



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

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Executive Leadership Role and Process

- 1. Getting the information/idea
- 2. Evaluating Capacity and Risk
- 3. Finding funding
- 4. Finding an Internal Championship Team

Keeping your eyes and ears open

- Triple Aim morphed into Quadruple Aim
- Physician fatigue and frustration
- OCHIN conference: wireless remote, genomes and chemotherapy; quadriplegic walking
 - “reticular activating system”
- Center for Care Innovation meetings
- My grandchildren
- CP3 – FQHC PPS Pilot requiring Alternate Touches
- GPP requiring 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 staff classification can run the reports and work the lists?
- Will patients even use it?
- **Investing in technology for visits that never become reimbursable?**

Finding funding (and time)

- Care Message was not budgeted at the time!
- Center for Care Innovation grants
- Blue Shield California Foundation grants
 - Luckily, we were funded.
- The grants do not pay for everything but they provided funds and a technical assistance infrastructure that focused the team on implementation

Finding a Team Champion and a Championship 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 and their team to do the work and be there to help when needed



The team

- September 2015 a work group was created to facilitate the piloting and go live of Care Message.
- We attended a site visit in San Francisco, where we had the opportunity to meet the CCI team and as well as other clinics who would be implementing texting technology at their sites.
- Our team met bi-weekly to defined the scope, approach, and determine the resources needed for this project.
- Our 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)
- The bi-weekly meetings served to brainstorm, plan, and design the project from a technical aspect and operational perspective.

Plan

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

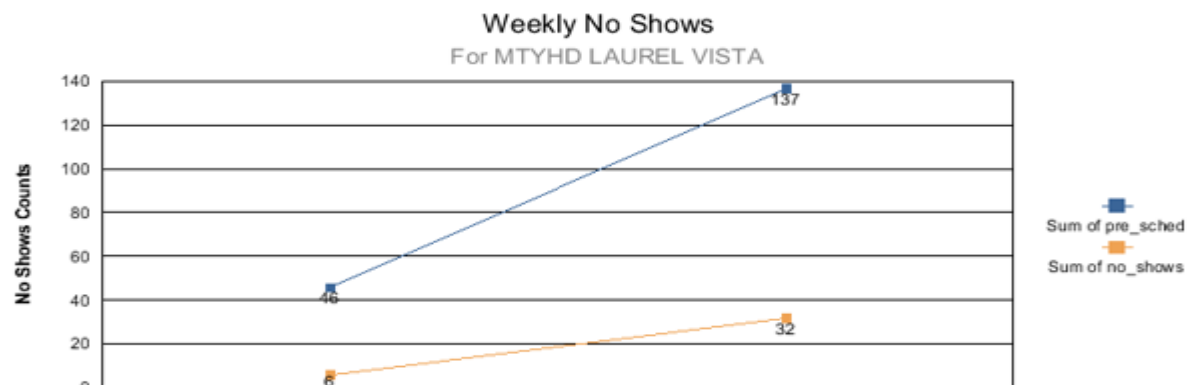
- 91% reported yes to having a cell phone.
- 98% reported that they can send and receive text messages.
- 89% reported that they would be interested in receiving text message appointment reminders.
- 31% reported that they already receive text messages from other locations/providers.

IMPLEMENTATION

- Create work flows
 - Staff to collect cell phone & home numbers
 - Verification & updates of correct number phone numbers
 - How to use the care message portal
 - Data abstraction from our EMR (no interface)
 - Upload of Data to Care message
 - Send out Text (setting the rules)
 - Cancellation reports
 - Integration of call center staff
 - Designated staff for monitoring and maintenance of the portal
 - Did our Data Improve?

