Voice & Text Messaging Cheat Sheet

by hjchoi91 via cheatography.com/23954/cs/5393/

Workflow

1) Check eCW Global Alerts (check if patient has already declined)

2) Approach Patient (Refer to "When Consenting Patients")

3) Confirm Patient Phone #

4) Obtain Consent for either voice OR text messaging **(not both)**

5) Activate Patient on eCM

6) Scan Consent Form into Patient Chart

7) Deactivate Patient if Patient Opts-out (within 48 hours) and create a note in global alerts

When Consenting Patients (Talking Points):

We are now offering a new service where you can receive appointment reminders through text OR voice messages **(only one, not both)**

In the future, we will use this service to send health tips such as screenings, health maintenance and more!

If you are interested, please sign this consent form.

Depending on your phone service provider or plan, you may be charged for these messages.

Please be aware that family members/friends/strangers may be able to hear or view your messages.

Please do not respond to these messages; if you have any questions or would like to stop receiving these messages, call our clinic office.

You can cancel these messages at any time.

Please also let us know as soon as possible if you lose your cell phone so we know to stop sending these messages.

To make sure we have enrolled the correct phone number, could you please tell me your current phone number? (cell or home depending on text or voice messages)

Messages

All messages are recorded in patients' medical records. All staff are expected to use appropriate and professional language.

FAQs

Available Languages?

> *English and Spanish*

When will I receive the appointment reminders?

> *Appointment reminders will be sent out 1 day before your scheduled appointment with time, date and location.*

What kind of health tips will I get?

> *An example of a helpful tip (sent in the future) is letting you know that it's flu season and we invite you to come in for your flu shot. Other examples include getting information about the importance of getting a mammogram, cancer screening, diet, nutrition, etc.*

How often will I get voice/text messages?

> *In addition to appointment reminders, you will receive no more than 2-3 voice/text messages per month.*

Can I get voice/text messages for my children's appointments?

> *As of now, we can only sent out voice/text messages to adult patients, ages 18 and above. We apologize for any inconvenience.*

How do I cancel?

> *You can cancel **anytime** by calling our health clinic and letting our staff members know.*

Can I receive these messages from other clinics/health centers?

> *Please ask your other clinics/health centers if this service is available. Certain clinics cannot send these messages due to sensitive services provided (ie. mental health, substance abuse etc.)*

Scan Patient Consent

Scan and Save under: Patient Documents -> Consent Forms

Name file as: "Date Name-Clinic" (ie. 2015-10-30 eCM-ENT)

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