Implementing Tech-Based Non-Traditional Services: Texting for Health

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How it all began

- Center for Care Innovation meetings
- Julies Grandkids
- Triple >>>>>>> Quadruple Aim
- Physician fatigue and frustration
- OCHIN conference: wireless remote, genomes and chemo; quadriplegic walking
  - "reticular activating system"
- CP3 – FQHC PPS Pilot >>>>Alternate touches
- GPP >>>>>>Alternate touches

Capacity and Risk

- Will it improve access and clinical outcomes or just add a layer to staff frustration?
- Is it more efficient than our current methodologies
- How do we integrate it into our EMR
- What Type of staff can run the reports and work the lists?
- Will patients even use it?
- Investing in technology
- What software to select

Finding funding (and time)

- Texting was not budgeted at the time!

- Luckily, we got funded to Pilot Texting

- Thanks Center for Care Innovations!

- The grants do not pay for everything but they provided funds and a technical assistance infrastructure that focused our team on implementation

Finding the Team

- Know your staff!
  - Who is interested in technology and is willing to do the work to make the process successful?
  - Who has an understanding of technology?
  - What job positions need to be on the Team
  - Giving them the time to do the necessary work (and convincing their managers to release them to do it)
  - Take the time to mentor as needed
- Trust your champion (Cheer Leader!) and their team to do the work and be there to help when needed the team was made up of members with various backgrounds, skills, knowledge of our EMR and day to day function.
  - care message staff
  - CCI consultants
  - Internal staff of different skill levels (Leadership, IT, operations, Call Center, Privacy officer, management, site specialist

How we jumped in!

- Just like you! We attended a site visit in San Francisco, where we had the opportunity to meet the CCI team and other clinics who would be implementing texting technology at their sites.
- September 2015 a work group was created to facilitate the piloting and go live of texting
- Internally our team met bi-weekly to defined the scope, approach, and determine the resources needed for this project
- CCI facilitated monthly group calls for update and idea sharing
- We began our search for texting software
- The bi-weekly meetings served to brainstorm, plan, and design the project from a technical aspect and operational perspective.

Pre-implementation surveys

As Part of the pre -implementation, we decided to survey patients to ensure this was the right technology needed to better serve our patients

Patient Survey Results

- 91% reported yes to having a cell phone.
- 98% reported that they can send and receive text messages.
- 89% reported that they would be interested in receiving text message appointment reminders.
- 31% reported that they already receive text messages from other locations/providers.

Implementation Goals

- Provide patients with new text messaging technology and voice reminders as back up
- Create internal work flows and develop easy and staff friendly training materials.
- Provide information in our website, poster, flyers for our patients
- Reduce no shows rates
- Decrease work load of front desk staff, allowing for more face to face interaction thus improving patient satisfaction.
- Front desk staff focus on registration, prep charts, billing inquiries, complete assigned work, provide excellent customer service.
- Simplify text confirmation language in the same manner across all of our departments
  - This is a reminder for*** you have an appt at 00:00 at CLINIC NAME,please arrive 15min early for registration. For questions call 555-555-5555.
    *press (1) to confirm *press (2) to cancel appt. You may Opt out at any time

Bumps on the road …
*What fun would it be without some challenges ?!?*

- To consent or not consent- we looked to TCPA, FCC and internal counsel for guidance
- Electronic Health Record interface (the race to the port)
- Partial implementation
- Staff training/FAQ
- Who does what /Call Center integration
- When to upload - allow clinic staff time to make changes in our EMR

