Log In

Username
Username

Password
Password

Remember Me

Log In  Forgot Username/Password?
Forgot Username/Password

Please provide the email associated with the account

Email

Send Email to Reset Password

A notification email will also be sent to your Administrator

I am not sure what email is associated with my account?
Email Administrator

Email will contain link to reset password and username associated with account

This will open up their email and fill out the email field with their administrators email

Email Administrator

Log In

Forgot Username/Password?
Users will reach this page through two ways:

- Clicking the reset password link in their email if they forgot their username or password

OR

- If they log into their account after 90 days of not changing their password. This would require that the user had actually typed in the correct username and password to try and log in.

**Reset Password**

Please Provide a New Password Below

**Username**

Username

**Password**

Password

**Re-Enter Password**

Password

[Reset Password and Log In]

- Password must be 6 - 14 characters
- Must contain at least **one uppercase letter and one number**

When user hovers over this box appears next to i
<table>
<thead>
<tr>
<th>Teen Clinic</th>
<th>Main Clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td>Current</td>
</tr>
<tr>
<td>Archive</td>
<td>Archive</td>
</tr>
</tbody>
</table>

Send Group Message

Search
New User Link only appears for the admin account

Clicking Support or feedback opens up an email to help@ellipsishealth.com

When expanding or collapsing this, remain on the current screen (I realize the current click throw is confusing, but I was unable to make it do this thru clicking)
Account Settings

Select a field to edit it

Personal Information

First Name: CJ
Last Name: Wang
Phone: (858) 123-1234
Email: cwang@gmail.com

Account Information

User Name: CJ
Role: Admin
Password: ********
Password Confirmation: ********

Save  Cancel
Edit User Link (can only be accessed by Admin)

### Main Clinic
- Current
- Archive

### Healthcare Access Texting Tool

#### Send Group Message

Search

CJ Wang
Admin

#### Select User to Edit
Tina Garcia

### Edit User

Select a field to edit it

<table>
<thead>
<tr>
<th>Personal Information</th>
<th>Account Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name: Tina</td>
<td>User Name: CJ</td>
</tr>
<tr>
<td>Last Name: Garcia</td>
<td>Role: Care Manager</td>
</tr>
<tr>
<td>Phone: (858) 123-1234</td>
<td>Email: <a href="mailto:tgarcia@gmail.com">tgarcia@gmail.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Password: *******

Password Confirmation: *******

[Save] [Cancel]
Add New User

Select a field to edit it

Personal Information
- First Name:
- Last Name:
- Phone: (XXX) XXX-XXXX
- Email:

Account Information
- User Name:
- Role: Select One
- Password
- Password Confirmation:

Create New User  |  Cancel

Roles: Admin, AHS Staff, Physician, Other
Group Message

Send by Patient Characteristics

Clinic: Select One

Insurance Status: Select One

Insurance Appt Request: Select One

Teen Clinic Appt Request: Select One

Age Range: 0 to 100

Send to Specific Patients

To:

Message Patients

Send

When exiting, returns to whatever screen they were on.

Drop Down Options (multiple options can be selected):
- Clinic:
  - Teen Clinic
  - Main Clinic

- Insurance Status
  - Family PACT Expiring
  - Medi-Cal Expiring
  - Unknown Insurance Status
  - Valid Insurance

Insurance Appt Request:
- Yes
- No
- No Response
- Invalid Response

Teen Clinic Appt Request:
- Yes
- No
- No Response
- Invalid Response
Group Message - Auto Complete

Main Clinic

<table>
<thead>
<tr>
<th>Current</th>
<th>Archive</th>
</tr>
</thead>
</table>

Send Group Message

Search

Clinic: Teen Clinic

Insurance Status: Family PACT Expiring, Medi-Cal Expiring

Insurance Appt Request: Yes

Teen Clinic Appt Request: Select One

Age Range: [0] to [100]

Send to Specific Patients

To: Jess

- Jessica Allen
- Jessica Booth
- Jessica Caren
- Jessica Smith

Send

If User types patients into the to section they can type their name or MRN and it will auto complete. However, the patients who show up in auto complete must follow the criteria from patient characteristics if criteria has been set.
### Family PACT Expiring

