Epic Library

CareMessage

CareMessage

CareMessage, Datica, and OCHIN have partnered to offer members CareMessage services integrated with OCHIN Epic Cadence module. CareMessage is a vendor designed to help communicate with your patients via phone call or text for appointment reminders and more. Datica provides HL7 Scheduling Information Unsolicited (SIU) messages and secure communication infrastructure for CareMessage and OCHIN Epic to work cohesively together. Patient information is sent to CareMessage only on patients with scheduled appointments. CareMessage will receive information on a patient once an appointment is scheduled. OCHIN Epic Cadence, appointment scheduling, will update every 30 minutes with patient responses for patient appointment scheduling, patient confirmation and patient cancellation.

> (!) If patients have not scheduled appointments with your Service Area (SA) their information will not be in your SA's profile in CareMessage.

Using CareMessage Service Areas (SA)'s will have the ability to:

· Customize patient appointment reminder templates

· Decide the frequency of message communication to patients

· View how many patients are sharing the same number

· Utilize analytics to customize messages to target populations based off patient responses to messages

· Download data to easily see how patients are interacting with messages

> CareMessage is an add-on service and requires a Statement of Work (SOW). Contact your OCHIN Account Manager or ask your Site Specialist (SS) to submit a JIRA for more information.

Setup CareMessage Account

To access the full benefits of CareMessage functionality SAs are required to have CareMessage accounts. CareMessage accounts are available in two security settings: Staff Supervisors and Staff Members. Staff Supervisors have the ability to create Staff Member accounts and edit staff member security. Staff Members with specific security can view patients appointment reminders sent out to patients. Your SS or CareMessage account manager can identify staff with Staff Supervisor security.

> OCHIN best practice is for every user with full access appointment security have a CareMessage account with appointment security.

1. Log into CareMessage

> CareMessage website https://app.caremessage.org/#/login is optimized to work in Google Chrome or Internet Explorer version 7 and above.

2. Select **Settings.** The Manage Staff window opens.

3. Click **Create Staff.** The Create Staff window opens.

4. Enter **First name, Last name, Email.**

> The Email for each new user must be unique.

5. In the **Permissions** section select Access by Feature security:

    a. For Patients select **View only** or **Full access.**

    b. For Appointment select **View only** or **Full access.**

> **(!)** Staff Members must be given a minimum of View only access to Patients for the other security options to be selected for Appointments, Messenger, Outreach and/or Programs.

6. Select the **Yes or No** radial button to answer question, Should this user access Protected Health Information (PHI).

7. Complete the **Preferences** section.

8. Select **Create and Add New** or **Create**.

> Use **Create and Add New** when more than one new user needs to be created.

9. The new user will appear in the Staff List window.

Deactivate CareMessage Account

There may be times when a Staff Member's account in CareMessage needs to be deactivated. Staff Supervisors have the security to deactivate Staff Member accounts. Staff Supervisors do not have the security to deactivate other Staff Supervisors accounts. To deactivate a Staff Supervisor account contact your CareMessage Account Manager.
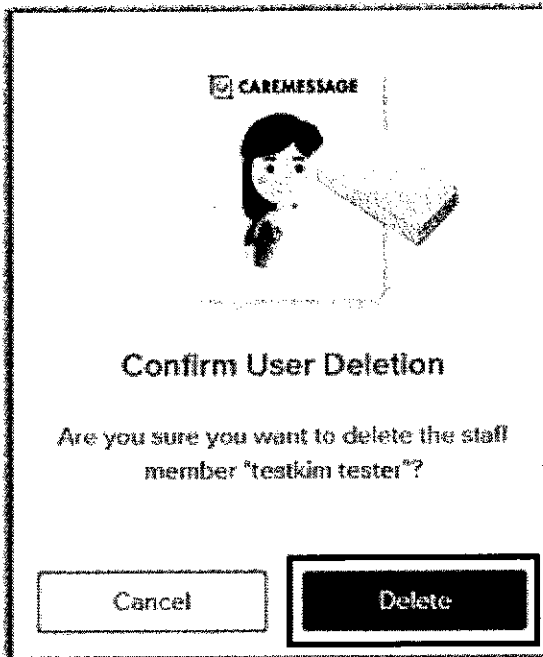
> 🔓 Staff Supervisor deactivation is restricted by user security settings. For more information, email **support@caremessage.org**.

