HOW TO USE TEXT MESSAGING TO IMPROVE PATIENT ENGAGEMENT IN A POST-COVID-19 WORLD.

The challenges healthcare organizations were already facing are now exacerbated because of the Covid-19 pandemic. It's never been more critical to leverage mobile technologies to improve efficiencies, communication, optimization and even morale.

This eBook outlines 10 best practices for using text messaging for your staff, patients and vendor communication as you work to resume operations - from emergency alerts and updates to new appointment arrival procedures and rescheduling of appointments.

IT'S A MOBILE-LED WORLD, AND IT'S NEVER BEEN MORE IMPORTANT TO USE TEXTING IN YOUR COMMUNICATIONS

We'll cut to the chase: This is the time when the value and effectiveness of text messaging really shines. Throughout the nation, ambulatory surgery centers, medical practices, and other healthcare organizations that greatly reduced or temporarily ceased operations during this pandemic are beginning to reopen or planning how to do so in the coming weeks. For those organizations that leverage text messaging, resuming operations will prove more streamlined, safer, and ultimately successful. **And in a mobile-led world where patient engagement has become an essential strategy, text messaging is a necessity.**

Not all texting solutions are the same. Providers need solutions to fit their challenges. At minimum, a texting platform should be cloud-based, HIPAA-compliant and healthcare focused; including two-way texting capabilities and Tier 1 connectivity; and be easy to use and self-service for this new environment of ever-changing, urgent communications.
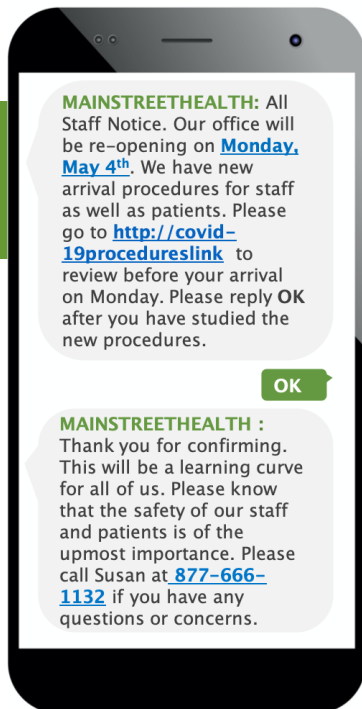
Here are 10 of the ways providers can use texting with patients, staff and vendor partners to their advantage post-Covid-19.

1. MASS TEXT ALERTS:
FOR ANNOUNCING PLANS TO REOPEN

A great first text to send to all key stakeholders is an announcement from organization leadership that the facility is gearing up to resume operations and more information will be forthcoming, including how safety will be ensured. This mass text will not only help mentally prepare recipients for the time when they will come to the organization for treatment, work or to provide a service, but it can also serve as welcomed, positive news of the beginning of the return to some semblance of normalcy.

How our clients are using text messages to inform staff, patients and vendors

- Announce reopening date and time
- Revised hours of operation
- New staff arrival procedures
- Updated staff schedules
- Vendor visits and protocol
- Links to arrival procedures
- Urgent positive Covid-19 result

MAINSTREETHEALTH: All Staff Notice. Our office will be re-opening on **Monday, May 4th**. We have new arrival procedures for staff as well as patients. Please go to **http://covid-19procedureslink** to review before your arrival on Monday. Please reply **OK** after you have studied the new procedures.

OK

MAINSTREETHEALTH : Thank you for confirming. This will be a learning curve for all of us. Please know that the safety of our staff and patients is of the upmost importance. Please call Susan at **877-666-1132** if you have any questions or concerns.