- **Jessica Allen**
- **Mike Booth**
- **Sean Caren**
- **Delia Foster**
- **Joel James**
- **Jake Gyllenhall**
- **Halle Barry**
- **Joe Longo**

### Medi-Cal Expiring

- **Jessica Allen**
- **Mike Booth**
- **Sean Caren**
- **Delia Foster**
- **Joel James**
- **Jake Gyllenhall**
- **Halle Barry**
- **Joe Longo**

### Unknown Insurance Status

<table>
<thead>
<tr>
<th>Patient</th>
<th>Contact Attempts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jessica Allen</td>
<td>1st Attempt</td>
</tr>
<tr>
<td>Mike Booth</td>
<td>1st Attempt</td>
</tr>
<tr>
<td>Sean Caren</td>
<td>2nd Attempt</td>
</tr>
<tr>
<td>Delia Foster</td>
<td>1st Attempt</td>
</tr>
<tr>
<td>Joel James</td>
<td>1st Attempt</td>
</tr>
<tr>
<td>Jake Gyllenhall</td>
<td>1st Attempt</td>
</tr>
<tr>
<td>Halle Barry</td>
<td></td>
</tr>
<tr>
<td>Joe Longo</td>
<td></td>
</tr>
</tbody>
</table>

Grey box will pop up if user clicks "Contacted no response" in the pop-up

**Automated Text Message Flow**

- Patient has been contacted by phone with no response

- Depending on which group is expanded, links to that groups automated message flow
Family PACT Expiring

- Jessica Allen
- Jessica Booth
- Jessica Caren

Medi-Cal Expiring

- Mike Booth
- Sean Caren
- Delia Foster
- Joel James
- Jake Gyllenhall
- Halle Barry
- Joe Longo

Unknown Insurance Status

- Patient has been contacted by phone with no response

Automated Text Message Flow
## Matches

### 17 Patients

### Match Search Criteria

<table>
<thead>
<tr>
<th>Patient</th>
<th>MRN</th>
<th>Clinic</th>
<th>Insurance Status</th>
<th>Response Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jessica Allen</td>
<td>0000000000</td>
<td>Teen</td>
<td>Family PACT Expiring</td>
<td>Current</td>
</tr>
<tr>
<td>Jessica Booth</td>
<td>0000000000</td>
<td>Teen</td>
<td>Family PACT Expiring</td>
<td>Current</td>
</tr>
<tr>
<td>Jessica Caren</td>
<td>0000000000</td>
<td>Main</td>
<td>Medi-Cal Expiring</td>
<td>Current</td>
</tr>
<tr>
<td>Jessica Foster</td>
<td>0000000000</td>
<td>Main</td>
<td>Medi-Cal Expiring</td>
<td>Current</td>
</tr>
<tr>
<td>Jessica James</td>
<td>0000000000</td>
<td>Teen</td>
<td>Medi-Cal Expiring</td>
<td>Current</td>
</tr>
<tr>
<td>Jessica Gyllenhall</td>
<td>0000000000</td>
<td>Teen</td>
<td>Unknown Insurance Status</td>
<td>Current</td>
</tr>
<tr>
<td>Jessica Barry</td>
<td>0000000000</td>
<td>Teen</td>
<td>Unknown Insurance Status</td>
<td>Archive</td>
</tr>
<tr>
<td>Jessica Longo</td>
<td>0000000000</td>
<td>Teen</td>
<td>Unknown Insurance Status</td>
<td>Current</td>
</tr>
</tbody>
</table>

Patient has been contacted by phone with no response

### Automated Text Message Flow
### Family PACT Expiring

<table>
<thead>
<tr>
<th>Patient Name:</th>
<th>Steve Smith</th>
<th>Patient ID:</th>
<th>OVMC-9999999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender:</td>
<td>Male</td>
<td>Birth Date:</td>
<td>10/10/1998</td>
</tr>
<tr>
<td>Phone Number:</td>
<td>(123) 423-1234</td>
<td>Phone Contact Status:</td>
<td>Select One</td>
</tr>
</tbody>
</table>

**Patient Contact Status:** Text and Phone

**Insurance Appt Request:** Yes (02.10.14 4:48 PM)  
**Teen Clinic Appt Request:** No (02/14/14 4:48 PM)

### Patient Messages

**Message:** Patient  
**Time:** 04/08/14 11:25 PM  
**Sent to:** Steve  
**Content:** Second try at contacting patient, no response. Second try at contacting patient, no response. Second try at contacting patient, no response.

