Plan impactful communication throughout the patient journey

2022-12-09 Webinar transcript

[00:00:00] **Taylor:** Hi everyone. Thank you for being here today. It's great to see the range of provinces covered. My name's Taylor, and as you can see on the slide here, I'm an instructional designer on the Education Content team along with Ingrid. So our team is the one responsible for creating all the training, articles, videos, and e-learning courses for the CHR, and I'm excited to contribute to these live events as well.

[00:00:25] We also have three CHR experts joining us today. Two senior learning specialists, Mike and Simone, who you'll recognize from our previous webinars. And joining this series for the first time is Tim, one of our senior account managers. So between the three of them, they have a vast range of experience implementing and supporting various types of clinics, and I'm excited for them to be able to share their expertise with all of you today.

[00:00:52] So after our last webinar about configuring eBooking, presenting issues and appointment types, we heard from you, our CHR users, that next you wanted to go deeper on appointment notifications and reminders. So that's why we're here today.

[00:01:09] So if you think about configuring a single reminder, there aren't many steps involved in that little task on its own. The difficult part is more often figuring out how that single reminder fits into the bigger picture of all the messages a patient is receiving and considering why all those messages might be beneficial to different people. So for you, you might be sending out messages to ensure your patients have the correct information at the right time, to collect relevant clinical or administrative information

from a patient, or to reduce the administrative burden on staff, on providers, and on the patient too.

[00:01:50] So we organized this webinar not just to address the how-to steps, but also to help you plan different ways of addressing the goals that are driving your configuration decisions. So that way you can be confident that you're using the CHR to its full potential, that you're working efficiently and you're bringing some meaningful value to your patients, to your staff, and to providers.

[00:02:12] So I'll take five minutes here to cover some base knowledge to make sure we're on the same page, before our expert discussion kicks off. The experts will cover two scenarios about how a clinic might plan their impactful communications, and then they'll show you how to configure the settings inside the CHR.

[00:02:30] So let's get started.

[00:02:32] So as we were planning this webinar, one of the challenges that we heard was that as a learner, I could watch someone configure a single notification and then do it myself, right away, just fine. But a few days later when I went to configure my settings, I'd lost track of what parts were done and where I should go in settings, since I actually wanted to configure multiple types of messages.

[00:02:55] So then when I showed my work in progress to a colleague, I was jumping around the menus explaining my plan, but they weren't getting the big picture of how those messages were supposed to flow. So we just ended up frustrated and working really slowly. So to help address this problem, we came up with a whiteboard visual that we'll use today.

[00:03:14] It helps us show how the different features in the CHR interact. It helps us plan out different options with our team and then when we're done planning, it helps move to the configuration by highlighting which

settings we need to go configure. So if you want to use something like this for your team or want to create something similar with Post-It notes and a physical whiteboard in your clinic, we'll share a PDF copy of this after the webinar.

[00:03:39] And we've been using the metaphor of building a puzzle when we're talking about this. Our whiteboard is like the image on the puzzle box that we'll reference, because obviously building a puzzle without that final picture is much more difficult than it needs to be.

[00:03:54] So the puzzle pieces we're working with today are appointment notifications, reminders, and then the questionnaires you might send to collect information from a patient.

[00:04:03] So we often talk about them in similar ways, or even use these words interchangeably, but they are different. So for notifications and reminders, the important difference is how the CHR knows when to send them out to a patient. So notifications are sent based on an appointment's status.

[00:04:22] So for example, a staff member would update an appointment status from requested to confirmed. So the patient then receives a confirmation notification and that notification will include any pre-visit Qnaires linked to the appointment for the patient to fill out. And then for reminders, instead of sending when an appointment status is changed, they're sent based on the reminder schedule for an appointment. So, in other words, I could send a reminder four days before an appointment, and then another reminder one day after the appointment.

[00:04:55] So when you're deciding which tools you should use, I always find it helpful to think in terms of timing specifically. So do I want to send or collect information as soon as an appointment is confirmed? Or should this info be sent out at a specific time before or after the patient's actual visit time?

[00:05:14] So as an example of that, you could send a patient demographics Qnaire with your notification when an appointment is confirmed. So that could be one to two weeks in advance. That'll vary of course, on when the confirmation happens. But then you can have a separate covid Qnaire that would be sent two hours before the appointment in a reminder.

[00:05:35] So while we're talking about Qnaires in that last example, they're both being sent because the patient has an appointment, but you can also send Qnaires separately from an appointment. So either as a one-off Qnaire that you send manually from the patient's chart, or you can set up a recurring schedule of Qnaires as well.

[00:05:53] So there's a lot of flexibility for you to collect information from the patient at the most relevant time.

[00:06:00] And then to finish off with the whiteboard, we also have an option for Other to cover things like manual communication steps, 'cause those obviously can still happen. And links to an encounter, links to a presenting issue, those sorts of things. And then we have some time markers as well to make sure that we're being precise with our timeframes.

[00:06:17] And so the last point I'll add is about the support material that's gonna be available for you when you're configuring your own system. So after today's webinar, there's a chance you might forget the exact steps inside the CHR that our experts show you today.

[00:06:31] So we've created a decision tree that reminds you where in the system to go and links to help articles if you want those step-by-step instructions to follow. So as an example for one of these trees, let's say I want to update my confirmation notification. So I'd ask myself: am I configuring this for just one appointment that's on the schedule? Or am I wanting to update my clinic-wide settings for all my future confirmation notifications?

[00:06:56] So let's say we're, we're dealing with clinic-wide settings. And then next, am I configuring the confirmation notification for a specific appointment type? Or is it the general confirmation that most appointment types are going to use? So if it's just the general one, then I'd go to settings, notifications inside the CHR, and I could check out the help article, "Customizing appointment notifications" for step-by-step instructions.

