Envoy SMS Message Reminders

SMS Reminder Functionality

Healthcare Communications (HCC) use a system called Envoy, to send SMS appointment reminders to patients with an upcoming appointment in the next 2 or 7 days. The role of SMS messaging is to provide an appointment reminder to patients after they have received an appointment letter. This will not replace the appointment confirmation letter.

Patients can confirm if they would like to opt in or out of the SMS Reminder Service – this notification preference is updated in the patient's registration screen. All appointment confirmation letters that go out to patients will include information on contacting the service if they wish to change their notification preference.
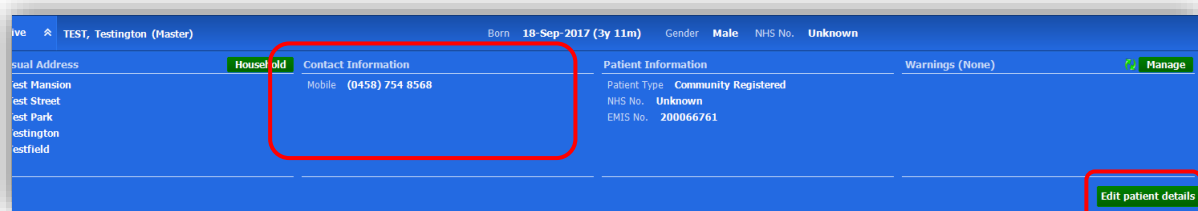
When the patient has an appointment booked on EMIS Web, the slot type used is mapped to 1 of 4 different text messages – Face to Face, Home Visit, Telephone Consultation, and Video consultation.

Where a child/young person is known to be in **foster care or not to be currently living with their parent/s**, please ensure that the SMS notification preference is set to **No** on the child/young person's record.

Checking and Updating patient mobile phone number

With the introduction of SMS appointment reminders, it is vital that the mobile number stored in the patient's demographic record is correct and up to date. Clicking on the Patient Précis bar, you can see the contact information stored for the patient, including the mobile phone number.

Where you identify that the mobile number currently within the system are incorrect or missing, please ensure these details are updated.

To amend the contact details within EMIS Web, click on the **Edit Patient Details** button on the bottom right of the Patient Précis bar.

On the **Patient Details** page, scroll down to the contact details section and amend or remove the **Mobile Tel No**

The field **Mobile Tel No** is the only field that will generate an SMS message, if any of the other phone number fields are been used to record the patients mobile number this must be updated.

Checking and Updating patient's notification preference

When a patient record is open on EMIS Web (desktop) you will notice that there is a patient alert on bottom right of the screen stating if the patient has a notification preference set.

*N.B. by default each patient will have the notification preference set to **No Consent Preference Set** and will receive SMS messages unless this is altered.*
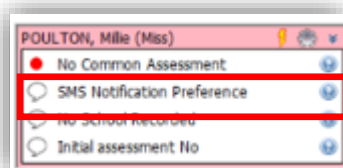
If the patient does have a preference set the alert will state **SMS Notification Preference.** Hovering over this alert will give details on what preference the patient has selected.
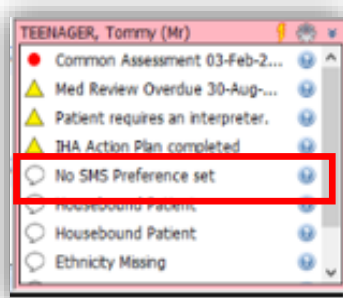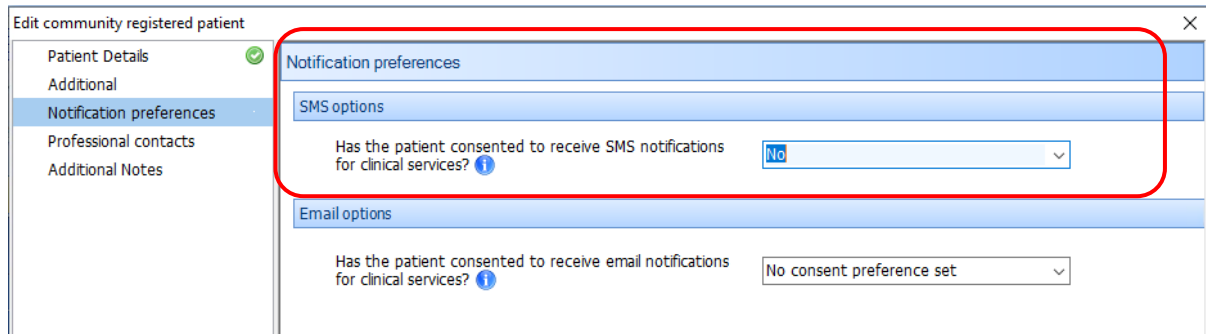

