A Complete Guide to Patient Messaging for COVID-19, Testing, Vaccines, and More

RELATIENT

Table of Contents

Introduction

The COVID-19 pandemic shook the whole world, creating a widespread crisis that seemed to halt everyday life while escalating the adoption of technology across every industry. Everyone from restaurants and retail to finance and healthcare shifted quickly to remote work, curbside pickup, mobile ordering, and even digital contact tracing. Virtually no one was left unaffected by the pandemic, resulting in unprecedented development and adoption of new technology. Healthcare is among the industries who made big digital strides in response to the pandemic, bridging some of the gap between patients/consumer expectations and the patient journey. The innovation continued as healthcare organizations were later tasked with distributing COVID-19 vaccines throughout their organizations and communities.

One of the biggest challenges during COVID-19 has been keeping patients and staff updated and informed as information changes rapidly, feeding patient confusion and fears. Healthcare leaders have turned to patient communication software to ease these concerns and help guide patients through a new kind of patient journey—whether it be a telehealth appointment or an in-person appointment with new policies, procedures, and restrictions. In this guide, we'll cover the use cases and strategies we've seen healthcare leaders and medical providers use successfully to guide both staff and patients through COVID-19, a mass vaccination effort, and the other commonplace disruptions.

Resources & Help From The CDC, HHS, AMA, & Others

There's a lot being done to come to the aid of healthcare leaders, providers, and frontline staff as they work diligently to care for patients and caregivers. Here are a few of the most relevant resources and policy changes for medical practices to leverage during this time.

- The CDC created a guide for healthcare providers, Steps Healthcare Facilities Can Take Now to Prepare for Coronavirus Disease 2019 (COVID-19). This guide offers helpful advice for preparing, communicating, and protecting both your workforce and your patients during this outbreak. Key to this guide is the importance of keeping both your staff and patients frequently updated as the information regarding coronavirus is changing rapidly and at times may require swift action on behalf of your practice.

- The Department of Health and Human Services relaxed the requirements for conducting Telehealth for the duration of the COVID-19 pandemic. In other words, providers who aren't already up and running with a HIPAA-compliant Telehealth solution can quickly start assessing and treating non-urgent patient conditions via non-secure channels (think Facetime) in order to keep patients at home and reduce the spread of the virus.

- The American Medical Association recently published this 128-page playbook for implementing Telehealth during COVID-19. It's an extensive resource for practices who have yet to adopt Telehealth but who are looking to make a quick start.

- The health innovators at Avia published a guide to some strategies you can implement quickly, 6 Digital Tactics Health Systems Can Implement This Week to Battle COVID-19.

Patient Communication Strategies to Guide Patients & Staff Through the Coronavirus Pandemic, Vaccines, and Disruptions

Push critical updates to the masses, whether it's staff, a list of patients, or the entire patient base.
How: Broadcast or on-demand messaging

Software solutions like broadcast or on-demand messaging take the burden of contacting staff and patients off the medical office staff with a simple interface that can message lists of contacts based on criteria you determine. Look for solutions that:

- Utilize multiple communication modalities, ideally voice, text, and email.

- Offers an intuitive interface so it's easy and quick to use

- Can be used without the help of support staff from your vendor, meaning you can communicate quickly and efficiently when the timing is critical

- Are backed by responsive support. When you do need assistance, you can't wait days for help.