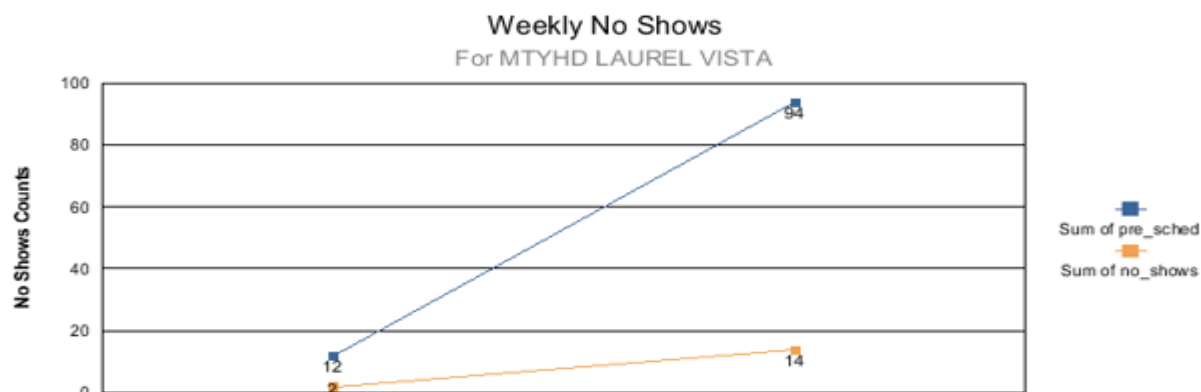
Before Texting Program Implementation

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



After Implementation

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



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.

Map Your Information

Click on the headings to map your information. A Unique ID is required to proceed.

Ignore	Ignore	Ignore	Ignore	Ignore	Ignore	Ignore	Ignore	Ignore
Unique Participant ID	Appointment Date	Apt Time	Communication method	Apt Template	First Name	Middle Name	Last Name	DOB

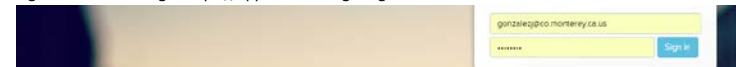
7. Click "NEXT" and then "SUBMIT"
8. Check the status of upload by going to file center page. (MENU>FILE CENTER)
9. Look for final status "IMPORTED"

File Center

File Name	Created By	Status	Size	Creation Date	Download
*ce77a88c7e06cd97f014.xls	Jose Machuca	Imported	29 rows	04/04/2016	Download
*ce77a88c6ed1519be516.xls	Jose Machuca	Imported	66 rows	04/01/2016	Download

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

Search & Filter

Filter by Participant From Date To Date Filter by Provider Search

Filter by RSVP Filter by Status

Filter by RSVP dropdown menu:

- Filter by RSVP
- Error
- Going
- Maybe
- No Reminders Scheduled
- No Reminders Sent
- No Response
- No Response Required
- Not Going

NEW

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:

caremessage™

Home > File Center

Processed Files

File Type	Created By	Status	Creation Date	Download
Appointment file	Jose Gonzalez	Processed	07/15/2016	Download

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 apt 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 FAQ
- Staff training
- Who does what /Call Center integration
- When to upload - allow clinic staff time to make changes in our EMR

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 accidentally 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 respond 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.

