



## ALL ABOUT SPEECH & LANGUAGE

### RTConnect: Procedure for Communication Preferences & Appointment Reminders

#### Communication Preferences

Communication Preferences, aka COMPRs, can be set up manually if necessary.

1. In Patient Demographics, if it is a child (which is 99.99% of our clientele), phone numbers and emails should not be included on the Patient Info screen, nor should the phone or text be checked beside the green tab labeled Communication Preferences:

The screenshot shows the 'Patient Info' form with the following fields and options:

- Mailing Address:** 1452 Bloomingdale Avenue, City: Valrico, State: FL, Zip: 33596
- Physical Address:** Same As Above, City: Valrico, State: FL, Zip: 33596, County: Hillsborough
- Home Phone:** [Blank], **Work Phone:** [Blank], **Primary Cell:** [Blank], **Secondary Cell:** [Blank]
- Birth Sex:** Male (selected), Female (radio button)
- Email Address:** [Blank], **Password:** [Blank]
- Patient Communication Preference:** [Blank]
- Driver's License #:** [Blank], **Effective Date:** 12-07-15
- Provider:** [Blank], **Financial Class:** [Blank], **Status:** SETUP, **Status as of:** 12-08-17
- Appointment Reminder:** Email (checkbox), Text Message (checkbox)
- Communication Preferences:** Green tab at the bottom.
- Best Time To Call:** Dropdown menu with a red arrow pointing to it.

2. COMPRs alternatively are to be added in the Parent/Guardian Employment Info Tab:

a. Select Authorized Representative, this will enable the Communication Preferences green link:

**BEFORE:**

The screenshot shows the 'Parent/Guardian Employment Info' form with the following fields and options:

- Contact Type:** Other
- First Name:** Holly, **Last Name:** Test
- Address:** 1452 Bloomingdale Avenue, City: Valrico, State: FL, Zip: 33596
- Home Phone:** [Blank], **Work Phone:** [Blank], **Primary Cell:** (813) 220-0971, **Secondary Cell:** [Blank]
- Parent Status:** Authorized Representative (checkbox selected)
- Preferred Delivery Method:** [Blank]
- Start Date:** 03-29-20, **End Date:** [Blank]
- Flags:** Emergency Contact (checkbox), Preferred Contact (checkbox), Lives in Household (checkbox), Guardian (checkbox), Caregiver (checkbox), Authorized Representative (checkbox), App Reminders - Email (checkbox), App Reminders - Text (checkbox), CC - Patient Statement (checkbox), CC - Visit Notes (checkbox), Visit Confirmation (checkbox), App Reminders - Phone (checkbox)



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#### AFTER:

Family Contact | Notes | Employer | Disclosures | Preset Setup

Communication Preferences

First Name: Holly MI Last Name: Test Maiden Last: [blank]

Address: 1452 Bloomingdale Avenue Copy from Patient

City: Valrico State: FL Zip: 33596

Home Phone: [blank] Preferred: [radio] OK To Call: [checkbox] Best Time To Call: [dropdown]

Work Phone: [blank] Preferred: [radio] OK To Call: [checkbox] Best Time To Call: [dropdown]

Primary Cell: (813) 220-0971 Preferred: [radio] OK To Call: [checkbox] Best Time To Call: [dropdown]

Secondary Cell: [blank] Preferred: [radio] OK To Call: [checkbox] Best Time To Call: [dropdown]

Fax: [blank]

E-mail Address: holly@aaaspeech.com Send Welcome Letter

Password: [masked]

Parent Status: [dropdown] (Other) [text]

Preferred Delivery Method: [dropdown]

DOB: [dropdown] SSID: [dropdown]

Start Date: 01-29-20 End Date: [dropdown] Marketing Referral Source: [checkbox]

Flags

☐ Emergency Contact ☐ Preferred Contact ☐ Lives in Household

☐ Guardian ☐ Conservator ☒ Authorized Representative

☐ Service Location ☐ Appt Reminder - Email ☐ Appt Reminder - Text

☐ CC - Patient Statement ☐ CC - Visit Notes ☐ Visit Confirmation

☐ Appt Reminder - Phone

3. Click on the COMPR green link:

Make sure that the primary contact name is accurate and that all boxes are selected for Appointment Reminder TEXT and EMAIL, and Billing EMAIL and TEXT:

Preference - Holly Test - Mother

General | History

Indicate the types of messages you agree to receive by checking the boxes below. If you select more than one method for a message type, you will receive the message by all of the methods selected.