[00:07:22] So today we are showing examples of how to configure in the system, but this job aid is here in case you need a little refresher when you go on to configure your own settings afterwards. There's a PDF copy of this in our Education Centre starting today. We also have a second decision tree about where and how to configure Qnaire delivery timings, and we'll share both of those along with our webinar recording next week as well.

[00:07:47] So that's all from me. You've got a solid foundation for our next segment where you'll see some planning and CHR settings in action. So I'll pass it off to Mike, Simone, and Tim.

[00:07:58] **Mike:** Awesome Taylor. Thank you so much.

[00:08:00] **Taylor:** Yea no problem.

[00:08:01] **Mike:** Let me navigate over to our whiteboard and start our planning.

[00:08:05] So I have my colleagues Simone and Tim here to help me navigate our terrain here to really help out this clinic optimize their configurations.

[00:08:13] So to give you some background information or context on this particular clinic, 'cause this is a multidisciplinary practice that has both specialists and general practitioners. In our first scenario, we're gonna be

taking a look at the general practitioner's journey around their preventative care appointment.

[00:08:29] In this context, we know that every month their admin is gonna be manually checking an analytic dashboard for their preventative care non-compliant patients. So they'll now know which patients are outstanding for certain screenings and preventative care measures. Now, in terms of automating this and empowering both the admin and our patients, we're gonna start off with a message template that the admin will now be able to send directly to our patients, informing them of what outstanding screening appointment they're they're needing and inviting them to book themselves online.

[00:08:58] Now Simone and Tim, what would be the next step we would want to configure? Again, minimizing any admin time or admin responsibilities.

[00:09:08] **Simone:** So at this point I think we can, we can make sure that we now are setting up an invitation for them to book, to book for themselves. That you've got right there, which is excellent. And then what I might say is, I don't want to have to have some, like a lot of what I've seen is they don't really want to have to manually update patient information.

[00:09:33] So I think what, you know, at a point of the booking, what they want to do is they wanna also have something where they're getting information. They're having the patient update their information. So I think at the point of booking, that's where I would go next.

[00:09:47] **Mike:** Okay, so we definitely know in the booking column we want to have an update Qnaire going out.

[00:09:52] Now, Tim, would you recommend a specific flow to have that included? Like where would this Qnaire be included?

[00:09:58] **Tim:** Where I would start with that information would be, part of the appointment type to set up their information, so that we can ensure that it's triggered as it's being created, so that if you want the questionnaire to gather that information from the patient, that it's part of the workflow. And that way it's, it's less likely for the staff to have to inquire or ask that information. It's more designed to capture that information based on the patient's update through the questionnaire.

[00:10:29] **Mike:** Perfect. And then also minimizing any of admin time. We don't want the admins to have to confirm any of these appointments as they come in requested for our patients.

[00:10:38] So what we're gonna do is we're actually gonna configure that appointment type to automatically be confirmed. So again, there's no admin time or legwork, for example, for anybody to approve or confirm these appointments as they come in. So naturally, we'll now have. Yeah. Sorry, Simone, go ahead.

[00:10:54] **Simone:** No, I was just gonna say that I do know that a lot of clinics really like that. Where, you know, they don't wanna have to do, and, and if you do wanna confirm, you know, depending on your workflow that, you know, absolutely you can, you can just have that internal status default to be, you know, confirmation required.

[00:11:10] But a lot of clinics do like the confirmed that way they're not having to manually go and do that. So that's a nice one as well.

[00:11:16] **Mike:** Great point. Especially since, again, patients can only book in an assigned availability, right? So they can't book outside of your provider's availability, so great point. Now after we have the confirmation, and again, with some of these preventative care appointments, the provider likes to know about them in advance so they can obviously take a look at the chart and, you know, review any last labs or last encounters.

[00:11:37] So we want this booked a little bit far in advance. So let's talk about having maybe a three day reminder. So after it's been booked, three days before the appointment, we're gonna remind the patient about certain things. So naturally, that's gonna need to be a reminder. Now potentially in this reminder, because it is well in advance, we even talk about specific instructions of where the patient's gonna need to arrive or where they should best park and how much time before the appointment they should show up.

[00:12:01] So that's gonna be about three days before.

[00:12:03] What's gonna be the next one on the list?

[00:12:06] **Tim:** I think another one would be, one day prior. Often sending out a reminder just to ensure that they've confirmed that their appointment's coming up. And then there's validation that they have like the general reminder.

[00:12:24] **Mike:** Yeah, I like that. Especially since, again, these, these patients are booking it, you know, up to four days or even a week in advance. It's nice to give them that one day before, just so they can get their schedule in order.

[00:12:33] **Tim:** Exactly.

[00:12:34] **Mike:** Great. Great idea, Tim.

[00:12:37] **Simone:** Yeah. And I would say for gathering specific information, like a COVID questionnaire, that's a bit timely, right? Like you want it at a certain point and you want it closer to the appointment itself. So yes, I might do something like, you know, some clinics have done two hours prior, or they're sending out with the reminder that COVID screening Qnaire. So I, that's also something yeah, that people like.

[00:13:03] **Mike:** Okay, good suggestion.

[00:13:05] And then potentially even after the appointment, I know what some providers are doing is just keeping that door open for some of their patients, reminding them that again, you have the ability of booking any follow ups or if any of your conditions change. So then potentially we even have something happening after the appointment where now a week after the appointment, we send out another reminder, just, you know, inviting them, saying if anything changes or of course you just want another checkup. You can always book a follow up.

[00:13:30] And at the same time, we're also trying to improve, you know, the patient experience. So maybe at the same time, we also include a satisfaction survey so we can kind of, again, create that automation all now based on one appointment.