Future

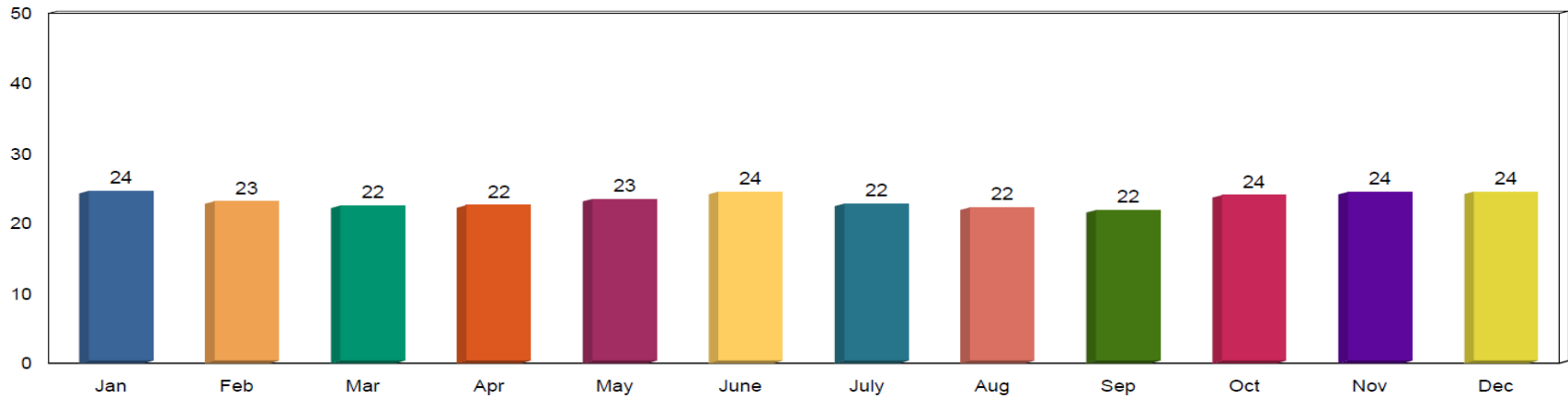
- Goal of 100% of patients receiving care message text reminders
- Measure satisfaction
- Measure no show rates
- Bi directional interface with EPIC
- Explore full Care Message functionality and provide outreach, education and patient engagement.
 - Patient Surveys
 - Case management
 - Mass education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

Quality Improvement

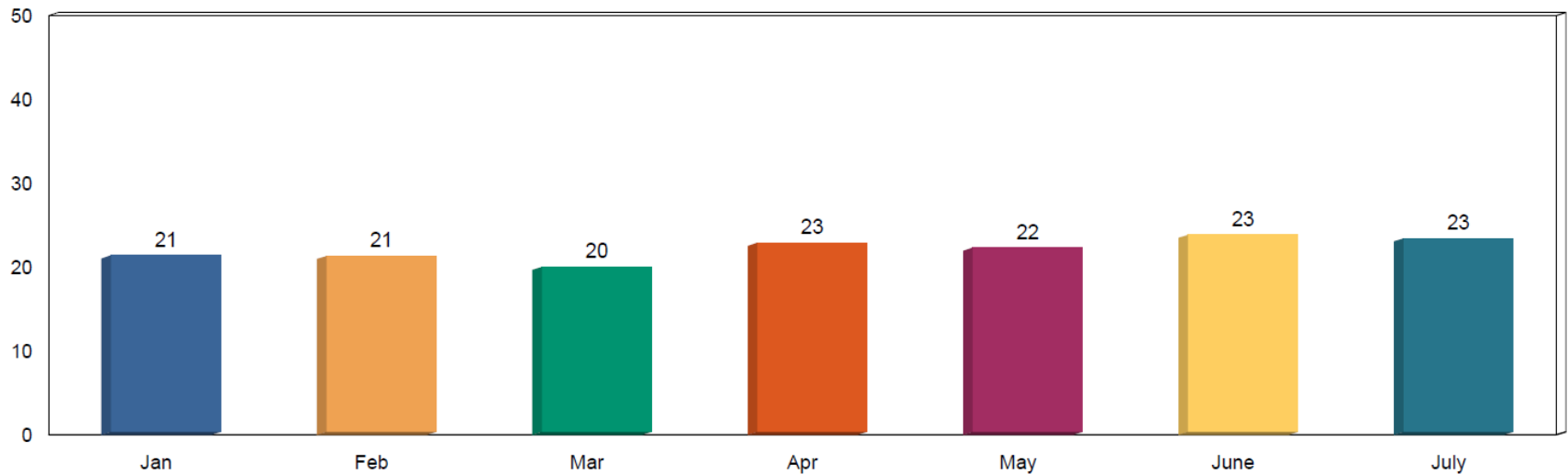
- No show rates
- Confirmed visits
- Patients receiving Text Messages