IMPLEMENTATION

- Created work flows
  - Staff to collect cell phone & home numbers
  - Verification & updates of correct number phone numbers
  - How to use the Texting portal-training is valuable!
  - Data abstraction from our EMR (no interface)
  - Upload of Data to Texting software
  - Send out Text (setting the rules)
  - Cancelation reports
  - Integration of call center staff was a go!
  - Designated staff for monitoring and maintenance of the portal
  - Did our Data Improve?
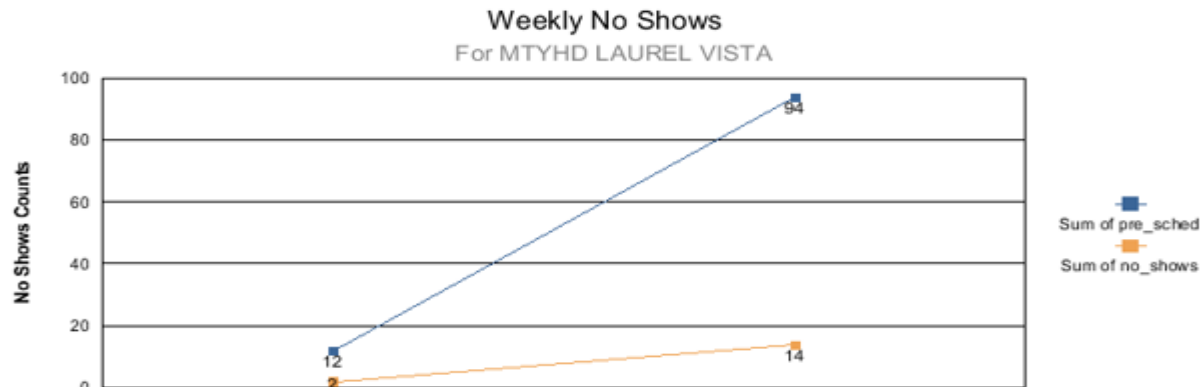 - Decide what to track: no shows, pat response, staff work load

Before Texting Program Implementation

Date Range: 03-03-16 / 03-11-16

Weekly No Shows
For MTYHD LAUREL VISTA
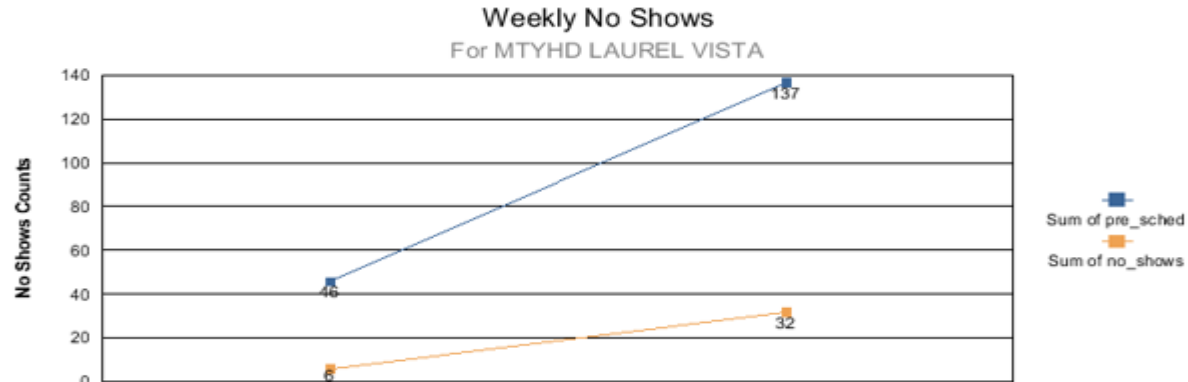
After Implementation

Date Range: 03-24-16 / 04-01-16

Weekly No Shows
For MTYHD LAUREL VISTA

Work flows

Care Message Appointment Upload Workflow

This process must be done before 9am every morning by the assigned user.