Message Type	Method
Appointment R...	TEXT
Appointment R...	EMAIL
Billing	EMAIL
Billing	TEXT

Authorization: You certify that you are authorized: (a) to enroll the designated mobile phone number in the Reminders and Alerts Service (b) to incur any mobile message or data charges that may be incurred by participating in the SMS/MMS Alerts Service (c) to enroll the designated email address in the Reminders and Alert Service and (d) to enroll the designated phone number(s) in the Reminders and Alert Service.

Data and Messaging Rates May Apply: We do not charge a fee for this Service; however, depending on your plan, your mobile carrier may charge you for each message we send you or that you send us. Some messages may contain links to secure documents, accessing

Options

Phone/Voice Message Destination: [dropdown]

I have a pre-paid, subsidized, or non-smartphone: [checkbox] Primary Contact Person: Holly Test

Enrolled in paperless statements: [checkbox]

Contact agrees: [radio] Contact does not want to receive any communication: [radio]

Save Communication Preferences



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#### 4. Select the Save Communication Preferences button:

Preference - Holly Test - Mother

General History

Indicate the types of messages you agree to receive by checking the boxes below. If you select more than one method for a message type, you will receive the message by all of the methods selected.

Message Type	Method
Appointment R...	TEXT
Appointment R...	EMAIL
Billing	EMAIL
Billing	TEXT

Please read and accept below agreement

**Authorization:** You certify that you are authorized: (a) to enroll the designated mobile phone number in the Reminders and Alerts Service (b) to incur any mobile message or data charges that may be incurred by participating in the SMS/MMS Alerts Service (c) to enroll the designated email address in the Reminders and Alert Service and (d) to enroll the designated phone number(s) in the Reminders and Alert Service.

**Data and Messaging Rates May Apply:** We do not charge a fee for this Service; however, depending on your plan, your mobile carrier may charge you for each message we send you or that you send us. Some messages may contain links to secure documents, accessing

Options

Phone/Voice Message Destination

I have a pre-paid, subsidized, or non-smartphone ☐ Primary Contact Person Holly Test Mother (813) 220-0971 holly@aspeech.com

Enrolled in paperless statements ☐

Contact agrees ☐ Contact does not want to receive any communication ☐

Save Communication Preferences

This will update the parent/caregivers Flags as follows:

Flags

☐ Emergency Contact ☐ Preferred Contact ☐ Lives in Household

☐ Guardian ☐ Conservator ☒ Authorized Representative

☐ Service Location ☒ Appt Reminder - Email ☒ Appt Reminder - Text

☒ CC - Patient Statement ☐ CC - Visit Notes ☐ Visit Confirmation

☐ Appt Reminder - Phone

5. These setup options allow for our clinic to send both eStatements and Appointment reminders to our clients with the option to opt out. We will receive prompts when messaging does not work and can also view it in the History Tab under the COMPRs:

History

02-21-22 03:56p (hmarino) Billing EMAIL is set

02-21-22 03:56p (hmarino) Appointment Reminder EMAIL is set

02-21-22 03:56p (hmarino) Billing TEXT is set

02-21-22 03:56p (hmarino) Appointment Reminder TEXT is set

02-21-22 03:45p (hmarino) COMPR Added



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The prompt at check-in will prompt about any messaging errors, and also low attendance rate in last 6 months, with a threshold below 80% of arrival.

6. All clients will be prompted when a New Patient is set up in Raintree to select their COMPRs. It is important that we do not change these selections once selected by the family. They can always re-opt out, but do not want to cause them the inconvenience.

7. Kiosk: Please note that when the parent/caregiver checks in, if they choose to check-in as “This is me”, please ask them NOT to add emails or phone numbers as this will populate on the Patient Info screen of the Patient Demographics. They can add and update this information if they select to check in as the “Authorized Representative” or, better yet, ask our knowledgeable front desk receptionists to update the information.

### **Appointment Reminders**

According to Raintree: Unlike other types of messages, appointment reminders can be sent without patient consent. These messages remind patients that they have an appointment coming up. To improve the visitation rate, the reminders are by default sent exactly 24 hours in advance, so the patients would remember the context of receiving the message; for example, if the message is received while the parent is picking up children from school, the parent is reminded that tomorrow someone else needs to do that, or they need to pick up the child early for their scheduled therapy appointment.

