



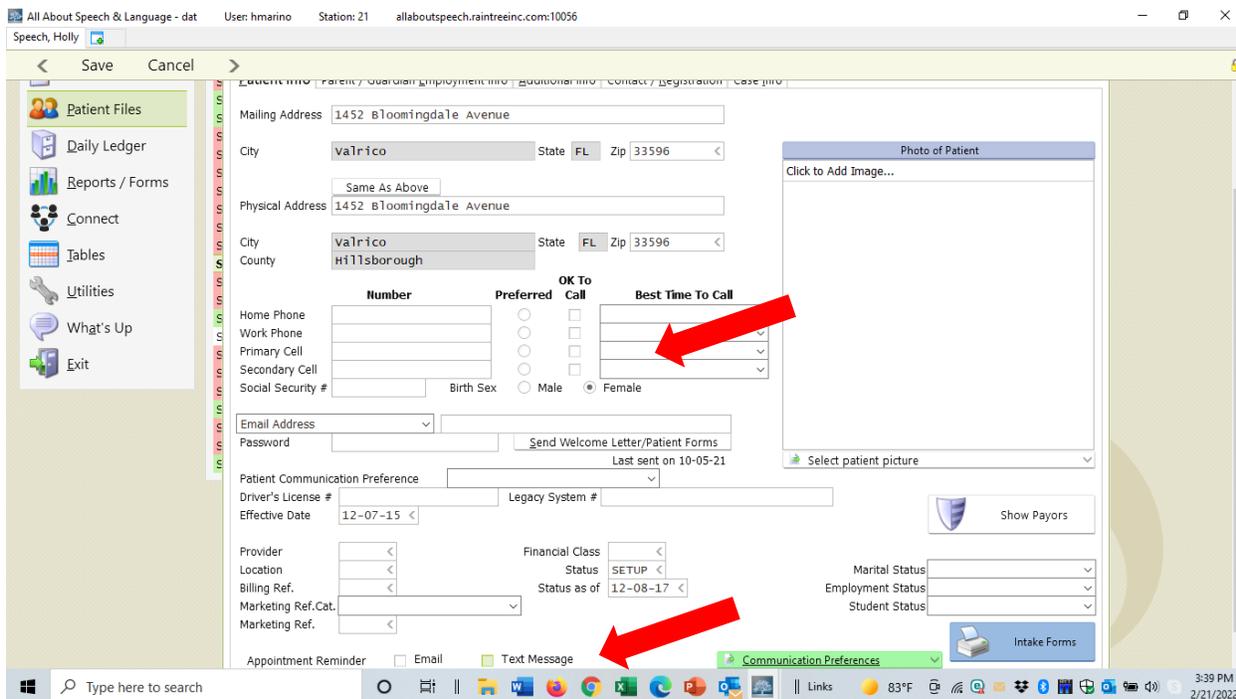
ALL ABOUT SPEECH & LANGUAGE

RTConnect: Procedure for Communication Preferences & Appointment Reminders

Communication Preferences

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

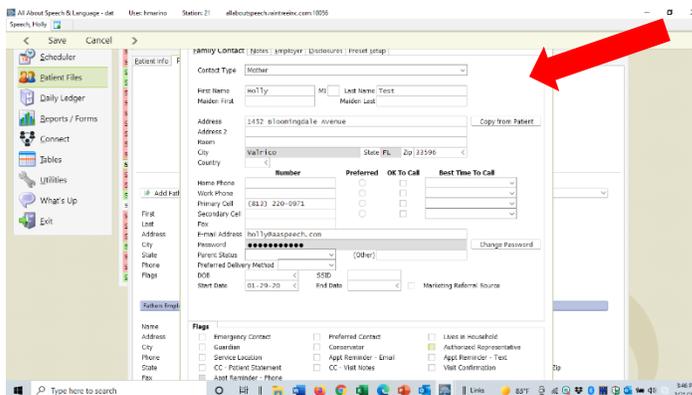
1. In Patient Demographics, if it is a child (which is 99.99% of our clientele), phone numbers and emails should not be included on the Patient Info screen, nor should the phone or text be checked beside the green tab labeled Communication Preferences:



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:





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AFTER:

The screenshot shows the 'Family Contact' form for 'Holly Test'. The 'Communication Preferences' link is highlighted in green. The 'Flags' section includes checkboxes for 'Emergency Contact', 'Guardian', 'Service Location', 'CC - Patient Statement', 'Appt Reminder - Phone', 'Preferred Contact', 'Conservator', 'Appt Reminder - Email', 'CC - Visit Notes', 'Lives in Household', 'Authorized Representative', 'Appt Reminder - Text', and 'Visit Confirmation'. The 'Authorized Representative' checkbox is checked.