For COVID-19 Communication:

Information around COVID-19 continues to evolve and change, thankfully not as rapidly as it did in the earliest days of the pandemic. Early on, providers were closing clinics, changing all or most of their appointments to telehealth, adjusting policies about masks, visitors, and check-in, all to keep patients and staff protected. Some health systems created "respiratory clinics" and routed patients with COVID-19 symptoms select locations to minimize exposure in their primary care and other specialty clinics. Today, health systems and medical offices continue to adjust and make changes, relaxing guidelines and restrictions as cases decline and opening more in-person appointment availability. Common broadcast messages regarding COVID-19 include:

- What to do if a patient believes they have coronavirus

- How to access virtual/Telehealth visits in place of coming to the clinic/office in person

- Reschedule non-essential appointments

- Providers who have been furloughed and how to access care if it's still needed

- Do not bring children or additional adults to appointments or limit support persons to 1 per patient

- Sites testing for coronavirus and when a patient should or should not visit those sites

- Resources for reliable data and information, namely the CDC

- Extended or shortened hours of operation

- Updates on the number of staff members who have confirmed cases of coronavirus or have been exposed and what to do

- Changes to shift arrangements. Creating a "Shift A" and a "Shift B" to limit exposure, same staff always working on the same team.

- A call for extra help, extra shifts available

- Schedule changes

- General updates about the virus and actions taken within the community

For COVID-19 Vaccine Communication:

Upon receiving the first doses of the COVID-19 vaccine, the first order of business in most states was to vaccinate healthcare staff. Still, for some organizations, like the Warren Clinic, they needed to vaccinate their own staff, as well as the staff of healthcare organizations in the seven counties

surrounding theirs. Broadcast messaging is key to distributing information about vaccines to groups of patients inside and outside an organization. Common information sent via broadcast messaging includes:

- The current phase of the vaccination program and who qualifies

- How to book a vaccine appointment

- Important information about the vaccine

- The location of vaccine clinics and links to directions

Other Disruptions:

The COVID-19 pandemic didn't take place in isolation, disruptions like the West Coast wildfires, tornadoes in the Midwest and South, blizzards across the nation, and common daily disruptions like sick or delayed physicians and changes to schedules all commanded attention and resources alongside COVID-19 cases, testing, and vaccines. Broadcast messaging made it easy for healthcare organizations to message a handful or thousands of patients with a few clicks. Here are some of the common uses for this strategy:

- Clinic closings and delayed openings

- Appointments moved to new locations

- Resources for those impacted by weather and natural disasters

- Staff changes, calls for extra hours

TEXT SAMPLE	EMAIL SAMPLE	VOICE SAMPLE
"Thank you for confirming your appointment. When you arrive, please text us and remain in your vehicle until an exam room is available. We will text you when your provider is ready to see you."	*IMPORTANT:* *Coronavirus Update* *Steps to Protect Yourself:* *-Wash your hands often.* *-Avoid touching your face.* *-Avoid close contact with people who are sick.* *-Stay home when you are sick.* *-Cover your cough or sneeze with a tissue.* *-Clean and disinfect frequently touched objects and surfaces.*	*"Physicians Group is reaching out to our patients about the coronavirus. If you have a cold or flu-like illness, please call us prior to your scheduled appointment. Visit our website physiciansgroup.com for more information. Press # to listen*

Use text messaging in one-to-one communication with patients to keep phone lines free and avoid playing phone tag with patients.
How: 2-way patient chat and/or secure messaging

Patients have a lot of questions about navigating appointments and 2-way patient chat and/or secure messaging solutions make it easy for medical office staff to answer patients in one-to-one text conversations. Staff and clinicians can initiate 2-way conversations with patients related to the prevention and treatment of COVID-19, testing, other health concerns, procedures for being seen in the office, how to check-in from the parking lot, and even information regarding COVID-19 vaccines. Secure messaging solutions take the convenience of text-like communication wrapped in security that ensures HIPAA compliance for conversations that include PHI or are clinical in nature.

Using 2-way Chat and Secure Messaging Solutions

2-Way SMS Chat

- Directions for parking
- Information about coronavirus testing sites
- Hours of operation
- Telehealth availability
- Changes to provider schedules
- Appointment changes
- Curbside check-in
- Vaccine information
- Directions to vaccine clinics

Secure Messaging

- Digital patient triage
- Questions about when to be seen and when to stay home
- Self-quarantine directions for infected patients
- Prescription refill information
- Questions about test results and care plans
- Vaccine follow-up
- Post-discharge patient follow-up

Doctor's Office // 7:05am

YOUR MEDICAL GROUP
Appt. scheduled with Dr. Smith for Mon, May 6 at 1:30pm. Add it to your calendar.