2. AUTOMATED / DIRECT TEXTS:
FOR RESCHEDULING CANCELED APPOINTMENTS

Once an organization determines when it will reopen, this is an apt time to begin sending text messages to those patients who had their appointments cancelled due to stay-at-home orders and social distancing guidelines. Such text messages would provide instructions for how patients can reschedule their appointments (e.g., phone call, form, portal). It can also include information on new safety measures or a hyperlink to a page on the organization's website that details such measures. More than 97% of phones can access text messaging and the mobile internet. Including hyperlinks is a useful way to engage patients by supplementing information in the text. Including the organization's phone number here is also an effective way to further engage with patients and encourage them to reach out with questions.
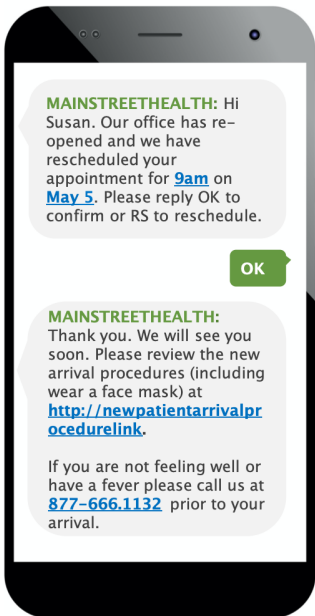
Leveraging text messaging to communicate about an organization's ability to accommodate patients is a highly efficient and cost-effective means of maximizing revenue and getting an organization back on track financially.

MAINSTREETHEALTH: Hi Susan. Our office has re-opened and we have rescheduled your appointment for **9am** on **May 5**. Please reply OK to confirm or RS to reschedule.

OK

MAINSTREETHEALTH: Thank you. We will see you soon. Please review the new arrival procedures (including wear a face mask) at **http://newpatientarrivalprocedurelink**.

If you are not feeling well or have a fever please call us at **877-666.1132** prior to your arrival.

How our clients are using text messages to reschedule lost appointments due to Covid-19

- Automated appointment rescheduling
- Direct / live texts to reschedule
- Two-way texts to confirm the reschedule
- Automated open slot filling
- Reminder to reduce no-goes
- Arrival procedures for on-time start

3. TEXT-BASED RECALL CAMPAIGNS:
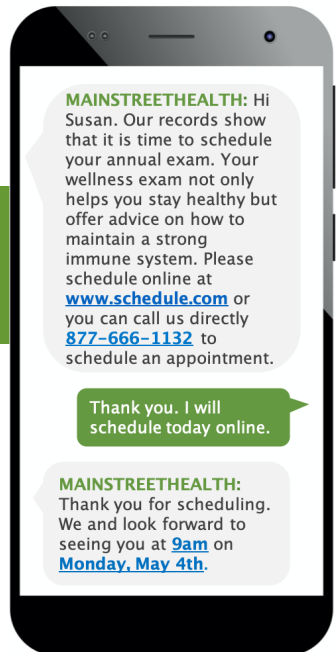## TO QUICKLY SCHEDULE NEW PROCEDURES

Following outreach to those patients who had their appointments scheduled, it's time to shift focus to scheduling patients in need of treatment who were identified during the shutdown but could not be scheduled. Organizations should use texts to help ensure optimization of available space on the patient schedule, which some organizations may expand (e.g., add weekend or evening hours) to accommodate the patient backlog and demand. Text messaging should also be used to drive recall campaigns, such as those for colorectal screenings and annual physicals/wellness visits.

Consider that not every outbound phone call staff members make is answered, but almost every inbound call to an organization during hours of operation is answered.

Texting is also a great way to inform patients that they need to call an organization. As noted, the text can put the organization's phone number at their fingertips.

How our clients are using text messages to manage recall / gaps in care programs

- Automated recall appointment
- Links to website / portal scheduling
- Two-way texts provide confirmation
- Automated open slot filling
- Phone number at fingertips for scheduling
- Confirmation with date and calendar load

MAINSTREETHEALTH: Hi Susan. Our records show that it is time to schedule your annual exam. Your wellness exam not only helps you stay healthy but offer advice on how to maintain a strong immune system. Please schedule online at **www.schedule.com** or you can call us directly **877-666-1132** to schedule an appointment.

Thank you. I will schedule today online.

MAINSTREETHEALTH: Thank you for scheduling. We and look forward to seeing you at **9am** on **Monday, May 4th**.