[00:13:45] Now from your personal experience both Simone and Tim helping clinics and stuff like that, any suggestions we can do? Cause we're now starting to see quite a bit of communications being sent to our patients, so of course they're getting their confirmation notification and now a series of reminders.

[00:13:59] Is there anything you suggest from your past experience that we can do to streamline these communications?

[00:14:04] **Simone:** Yeah, Mike, I know in my experience, sometimes clinics say that, hey, you know, patients are getting all these notifications and it, you know, it inundates them and then, you know, they don't read them. Right? So something, a good example in this one, if I kind of look at it now, I mean. That the COVID screening at two hours.

[00:14:27] I might also, depending on some feedback that I've heard from clinics, is I might actually combine that with the one day, so that way we're not having many, like individual reminders, but having the one, but we're still getting that COVID screening.

[00:14:41] We're just maybe getting a combined with something else and that reduces the number of notifications that a patient's going to have to kind of go through.

[00:14:50] **Mike:** I agree.

[00:14:53] And Tim, in your landscape, since again, you may be in a location where it's a little further for travel. Do you also make I think you've made some suggestions that the two hour timeframe might be a little too close for some of the patients in your area.

[00:15:05] Is that correct?

[00:15:06] **Tim:** Well, I'm just giving the concept that sometimes timeframe is of the essence, and you wanna make sure that they have their capability of completing that questionnaire or that detail prior to the appointment. But it's also the nice functionality is if you can control that, if you decide that something specifically that needs to be captured just before they walk into the door that you want them to fill or complete, you have that capability of adding that functionality. And I think that adding this new feature or this enhanced feature that happened recently is giving that concept that you can include a time window within an hour to two hours prior to their appointment.

[00:15:44] **Mike:** Love it. So, yeah. Clinics now definitely have that flexibility.

[00:15:47] And I think to your point, Simone, I think you're right, I think in this context, we're actually gonna amalgamate them. So I think to your point, yeah, we'll get rid of our two hour reminder and we'll now have things well in advance. This doesn't mean though, that they still can't fill it out two hours before, they just now have that full 24 hour period to do so.

[00:16:02] **Tim:** Exactly

[00:16:03] **Mike:** Great idea.

[00:16:04] What we're gonna do now that we've kind of put our puzzle picture together is let's start going, putting these pieces together. So what I'm gonna do is I'm actually gonna go into our CHR and I'm gonna use that as a reference when I move into my whiteboard. So I'm actually gonna do a quick split screen here, just getting us so we can now actually see both our whiteboard and the CHR in the same view.

[00:16:27] So just using that as my reference now, we can now actually see all moving pieces in one view with our CHR on the left.

[00:16:34] So starting off with the first part, so we now know our admin is gonna be checking a manual report every month, and then using a message template to send to our patients to invite them to book their appointment online.

[00:16:44] So let's take a look at that first moving piece.

[00:16:47] So we're now gonna navigate in your CHR using the navigation panel to our settings.

[00:16:53] And then now scrolling down all the way to the bottom of our list, the very last item in the list, which is our templates.

[00:17:00] And last but not least, we're gonna move over to our message templates.

[00:17:06] Here's an example of one of our preventative care suggestion messages that can now be sent to our patients pre-built in a template. So again, one of the options we can do is we can have it customized, so it's now including the patient's name. And we also have some instant variables, so the admin can now select from a dropdown list and assign the appropriate preventative care test that this patient is now due for.

[00:17:29] Therefore, we're able to use one encounter, or one letter template or message template to now address all preventative care issues or screenings, and include the link directly for our patients to book online.

[00:17:41] Alternatively, because this does require some manual interaction using our instant variable, you can also create itemized message templates, which now require no manual interaction whatsoever, and allows your patients to now receive this message indicating what appointment type, or presenting issue they should be booking for, and again, inviting them using the e-booking link.

[00:18:04] **Simone:** Mike, if you don't mind me interjecting here, I might just say one thing with naming of your message templates, because your message templates are internal so you know, between staff members as well as they can also be patient facing. So what I've seen clinics do. What I recommend is having like a bit of a nomenclature, right?

[00:18:27] So you might have "patient" and then the name of the notification. That way when someone's scrolling through the list of the message templates, they know that this one is meant for patients. Whereas the other one, you know, like. Clear out the lab inbox, right? That's not patient facing, right? That is that's something that we know that we can use internally.

[00:18:48] So having a little bit of a nomenclature is not a have to, but it is kind of nice just so that they kind of stay grouped together and at a glance. It's not difficult for staff using these to figure out which ones do we mean for a patient and which ones do we mean, internally.

[00:19:03] **Mike:** Great suggestion. And as you can see the separation here, this is our internal naming convention and this is the title our patients would receive.

[00:19:10] So great suggestions, Simone. Thank you.

[00:19:13] **Tim:** And second to note as we are accustomed to using all the time, anytime you make a modification to this section, we wanna make sure you refresh.

[00:19:21] **Mike:** Excellent. Thanks Tim 'cause yeah, if I wanted to go use this in a patient's chart right now, I wouldn't see that change. So of course, making sure you refresh your browser.

[00:19:31] Awesome. So referencing back to our whiteboard, we now know that we've actually accomplished our message template. So let's take a look at the next one on our list. Moving over to the right, we have our notifications, so I'm now gonna be, again, using my settings to navigate down to my notification section.

[00:19:52] Within your notifications, as Taylor was mentioning, these are controlled based on appointment statuses. So as your appointment status will change, your patient will now receive one of these notifications.

[00:20:04] Keeping in mind in this section, we now have the ability of, again, customizing using our patient data variables and allowing it to pre-populate information from our system.