In an effort to reduce the spread of COVID-19, we're asking that you only have one support person with you during your visit.

Call (866) 473-8160 if you have questions. Reply STOP to block.
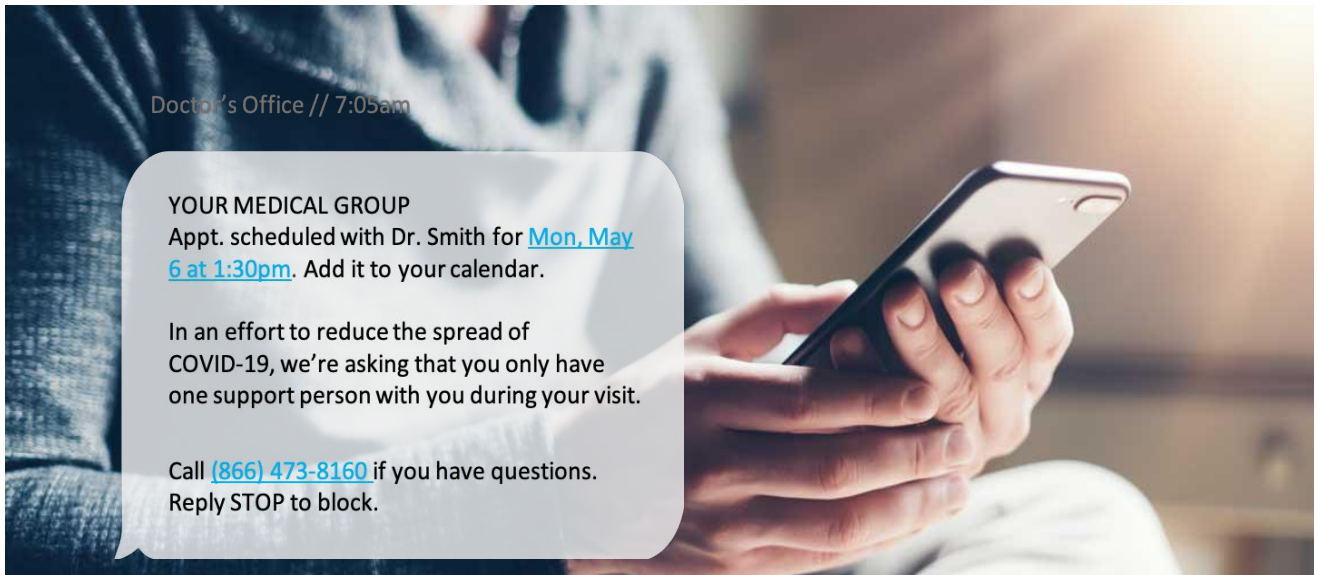
Give patients the right information about their appointments at strategic times so they'll be more likely to confirm and keep their appointments as scheduled.

How: automated appointment reminders utilizing text, voice, and email

Appointment reminders are one of the earliest patient messaging software solutions and have been used successfully for years to reduce patient no-show rates. In the context of the COVID-19 pandemic, appointment reminders have also been a key strategy to expanding access and helping patients safely navigate outpatient visits. Adding key pieces of information to an appointment reminder and/or links to additional information helps ensure patients know what to expect when they arrive, how to access their telehealth appointments (put the link in the reminder!), and much more.

With the COVID-19 vaccine now available, appointment reminders are proving key to getting patients to the correct location for their vaccination and ensuring they make it back for their second doses. You can find more detailed information about how healthcare leaders are organizing and managing COVID-19 vaccination programs here.

