

# YOUR AUTOMATED PATIENT COMMUNICATION SOLUTION CHECKLIST

Patient communication solutions can deliver big results: improved productivity, targeted engagement, front office and back office alignment, reduced no-shows, increased revenue, and clear insight into your schedule.

Do you want to reap these same benefits for your organization? As you explore the market of patient communication solutions, here is a 3-step checklist to help you make an informed decision that's right for you.

## STEP 1 WHAT ARE YOU LOOKING FOR?

What is your organization trying to achieve with automated patient communication? Identify and document your goals.

**Enter your goals here:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Example Goals:**

- *We want to lower no-show rates*
- *We want a more reliable schedule for staffing*
- *We want to communicate our wellness and preventative care programs*
- *We want to generate more revenue for the practice*
- *We want to improve our patient satisfaction rate*

## STEP 2 AUTOMATED PATIENT COMMUNICATION CHECKLIST

Use this checklist to ensure your automated patient communication solution has the capabilities you need to meet your goals now and in the future.

### Deliverability/Confirmations

When it comes to getting your patients to confirm their appointments, a patient communication solution must have the following capabilities:

- Real Voice Actress:** Patients are less likely to listen to a voice call that sounds robotic or choppy. Having the same real voice on all of your messages enhances confirmation rates and comprehension of prep instructions.
- Rapid Retry of a Busy Signal:** If a reminder is sent to a busy signal, that is a great indication that there is someone on the line. Rapid retry will continue to try the line until a connection is made.
- Voicemail Detection:** The ability to play a different message when you reach a voicemail as opposed to a person allows you to customize that message with important call back information, and eliminates leaving truncated messages on your patients' voicemail.
- Back-to-Back Appointment Consolidation and Appointment Itinerary:** Nothing annoys patients more than getting multiple reminders one right after the other. Appointment consolidation and appointment itinerary combine reminders for back-to-back appointments and multiple household appointments in to one message.



**Drive More Patients  
to Your  
Organization**



To learn more, visit

855.669.7080

[patientprompt.com](http://patientprompt.com)

- ❑ **Suppress on Confirm:** Once a patient confirms an appointment, it is not always necessary to send another reminder. With suppress on confirm, you can choose to not send patients another reminder after initial confirmation.
- ❑ **Patient-friendly Messages:** Patient communications should always start with the patients' names. This increases the likelihood that they will listen to the message, and contributes to the provider-patient relationship.
- ❑ **Simple Appointment Confirmation:** Patients should be able to easily confirm their appointments with a simple click, push of a button, or reply to a text.
- ❑ **Multi-lingual Messaging:** If your patients speak languages other than English, your patient communication solutions should too. Choose a tool that allows you to send messages in the languages you and your patients need.
- ❑ **Escalating Protocols:** The method and timing of patient communication delivery (email, voice and text) should be customizable based on your organizational goals and patient preferences. Whether you're trying to reduce no-shows with an email reminder 5 days before the appointment, a voice reminder 2 days before and a text the day before, or if you just want to send a quick text to your patients to remind them to get their flu shot, you should be able to pick how and when those messages are delivered.
- ❑ **SMS Detection:** SMS text is becoming one of the most effective ways to communicate with patients. However, most organizations have not differentiated between home and cell numbers for patients. Your automated patient communication solution should have the capability to determine if a phone number is textable.
- ❑ **Reliable, Safe, and Up-to-Date Technology:** Technology is great when it works! Your automated patient communication solution should be state of the art and HIPAA compliant. Your solutions should have servers hosted in the United States and be Meaningful Use and SOCII certified. Your vendor should constantly be innovating, and should provide updates and enhancements free of charge.

## Customization and Important Information

The right patient communication solution allows for highly customizable messages that meet the unique needs of your organization and patients. Appointment reminders should not only remind patients of their appointments, but also the important information about that appointment. Find a solution that enables:

- ❑ **Prep Instructions:** You not only want your patients to show up for their appointments, but you also want them to show up prepared. Your automated patient communication solution should allow you to

include unique prep instructions to messages based on appointment type as well as location and provider preferences.