We pay per appointment reminder TEXT, eStatement TEXT. This is important to know for the following reasons:

- Each auto text has a charge attached to it, so if a family opts out and has good attendance and a good handle on paying their balance, this is a win/win.
- If a family opts out and has payment issues and/or attendance issues, this provides us more leverage for making decisions on the longevity of the client.
- When we send manual text reminders for the appointment, be cognizant that this costs the company money.
- If the patient shows up for an appointment due to the text reminder, this is worth the cost to eliminate a last-minute cancel or no show!

We do not have a setup option to tag only certain families for notifications, i.e. Poor Attendance families; this is an all or nothing proposition at this time.

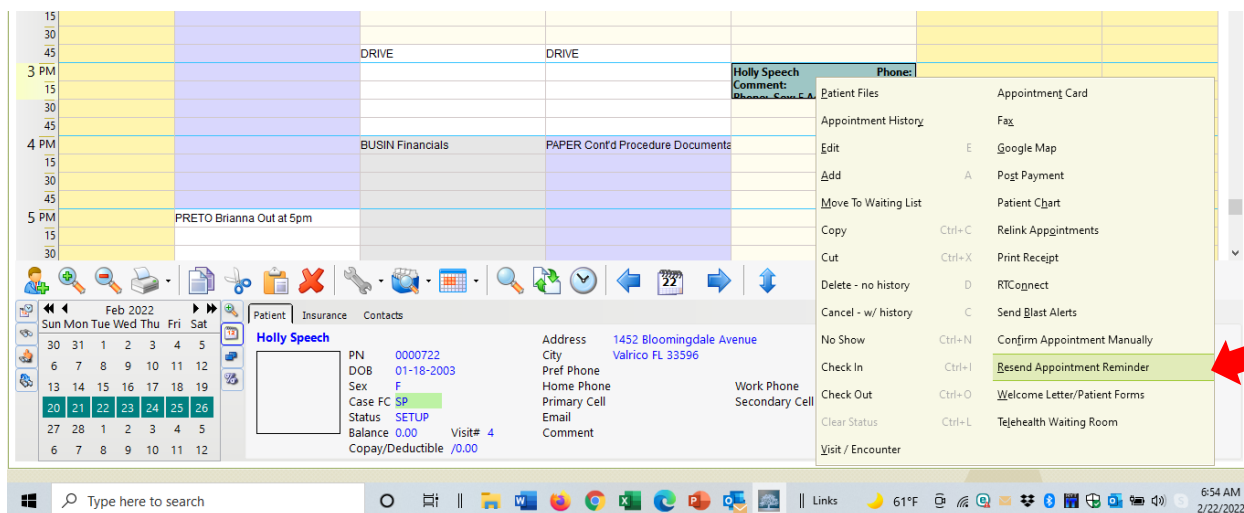
1. Appointment reminders are currently set up for our clinic as a 24-hour notification, per the default setup option. We will monitor this closely and determine if the auto notifications need to be reset. This requires no action and is set up effective 2/28/2022.



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2. Rescheduled appointments will be prompted. When the Prompt option is selected as the setup option, a popup will appear with 2 options, either send the reminder or don't send it. If 'Yes' is selected, then it will open up the NOTES screen to be able to edit the message going out to the patient.
3. We will manually send out appointment reminders. These manual notifications will be required under the following situations:
  - a. Initial Evaluations:
    1. Patient Scheduler will send out the reminder five business days before the Initial Evaluation is scheduled.
    2. Front Desk CHANGE. The system will auto send out the text reminder 24 hours before the appointment, so she will be required to **call** the Initial Evaluation two business days prior to the appointment and then follow up.
  - b. Appointment reminders when an appointment change falls within the typical 24-hour notification. Use your professional discretion, i.e. if you confirmed the reschedule at 3:00pm for 6:00pm the same day, chances are a text reminder is not necessary.



At this time we have opted out of the following RTConnect setup options:

1. eCheck-in
2. Option for clients to respond back to our reminders to cancel. They are prompted to contact us to cancel if they cannot make the appointment.
3. Option for clients to reschedule electronically.

The only appointment type currently not sent reminders is a Consult Appointment.



Sign and date with your name if you are required to know this policy. By signing you are attesting that you have received, read, and understand the policy, and will apply it as required.

(Date)

[illegible]