- Warren Clinic leverages Epic and Relatient to Distribute COVID-19 Vaccines

- Interview with Med Center Health: Distributing the COVID-19 Vaccine

- How to Prepare Patients and Effectively Distribute the COVID-19 Vaccine

- The COVID-19 Vaccine Has Arrived, Here's How Relatient is Helping

Leverage Appointment Reminders to Do More

- Add short links for accessing and scheduling Telehealth appointments

- Include directions for where to park or wait when arriving

- Include information about new check-in procedures or links to digital registration forms

- Include any new policies regarding support persons or other procedures for visiting the office in person

- Use specific (but not PHI) language to clue a patient in that this is their vaccine appointment (if appropriate). Ex: "This is appointment 2 of 2, please notify us immediately if you need to reschedule."

Move patient registration forms to a pre-visit digital activity to screen for COVID-19 symptoms early, support telehealth appointments, ensure payer information is collected ahead of time, and reduce time spent in the waiting room.

How: Digital patient registration

Equipping medical office staff with patient information prior to the appointment time helps everyone from provider to patient prep for a great experience. Digital registration forms have become more important to healthcare providers as COVID-19 sheds light on how many materials and surfaces are shared between patients and patient and staff during a visit. Empowering patients to use their own devices means shared kiosks, clipboards, pens, and paper are no longer needed to get patients registered and checked in for their appointments and this strategy is safer for everyone. For providers utilizing telehealth, digital registration means they can still collect family histories, current medications, and payer information. Digital or eregistration is an important component for medical offices with low staff or who furloughed employees in response to COVID-19 and no longer have dedicated resources for tasks like manual data entry and/or scanning hard copy patient forms.

Many medical offices utilize a COVID-19 screening form as part of their pre-visit registration forms to identify patients who may have COVID-19 and either direct them to a specific clinic location or adjust
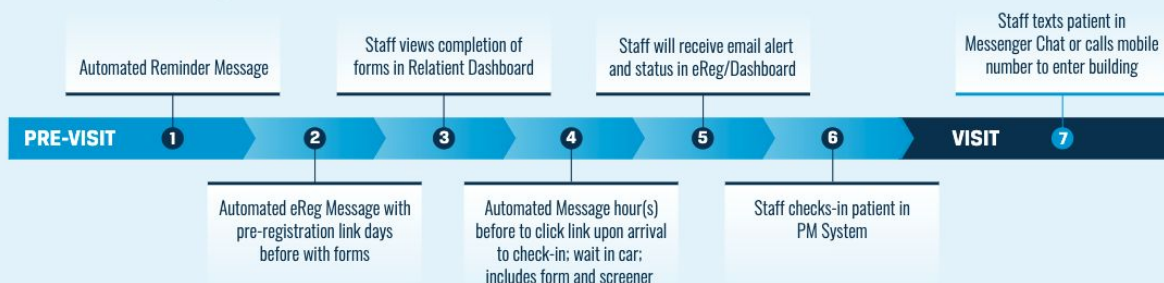
their patient appointment procedures to protect other patients and staff. Advanced notice of COVID-19 symptoms (or other illnesses a medical office decides to pre-screen for) empowers practice staff to reach out to patients who may present with these illnesses and guide them through the appropriate isolation and testing protocols.

Bypass the traditional waiting room experience with a virtual waiting room or "curbside check-in".

How: Appointment reminders, digital registration and check-in, and 2-way chat

The more the healthcare community has learned as COVID-19, the more mindful healthcare providers are about the shared spaces patients spend time in, either with other patients or with their own staff. The waiting room was quickly identified as a high-risk area as more COVID-19 agreed that the virus could travel through the air and infect those in close proximity. Leveraging patient messaging solutions together made it possible for patients to check-in for their appointments using a mobile device, allowing them to remain in their vehicles while they waited instead of in the waiting room. Having completed their registration forms digitally prior to the appointment, forms don't need to be completed and collected in person. When a provider is ready to see a patient, medical office staff can text a patient and let them know it's time to come inside. Learn more about how to power a virtual waiting room here.