[00:20:13] A key variable to note is this patient action variable. This is the one that will now include the link for all your patients to action, any of the assigned Qnaires that have been sent to them prior to the appointment. If at any point in time while you're customizing this notification, you accidentally delete that variable, it's very easy to pull it back into your notification using the add variable button and assigning our patient actions.

[00:20:40] Let's save this one as well.

[00:20:45] Now that we've done notifications, what's the next place? I would be looking, Simone?

[00:20:50] **Simone:** I'd say at this point we really wanna go into the appointment type, 'cause all of those things are hinged in there. So now we've got our notifications set up for the different phases of an appointment. If you wanna call it the, you know, I confirm an appointment, I change appointment, I, you know, all those things. I'm reminding someone. So once you've got all those set up, now we can go into the appointment type and put those all together.

[00:21:12] **Mike:** Perfect. So let's go take a look at that appointment type, which again lives in our system settings, and now it's gonna be under scheduling. When we click on the appointment type tab, we can now see all of the appointment types that are available currently in our system.

[00:21:26] And we already have kind of created our preventative care appointment type. So let's take a look at its configurations and how it correlates to our whiteboard. So starting off at the beginning, of course, most of you have already seen this type of screen and have already configured some appointment types yourself.

[00:21:42] But now let's start to match them with our whiteboard. So for the very first part that I'm noticing, as I scroll down to my minimum and maximum booking notice, we wanted to make sure that we can at least capture a three day reminder. So if that's the case, then we wanna make sure that this is booked at least four days in advance so we can now see the appointment in our schedule and we can ensure that all reminders are now gonna go out in their time intervals.

[00:22:06] The next section, I remember, Simone, you had mentioned that we didn't want our admins to confirm any appointments. We want them to come in confirmed. So again, I'm just gonna actually switch this to our confirmed, again, matching the notification that we want to go out the moment this appointment is booked.

[00:22:22] Additionally, because this is a preventative care appointment, we wanna ensure that the patient is only our existing patients that are booking online, because of course, we're inviting 'em to book. We know they're outstanding. So of course we wanna make sure that only existing patients are selected. And we also wanna ensure that our patients are only booking these appointments with their primary provider.

[00:22:40] So again, ensuring that the person is now booked with their primary provider.

[00:22:45] Now that we've taken a look at just those first steps to ensure our timelines are correct, let's now take a look at anything that's now gonna go out automatically. So I know we've talked about our notification and where would our update information sit in this configuration, Tim?

[00:22:59] **Tim:** Yeah. The second, or, sorry, third tab, middle tab pre-visit questionnaires, we wanna make sure that you add the questionnaires that you want to gather from the patient so prior to their appointment. And in this section here, just as a reminder, this when creating the appointment will go out automatically as soon as you create the appointment.

[00:23:19] So this is not one of the reminders, which we're gonna go in just a moment, but this is where it gets triggered immediately when the appointment is booked.

[00:23:28] **Mike:** Love it, love the clarification. And in fact, that actually matches our whiteboard perfectly, right? Because we have our notification going out and the moment that it is booked, we have our questionnaire going out.

[00:23:37] Fantastic.

[00:23:37] **Tim:** Correct.

[00:23:39] **Mike:** The next part that we move over are gonna be our reminders. So it's still before the appointment, but now more specifically at time intervals than necessarily statuses or again, actions being done. So when we move over to our reminder tab, let's take a look at our whiteboard and start comparing them.

[00:23:55] So for the very first reminder here, we have our preventative care instructions that are gonna be going out three days before the appointment, and we can even see that here that it is now configured to three days prior. Additionally, we have our one day prior reminding patients that, again, they have their appointment coming in tomorrow.

[00:24:11] So again, to clear up any schedules and to come in at the appropriate timing. But I know during our conversations we had talked about potentially changing the timing of our COVID screening Qnaire going out, and we said that at times the two hours beforehand wasn't quite enough time for our patients to fill them out prior to arriving in the clinic.

[00:24:30] So I know we added a suggestion by Simone to amalgamate both our one day prior and our COVID screening. So let's do that together. So in this scenario, I'm actually going to remove or delete our two hour prior notice, and I'm now going to edit my one day prior. So in our edit additional reminders note window, we have the opportunity of providing a title or a name to that message and the body of the message.

[00:24:56] And then just below that, we have the opportunity of now amalgamating or adding our Qnaire to go out at the same time as this specific reminder. So by clicking in my Qnaire section, I'm now given a list of all the Qnaire I have available in my system currently. And I can even do searches if I'd like.

[00:25:11] So for example, if I type in our COVID, even just typing in two letters, it starts to reduce my search. And again, the more I continue, the more it refines my search. So in this scenario, I'm now gonna attach my

COVID assessment Qnaire to now go out that one day prior first thing in the. And save.

[00:25:31] So as our experts recommended, we've now reduced the amount of notifications going out from four to three and having them all included in the system.

[00:25:39] And of course, just to hone in on that last reminder that we haven't yet touched, we're talking about the one week reminder that we now have seven days after the appointment, which again invites our patients with that eBooking link to now book any follow up or subsequent appointments themselves online and including our COVID Qnaire satisfaction survey.

[00:25:58] Sorry, our satisfaction survey.

[00:26:01] **Tim:** Hey, Mike. The only thing I would add as a my context with the pre-visit questionnaire that goes out prior is you can control which inbox it's associated to. So I've noticed that with some clients that I've spoken to. Sorry, if you go back just for a moment in just the, the second tab, the pre-visit questionnaire, that's going out.

[00:26:22] Is just to allow yourself to actually click on and where it goes to default based on the schedule. But you may want to go to one of your other staff members that wants to control when they're receiving that, that response from the patient.

[00:26:35] **Mike:** Great suggestion, Tim. Manage that inbox for sure.