4. TEXT LINKS TO TELEHEALTH VISIT:
FOR AVAILABILITY OF TELEHEALTH SERVICES

For those organizations already running or planning to develop telehealth programs, text messaging is the most effective way to communicate with a majority of patients and encourage them to take advantage of these virtual services. Nearly all consumers already own mobile phones. Most mobile phones can access the internet and include a camera, and all can receive and interact with text messages. There is little to no learning curve for patients as most know how to use their phone for texting, and most have used videotelephony programs (e.g., FaceTime, Skype, Facebook Messenger). There is no need for someone to have wi-fi, a computer, speakers, or even be at home to access telehealth services through their mobile phone.

After scheduling a telehealth appointment, organizations can send a text message that includes the direct hyperlink to initiate the consultation and the time when the patient should click the hyperlink. Once the link in the text is selected, a web browser or default videotelephony app will automatically open and the camera on the phone should activate. This makes telehealth simple for patients and helps further optimize the billable time for telehealth visits.

How our clients are using text messages to schedule and conduct telehealth visits

MAINSTREETHEALTH: Hi John. Here is your appointment reminder for your telehealth visit tomorrow – April 24th with Dr. Smith at 11am.

MAINSTREETHEALTH: Hi John. Here is your direct link http://telehealthapptlink to your telehealth appointment today at 11am. Please log-in 5 minutes early. Thank you.

- Text to schedule telehealth visit
- Direct link to telehealth visit / platform
- Provide reminder of telehealth visit start time
- Texting can turn the mobile phone into a powerful telehealth tool
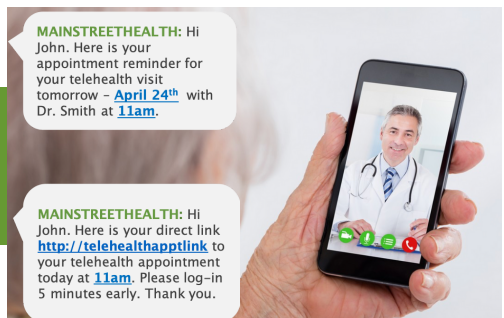
5. TEXT CHECK-IN PROCEDURES:
TO PROVIDE SAFETY DIRECTIONS TO PATIENTS

While efforts to "flatten the curve" seem to be working, the risk of contracting COVID-19 remains high in many areas of the country. Organizations should use text messages to explain to patients the safety directions they are expected to follow for their appointment. This may include changes to check-in and discharge procedures, wearing of personal protective equipment (PPE) and new waiting room policies.

If an organization wants to speak with patients to review these directions, a text can inform patients about this need and then include the phone number from which the organization staff member will be calling and the time of day patients should expect the call. This will increase the likelihood that patients answer a call from a number they may have otherwise not recognized.

MAINSTREETHEALTH: ..
Your appointment is tomorrow at **9am** on **April 24th**. We look forward to seeing you.

If you are not feeling well or have a fever please call us at **877-666.1132** prior to your arrival.

MAINSTREETHEALTH: Hi Susan. We have updated our arrival procedures to keep everyone safe and healthy. Please call us at **787-666.1132** from your car when you arrive tomorrow. We will let you know when to come into the building. Please follow Sonoma county guidelines and wear a face mask to the appointment.

How our clients are using text messages to provide safety and appointment arrival procedures

- Automated pre-appointment procedure
- Explain managing patient arrivals to staff
- Links to website / portal with arrival instructions
- Link to FAQ on safety and facility operations
- Provide office number to expect call pre-appointment
- Explain new safety procedures to staff, patients and vendors
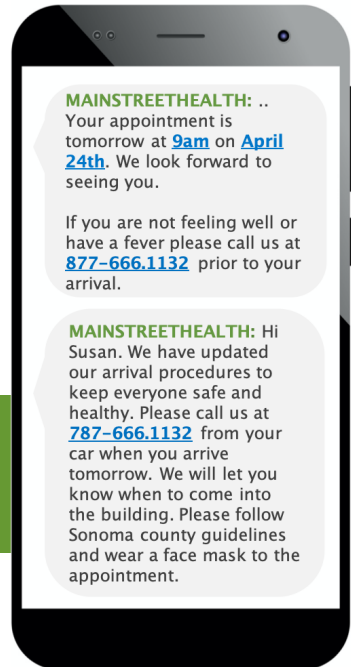
6. TEXT APPOINTMENT REMINDERS:
REMINDING PATIENTS AND REDUCING NO-GO'S