If the patient does not have a preference set the alert will state, **No SMS Preference Set**

To amend the Notification Preference within the EMIS Web, click on the **Edit Patient Details** button on the bottom right of the Patient Précis bar.

On the **Notification Preferences** Page, there is a section for **SMS Options**

Under the SMS Options section, in the *Has the patient consented to receive SMS notification for clinical services?* change the dropdown option to **Yes** or **No**. Selecting **No** will exclude the patient from receiving any further SMS messages.
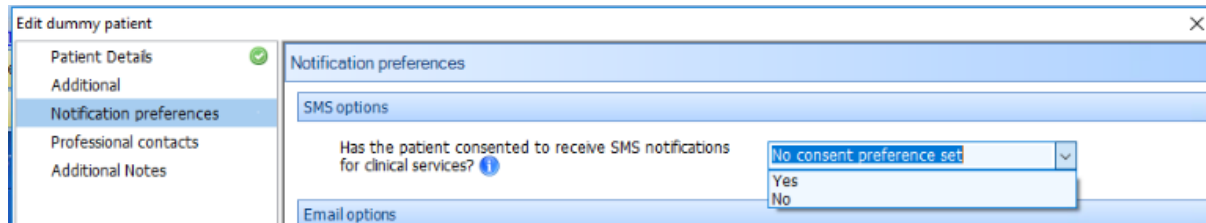
Cancelled Appointments

The appointment data is taken out of EMIS Web every day and provided to the MFT Data Team in the form of a data extract. This data is then process and made available to HCC to use for sending the appropriate SMS messages to patients. This process is not immediate and so there is always a gap between Live appointment data and the appointment data that is provided to HCC.

Data extract dates:

EMIS appointment data extracted	Data Received by MFT	Data made available to HCC
Monday	Tuesday	Wednesday
Tuesday	Wednesday	Thursday
Wednesday	Thursday	Friday
Thursday	Friday	Saturday
Friday	Monday	Tuesday

The result of this is a time just prior to a booked appointment, where if an appointment is cancelled within this window then the patient may still receive the SMS message. For this reason, patients should be advised when cancelling an appointment less than a week before it is due, that they may still receive an appointment reminder via SMS. The tables below should help to explain the timings in more detail.

To cancel an appointment and <u>NOT</u> receive a 2-day reminder text:

Booked Appointment Day	Last day to cancel (up to 5pm)	Days prior to the appointment
Monday	Thursday	4 days
Tuesday	Thursday	5 days
Wednesday	Thursday	6 days
Thursday	Friday	6 days
Friday	Monday	4 days
Saturday	Tuesday	4 days
Sunday	Wednesday	4 days

To cancel an appointment and <u>NOT</u> receive a 7-day reminder text:

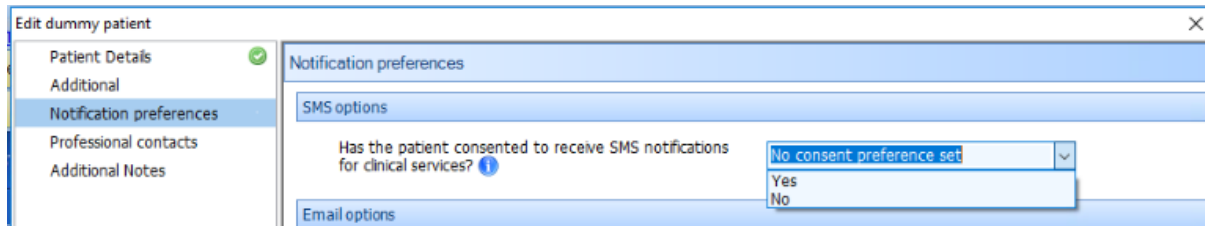| Booked Appointment Day	Last day to cancel	Days prior to the appointment
Monday	Monday	11 days
Tuesday	Tuesday	12 days
Wednesday	Wednesday	13 days
Thursday	Thursday	12 days
Friday	Friday	11 days
Saturday	Saturday	11 days
Sunday	Sunday	11 days