[00:26:38] **Simone:** Yeah, Tim, this is huge 'cause I have a, you know, a lot of clinics where, yeah, I mean sometimes it may be, you know, the provider with whom the patient's booked, they wanna get the questionnaire.

[00:26:48] But other times, you know, the flow may be in larger clinics they've got admin staff who deal with the questionnaire responses and so they want that to go into significant box. So yeah, no, this is, this is a setting that I think a lot of clinics like to have control over for sure.

[00:27:04] **Mike:** Great suggestion and what a way to organize all the information coming in.

[00:27:09] So now if we review our whiteboard, we've actually been able to tackle every piece on this item. And I do agree with Taylor from earlier, having that puzzle reference is a lot easier to put the pieces together with having that visual aid.

[00:27:24] So let's take a look at another scenario where we, again, being in a multidisciplinary practice, we have some specialists that will also have their own unique workflows.

[00:27:33] So as we scroll over to our next scenario, this is where we have an orthopedic surgeon in our office that is looking to create an automated workflow for his hip surgery appointment type. Now, this particular provider has gone ahead and created their own whiteboard ahead of time and have now submitted this to their admin to now configure in the system.

[00:27:52] So let's break this apart as experts to really start putting these puzzle pieces together. Now, this is a lot of information to look at at first, so you know, experts, Simone, Tim, where should I even start?

[00:28:05] **Simone:** Tim, do you want?

[00:28:08] Go ahead

[00:28:09] **Tim:** Sorry go ahead Simone.

[00:28:11] **Simone:** Yeah, yeah, I was just gonna say Mike again, really we saw it before with the previous example. It really all hinges on the appointment type. So once we kind of have everything there in the appointment type, we can set up the reminders and the cadence of those reminders.

[00:28:28] So I'd say you know, if I was doing this, I would start as the appointment type.

[00:28:33] **Mike:** Great recommendation, Simone. And yeah, we did see that a lot of, one of those moving parts that we just saw in our previous one were in fact in that appointment type. So let's start there again. So hopping over to our CHR again using our navigation panel and going over to settings.

[00:28:48] And we're now gonna be navigating over to scheduling...

[00:28:53] and our appointment type tab.

[00:28:56] Here we're now gonna be adding a new appointment type because we don't have a hip surgery one already in our system. So in this case, I'm gonna click on my add button, which is just tucked over here on the side. And I'm now gonna create this appointment type. So of course we have our icon and our naming convention.

[00:29:16] We now know that this appointment is gonna be two hours long to complete that hip surgery. And for the colour, we're looking on our screen or our calendars is gonna be this green. Now the remaining sections of this, which are primarily eBooking, we already know that this particular provider does not want this appointment to be available online.

[00:29:36] So the remaining configurations aren't necessarily as dire as long as we ensure that both new and existing patients are deselected from this list. That's actually gonna remove this appointment type from being

visible online, so our patients can no longer book this themselves. Therefore, again, any of these configurations will not apply.

[00:29:56] Sorry, Tim, what were you saying?

[00:29:57] **Tim:** Oh no, I'm sorry. I'm just that makes a great point 'cause I know that often we miss associating that option to remove both those sections 'cause all of a sudden next thing you know, you are receiving an online booking request for a hip surgery. So.

[00:30:11] **Mike:** Exactly.

[00:30:12] **Tim:** Just as a rule of thumb, just to ensure that what options we're just deselecting, I guess at this point.

[00:30:19] **Mike:** Perfect. Great point. And again, just to give all clinics that closure, again, deselecting both patients. This appointment does not show up online.

[00:30:27] So let's take a look at some of the other moving parts that are gonna be involved in this particular appointment type. So we now know, based on this whiteboard that our provider wants two Qnaires to be going out at the time of booking.

[00:30:39] Now what we just saw in our previous preventative care appointment scenario, we now know that if we want these to go out at the time of booking, those are gonna be dependent on our pre-visit Qnaires.

[00:30:50] So to add our Qnaires, we have an add Qnaire button and similar like we just saw in a reminder on the previous scenario, we can now do a search.

[00:30:58] So even if I just start typing some keyword in here or some key letters, it now brings up the associated Qnaire that I'm looking for to attach to this appointment.

[00:31:10] Perfect. So again, if we start looking down this list, we now have both Qnaire, completed. What's the next one that we can tackle?

[00:31:19] **Tim:** I think we're going back to the same kind of processes just to ensure that we have a reminder set up.

[00:31:24] **Mike:** I love this. It's so much easier looking at this whiteboard. Tim, you make it sound so natural.

[00:31:29] So let's hop over to reminders. Now we have our one day, one already triggered in there, but of course we're gonna need to customize some of these. So let's take a look at our one week reminder. For example, now our one week reminder, since these appointments are booked well in advance, we can see that it is one month before that these are booked.

[00:31:45] We're gonna send out a one week reminder. And again, this is gonna give us things like directions to the hospital, how much parking's gonna cost, and what we need to do to prepare for the surgery. So we're gonna add in our new reminder here, and I'm gonna talk about a pre-surgery instructions. So pre-surgery instructions.

[00:32:07] The nice thing too is that I actually have a Word document on my computer, or I should say the admin has a word document on the computer that they've been using in the past before they moved over to the CHR. So they already have all of these instructions written out. So what I'm gonna do is I'm just gonna put a little reminder to myself here to copy and paste from the Word document.

[00:32:29] **Tim:** Just wanna make sure that that doesn't go out to the patient.

[00:32:32] **Mike:** Of course, I'm doing that right after this, so I just wanna make sure that I have that in place so that again, I remind myself where it needs to go.