Virtual Waiting Room & Check-in

Automated Reminder Message

Staff views completion of forms in Relatient Dashboard

Staff will receive email alert and status in eReg/Dashboard

Staff texts patient in Messenger Chat or calls mobile number to enter building

PRE-VISIT 1 2 3 4 5 6 VISIT 7

Automated eReg Message with pre-registration link days before with forms

Automated Message hour(s) before to click link upon arrival to check-in; wait in car; includes form and screener

Staff checks-in patient in PM System

Relatient Solutions needed (standard versions of each):

(( )) Appointment Reminders | Messenger Chat | eRegistration + Check-in

Empower patients to self-select appointment dates and times to keep the provider schedule full and meet patient expectations for self-service convenience.

How: Patient self-scheduling and automated waitlist

Patient self-scheduling or online scheduling is a software solution that hospitals, health systems, and medical offices use to allow patients to find their own appointments and request them without having to call the clinic office, play phone tag with staff, or navigate the phone tree. It also frees up medical office staff and keeps the phone lines open.
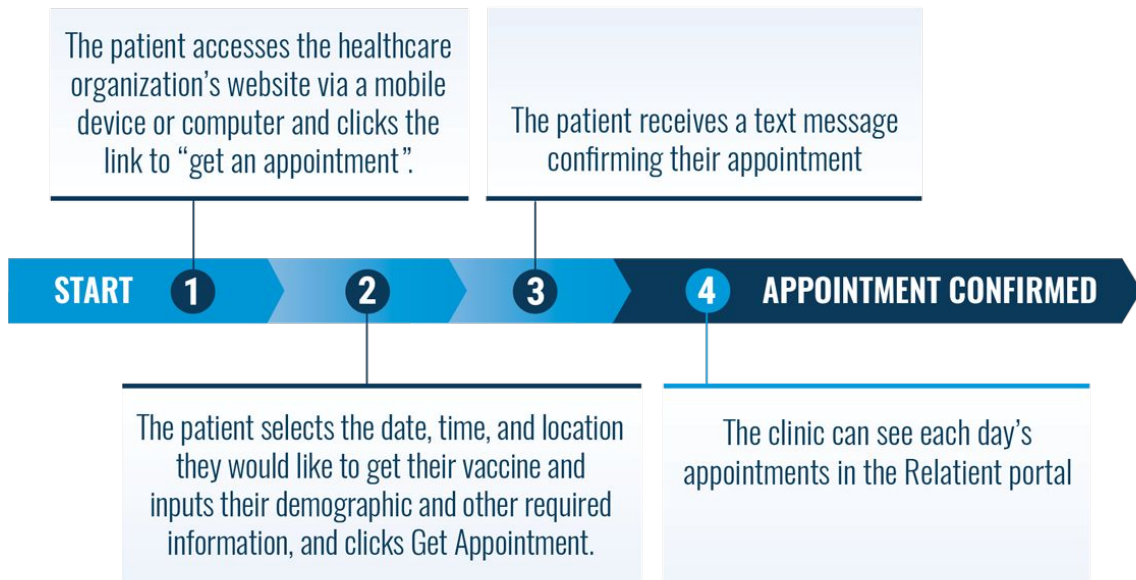
Medical practices are leveraging patient self-scheduling to help them organize and navigate patients appropriately through office visits using custom appointment types for visits like COVID-19 sick visits, testing, and vaccines. Patient self-scheduling also offers an opportunity to identify patients with COVID-19 symptoms prior to their arrival to appointments, allowing staff to guide patients through the appropriate protocols testing or isolation.

