Automated Appointment Reminders

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Overview of Automated Appointment Reminders

Reminding a patient of their upcoming appointment is one of the most crucial success factors for a medical practice. Our Automated Appointment Reminder integration ensures that this reminder takes place with no work needed by your staff. Our solution will deliver a reminder to your patient's in the way that both you and the the patient prefer - be that by phone, email, or text.

This integration will:

- 1. Allow patients to select their preferred reminder method via the Intelligent Intake
- 2. Allow a practice to setup business rules on when reminders are delivered to patients
- 3. Automatically send out phone calls, text messages, and emails to patients
- 4. Allow patients to electronically confirm or cancel appointments
- 5. Automatically update the appointment status in the iScheduler

Setup the Automated Appointment Reminder Integration

Sign-Up

The first step is to sign-up for Automated Appointment Reminders: https://isalushealthcare.com/services/

Configure Reminder Rules with Inphonite

Once you sign-up, you will be contacted by our Appointment Reminder partner, Inphonite. They will work with you to configure the solution. They will help customize the message, determine dates and times of reminders, etc...

Configure Reminder Rules with iSalus

Once you have setup the rules with Inphonite, the next step is to configure our application.

Products

In order to have a product activated, the practice must request this from iSalus by contacting our support team.

The support team will need to activate the following product:

• Global Call Reminders

Roles

The following screens need to be assigned to administrators:

• Practice - Global Call Reminders > Setup > Call Reminder Setup

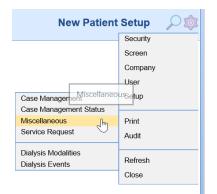
The following screens need to be assigned to users that should update individual patient preferences:

• Practice - General > Setup > Patient Portal Miscellaneous

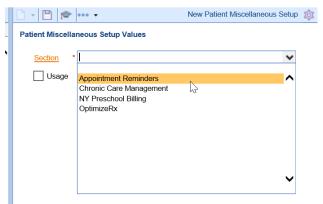
Screen

The following screen must be added to the Miscellaneous portal:

- 1. Navigate to Setup > Patients
- 2. Click the Gear icon
- 3. Select Setup > Miscellaneous



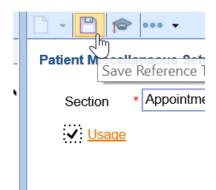
4. Select Appointment Reminders from the Section dropdown



5. Click the Usage checkbox

-	Patient Miscellaneous Setup Values
`	Section * Appointment Reminders
	Indicates that this section can be use

6. Click Save



7. The Appointment Reminders section should now be accessible in the Patient Setup screen under the Miscellaneous tab.

	Disability	INOTI-CI	sabled U	Preschooler	with disability		
	Appointment Remind	ers					
	Reminder Type	Consent	Reminder \	/alue			
Summary	Phone Calls	✓	Home	O Work	O Other	Override	
Demographics	Text Messages	✓	Home	⊖ Work	O Other	Override	
Insurance	Email		Patient	Overrid	e		
Responsible Party	OptimizeRx						
Emergency Contact	OptimizeRx Type	Consent	<u>OptimizeRx</u>	Value			
Comments	Text Messages	✓	Home	⊖ Work	◯ Other	Override	
Case Management	Email	✓	Patient	Overrid	e		
Dialysis							
Sliding Fee							
Immun. Registry							
Patient Extension							
Miscellaneous		2					
Referral Tracking							

Company Settings

The following company settings can be configured:

- Company Setting: Automated Reminder Text Consent
- Company Setting: Automated Reminder Phone Consent
- Company Setting: Automated Reminder Email Consent

Pro Tip: Want to apply these new settings to all EXISTING patients? Ask iSalus to update this for you.

Call Reminder Rules Setup

The Automated Appointment Reminder integration allows you to configure exactly what types of appointments receive reminder, how many days in advance reminders are sent, and more.