[00:32:40] **Simone:** Mike, you also make a good point. Oh, oh, sorry Mike, I didn't mean to interrupt you. I was just gonna say that you make a good point in that, sometimes, you know, you do have a really nice sort of scripted reminder that you've used previously, or specific things that you wanna say, a specific message. So having it as a Word document is great. I would just say obviously make sure you're putting it in, but yeah.

[00:33:02] **Mike:** Of course. Yeah, definitely. You know what, I can even use my tasks in my CHR to remind myself to update reminder. Update hip surgery reminder. I like it.

[00:33:24] So now we were referencing back to our whiteboard and we now noticed that our pre-surgery instructions should actually go out the one week before. So again, hopping down to our when, and we're now gonna control this to be sent out one week prior and save.

[00:33:43] We now also have our defaulted message, but again, we wanna customize this with our dos and don'ts before the actual surgery.

[00:33:50] So, again, if I was going to customize this, which again, I have something written on a word document that I'll make sure that I update here. And we're gonna change this from default notification to dos and don'ts, before surgery. And of course, remind myself to update.

[00:34:14] Perfect. And this was our one day prior.

[00:34:19] And it's looking like it's still following the same structure. So as we continue to move on, again, noticing timelines. Again, anytime you're seeing things at specific time intervals, we now know that those again, are gonna live in the reminder section. So now thinking about any instructions to call the nurse if conditions change. So naturally, we wanna remind them that one day after to ensure that they contact us if anything, changes.

[00:34:43] So a little bit more of a rinse, wash, repeat. So we're now going to call if condition changes and add in our little blurb, and this is now gonna be one day after.

[00:35:02] And similar. Now moving down, we have another timeline configuration here, which is now days related. So two days post the visit, but we don't have any instructions necessarily or any reminders per se, but just that invite to complete those Qnaires, so now see what they were like prior to the surgery and now post surgery.

[00:35:21] So of course in this scenario we're now doing the same thing. This one's gonna be, follow up on mobility

[00:35:32] and all we need to include now is our Qnaires. In this particular timeframe, we actually want both the function and pain to go out, whereas subsequently afterwards, we're only looking at function.

[00:35:48] **Simone:** Mike?

[00:35:48] **Mike:** Yes.

[00:35:49] **Simone:** Okay. I'll let you finish your thoughts sorry. But I was just gonna say, so you are setting up kind of a quick custom reminder on this particular appointment, but, I'd also just wanna point at that in settings > notifications. All of the notifications are kind of pre-coded.

[00:36:09] So, hi, patient name. Your appointment is on such and such a date, such and such a time at such and such a provider. So it's all kind of, that part is done for you, but the part where you were in, where you were configuring that reminder, that's really great 'cause if you had a specific note you wanted to put in, that's where could do it.

[00:36:25] There were just, I just wanna point out that we do have sort of preconfigured things in the settings >notification section as well.

[00:36:33] **Mike:** I think you gave me a great reminder because again, we're building the appointment type and, and now we have most of these done, but we still need to go back to our notifications afterwards.

[00:36:41] So, great point. And actually, if anything, it's actually the right flow because we couldn't have created the notification for this until the appointment type was created. So great reminder, Simone. Thank you. So let's close off our reminder, our follow up reminders before we get into the actual notification that's going out.

[00:36:58] So let's see -

[00:36:59] **Tim:** Mike, Oh, sorry. Go ahead. No, continue.

[00:37:02] **Mike:** So let me add this in here, but as I'm adding in our function post-surgery Qnaires, Tim, what's, what's your next comment to make?

[00:37:11] **Tim:** Well, I'm just gonna go back to the main general section just so that we can ensure that, how do we wanna send this up from our perspective with the staff? Do we want to confirm? Do we want it to be requested? We wanna ensure that it's selected correctly.

[00:37:27] **Mike:** Sure.

[00:37:28] **Tim:** The second and last step, once this has all been completed. As our favourite word refresh or F4 or however you wanna identify it, but it's just to make sure that we can't complete that process as part of our notifications until we actually refresh our screen.

[00:37:43] **Mike:** Great point. Yeah. You gotta push that change throughout the rest of the system.

[00:37:47] We have one last reminder. I've completed our one month, and we're just gonna close that off with our three month, we're gonna call this our final mobility check...

[00:37:58] and add in that last Qnaire that we're gonna be sending off.

[00:38:04] Okay, so Simone and Tim made a great point there that now that I've done all my reminders, so everything in this whiteboard, excluding our notifications have now been completed. So let's submit this and as our expert, Tim had reminded us to refresh our browser, if you like a little jingle, I'm a F5 to revive your system, and then that way you can refresh without having to necessarily navigate to the top of your browser.

[00:38:29] So as Simone and Tim have mentioned, we need to confirm our notification for this. So as Taylor's tree kind of helped us earlier identify, we're gonna be using our system settings, navigating down to our notifications. And in this particular scenario, as Taylor mentioned, is it something that's general, that is, you know, for all of our appointments or do we want something specific for this type of appointment?

[00:38:54] And I would agree that it's now specific for only hip surgery. So in which case I'm gonna go on my appointment type option, scroll down to my hip surgery, and now be able to customize the notifications only for this appointment. And Simone, just to bring in what you just talked about, aside from all our statuses that we had control of, we also have an appointment reminder notification.

[00:39:17] So at all those key intervals, we now have a template that's gonna go out. So let's take a look at that template together.

[00:39:26] And similar to what we saw in our first notification, we have some variables kicking in to customize patient name, for example, and we have those patient action variables. Again, if there's any outstanding Qnaires to complete or if there was a Qnaire to complete in the reminder,

again, we wanna ensure that we have that patient actions. But we now we also have this reminder message.

[00:39:49] Now what that means is this is now pull pulling in the customized message that you just saw us create within the appointment itself. So I had a couple of scenarios in which I had, you know, something that I'm gonna be referencing off a Word document that I'm gonna be copying and pasting into that appointment reminder.