Texting patients is a proven way to reduce cancellations, no-shows and no-goes. Prior to an appointment, organizations should send a text that reminds patients about their scheduled treatment. The text can also include a reminder or information about required preparation for the treatment (e.g., fasting), directions to the organization, safety policies, and the organization's phone number in the event that patients have questions. This is also a good time to tell patients that if they are not feeling well, they should reach out to cancel their appointment.

Patients who receive appointment information via text are at least 2x more likely to complete their appointment as scheduled...reminding us once again we live in mobile-led world.

How our clients are using texting to increase efficiencies and reduce no-shows

- Automated appointment reminders
- Automated appointment reminders with links - directions to facility
- Provide co-payment information and pre-appointment paperwork
- Explain arrival procedures for on-time start

7. GROUP TEXT ALERTS:
INFORMING STAFF AND VENDORS ABOUT NEW POLICIES AND PROCEDURES

As with patients, organizations should use texting to tell staff and vendors who will be coming to the organization about changes to policies and procedures, such as those concerning pre-screening, screening upon admission, vendor check-in and wearing of PPE. Such an effective use of mass texting capability can also serve to remind staff and vendors about the need to avoid traveling to the organization if they are not well.

Organizations can use texting to send direct links for the most updated policies and procedures documents, websites, or portals.

How our clients are using text messages to inform staff and vendors

- Texts sent to specified groups
- Links to all updated procedures documents
- Provide delivery procedures to vendors
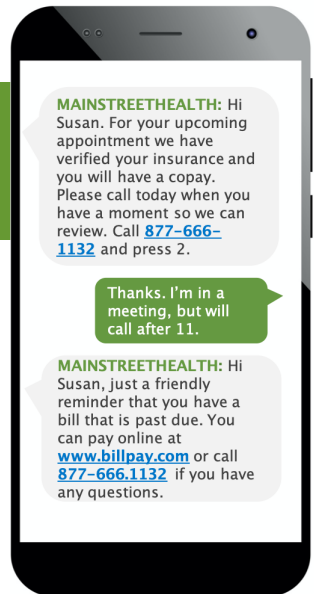- Share safety procedures with staff and vendors

8. TEXT REVENUE CYCLE MANAGEMENT:
TO INCREASE TOP-LINE REVENUE

As discussed, using texting for appointment-related messages reduces cancellations and no-shows. Not only can you more effectively identify which patients plan to keep their appointment, but staff also can identify patients who need to cancel or reschedule. That gives staff a chance to fill that appointment slot with other patients.

Organizations can also send well-worded and polite texts reminding patients of their payment responsibility — either upcoming or overdue — and the manner in which they can pay for treatment. Include a link to an online bill pay website, if you offer such a payment mechanism. This approach to securing payment is familiar to most people, since many other industries already use texting for payment prompts, including most major credit cards and many banks.

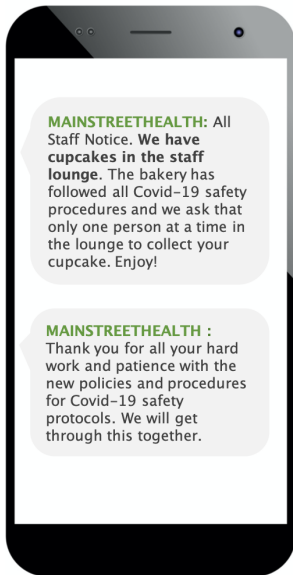### How our clients are using text messages for revenue cycle management

- Communicate co-pays
- Provide link to payment portals
- Phone number at fingertips for questions
- Provide link to balance due
- Provide link to insurance forms
- Automated appointment reminders with co-pay information

MAINSTREETHEALTH: Hi Susan. For your upcoming appointment we have verified your insurance and you will have a copay. Please call today when you have a moment so we can review. Call **877-666-1132** and press 2.