- 1. Navigate to Setup > Call Reminder
- 2. Update the settings viewed on the screen to meet your desired preferences

Pull Status 2	2 Items	~			
Pull Days 2	2				
Only Weekdays					
Update Status	⁄				
Contact Status	Scheduled	~			
Resource Speci	ific	✓ Location Specific		✓ Type Specific	
All		All		All	
Personnel	^	✓ AAOE 1	~	Advanced Prostate Cancer Clinic	~
Allison Myers, NF	P-C	AAOE 2		BCG	
Clarance S. Gold	Ismith, MD	AAOE 3		Biopsy	
Ct		AAOE 4		Bladder Fulgeration	
Eligard		Atlas HLB Test		Bladder Instillation	
Ic Tx/spt Change	/bcg	Choice - ASC		Block	
lvp/cystogram	-	Choice - Main Office		Blood Draw	
Jon T. Quillen, M	D	Choice - North		Cancer Discussion	
Jonathan Lincoln	, MD	Diagnostic Imaging		Cath UA	
Katelyn C. Clark,		Dialysis Location		CIC	

3. Click Save

Screen Options

- <u>Pull Status</u>: This is the list of appointment statuses that new reminders should be created for on a nightly basis.
- <u>Pull Days</u>: This will dictate how many days in advance of an appointment a patient receives a reminder. If you worked with Inphonite to configure your rules to contact the patient multiple times, this should line up with their very first reminder.
- <u>Only Weekdays</u>: This will indicate that patients should only be contacted on weekdays. Therefore, no reminder file will be created on the weekends.
- <u>Update Status</u>: This indicates that patient responses can update the appointment status for a patient. The application supports two types of patient initiated response:
 - *Confirmed*: If a patient confirms and appointment via the reminder, the appointment status will be set to Confirmed.
 - *Cancelled*: If a patient cancels a appointment via the reminder, the appointment status will be set to Cancelled. This can be turned off via Inphonite so that patients do not have this option.
- <u>Contact Status</u>: When a reminder is sent, the system will update the appointment status to the selected status. Many practices will create a status like "Reminder Sent" to indicate that the reminder was sent but has not yet been responded to.
- Resources: This will allow a practice to control which resources have appointment reminders delivered.
 - *Resource Specific:* If this box is checked, you must determine which resources we should create a reminder for. If deselected, all patients on that resource's schedule will have a reminder generated (unless other rules dictate that they should not).
- <u>Locations</u>: This will allow a practice to control which service location have appointment reminders delivered.
 - *Location Specific:* If this box is checked, you must determine which locations we should create a reminder for. If deselected, all patients scheduled at that location will have a reminder generated (unless other rules dictate that they should not).
- <u>Type (Appointment Type)</u>: This will allow a practice to control which appointment types have appointment reminders delivered.
 - *Type Specific:* If this box is checked, you must determine which appointment types we should create a reminder for. If deselected, all patients schedule with that appointment type will have a reminder generated (unless other rules dictate that they should not).

Using the Automated Appointment Reminder Integration

Once the Automated Appointment Reminder Integration has been configured for your practice, you will be able to start setting up patient's reminder preferences and adding patients to the schedule in the iScheduler. Once the patient is on the schedule, the automated process takes over and patients will receive reminders based on your pre-configured rules.

Set a patients Appointment Reminder Preference

Appointment Reminder preferences can be set in three different ways:

Option 1 - Intelligent Intake:

If your practice uses the Intelligent Intake feature, patient's may set these preferences themselves as part of your intake process.

Option 2 - Set on New Patient Creation:

If your practice has configured the necessary Company Settings, reminder preferences for a patient may be saved automatically after the patient is created.

Option 3 - Manually Set Patient Preference:

You can manually set the patients reminder preferences by following the below steps:

- 1. Navigate to the Patient Setup screen (this can be accessed in many different ways)
- 2. Select the Miscellaneous tab



3. Update the Appointment Reminder preferences

	Appointment Remind	ders					
	Reminder Type	Consent	Reminder \	/alue			
nmary	Phone Calls	✓	 Home 	◯ Work	O Other	Override	
graphics	Text Messages	~	Home	⊖ Work	O Other	Override	
irance	Email		Patient	Overrid	e		
sible Party							
4. Click Sa	ve						
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			NY P	rescho	ool Billi	ina	

Automated Appointment Reminder File Generation

On a nightly basis, an appointment reminder file will be generated according to your preferences and delivered to Inphonite.