[00:40:06] This is now where that would appear. So again, your patients are still gonna be having some information given to them of when and where they need to be, but we can now have a specific section in this reminder notification. To include those customized reminders in the appointment type.

[00:40:22] **Simone:** Yeah. And I would just point out that this is, you know a lot of users when setting up notifications and stuff, this is a great place to come to because the hard work's kind of already been done.

[00:40:34] You've got the variables for patient name, business name, and appointment time. But if you needed to have something sort of really hard coded to a specific appointment type or to all of your appointment types, maybe you're always telling people: "bring in your latest meds list" or you know, whatever it might be, this is a great place to put that in.

[00:40:52] That way you're not having to do it every time, so a nice spot to come in. So when you're setting up appointments, also think about your notifications as well.

[00:41:00] **Mike:** Exactly, and the moment you customize anything in this, it's now gonna also indicate that your appointment notification has been customized. So if we were to change any of this whatsoever, and for example, add in location, so if I also wanted for the patients to know where to go and include the address of the appointment, by now adding in our

location information, we've now customized this notification and the moment I save my changes, we'll now be able to visualize the change has been made in our system.

[00:41:29] **Tim:** Hey, Mike, do you mind just doing a preview of what that would look like?

[00:41:34] **Mike:** I think that's a great idea.

[00:41:35] **Tim:** Can take a look at?

[00:41:37] **Mike:** So sometimes I wanna see what the patient's gonna see when we're confirming these notifications. So up at the top right hand corner, we have a preview button that I can click. It may not be as pretty as what your patients are gonna see just because this does strip out some of the buttons, for example, that your patient will see. But it does at least give you an idea of what it's gonna look like from that patient experience.

[00:41:58] Great suggestion, Tim.

[00:41:59] **Tim:** Well, and someone just mentioned regarding the virtual platform in this aspect. So just the location itself, when you customize that appointment type, you don't necessarily have to have a location, so you may not want that to be part of it. You may remove that variable as part of the notification that goes out.

[00:42:16] So if you're using this functionality as an appointment type, you may remove the location so it's not incorporated as part of the notification that goes out to the patient.

[00:42:26] **Mike:** Great suggestion.

[00:42:28] **Simone:** Yeah. And I'd also say that when you're booking, we're not quite here to discuss that today, but if you're booking an appointment and you click virtual and that little appointment the little appointment

window from the schedule that makes sure that it's not a, "Hey, it's 123 Cherry Lane", but it's that's they're gonna get a link with sorry, a notification with the link and the passcode that they could use.

[00:42:53] **Mike:** Exactly. Great suggestion.

[00:42:56] Now I know if we refer back to our whiteboard, we've now accomplished pretty much everything that our orthopedic surgeon has suggested that their admins build. The only thing I'm noticing left is this prehabilitation exercise videos. Now I know there's so many different avenues we can explore in terms of having these communicated to our patients.

[00:43:15] And again, with Simone and Tim, you being the experts. Where would you suggest and why would we put those prehabilitation exercise videos in a certain format?

[00:43:26] **Simone:** What I might say is that whenever we're sending messages to patients, so obviously outside of appointment reminders and things like that, if we're sending messages to patients, we always recommend using the patient messages. So from the patient chart: Start/Open > Message Patient. That sends it securely. So a patient does need to verify who they are before accessing it. And then, that way you can see those message templates that you were mentioned before in the beginning, Mike. And then in that message template, you can have that hyperlink to, you know, rehabilitation exercises, the YouTube video you want them to watch, or the PDF you want them to access or something like that.

[00:44:11] So you can set up a message template for that and then send it out via Message Patient.

[00:44:18] **Mike:** Love it. Let's take a look at what that looks like. So when we go into our settings and just like our very first scenario, we're gonna

scroll down all the way to templates. And again, get into our message templates.

[00:44:31] And like we've just seen, we've now have our nomenclature here, our naming convention to indicate that this would be patient facing. And we have our acronym now for prehabilitation exercise videos. Now, when we go into the message template itself, we can now see that the patient is gonna receive a much different title explaining what the content is, and of course, having that direct link to those prerequisite exercises.

[00:44:56] And Tim, what's another benefit to using our patient messaging? So as I hop into a patient's chart, what would be the benefit to using our patient messaging?

[00:45:04] **Tim:** Well, the, what I find great about our messaging is it's secure and just to make sure that they received it, you can also validate that they've actually read it.

[00:45:14] So looking at the patient's chart, once you message the patient, the response will indicate that they've either read it or that at least that they've received it.

[00:45:24] **Mike:** Beautiful. So of course, just by loading that template, it was a simple click of a button, having the template loaded, and now being able to submit it to your patient.

[00:45:33] Great suggestion. Thank you, Tim.

[00:45:35] **Simone:** I'm sorry, can you. Sorry, Mike. I think if we can repeat that part again about the benefits of sending it via patient messages. So I think maybe someone just messaged in the chat. Maybe, they didn't quite hear it, or I wonder if you and Tim can maybe just repeat that part again for folks?

[00:45:55] **Tim:** Sure, of course. I think what I was addressing is that when you message a patient through our portal, it's a secure portal requiring the patient to indicate that they've actually logged in. There is no email that's going out that's not secure. So it's using our secure portal and once it's been received by the patient, it will indicate if they've actually opened and read the document.

[00:46:18] So if Mike goes into messages. It also indicate that this one was just sent recently, but if you click on it, you can actually see that it's been either received or read by the patient.

[00:46:34] **Mike:** Great suggestion, Tim. So now not only am I confirming that a patient has seen it, but it's still gonna go independently from all the other notifications. And Simone, I think you made a good reference, is that along this journey, the patient may be inundated with several notifications, whereas this now isolates it.