1. Log into CareMessage

2. Select **Settings.** The Manage Staff window opens. .

3. In the Staff List window, find the staff member name and select **Delete.** The Confirm User Deletion window opens.
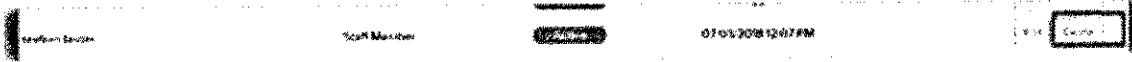
4. Select **Delete.**

Create an Appointment Template in CareMessage

In CareMessage you have the ability to create different template types for your appointment reminders. For example, you may create template types based on location, visit type, etc.

If a new template is created it must be mapped to the appointment type it will be associated with in Epic.

> ⊘ A maximum of ten appointment templates can be created. For over ten appointment templates submit a JIRA or contact your OCHIN Account Manager.

> ⓘ Each template created must be mapped to an appointment type. Contact your CareMessge Account Manager or your OCHIN Account Manager for more assistance.

1. Log into CareMessage
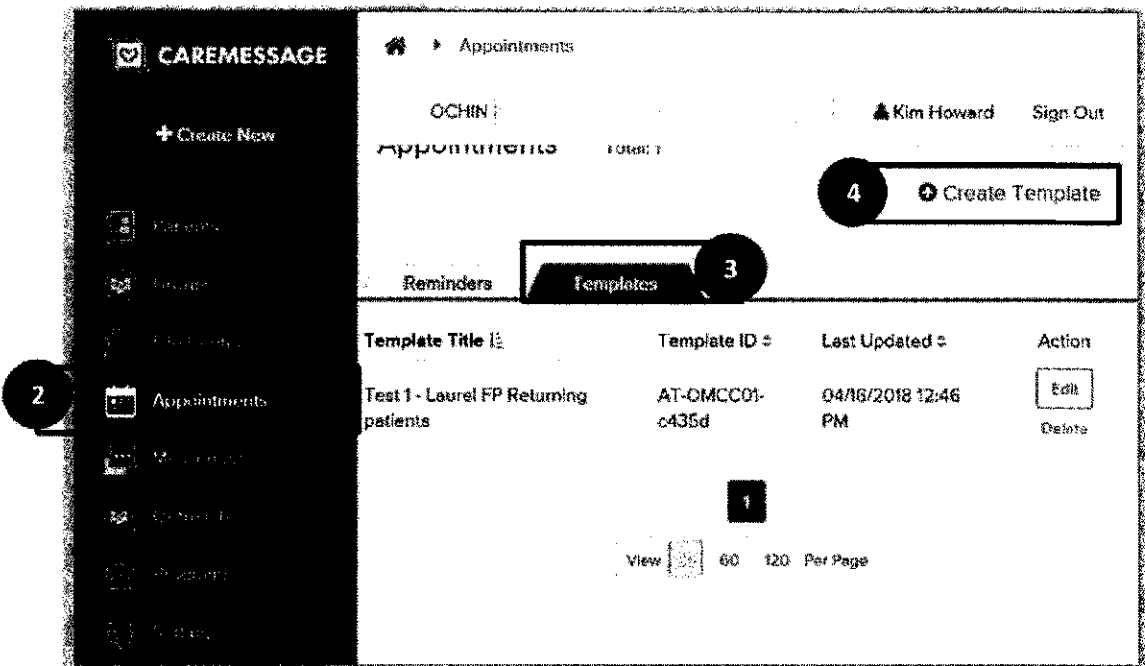
2. Select **Appointments** from sidebar menu.

3. Select **Templates.**

4. Click **Create Template.**

5. Enter a template name in the **Template Title** field.

6. Enter appointment **Duration** minutes from Epic schedule.

7. In Reminder messages section, select up to three reminders:

    a. From dropdown list select **Reminders type**:

        i.**RSVP reminder**: The message, "Text YES to confirm, NO to decline, or STOP" will be added to mobile phone texts. The message, "If you are able to make your appointment please press 1. If you do not plan to attend please press 3. Press 9 to repeat this message or press 0 to stop receiving messages" will be used for voice reminders.

        ii.**No Response reminder**: Will not include text or voice communication requiring a response from the patient for the appointment reminder.

CareMessage has 6 tags which you can use to personalize appointment reminders. A tag will automatically pull specific information about the appointment. To add a tag to an appointment reminder:

1. Type "@" in the message box for English and Spanish messages.

2. Select the type of tag you would like to include in the message. The available tags are:

· @Patientfirstname

· @Weekday
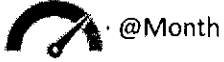
· @Month

· @Date

· @Time

· @Location

Examples:
Text in template: Your appointment is on @weekday @month @date at @time at @location

Text message to patient: Your appointment is on MON JAN 21 at 1:30 PM at 320 Pine St.