Automated Appointment Reminders Sent to Patients

Inphonite will deliver reminders via text, email, and phone calls based on the information provided in the reminder file.

Appointment Status Updated based on Contact

Contact Status

Once an appointment reminder is sent to a patient, the status of the appointment will be updated based on the 'Contact Status' that was configured.



Confirmed Status

If a patient confirms their appointment via the reminder system, the status will be automatically updated to 'Confirmed'.

12 ^{pm}	Peterson, TESTING Choice - Main Office Advanced Prostate Cancer Clinic (R)
1 pm	Choice - Main Office Choice - Main Office

Cancelled Status

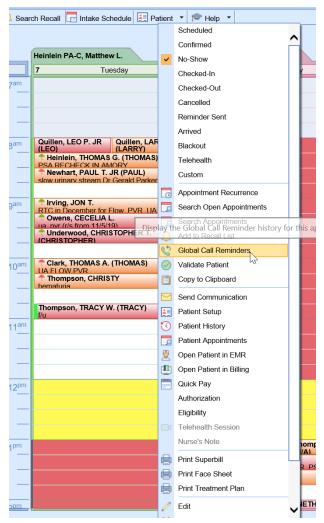
If a patient cancels their appointment via the reminder system, the status will be automatically updated to 'Cancelled'. Based on practice preferences, the appointment may no longer appear on the schedule.

	12 ^{pm}		
	—		
	_		
Offic	1 ^{pm}	Choice - Main Office Choice - Main Office	Choice Mons k

Detailed Contact Information

Users can see a detailed view of the contact by following the below steps:

1. Right click on the appointment and select Global Call Reminders



2. The date, time, method, and results of the reminder will be displayed

Global Call Rer	ninder		F
Date	Method	Results	П
01/05/2020 1:08PM	Phone Call	Message Delivered	

Using the "Rescheduled" Status

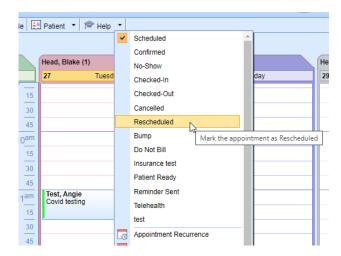
The "Rescheduled" status allows a practice to create a new appointment for a patient when they need to move the date/time/location of their appointment. This status also alerts the reminder system and prevents the system from sending out incorrect or outdated appointment information.

When should we use the Rescheduled status?

The practice may determine that the rescheduled status should be used when the date, time, location, or resource needs to be changed for the patient's appointment. The practice may also determine that the patient will need to receive an appointment reminder for updated appointment information. The status change will also allow the practice to efficiently manage the patient's appointment history by reviewing past appointments in the "Rescheduled Status."

How to use the Rescheduled status

To reschedule an appointment, simply right click over the appointment and choose the "Rescheduled" status from the list of options



The user will be presented with the Cancel Comments window, where they are able to add any applicable comments for the reason to reschedule. Click OK.