Uploading File

1. Go to ***https://app.caremessage.org/*** and sign in.
2. Go to Menu> File Center.
3. Click "Upload" > Choose File.
4. Find location of "Appointment Upload" folder and select file to upload.
5. Click "NEXT" The file will be uploading. The page will automatically refresh when it is done uploading.
6. Map Your Information by selecting the Unique ID's to each column. Match the Column header to each field.
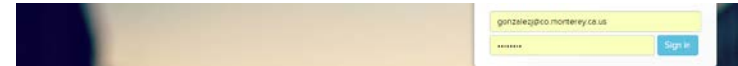

7. Click "NEXT" and then "SUBMIT"
8. Check the status of upload by going to file center page. (MENU>FILE CENTER)
9. Look for final status "IMPORTED"

How to Run and download Confirmation list

1. Sign into care message: https://app.caremessage.org

2. Click on Menu after sign in; click on appointments

3. Fill out the following Fields in order to process the appointment report accordingly. Chose a date and then click on the clock icon to choose the start time

4. Choose either Going or Not Going. After you have filled out the required fields click on the search button.

5. After you have generated the report you will have to click on the "download filtered list" button.

6. The final step would be to download the report. Scroll down to processed file section. Click on the download:

Care message FAQ

*Care message pulls apt data 3 days in advance, this data is downloaded and patient are sent text reminder.
*If a patient cancels 2 days before an apt, they will still get a text reminder. Please educate pats that if they receive a text reminder for the cancelled apt, please disregard.
*We are currently reviewing the Cancel list and calling patient to ensure they selected the correct option, then we are cancelling the apt. as of 1/19 we will stop calling pats to verify and just cancel all apt on the CX report.

I cancelled my apt, why am I still receiving a text reminder?
We apologize for the inconvenience, our secure system is set up to retrieve apt information 3 days in advance, if you have cancelled your apt, please be reassured the clinic has cancelled the apt, disregard the text or simply text back No

Cancelled apt thru text, why is my apt still scheduled?
We are in the early phases of implementing this texting system, we realize it may take some adjusting for many patients, to better serve you and make sure you didn't select the wrong choice, at this time we are not cancelling apt until we get a verbal cancellation. This will however change very soon, and once you select not going we will cancel the apt.

Will I receive a charge for these messages?
Our texting system is set up not to charge you, however your service carries can and may charge you, feel free o call them or you always have the option to opt out of receiving messages.

What do I do if I accidently clicked No but I plan on attending my apt?
Feel free to call the clinic, we will make sure your apt doesn't get cancelled/ PSR make a note in apt notes "pat accidentally cancelled via text but will be attending, and CONFIRM the apt. (pat will show up on downloaded CX report, do not cancel pat)

Why did I receive a call after receiving a text?
Our texting system sends out a phone call reminder if you didn't responded to your text, I encourage to respond to the text as soon as you receive it. You can always opt out of receiving text messages at any time.

I responded to my text and still someone called me to confirm, why?
Because we are such a busy clinic and in order to serve you better, we will if time permits call you the same day as a reminder to arrive early, Traffic and parking can be a challenge and we ask that you arrive 15 minutes early for registration and any forms that may need to be updated.

My text reminder stated I had an apt at **:** but when they called me they told me a different time?
I apologize for the confusion, let me double check and ensure the apt was changed.
Our late policy requires patient to be registered for their appointment on time, we often ask that patients arrive 10-15 early for registration. That's probably why they told you to be here at an earlier time.

My apt was cancelled but I never received a text or call
Let's take a look at what contact information I have for you in EPIC? It looks like you never called to update your new phone number. It is extremely important you update contact information to best help you. Let's update the information now and I can make you a new apt.

Where Are We Now

- Sending & receiving confirmation text messages to 60% of our patients, when we started in 4April 2016 we were at 34%

- No show rates have dropped

- 3 call center members and 2 admin users collaborate with clinic staff to finish daily upload, review and confirmations in our EHR