**Time:** 04/01/14 11:25 PM  
**Sent to:** Me  
**Content:** Contacted patient once, still has not responded.

**Time:** 04/10/14 11:25 PM  
**Sent to:** Steve  
**Content:** Second try at contacting patient, no response. Second try at contacting patient, no response. Second try at contacting patient, no response.

**Time:** 04/10/14 11:25 PM  
**Sent to:** Me  
**Content:** Second try at contacting patient, no response. Second try at contacting patient, no response. Second try at contacting patient, no response.

**Time:** 04/10/14 11:25 PM  
**Sent to:** Me  
**Content:** 3 hours

**Time:** 04/09/14 11:25 PM  
**Sent to:** Steve  
**Content:** Second try at contacting patient, no response. Second try at contacting patient, no response. Second try at contacting patient, no response.

### Drop down Options for Contact Status:
- Patient Responded
- No Response: Attempt 1
- No Response: Attempt 2
- No Response: Attempt 3 (Archive)
- Archive

### Possible responses for Status/Response:
- Yes (02.14.14 4:48 PM)
- No (02.14.14 4:48 PM)
- No Response
- Invalid Response 1 - “Yes I did”
- Invalid Response 1 - “Yes I did”, Invalid Response 2 - "I did book one"

### Notes

When message is edited, have it pop into the notes box and submit.

Submit box should result in message appear below (or if editing, updating below).
### Archived Patients

<table>
<thead>
<tr>
<th>Patient</th>
<th>MRN</th>
<th>Insurance Status</th>
<th>Text Response</th>
<th>Contact Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Alford</td>
<td>000000000000</td>
<td>Family PACT Expiring</td>
<td>No Response</td>
<td>3 Contact Attempts</td>
</tr>
<tr>
<td>Mike Buchanan</td>
<td>000000000000</td>
<td>Family PACT Expiring</td>
<td>Requests Appt</td>
<td>Contacted by Phone</td>
</tr>
<tr>
<td>Laura Desdin</td>
<td>000000000000</td>
<td>Medi-Cal Expiring</td>
<td>Did Not Request Appt</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Jean Frank</td>
<td>000000000000</td>
<td>Medi-Cal Expiring</td>
<td>Did Not Request Appt</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Thomas Gale</td>
<td>000000000000</td>
<td>Medi-Cal Expiring</td>
<td>No Response</td>
<td>3 Contact Attempts</td>
</tr>
<tr>
<td>Fred Kirk</td>
<td>000000000000</td>
<td>Unknown Insurance Status</td>
<td>Requests Appt</td>
<td>Contacted by Phone</td>
</tr>
<tr>
<td>James May</td>
<td>000000000000</td>
<td>Valid Insurance</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Thomas Hammond</td>
<td>000000000000</td>
<td>Valid Insurance</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>James Melford</td>
<td>000000000000</td>
<td>Family Pact Expiring</td>
<td>No Response</td>
<td>3 Contact Attempts</td>
</tr>
<tr>
<td>Mike Norris</td>
<td>000000000000</td>
<td>Family Pact Expiring</td>
<td>Requests Appt</td>
<td>Contacted by Phone</td>
</tr>
<tr>
<td>Laura Tungston</td>
<td>000000000000</td>
<td>Medi-Cal Expiring</td>
<td>Did Not Request Appt</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Jean Vera</td>
<td>000000000000</td>
<td>Medi-Cal Expiring</td>
<td>Did Not Request Appt</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Thomas Watson</td>
<td>000000000000</td>
<td>Medi-Cal Expiring</td>
<td>No Response</td>
<td>3 Contact Attempts</td>
</tr>
<tr>
<td>Fred Watson</td>
<td>000000000000</td>
<td>Unknown Insurance Status</td>
<td>Requests Appt</td>
<td>Contacted by Phone</td>
</tr>
<tr>
<td>James Waters</td>
<td>000000000000</td>
<td>Valid Insurance</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Thomas Winters</td>
<td>000000000000</td>
<td>Valid Insurance</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
</tbody>
</table>
# Archived Patients