[00:46:48] So we can actually control when this is going out. Now, typically these videos wouldn't be sent to a patient until they've been booked, so we can actually place this in our Miro board to understand the workflow by suggesting that this will be a manual workflow, but it's actually gonna be in between them being booked and their very first reminder.

[00:47:07] So experts, what do we think about this mural board or this whiteboard? And now the configurations in our CHR?

[00:47:17] **Simone:** Okay, perfect. So I'm just looking to make sure. Yeah, and I would just say really, I mean this is a guideline really, right? So I mean your clinic might do things slightly differently. And you know, in terms of the cadence of the messages, what types of messages, that are being sent.

[00:47:38] So, you know, don't feel, you're like, oh, but you know, Mike, in the presentation, he only did, you know, the you know, the one week and

the one day, like, don't feel restricted by that. It really is dependent on your own workflow. But this is just a great guideline to say that you can, you can send, you know, multiple reminders, you know, to patients. If you booked an appointment far in advanced, we know how this goes. Right? You book it far in advance and then we wanna make sure that, you know, they're getting reminders closer to the day.

[00:48:07] **Mike:** Excellent. Thanks Simone.

[00:48:11] At this point in time, are there any questions from the chat that we can help address or illustrate today on our webinar?

[00:48:21] **Simone:** Sorry, Mike, I'm, I'm not being distracted. I'm just trying to make sure that I've covered everything in the chat. I think another question that that has come up is so we were attaching questionnaires to specific appointment types. So for example my, you know, my hip surgery consult appointment type, but what if I, you know, maybe they're coming in for back pain or they're coming in for cough and cold, and we wanted to send a questionnaire about that as well? So I know that's something that's come in as well, but I thought maybe we can quickly, if you can show them Mike if you don't mind?

[00:49:06] **Mike:** Of course. And I think that might even be a great scenario in our first general practitioner scenario, even just using our preventative care for example.

[00:49:14] We can now have it so that when they come in and they are requested to book their preventative care, and again, we had created that update your demographic Qnaire to go out at the same time. Well, in addition to that, what we can do is we can use our presenting issues, which now allows us to also include an additional pre-visit Qnaire. So again, the patient would be coming in and booking a preventative care, which as we know would send out our review and update information. But what we can also do is now that they're selecting, for example, their

influenza presenting issue, we can create an influenza appointment type, or, sorry, presenting issue that would now trigger a pre-visit Qnaire to ask them if they've maybe received their influenza shot already prior to coming in.

[00:49:57] So we can now create, again, something that's going out at the time of booking that is now specific to the reason for visit.

[00:50:06] Did that help out Simone? Providing that that two-tiered system when appointments are booked?

[00:50:11] **Simone:** Yeah. Basically just saying that we can send you know, it can be on the appointment type level as well as the reason for visit or presenting issue type level, right? Because I know some clinics have wanted to have both.

[00:50:26] They wanna have the COVID screening for the appointment type, but they wanna have the back pain questionnaire for back pain.

[00:50:32] **Mike:** You got it. So, just keep in mind, again, anytime you see that wording for pre-visit Qnaire, that means it's gonna be triggered at the time of booking.

[00:50:42] Great suggestion. Thanks for the question.

[00:50:48] I think we might have time. One more question from the group?

[00:50:52] **Simone:** Yeah, I was just gonna say you know, there was a question asked about where can I, where can I see what was sent to a patient, you know, "I never got that!". You know in a patient chart. I know this is a little bit out of scope, but just in the patient chart, Start/Open, and then you scroll all the way down to Patient Outbox.

[00:51:12] That's where, you know, that's where you can see things that were sent out to the patient. Okay, so you know Rudy Rash, there we go.

Six minutes ago he was sent a message eight months ago. He was sent a questionnaire. So this is a place where you can kind of see what was sent, and then I think there's a column there for status.

[00:51:30] So I know there were some questions about, well, how do I know if they got it? This, this is a good place to look as well. Tim, I don't know if you wanted to add anything to that but?

[00:51:41] **Tim:** No, I've got the understanding of that the message itself is sometimes difficult to actually see what the actual message is.

[00:51:47] Cause when you click on it, it doesn't give you the details. But it's assuming that the, and this is just the message through the portal, but this is the notification that we're responding to. So the notification that goes out is just indicating that a notification was processed. So if there are updates during when a notification was processed or scheduled to go out, and it may not determine what that actual notification is based on if it was updated through the settings.

[00:52:21] **Ingrid:** Okay.

[00:52:23] We are unfortunately close to the end of our session today. This was great discussions, great questions, great comments. Thanks again everyone for your participation and questions. Just like last time, we'll address any questions we didn't get to in our help page for this webinar. I know there were some at the end now, and we will most definitely address them.

[00:52:46] We'll be sharing it with you next week. So please keep an eye out for that email. It'll also include the webinar recording and the job aids Taylor mentioned at the beginning of the session. If you look in the chat, you'll see that Taylor's just posted a link to a survey. We'd really love to hear from you and get some feedback about this webinar.

[00:53:09] And we just, yeah, we really appreciate your input, your feedback helps us plan and more importantly, improve these live events. You know we wanna try and keep them as short and concise as possible. We know how busy you are. And then, yeah, don't worry, your answers are all anonymous. And then yeah, I'll keep the meeting open at the end to give you more time to complete the survey.

[00:53:36] And the survey is our last item for today. I want to give a big thank you to our presenters, Mike, Tim, Simon and Taylor. They're all super busy. But of course, very happy to to be here for you guys and of course to you for joining the webinar today. Thank you. And so, yeah, we wish you all a very festive season and hope to see you all again in the new year!