- ❑ **Custom Email Address:** Increase open rates and confirmations with email reminders and messages sent from your organization's email addresses.
- ❑ **Customization By Appointment Type:** Messages should be customized by appointment type to include the appointment's corresponding arrival and preparation instructions.
- ❑ **Customization By Location:** Messages should be able to include unique information from each location to best service each piece of your practice with the messages they need to make their goals and satisfy their patients.
- ❑ **Customization By Provider:** Customize your messages to meet the unique needs of your providers and their patients.
- ❑ **Maps and Directions:** It's one thing for a patient to confirm their appointment, but if they have trouble finding your building, they may no-show or show up late. Automated patient communications, especially appointment reminders, should be able to provide patients with maps and directions to your location(s).



To learn more, visit

855.669.7080

[patientprompt.com](http://patientprompt.com)

## Communication, not just reminders

Sometimes you need your automated patient communication solution to do more than just appointment reminders. Find a solution that enables:

- ❑ **Preventative Care and Population Health Messaging:** You should be able to use your patient communication solution for promotion of population health and preventative care programs, as well as communicating other important messages to your staff and patients.
- ❑ **Mass Patient Notifications:** The ability to contact large numbers of patients and staff members effectively and quickly in case of emergencies or last minute schedule changes is imperative to operational efficiency as well as keeping your staff and patients safe.
- ❑ **Message Broadcasting:** Easy self-service tools that allow you to login, build, and send messages to lists pulled directly from your EHR will empower your organization to launch your own mass notifications. You can also send email, voice, and text messages to easily promote your wellness and preventive care programs.

## Analytics

You are investing in automated patient communications to meet certain goals. Our solution will not only help you do that but also help you track and report on those goals with:

- ❑ **Daily Reports:** These will give you visibility into the reminders that were sent the day before. These reports can contain sensitive information and should always be sent through a secure email with a password-protected link.
- ❑ **Online Console:** Your patient communication solution should offer a place where you can login and see the details of all of your reminders and messages that have gone out. You should be able to audit the reminders (listen to the actual calls, read the emails and texts, etc) and manage patient opt-ins and -outs. Additionally, you should be able to run reports on the outcomes of your reminders. The console should have the ability to be controlled by permissions and user roles.

## Other

Healthcare is forever changing, and so are your needs from your vendors. Ensure your patient communication solution is:

- ❑ **Enterprise Ready:** The solution you select should be able to grow with your organization. Ensure that they are not only currently servicing organizations like yours, but that they also have experience with larger, more complex organizations. This ensures that the solution can handle changes that could happen to your business, such as joining a community connect group or a larger organization.
- ❑ **Technology Driven:** Technology companies continue to innovate and improve on their solutions. Ensure your patient communication solution vendor is committed to continuous improvement and has a product roadmap that relates to your long-term organizational goals.
- ❑ **Available for 24/7 support:** When you need assistance, you should be able to receive customer support at no extra cost, no matter the time of day.

## STEP 3

### COMPARE YOUR OPTIONS

Now that you know which features to seek out, take the time to evaluate your options. Consider which functionalities you truly want and need.

Jot down some specific tasks that you need your automated patient communication to be capable of:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Examples of specific tasks include

- ❑ **Multi-channel engagement:** The ability to send email, voice and text messages.
- ❑ **Customization:** The ability to customize your messages based on appointment type, location, and provide preferences as well as the ability to include detailed prep instructions.
- ❑ **Escalating protocols:** The ability to send messages when and how you patients want to send them.

[patientprompt.com](http://patientprompt.com)

855.669.7080

We're available to answer any questions you might have about what you should consider when selecting an automated patient communication solution for your organization. Please reach out to us at any time to discuss.



To learn more, visit

855.669.7080

[patientprompt.com](http://patientprompt.com)