<table>
<thead>
<tr>
<th>Patient</th>
<th>MRN</th>
<th>Insurance Status</th>
<th>Text Response</th>
<th>Contact Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Alford</td>
<td>0000000000</td>
<td>Wednesday 11/01/2022</td>
<td>No Response</td>
<td>3 Contact Attempts</td>
</tr>
<tr>
<td>Mike Buchanan</td>
<td>0000000000</td>
<td>Monday 11/02/2022</td>
<td>Requests Appt</td>
<td>Contacted by Phone</td>
</tr>
<tr>
<td>Laura Desdin</td>
<td>0000000000</td>
<td>Monday 11/02/2022</td>
<td>Did Not Request Appt</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Jean Frank</td>
<td>0000000000</td>
<td>Monday 11/02/2022</td>
<td>Did Not Request Appt</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Thomas Gale</td>
<td>0000000000</td>
<td>Monday 11/02/2022</td>
<td>No Response</td>
<td>3 Contact Attempts</td>
</tr>
<tr>
<td>Fred Kirk</td>
<td>0000000000</td>
<td>Saturday 11/03/2022</td>
<td>Requests Appt</td>
<td>Contacted by Phone</td>
</tr>
<tr>
<td>James May</td>
<td>0000000000</td>
<td>Wednesday 11/01/2022</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Thomas Hammond</td>
<td>0000000000</td>
<td>Family Pact Expiring</td>
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<td>Contacted by Phone</td>
</tr>
<tr>
<td>James Melford</td>
<td>0000000000</td>
<td>Wednesday 11/01/2022</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Mike Norris</td>
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<td>Monday 11/02/2022</td>
<td>Did Not Request Appt</td>
<td>Archived Directly</td>
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<tr>
<td>Laura Tungston</td>
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<td>0000000000</td>
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<td>0000000000</td>
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<td>James Waters</td>
<td>0000000000</td>
<td>Monday 11/02/2022</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
<tr>
<td>Thomas Winters</td>
<td>0000000000</td>
<td>Monday 11/02/2022</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
</tbody>
</table>
## Archived Patients

<table>
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<tr>
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<th>Contact Status</th>
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<td>Valid Insurance</td>
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<tr>
<td>Thomas Winters</td>
<td>0000000000</td>
<td>Valid Insurance</td>
<td>Has Insurance</td>
<td>Archived Directly</td>
</tr>
</tbody>
</table>
### Archived Patients

**Patient Name:** Steve Smith

<table>
<thead>
<tr>
<th>MRN</th>
<th>0000000000</th>
</tr>
</thead>
</table>

**Gender:** Male  
**Birth Date:** 10/10/1998

**Phone Number:** (123) 423-1234  
**Phone Contact Status:** Contacted - 2 Attempts

**Insurance Appt Request:** Yes  
**Teen Clinic Appt Request:** No

**Patient Contact Status:** Text and Phone

**Patient Messages**

- **Steve**
  - Second try at contacting patient, no response. Second try at contacting patient, no response.
  - Second try at contacting patient, no response.
  - 3 hours

- **Me**
  - Second try at contacting patient, no response. Second try at contacting patient, no response.
  - Second try at contacting patient, no response.
  - 3 hours

- **Steve**
  - Second try at contacting patient, no response. Second try at contacting patient, no response.
  - Second try at contacting patient, no response.
  - 3 hours

**Notes**

- **04/8/14 11:25 PM**  
  - Second try at contacting patient, no response.

- **04/14 11:25 PM**  
  - Contacted patient once, still has not responded.