Thanks. I'm in a meeting, but will call after 11.

MAINSTREETHEALTH: Hi Susan, just a friendly reminder that you have a bill that is past due. You can pay online at **www.billpay.com** or call **877-666.1132** if you have any questions.

9. URGENT COMMUNICATION TEXTS:
KEEPING STAKEHOLDERS CURRENT ON CHANGES

During these uncertain times, policies and procedures in place one day may need to change for the next. Text messaging is a fast, effective way of keeping stakeholders current on rules and expectations. Mass texting is also valuable in the event that an organization must quickly inform stakeholders of a significant development, such as a visitor testing positive for the novel coronavirus.

As the Department of Homeland Security's Ready website notes, "When an emergency occurs, the need to communicate is immediate. ... An important component of the [emergency] preparedness program is the crisis communications plan. A business must be able to respond promptly, accurately and confidently during an emergency in the hours and days that follow. Many different audiences must be reached with information specific to their interests and needs." In addition, an effective mass communication plan, as a component of an emergency preparedness plan, also allows businesses to track whether critical messages have reached audiences successfully.

MAINSTREETHEALTH: All Staff Notice. **We have cupcakes in the staff lounge**. The bakery has followed all Covid-19 safety procedures and we ask that only one person at a time in the lounge to collect your cupcake. Enjoy!

MAINSTREETHEALTH : Thank you for all your hard work and patience with the new policies and procedures for Covid-19 safety protocols. We will get through this together.

How our clients are using texting for critical and rapidly changing information

- Direct / live (1 to 1) texts
- Mass / broadcast texts
- A nice reminder that not all texts need to be emergency related

10. EMOTIONAL SUPPORT TEXTS:
FOR BOOSTING STAFF MORALE

While most text messages sent by organizations will concern safety and business matters, there is another beneficial way to use the technology: providing emotional and inspirational support to staff during this unprecedented and uncertain time. Sending an uplifting text message can have a positive impact on mental health.

We believe the value of supportive text messages can be underestimated, but that is changing as mental health is challenged during uncertain and turbulent times. Here are a few examples of texts organizations are sending to help lift the spirits of their team members:

How our clients are using texting for emotional support for their staff

"Sometimes we are tested not to show our weaknesses but to discover our strengths" – John F. Kennedy. As you know we have been tested these past few weeks, but it's the confidence we have in our team that assures us we will return from this stronger and better than before. Until that time, please know we are wishing you and yours good health.

During this challenging time, we want you to know that we are appreciative of everything you do and the sacrifices that have been made. Your selflessness is a reflection of our patient care and represents the best of our centers. We look forward to coming back together as soon as possible, but in the meantime, we wish you good health.

CONCLUSION

Text messaging is a proven method for engaging patients, enhancing outcomes, improving staff productivity and strengthening workflow, among other benefits. As text messaging has become the preferred communication method for a growing number of Americans, healthcare organizations should evaluate how they can incorporate two-way text messaging as a communication platform or further expand its existing use during this transitional period.

We are here to help. Organizations interested in adding or expanding text messaging should visit the Dialog Health website at dialoghealth.com, text or call (877) 666-1132 or email info@dialoghealth.com.

During Covid-19, we have fast-tracked mass text alert setup and streamlined database uploading.

4 EASY STEPS TO SET-UP MASS TEXT ALERTS

STEP 1: SIGN-UP
Set up is fast. Since the platform is cloud-based, there's no software to install.

STEP 2: LOAD CSV FILE
Load your CSV file into the provided template and complete a short training.

STEP 3: WRITE YOUR TEXT MESSAGE
Write your custom message or use one of our best practice texts. Need help? Call on our support team.

STEP 4: SEND TEXT ALERTS
GO LIVE!
Start sending text messages to your selected groups.

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Please contact us if you would like more information about text messaging for patient, staff and vendor communications.

CONTACT:
BRANDON DANIELL | 615-429-4252

VISIT US:
WWW.DIALOGHEALTH.COM