Reminder Messages

Schedule up to three messages reminding patients of an upcoming appointment. Type "@" to add tags and help customize your message.

Reminder 1	Off ▼	
	Off	
Reminder 2	No Response Reminder	
	RSVP Reminder	
Reminder 3	Off ▼	

If sending Appointment Reminders for appointments scheduled 15 days before appointment select No Response Reminder. A response from the patient will not be sent back to Epic if appointment is scheduled more than 15 days before appointment reminder is sent.

b. Create a customized messages to send to patients.

Text messages have a maximum character limit of 160 characters. CareMessage will not allow messages longer than 160 characters to be sent.

c. Select **View Message Preview** to see a preview of template created.

d. Select when appointment reminder **Will be sent**. If Immediately radial button is selected once appointment is scheduled the appointment reminder will be sent. If days before radial button is selected the number of days entered and time will determine how days before at specified time

the appointment patient will receive appointment reminder.

Will be sent:

⦿ Immediately

○   day(s) before at

HH:MM XM

e. To add an additional reminder, select **Reminder 2.**

Two additional reminders can be added for appointment reminders, for a total of three reminders.

Reminder Messages

Schedule up to three messages reminding patients of an upcoming appointment. Type "@" to add tags and help customize your message.

Reminder 1	Off	▾
Reminder 2	Off	▾
Reminder 3	Off	▾

8. Create a **Cancellation Message** that will be sent to patients if clinic cancels appointment.

Cancellation Message

If you need to cancel a patient's appointment, they will receive this message.

Cancellation	Message in English	Mensaje en Español
8		
	0/160	0/160

Cancel   Create   **9**

Creating a cancellation message template is optional.

9. Select **Create.**

For more information, see CareMessage **Create Appointment Templates** website.

Block Text Messages in CareMessage

If a patient elects to not receive text messages but still would like to receive phone calls, you can set the patient's contact preferences in CareMessage.

Even after setting a patient's contact preferences in CareMessage to receive phone calls, the patient may still receive text messages. CareMessage is aware of this issue. If the patient never wants to receive text messages, OCHIN's recommended workflow is to opt out the patient from receiving phone calls or text messages by following the steps below.

The patient is able to opt-out of receiving any communication by replying STOP to an appointment text message. This will opt the patient out of receiving all appointment reminders, including phone calls.

1. Log intoCareMessage

2. Select **Patients** from the sidebar menu. The Patients window opens.

3. In the Search section, enter patient name. Click **Apply**.

4. In the Patients window, review patient list for desired patient name.

5. Select **Edit**. The Edit Patient window opens.

6. In Contact Preference section, select the **Voice** radial button for Appointments.

Contact Preferences

Appointments	◯ Text	◉ Voice	

Outreach	◉ Text	◯ Voice	◯ Email

7. Select **Save**.

For more information, see CareMessage path **All Collections > Patients and Groups > Opt Out Patients**

Schedule a CareMessage Appointment Reminder

In order to generate an appointment reminder, the patient record and the appointment must meet all of the below criteria:
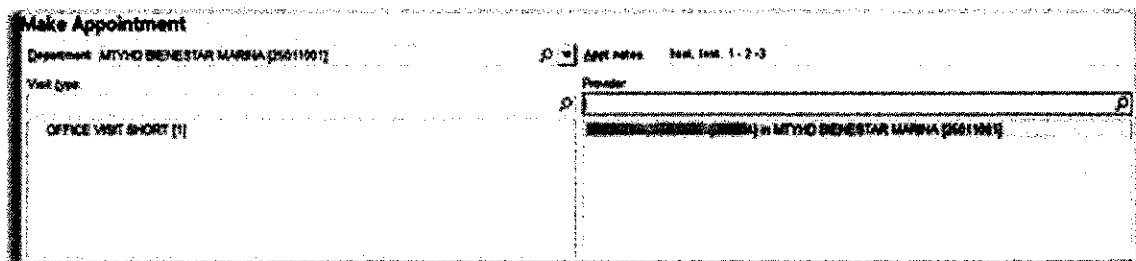
· The patient has a phone number

· The appointment status is Scheduled

· The patient Status is Alive

Patients will not receive an appointment reminder if any of the following apply:

1. The patient type is listed as Confidential, 999C, Unk Confidential, or Confidential-MH

2. The patient has a guarantor account types that is Confidential or Family Planning

3. The appointment visit type is Confidential Counsel & Test, Off Site Visit, or Abstraction

4. During the appointment entry workflow, the **Block calls for appt** box is checked

Schedule an Appointment to Receive Appointment Reminder

1. To open a patient's appointment desk, follow the menu path **Epic > Scheduling >**   🖧   **Appt.**

2. Search for and select the appropriate patient. The Appointment Desk opens.

3. Click   📅   **Make Appt**. The Make Appointment window opens. Select **Department**, add **Appt Notes**, select **Visit type**, and **Provider.**

4. Select an appointment date. The Provider Schedule window opens, select an appointment time. Click **Schedule**.

5. Review information in Appointment Review window. Click **Accept**.

6. Verify/update Appointment Information. Ensure Contact Information: Home Phone and Mobile are correct. Click **Accept**.

     a. Click Block calls for appointment box to prevent an appointment reminder for this appointment to be sent.

> For more information on Block calls for appointment see the section **Block Phone Call Appointment Reminder for Upcoming Appointment.**

Appointment Information

Undo   PCP   Beg   LCD/ABN

▽ OFFICE VISIT SHORT
  Patient Demograp...

Name: Alyssa CasebeeLake   SSN: xxx-xx-2355

Sex: Female   Birth date: 10/2/1986   Aliases: 1

| 1-Permanent Address | 2-Temporary Address | 3-Confidential Address |

Address: 1515 CENTER ST

Contact information:

#	Number Type	Number
1	Home Phone	971-971-9711
2	Work Phone	
3	Mobile	503-891-5656

City (or ZIP): PORTLAND

State: OR ZIP: 97225   Email:

County: WASHINGTON   Comments:

Country: United States of America

Referring:

How you heard about us: 1

On Demand Print

Appt letter: 0   OCHIN APPOINTMENT L

Enc form: Face sheet: 0

Visit label:

PCP: AUSTIN, PAUL [8480024]

Appt phone: Perm comm:

6a ☐ Block calls for appointment

Appoin... OVS on 5/29/18 at 4:15 PM with Alex Sport, in OCHINPC for 15 minutes

> A text message will be sent if a number is a mobile number. If a patient does not want to receive a text message see section **How to Block Text Messages.**

> ⊙ If patients does not want to receive appointment reminder phone calls or text messages see the section **Criteria to Block Appointment Reminder.**

7. Verify patient Pref Language in patient header.

> CareMessage can send messages in English or Spanish.

8. Verify/change/update any information in the Registration window on the Interactive Face Sheet (IFS). To change preferred language go to step 7a.

    a. Select **Comm/Barriers.** The Patient Communications window opens, to change preferred language.

    b. Select Preferred Language, click **Accept**.

9. Click ✔ **Finish.**

For more information, see **Basic Appointment Scheduling.**

Criteria to Block Appointment Reminder

Patients and staff can block appointment reminders if certain steps are taken and/or if certain criteria is met.

An appointment reminder will not be sent for any appointment a patient has if the patient has any Guarantor account type equal to Confidential or Family Planning.
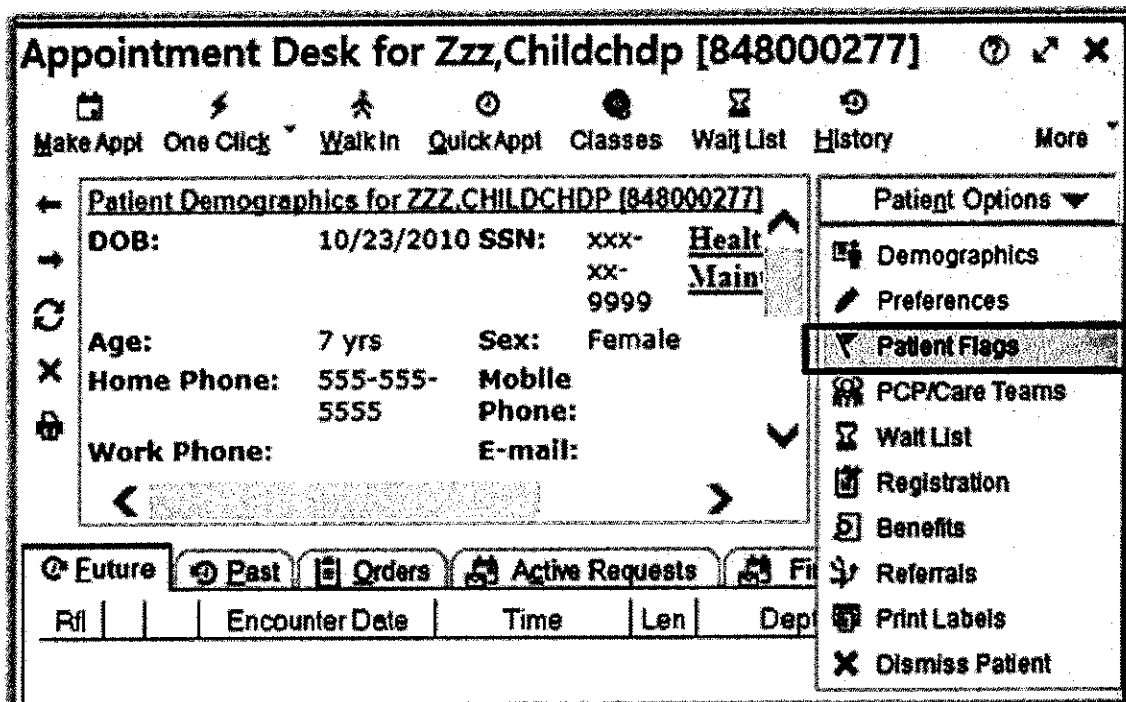
The staff has the ability to block reminders for:

· Text and phone call appointment reminders.

· Text only appointment reminders.

· Phone call only appointment reminders.

Patients can opt-out themselves out of receiving appointment reminders when an appointment reminder is sent via phone call or text.

Block Text and Phone Appointment Reminders

1. To open a patient's appointment desk, follow the menu path **Epic > Scheduling >** 🖳 **Appt.**

2. Search for and select the appropriate patient. The Appointment Desk opens.

3. From patient's Appointment Desk, select **Patient Options** ▼ > ⅄ **Patient Flags.**

4. Click the ☑ **Block reminder** check box.

Patient Flags   ⑦ ✕

Patient Settings

Patient status: | Alive [1]   🔎 | Patient types: |

☐ Restricted record   ☑ Block reminder   ☐ Chart abstract

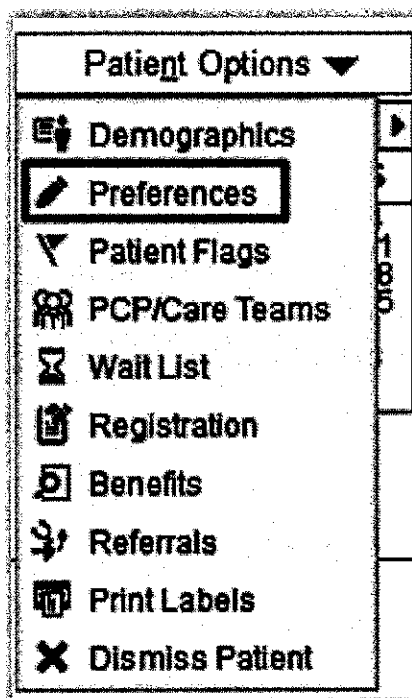**Appointment Notification**

5. Click **Accept.**

Block Text Message Reminder for Appointments

Staff can block text message reminders for upcoming appointments to patients. Blocking text messages will ensure patients receive a phone call for upcoming appointments and no text message.

If patients are okay receiving text messages and/or phone calls no action needs to be taken.

To block text message reminders follow the steps below:

1. To open a patient's appointment desk, follow the menu path **Epic > Scheduling >** 🖧 **Appt.**

2. Search for and select the appropriate patient. The Appointment Desk opens.

3. From patient's Appointment Desk, select **Patient Options** ▼ > ✎ **Preferences > Patient Preferences** window opens.

Patient Options ▼
- 🧍 Demographics
- ✎ Preferences
- ▼ Patient Flags
- 🗝 PCP/Care Teams
- ⏳ Wait List
- 🗓 Registration
- 🗇 Benefits
- ᣞ Referrals
- 🖶 Print Labels
- ✕ Dismiss Patient

4. Select **No** in the Accept text messages.

The response in Accept text messages is set to Default: No, you must select No to prevent text messages from being sent for appointment reminders.

5. Select **Accept**.

Block Phone Call Appointment Reminder for Upcoming Appointments

In the event the patient does not want to opt-out of receiving phone calls for every appointment the staff can block a phone call for the current appointment getting scheduled. The patient will still receive a text message reminder of the appointment getting scheduled but will not receive a phone call reminder of the current appointment scheduled.