Patients Responding to Texts

Care Message Project
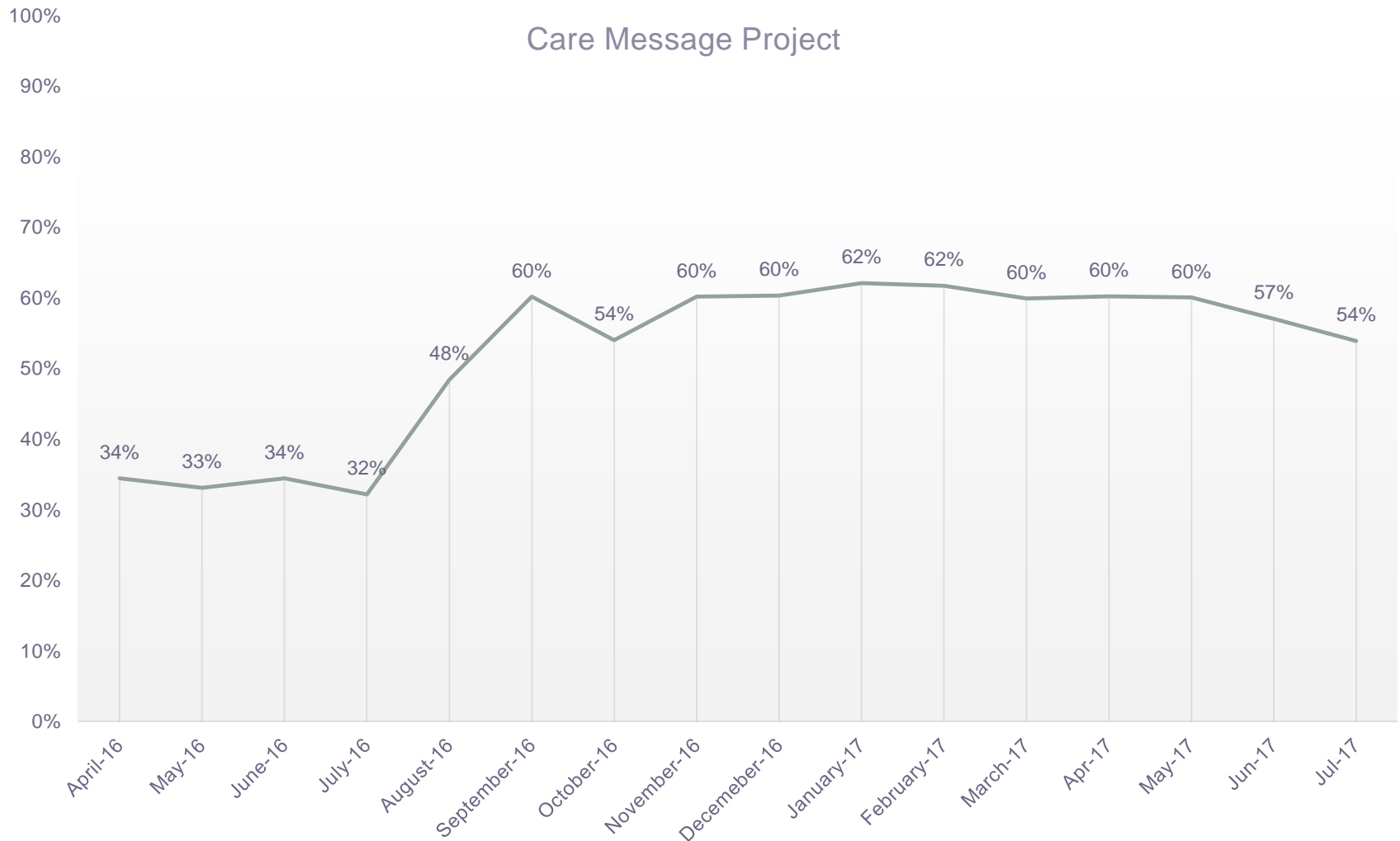
Future

- Goal of 100% of patients receiving care message text reminders
- Measure satisfaction
- Measure no show rates
- Bi directional interface with EPIC
- Explore full Care message functionality and provide outreach, education and patient engagement.
  - Patient Surveys
  - Case management
  - Education program via text messages

Thank you

Thank you for being here today and allowing us to be part of this exciting journey

Diving into something new can bring uncertainty and can be scary…

but can also be a great way to find opportunity in creating and providing staff and patients with innovative ways to receive medical care.

Look to CCI and others on this journey for ideas and answers, you will be surprised how much you can gain and learn from each other. The best part is how many friends you gained along the way. ☺