Inactive

Pending

Portal

Appt Reminders via: Email Text Message Phone Message

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.

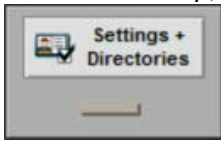
If the patient texts back YES, the Patient Reminder Status Report will show as confirmed.

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

Text Reminders Guide

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.

A dialog box titled "Enter Password" with the text "Enter your password to access the Security Center." and "Account Name: jmoody". It has a "Password" input field and an "OK" button.

Enter Password	
Enter your password to access the Security Center.	
Account Name: jmoody	
Password	
OK	

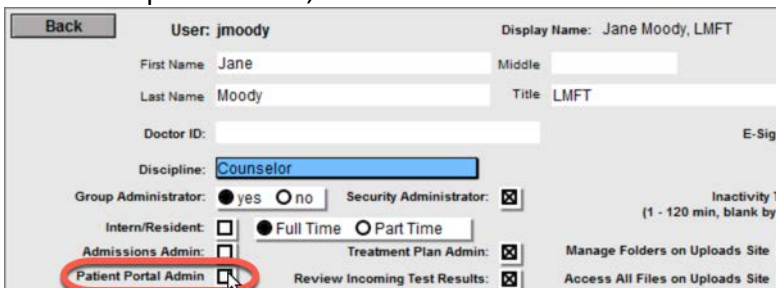
4. Click the **OK** button to continue.

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.)

A screenshot of the "Security Center" interface showing a table of users. A red arrow points to the "Edit" button for Jane Moody, LMFT.

Name	Username	Discipline	Group Admin	Security Admin	TimeZone	Electronic Signature	Doctor ID	Created	Edit	Account Status
Anna Recksick, MD	arecksick	Psychiatrist	yes	<input checked="" type="checkbox"/>	-5	0FC110F75AA32725E13D1		6/15/2016 3:02:41 PM	Edit	Account Enabled
Emma Royds, RN	eroyds	Nurse	no	<input type="checkbox"/>	-5	2B0BCB38C2D133C2B56F		6/15/2016 3:05:04 PM	Edit	Account Enabled
Jane Moody, LMFT									Edit	Account Enabled
Lotta Dinero	ldinero	Office	yes	<input checked="" type="checkbox"/>	-5			6/15/2016 3:07:23 PM	Edit	Account Enabled

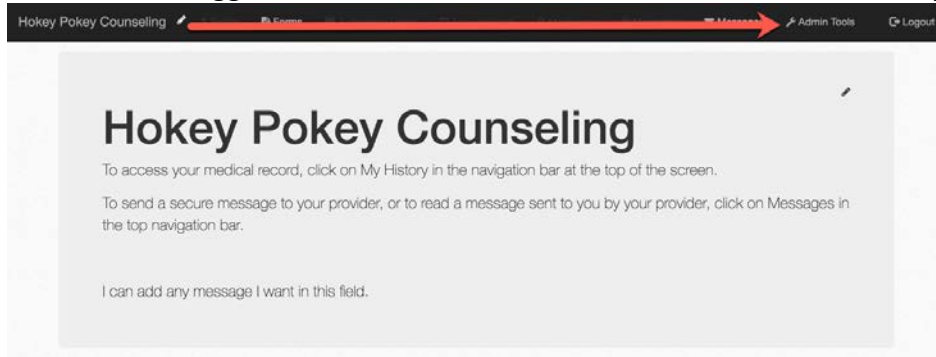
6. In the top left corner, click the 'Patient Portal Admin' checkbox to turn on the feature.

A screenshot of the user profile form for Jane Moody, LMFT. The "Patient Portal Admin" checkbox is circled in red.

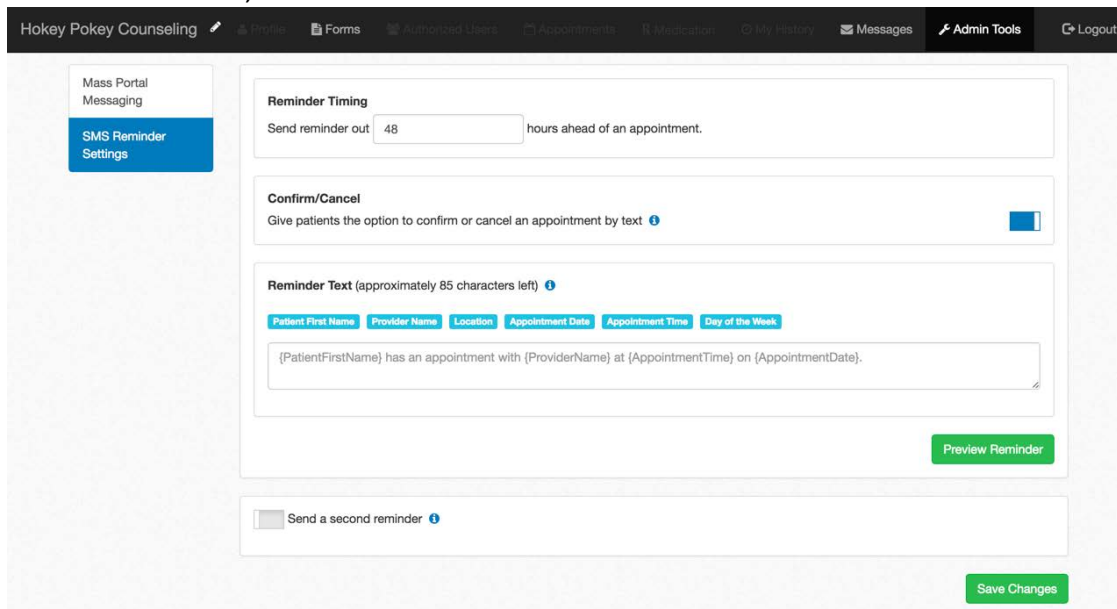
Back	User: jmoody	Display Name: Jane Moody, LMFT
First Name: Jane	Middle:	
Last Name: Moody	Title: LMFT	
Doctor ID:	E-Sig:	
Discipline: Counselor		
Group Administrator: <input type="radio"/> yes <input type="radio"/> no	Security Administrator: <input checked="" type="checkbox"/>	Inactivity T (1 - 120 min, blank by
Intern/Resident: <input type="checkbox"/> <input checked="" type="radio"/> Full Time <input type="radio"/> Part Time		
Admissions Admin: <input type="checkbox"/>	Treatment Plan Admin: <input checked="" type="checkbox"/>	Manage Folders on Uploads Site
Patient Portal Admin: <input checked="" type="checkbox"/>	Review Incoming Test Results: <input checked="" type="checkbox"/>	Access All Files on Uploads Site