- 1	Last 10 Cancelled Appo	pintments			Row 0 of			
	Start Date/Time	✓ End Date/Time	Resource Name	Туре	Cancelled C			
1	Apr 25 2017 11:15AM	Apr 25 2017 12:45PM	Hynes MD, Patrick	Therapy				
2	Apr 14 2017 2:30PM	Apr 14 2017 2:45PM	Hynes MD, Patrick	Injection 2				
3	Jan 19 2017 4:45PM	Jan 19 2017 5:15PM	Adams ARNP, Blaire	Headaches				
4	Jan 11 2017 2:00PM	Jan 11 2017 2:45PM	Armstrong PT, Stephen	Follow up				
5	Aug 2 2016 3:00PM	Aug 2 2016 4:00PM	Shawn md, test	Group Session				
6	Apr 25 2016 10:00AM	Apr 25 2016 10:15AM	Belza MD, Robert	Catheter Change				
				·	• •			
		Eeb 27 2024 11:20AM	Head Blake	Covid testing				
1	Feb 27 2024 11:00AM	1 60 27 2024 11.30AW	rioda, Diano					
1	Feb 27 2024 11:00AM	160 27 2024 11.30AW	noud, plano					
Last 10 Cancelled Appointments Row 0 of 6 Start Date/Time End Date/Time Resource Name Type Cancelled C 1 Apr 25 2017 11:15AM Apr 25 2017 12:45PM Hynes MD, Patrick Therapy 2 Apr 14 2017 2:30PM Apr 14 2017 2:45PM Hynes MD, Patrick Injection 2 3 Jan 19 2017 4:45PM Jan 19 2017 5:15PM Adams ARNP, Blaire Headaches 4 Jan 11 2017 2:00PM Jan 11 2017 2:45PM Armstrong PT, Stephen Follow up 5 Aug 2 2016 3:00PM Aug 2 2016 4:00PM Shawn md, test Group Session 6 Apr 25 2016 10:00AM Apr 25 2016 10:15AM Belza MD, Robert Catheter Change 1 Next 5 Scheduled Appointments Row 0 of 1 Start Date/Time End Date/Time Resource Name Type								
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		T 60 27 2024 TL.30AW			Þ			
Last 10 Cancelled Appointments Row 0 of 6 Start Date/Time End Date/Time Resource Name Type Cancelled C 1 Apr 25 2017 11:15AM Apr 25 2017 12:45FM Hynes MD, Patrick Therapy 2 2 Apr 14 2017 2:30FM Apr 14 2017 2:45FM Hynes MD, Patrick Injection 2 3 3 Jan 19 2017 4:45FM Jan 19 2017 5:15FM Adams ARNP, Blaire Headaches 4 4 Jan 11 2017 2:00FM Jan 11 2017 2:45FM Armstrong PT, Stephen Follow up 5 5 Aug 2 2016 3:00FM Aug 2 2016 4:00FM Shawn md, test Group Session 6 6 Apr 25 2016 10:00AM Apr 25 2016 10:15AM Beiza MD, Robert Catheter Change Image: Comme 1 Next 5 Scheduled Appointments Row 0 of 1 Start Date/Time End Date/Time Resource Name Type Comme 1 Feb 27 2024 11:00AM Feb 27 2024 11:30AM Head, Blake Covid testing Image: Covid testing								
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The system will present the user with a trailing "copy" cursor where they are able to create a new appointment, using the original appointment details

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45				
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30				
45				
11 ^{am}		Mick Cadd appointment		
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Simply click and drop (or right click to assign to a placeholder) to create the newly rescheduled appointment

							30		_
-	🕒 Copy Aj	ppo	intment					X	
-	Patient *	Tes	t, Angie					Q	
-	Sched. With	Hea	ad, Blake						
_	Sched. On	02/2	29/2024	11:0	OAM To	11:3	0AM		
-	Appt. Type *	Cov	vid testing					~	
	Location	Far	nily First Carı	mel				~	- F
	Chief Compla	int						Default	U
-								-	
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-	Comment							Default	
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_	Ins. Profile	*	Health Insur	ance				~	
_	Ins. Primary		TEST BCBS	;				~	
_	Ins. Seconda	ry	44 NORTH					~	
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_	Referring	Re	ferring					Q	
-	Prior Auth. #]		
_	Assign Auth.							~	
					0	K_lh		Cancel	
_						\rightarrow	/	te/update tl	he appointment
							nm		

How to "hide" rescheduled appointments

If you wish to "hide" or make the rescheduled appointments disappear once they are rescheduled, the Company Setting: Display Rescheduled Appointments on the schedule, should be unchecked

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