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:

The screenshot shows the 'Preference - Holly Test - Mother' form. The 'Message Type' table has the following rows:

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

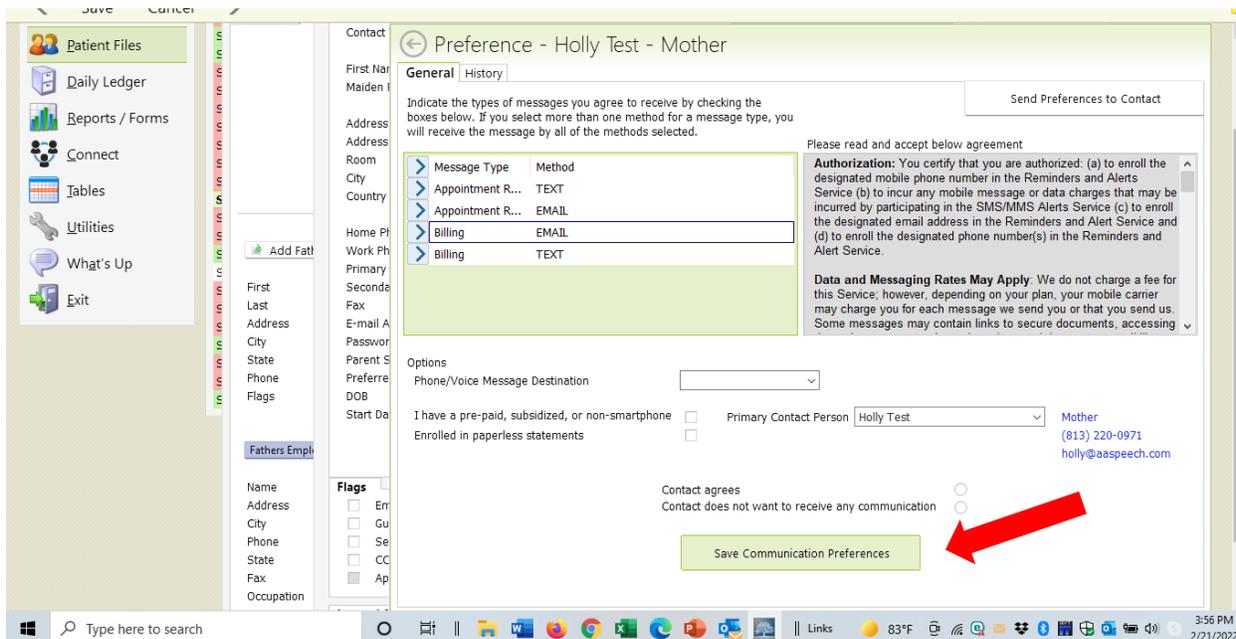
The 'Appointment R...' row is highlighted in green. The 'Primary Contact Person' dropdown menu is set to 'Holly Test'. The 'Send Preferences to Contact' button is visible.



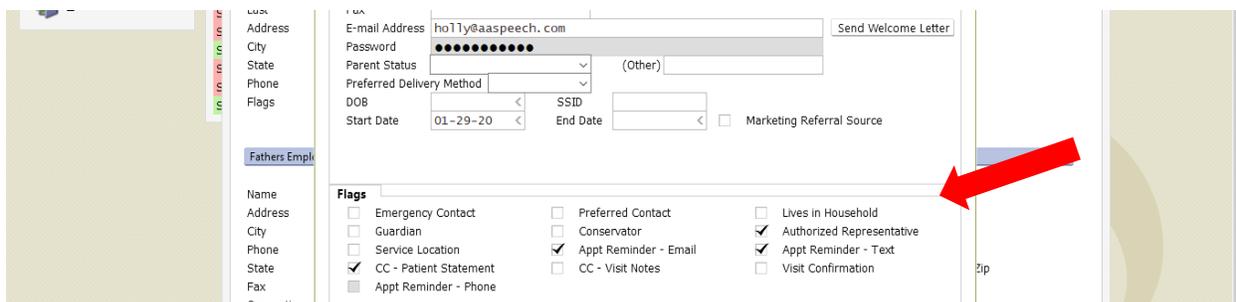
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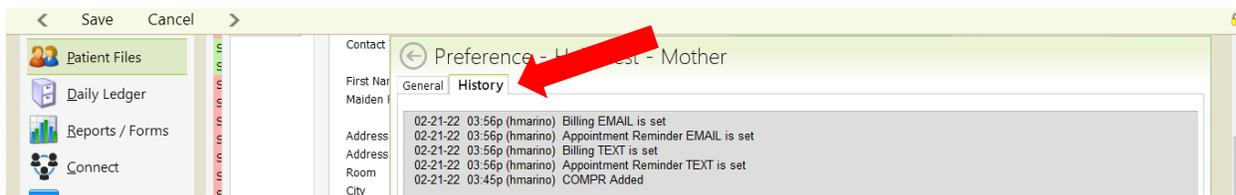
4. Select the Save Communication Preferences button:



This will update the parent/caregivers Flags as follows:



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:





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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.

The screenshot shows a scheduling software interface. At the top, there is a calendar for February 2022. Below the calendar, there is a patient information section for 'Holly Speech' with details such as PN 0000722, DOB 01-18-2003, Sex F, Case FC SP, Status SETUP, Balance 0.00, and Visit# 4. To the right of the patient information, there is a context menu with various options. A red arrow points to the 'Resend Appointment Reminder' option in the menu. The menu also includes options like 'Patient Files', 'Appointment History', 'Edit', 'Add', 'Move To Waiting List', 'Copy', 'Cut', 'Delete - no history', 'Cancel - w/ history', 'No Show', 'Check In', 'Check Out', 'Clear Status', and 'Visit / Encounter'.

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.