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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


Text Reminders Guide


Reminder Timing
Send reminder out 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) 

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


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

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

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) 

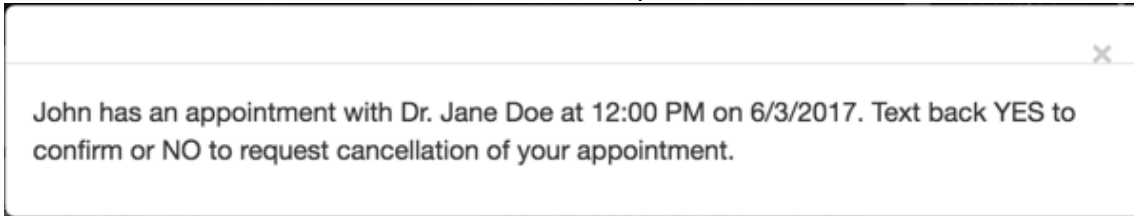
{PatientFirstName} has an appointment with {ProviderName} at {AppointmentTime} on {AppointmentDate}.


5d. The  icon can be clicked for help.

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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.



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 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.

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 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.



Text Reminders Guide

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).

Notification Text (approximately 13 characters left) ⓘ

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

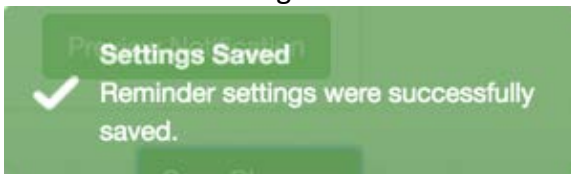
Hey sleepy head! If you miss your {AppointmentDate} appointment with {ProviderName} at {Location} you'll be sorry. {PatientFirstName}, I'm talking to you.

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

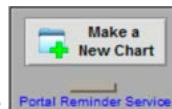
Hey sleepy head! If you miss your 4/28/2017 appointment with Dr. Jane Doe at Med Center you'll be sorry. John, I'm talking to you.

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.

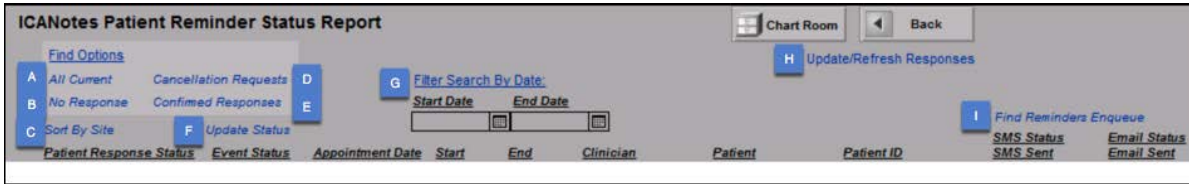


Using the Portal Reminder Status Report



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.

Don't Sort By Site										
Patient Response Status	Event Status	Appointment Date	Start	End	Clinician	Patient	Patient ID	SMS Status	Email Status	
Site: << No Site Assigned To Reminder >>										
✓	Patient Confirmed	Confirmed	6/2/17 Friday	12:00 PM	12:30 PM	Emma - Clinic	Alice Doe	2004684621	Sent	5-31-2017
Site: Hokey Pokey Counseling										
✓	Cancellation Requested	Cancelled	6/1/17 Thursday	10:00 AM	11:00 AM	Anna - Clinic	Christopher	2004676568	Sent	5-31-2017
	Unconfirmed	Scheduled	6/1/17 Thursday	12:00 PM	1:00 PM	Anna - Clinic	Gene Jones	2004676564	Sent	5-31-2017
✓	Patient Confirmed	Confirmed	6/2/17 Friday	11:00 AM	12:00 PM	Jane - Clinic	Kent Brockman	2004684333	Sent	5-31-2017

- 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	B	C	D	E	F	G	H	I	J	K
Patient Response Status	Event Status	Appointment Date	Start	End	Clinician	Patient	Patient ID	SMS Status	Email Status	
✓	Cancellation Requested	Cancelled	6/1/17 Thursday	10:00 AM	11:00 AM	Anna - Clinic	Christopher	2004676568	Sent	5-31-2017
	Unconfirmed	Scheduled	6/1/17 Thursday	12:00 PM	1:00 PM	Anna - Clinic	Gene Jones	2004676564	Sent	5-31-2017
	Patient Confirmed	Scheduled	6/2/17 Friday	11:00 AM	12:00 PM	Jane - Clinic	Kent Brockman	2004684333	Sent	5-31-2017
	Patient Confirmed	Scheduled	6/2/17 Friday	12:00 PM	12:30 PM	Emma - Clinic	Alice Doe	2004684621	Sent	5-31-2017

- 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).