Follow the steps below:

1. To open a patient's appointment desk, follow the menu path **Epic > Scheduling >** 🖧 **Appt.**

2. Search for and select the appropriate patient. The Appointment Desk opens.

3. Click 📅 Make Appt. Add Appt Notes, select Visit type, and Provider.

4. Select an appointment date, the Provider Schedule window opens, select an appointment time. Click **Schedule.**

5. Review information on Appointment Review window. Click **Accept.**

6. Verify/update Appointment Information. Ensure Contact Information: Home Phone and Mobile are correct.

a. Check box to ☑ **Block calls for appointment.**

b. Click **Accept.**

7. Verify/change/update any information in the Registration window on the Interactive Face Sheet (IFS).

8. Click ✔ **Finish.**

> If appointment is scheduled, select **Appt Info** button in the lower toolbar on the patient Appointment Desk to reopen the Appointment Information page to check/uncheck Block calls for appointment box.

Patient Opt-Out

Patients always have the option to opt-out of receiving phone calls and/or text messages on their own. This can only be performed when they receive the appointment reminder phone call and/or text message. The appointment reminder(s) will be sent to the patient based on your Service Area Appointment Reminder template setup.

For phone calls:

1. When patient receives a phone appointment reminder **press 0.**

For text message:

1. When patient receives a text message appointment reminder, reply **STOP**.

View Automated Appointment Cancellations and Confirmations

Depending on your organization's set up with CareMessage, patients will receive an appointment reminder through phone call or text. When they receive this reminder they have the option to confirm the appointment or cancel the appointment. You can see the whether the patient confirmed the appointment from the CareMessage reminder by looking at the Department Appointment Report (DAR) with an additional column added or by looking at the Appointment Information screen.

DAR

To add columns to a private DAR report:
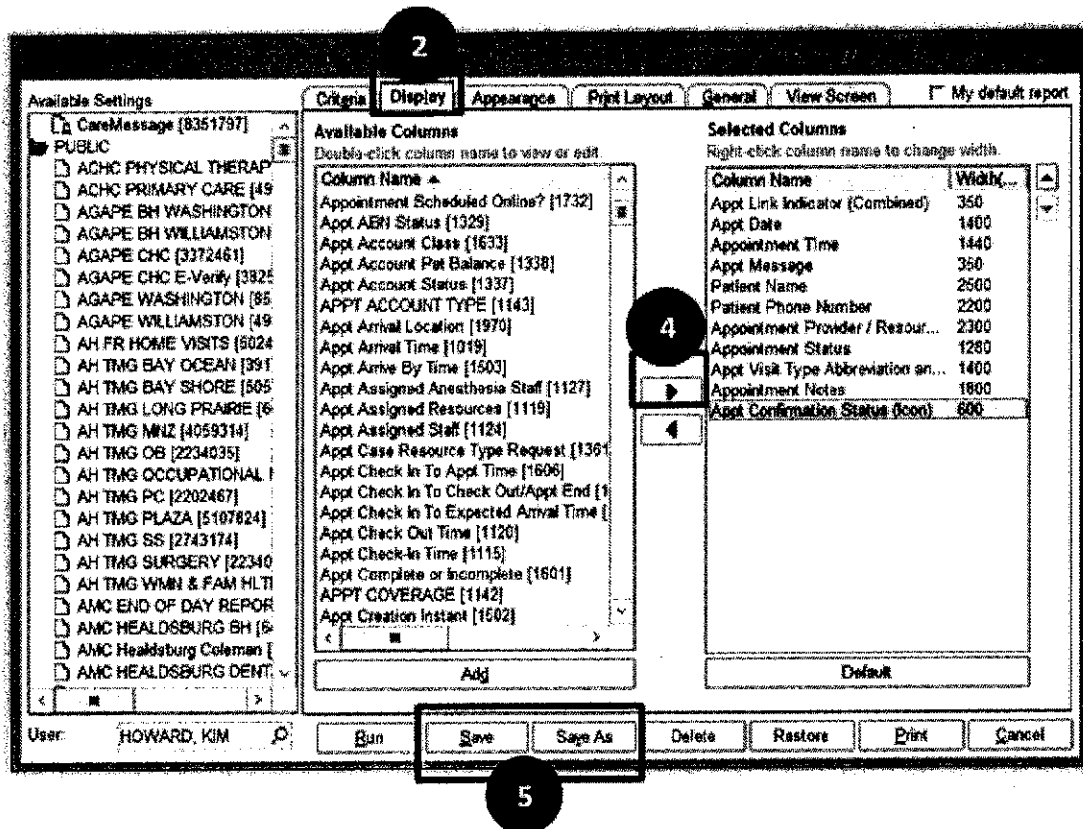
1. Select ▤ **Dept Appt** from toolbar, the Report Settings – Department Appointments Report window opens.