Medical offices are also specifying telehealth as it's own appointment type through patient self-scheduling, giving patients the opportunity to experience a streamlined, digital healthcare journey start to finish and helping medical practices drive patient volume to telehealth appointments when necessary. In the case that a practice has to close down in-person appointments for a period of time, telehealth volumes allows the practice to maintain a revenue stream while minimizing risk to patients and staff.

Quick Scheduling Solutions for COVID-19 Testing and Vaccines

"*You need an army of people scheduling vaccines*," one customer told us after tackling the first few weeks of scheduling vaccine appointments. When it comes to COVID-19 testing and vaccines, appointment volume makes it difficult for healthcare staff to manage these new appointment types and keep medical office operations running as normal. A self-service version of patient self-scheduling offers hospitals, health systems, and medical groups a strategy that takes minimal training to operate, can be configured and managed by healthcare personnel, and equips patients with the ability to find the appointment dates and times that work best for them. While a solution that's integrated to the PM system is preferable in most cases, an unintegrated version means a medical group or health system can get up and running in a matter of days vs. weeks. The quick-start nature of this strategy has been vital to organizations who need to respond quickly to demand or have little notice prior to having vaccines arrive onsite for distribution.

Virtual Waiting Room Workflow

The patient accesses the healthcare organization's website via a mobile device or computer and clicks the link to "get an appointment".

The patient receives a text message confirming their appointment

START **1**   **2**   **3**   **4** APPOINTMENT CONFIRMED

The patient selects the date, time, and location they would like to get their vaccine and inputs their demographic and other required information, and clicks Get Appointment.

The clinic can see each day's appointments in the Relatient portal

What's Next & Getting Help

Telehealth or otherwise, the patient journey is digital.

If you're starting to think about what's next for your practice, you're likely expecting a better balance going forward between telehealth and in-office appointments. A strong patient communication strategy will be important to getting your patients to your office, helping them access telehealth if needed, and guiding them through numerous touchpoints of the patient journey. One thing is for sure, your patients have learned how to interact in a digital environment and they'll expect the same level of ease and convenience from their healthcare providers.

Today it's coronavirus.

COVID-19 has shed light on healthcare's need for digital tools and the importance of a "here and now" timeline. Today, there's widespread confusion about coronavirus, but this isn't the first crisis, nor will it be the last. Relatient customers have been using our patient engagement platform for years to keep their patients and staff safe and informed during hurricanes, tornadoes, floods, blizzards, and more. Sometimes it's a major crisis, sometimes your provider is running behind schedule. Whatever the situation, we want you to have the confidence of knowing you're equipped with the tools to calmly and efficiently direct patients and distribute accurate, relevant information without tying up precious resources in manual outreach.

You should have a partner.

If you're a current Relatient customer with questions or looking for assistance to use any of the solutions mentioned above to inform and guide your patients, we want to help. You can contact support or start with our self-service guide.

Need a quick reference or something you can share internally? Download a copy of this infographic.

If you're having trouble getting the help you you, let's talk. We can show you how our solutions can equip medical office(s) to communicate with patients more effectively and why our customers made us the 2020 KLAS Category Leader in Patient Outreach. Whether its coronavirus, inclement weather, or general follow-up and prevention, we have the tools for effective patient communication. Schedule a call with us.

KLAS CATEGORY LEADER
PATIENT OUTREACH 2020

AWARDED #1 IN PATIENT OUTREACH

RELATIENT.

Patient Engagement Solutions

(866) 473-8160 | Relatient.net

INDUSTRY AWARDS

KLAS CATEGORY LEADER PATIENT OUTREACH 2020

500 Technology **Fast 500** 2019 NORTH AMERICA **Deloitte.** AWARDED IN 2018 & 2019

RED HERRING 100 WINNER N. AMERICA

Capterra ★★★★★ USER REVIEWS

CUSTOMER RATED **KLAS** REVIEWED

High Performer WINTER 2020

PROUD SUPPORTERS OF

hfma · HBMA · naham · MGMA · HiMSS