Care Homes – Adult Services

If patient goes into a care home, many of these homes will use a single contact number for residents as most patients there will not be using and in charge of their own phone. To make sure that these numbers are not flooded with SMS messages when community services are making visits to the care home, the patient notification preference must be set to **No**.

Edit the patient details and navigate to the **Notification preference** page

Under the SMS Options section, in the *Has the patient consented to receive SMS notification for clinical services?* change the dropdown option to **No**. This will exclude the patient from receiving any SMS messages.

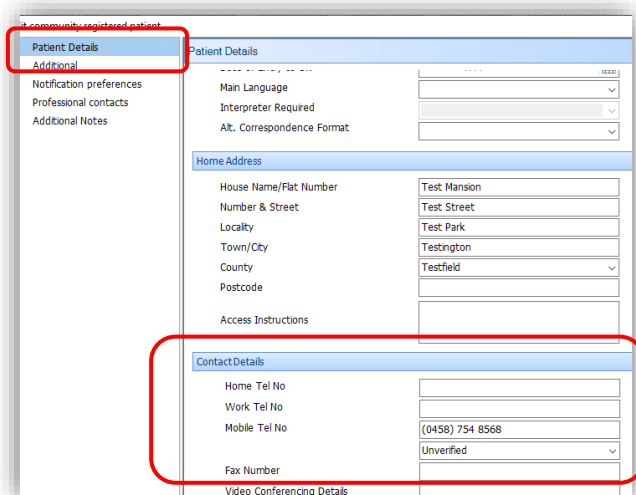# Internal Referrals – Children's Services

Making an Internal Referral

Prior to the internal referral being made within the EMIS EPR, the referrer must confirm the correct address and contact number for the parent/carer and ensure these are updated on the child/young person's EMIS record. Clicking on the Patient Précis bar, you can see the contact information stored for the patient, including the mobile phone number.

Where you identify that the mobile number currently within the system are incorrect or missing, please ensure these details are updated.

To amend the contact details within EMIS Web, click on the **Edit Patient Details** button on the bottom right of the Patient Précis bar.

On the **Patient Details** page, scroll down to the contact details section and amend or remove the **Mobile Tel No**

The field **Mobile Tel No** is the only field that will generate an SMS message, if any of the other phone number fields are been used to record the patients mobile number this must be updated.

Once all relevant details have been confirmed and updated (as appropriate) within the EMIS EPR, complete the internal referral to the relevant service in the usual way. Please ensure that within the comment field, you clearly identify within the first sentence that all demographic details including mobile number have been checked and confirmed and the

date this was done. Where **a child or young person is currently in foster care or known not to be currently living with their parent/s** this must also be included within the comment section.

Receiving an internal referral
Prior to the internal referral within EMIS being accepted by your service, please check that all demographic details have been checked and confirmed by the referring service. To review these details please check within the comments section of the referral that the referrer has indicated that this has been completed. This should be visible within the details of the referral.

Where this information has not been included, please task the referring service to ask for confirmation that all demographic checks including the mobile number have taken place.

Where these details have not be previously confirmed and cannot be confirmed without a delay in accepting the referral or where the referring service have indicated the child/young person is in foster care, please ensure that the SMS notification preference is set to **No** on the child/young person's record.

Edit the patient details and navigate to the **Notification preference** page

Under the SMS Options section, in the *Has the patient consented to receive SMS notification for clinical services?* change the dropdown option to **No**. This will exclude the patient from receiving any SMS messages.