2. Click **Display** tab.

3. In the Available Columns list scroll to and select **App Confirmation Status (Icon)** column

4. Click the ▶ **right arrow** to add it to the Selected Columns list.

5. Click **Save** or **Save As.** The column will now appear on your DAR.

Appointment Cancellations

A Follow Up report can provide information on patients that have cancelled or no show appointments.

To run Follow Up report:
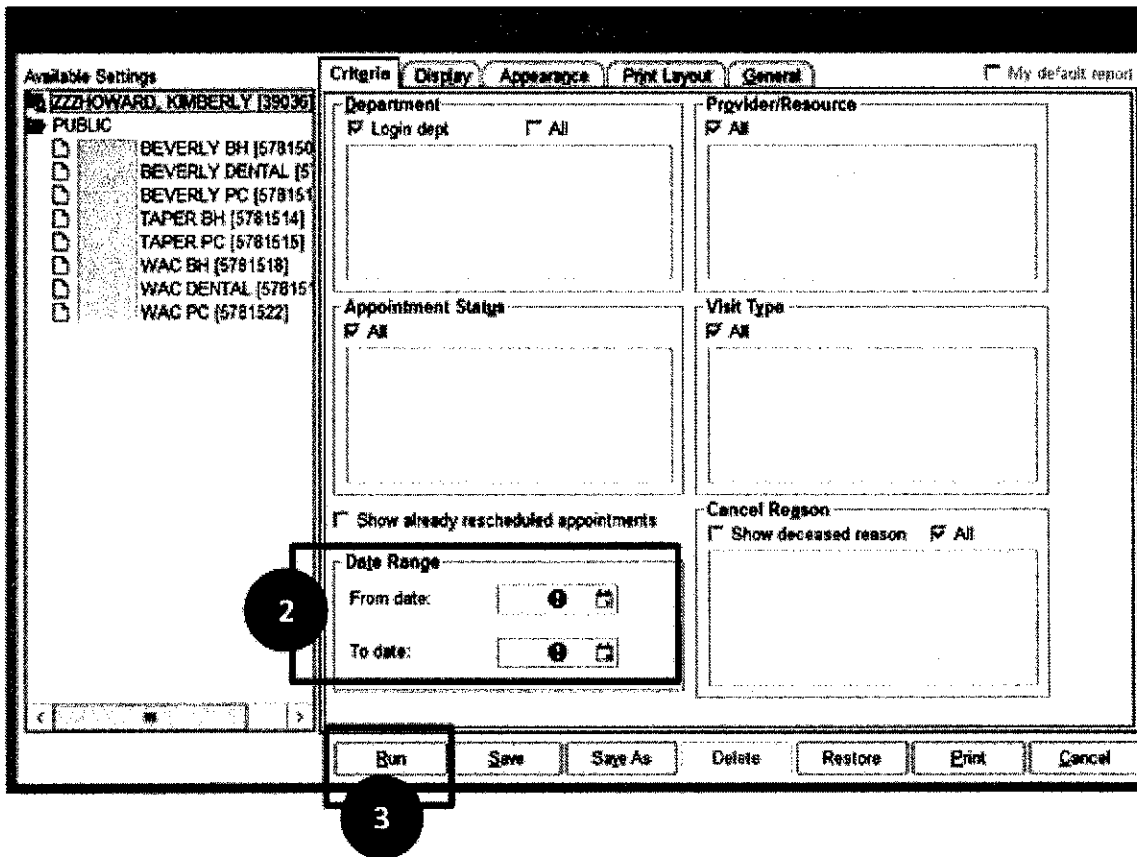
1. Click **Epic > Scheduling >** 📄 **Work Lists >** 🚶 **Follow-up.**

2. Select **Date Range.**

3. Select **Run.**

Patients Not Receiving CareMessage Appointment Reminders

If a patient states they are not receiving appointment reminders there are steps to take to investigate the situation.

In Epic:

1. To open a patient's appointment desk, follow the menu path **Epic > Scheduling >** 🖥 **Appt.**

2. Search for and select the appropriate patient. The Appointment Desk opens.

3. From the activity toolbar, select the 📋 **Reg** icon. The registration window opens, verify and/or update patient's home and/or mobile numbers.