No Show Rates

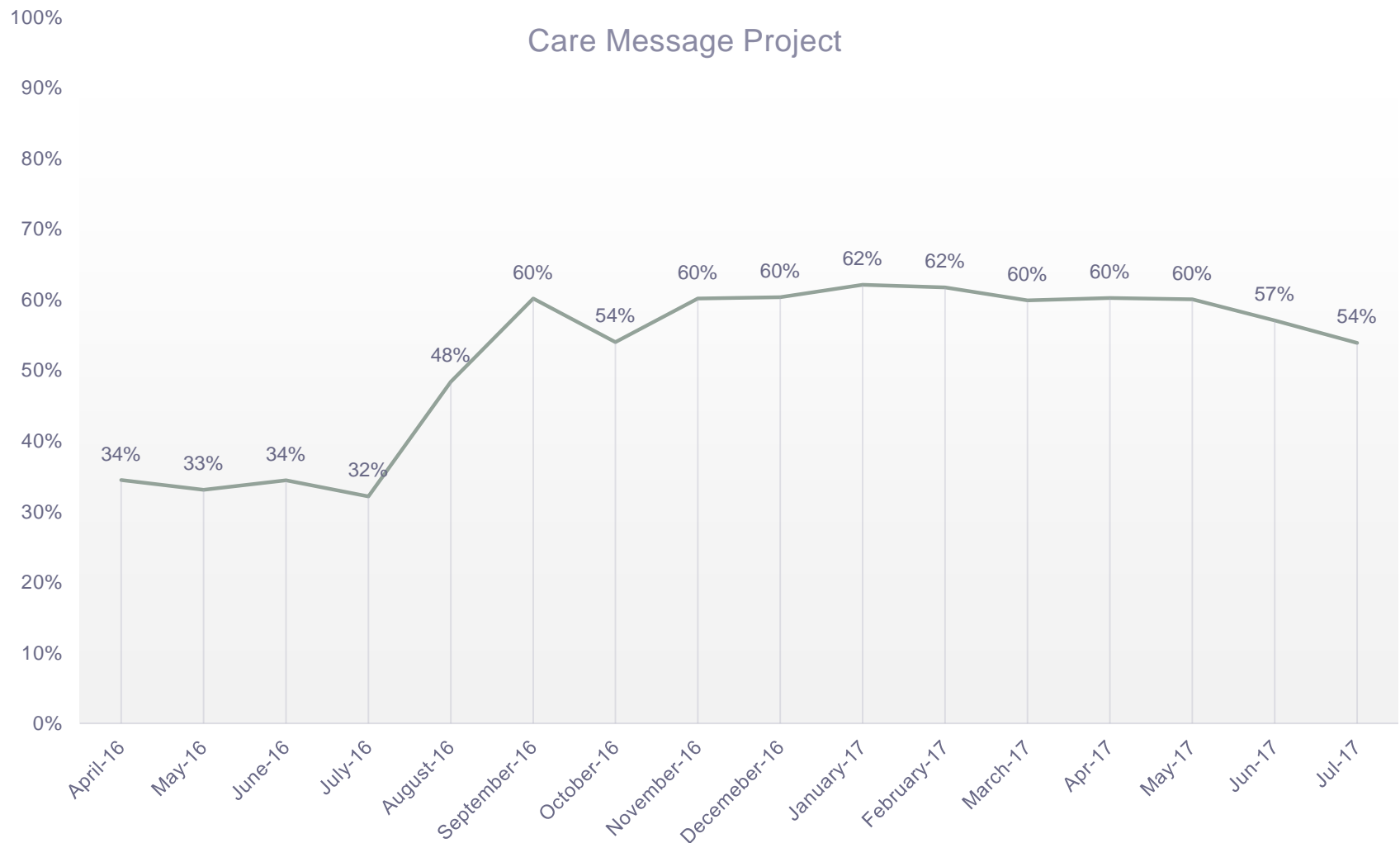
2016 No Show Rate



2017 No Show Rate



Patients Responding to Texts



Receiving Text messages

- General patient consent opts everyone in, patients have the right to opt out anytime by selecting that option via text message

Questions?

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- Denise Vasquez, Quality Improvement Manager