**When message is edited, have it pop into the notes box and submit.**

**Submit box should result in message appear below (or if editing, updating below).**
Family PACT Expiring

**Family PACT Messaging:** Patient list uploaded from Excel spreadsheet

System automatically sends text message to selected patient or groups of patients

Hi, this is Asian Health Services Youth Program. Your Family PACT is expiring, please come in to renew. Text “1” and we will call you to set up an appointment.

No Response

- Patient added to no response list

Responded “1”

- Patient added to call for appointment list

Responses to text messages are stored in Ellipsis Health texting platform and patients are prioritized for review and contact by Youth Program Coordinator

Youth Program Coordinator contacts patients in following priority:
1. Patient responds that wants an appointment
2. Patient responds in a free text
3. Patient does not respond to text messages

Youth Program Coordinator utilizes the Ellipsis Health platform to track communications with patients and send additional text messages as needed.
- Youth Program Coordinator can note whether a patient has been contacted and whether the communication is closed or still open
- Ability to archive patient responses
- Youth Program Coordinator can note whether a patient requests no text messages
**Texting Flow Diagram**

**Medi-Cal Messaging:** Patient list uploaded from Excel spreadsheet

System automatically sends text message to selected patient or groups of patients

Hi, this is Asian Health Services Youth Program. Your Medi-Cal is expiring, please come in to renew. Text "1" and we will call you to set up an appointment.

No Response:
- Patient added to no response list

Responded "1":
- Patient added to call for appointment list

Responses to text messages are stored in Ellipsis Health texting platform and patients are prioritized for review and contact by Youth Program Coordinator

Youth Program Coordinator contacts patients in following priority:
1. Patient responds that wants an appointment
2. Patient responds in a free text
3. Patient does not respond to text messages

Youth Program Coordinator utilizes the Ellipsis Health platform to track communications with patients and send additional text messages as needed:
- Youth Program Coordinator can note whether a patient has been contacted and whether the communication is closed or still open
- Ability to archive patient responses
- Youth Program Coordinator can note whether a patient requests no text messages

Note: Algorithm to check time of day and only send text between 8am to 8pm
**Asian Health Services** can help you enroll in health insurance. Text “1” and we will call you to set up an appointment. If you already have health insurance, text “2”.

**Texting Flow Diagram**

**Unknown Insurance Status Messaging**: Patient list uploaded from Excel spreadsheet

- System automatically sends text message to selected patient or groups of patients
- Asian Health Services can help you enroll in health insurance. Text “1” and we will call you to set up an appointment. If you already have health insurance, text “2”.

**Responses to text messages are stored in Ellipsis Health texting platform and patients are prioritized for review and contact by Youth Program Coordinator**

**Youth Program Coordinator contacts patients in following priority:**
1. Patient responds that wants an appointment
2. Patient responds in a free text
3. Patient does not respond to text messages
4. Patient responds that he/she has health insurance

**Youth Program Coordinator utilizes the Ellipsis Health platform to track communications with patients and send additional text messages as needed.**
- Youth Program Coordinator can note whether a patient has been contacted and whether the communication is closed or still open
- Ability to archive patient responses
- Youth Program Coordinator can note whether a patient requests no text messages

Note: Algorithm to check time of day. What time of day do you want text sent?

Will you be following up with those that said they now have health insurance?
**Teen Clinic Messaging:** Patient list uploaded from Excel spreadsheet

System automatically sends text message to patient or groups of patients

Asian Health Services offers a Teen Clinic every Wednesday from 5-7pm. Text “1” and we will call you to set up an appointment.

- **No Response**
- Patient added to no response list

- **Responded “1”**
- Patient added to call for appointment list

Responses to text messages are stored in Ellipsis Health texting platform and patients are prioritized for review and contact by Youth Program Coordinator

Youth Program Coordinator contacts patients in following priority:
1. Patient responds that wants an appointment
2. Patient responds in a free text
3. Patient does not respond to text messages

Youth Program Coordinator utilizes the Ellipsis Health platform to track communications with patients and send additional text messages as needed.
- Youth Program Coordinator can note whether a patient has been contacted and whether the communication is closed or still open
- Ability to archive patient responses
- Youth Program Coordinator can note whether a patient requests no text messages