3. Select the 🕒 **Past** tab in the appointment list section to view past appointments and to verify the patient had an appointment scheduled within the appointment reminder time frame.

4. Follow the steps in the section of this user guide **Block Text and Appointment Reminders**. Verify the ☐ **Block reminder** check box is not selected.

5. Follow steps in the section of this user guide **Block Text Message Reminders for Appointments**. Verify the **Accept text messages** is not selected as No. The selection box can have the Default No or Yes and patients will receive text message reminders.

```
Other Communication
  Preferred methods: ⑦     ⊏ No pref  ⊏ Do not contact  ⊏ Mail  ⊏ Phone  ⊏ Email  ⊏ MyChart    MyChart Signup
  Accept text messages?    «Default: No»  🔍
```

Or

```
Other Communication
  Preferred methods: ⑦     ⊏ No pref  ⊏ Do not contact  ⊏ Mail  ⊏ Phone  ⊏ Email  ⊏ MyChart    MyChart Signup
  Accept text messages?    Yes          🔍
```

If all of the previous steps have correct information you can verify patient profile in CareMessage is complete.

> 🔒 You will need a CareMessage account with a minimal of Appointment View access security. For more information, view the Setup CareMessage Account section or consult your organization's Site Specialist.

From CareMessage:

1. Log into CareMessage

2. Select **Patients** from sidebar menu, the Patients window opens.

3. In the Search section, enter patient name. Click **Apply**.

4. In the Patients window, review patient list for desired patient name.

5. Last Contact displays when the last CareMessage message was sent.

6. Last Response displays the last response from patient.

7. Select **Edit**, Edit Patient window opens, to view/change Contact Information and Contact Preferences.

Edit patient is restricted by user security settings. For more information, view the Setup CareMessage Account section or consult your organization's Site Specialist.

8. Select **Save**.

CareMessage Reclassification

CareMessage platform uses a number classification system called reclassification. Reclassification can detect whether a number is a landline or mobile number and it will populate the number information to the corresponding field in CareMessage.

Mobile Number Only Reclassification Actions

Patient Preference	Outreach Method	Implemented Behavior
Text	Text	Text
Voice	Voice	Voice
None	Text/Voice	Text/Voice

Landline Number Only Reclassification Actions

Patient Preference	Outreach Method	Implemented Behavior
Text	Text	Can't receive
Text	Voice	Voice
Voice	Voice	Voice
None	Text/Voice	Voice

Landline and Mobile Number Reclassification Actions

Patient Preference	Outreach Method	Implemented Behavior
Text	Text	Text
Text	Voice	Voice
Voice	Voice	Voice
Voice	Text	Text
Voice	Text/Voice	Voice
Text	Text/Voice	Text
None	Text/Voice	Text

Appointment Reminders and HIPAA Compliance

To maintain the confidentiality of the patient information when using CareMessage, it is the best practice to verify the patient's contact information on each visit to ensure that reminder calls and text messages are being sent to the correct phone number. When verifying the patient's phone number specifically state that it may be used for reminders that may be sent via text if it is a mobile number.

It is ok to let them know that they could incur a cost from their own service provider. Make sure the patient knows how to opt out if they no longer want to receive appointment reminder messages. Inform the patient that if someone else makes the appointment for them and changes the number on the account, the reminders will go to the number provided and not the patient.

Shared Phone Numbers

There may be times when you want to inquire how many patients have the same telephone number or inquire why patients are not responding to appointment reminders. In CareMessage the Data Review functionality can provide information on how many patients are sharing a common phone number.

1. Log into CareMessage

2. Select **Patients** from the sidebar menu.

3. Click **patient name,** the patient Profile window opens.

4. If number(s) are shared, a Shared message will display to the number in the Patient Info section.

> The Service Area (SA) will need to make a decision on how to address patients that are sharing the same telephone numbers if the contact number should not be shared.

Troubleshoot

· If a landline and mobile phone number are populated in the CareMessage account, which number will default?

　　o View CareMessage Reclassification section.

· When is patient contact information updated?

　　o Patient information is updated based on when the appointment is scheduled. For example, if a patient has weekly appointments CareMessage will update the patient profile based on the appointment reminder schedule the Service Area setup. If a patient is not scheduled for an appointment until next year, the patient information will be updated at that appointment reminder timeframe.

· Can appointment data be downloaded?

　　o Patient appointment information can be downloaded from your CareMessage account as a CSV file. Information will download directly to computer to review and/or search information.

By: Kimberly Howard, published on 12/14/2018

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