

Industry Insights Webinar

Utilizing Messaging Technology to Communicate with Patients



BO NIELSEN

Founder & CEO, AutoRemind



Webinar tips for attendees



Questions

You can submit a question anytime by using the "Question" area of your control panel. We will reserve time for Q&A at the end of the session.



Audio

Your audio will be streaming through your computer speakers.



Recording

After the webinar ends, registrants will receive a notification through email with a URL link of the recording for on-demand viewing.

Get **inspired** by **real life examples** on how to use electronic communication technology to grow your business and improve patient service.

- Stay top of mind via Newsletters/Birthday Greetings
- Bring patients back with Recalls
- Look great online. Website design and Reputation Management
- Streamline Rx refills
- Rules and regulations of electronic communication

Stay top of mind

Newsletters and Birthday Greetings

Stay top of mind

AutoRemind

Why does the Coca-Cola company continue to advertise?

They spend \$4+ Billion every year which is more than 10% of their revenue



AutoRemind

Microlife

Stay top of mind

AutoRemind

Out of sight, out of mind

Consumers are bombarded by options



AutoRemind

Microlife

Stay top of mind

AutoRemind

You are not Coca-Cola, but you have something they dream about

You have customers/patients and you know their name, address, phone number and more

Acquiring a new customer can cost 5x more than retaining an existing customer

The success rate of selling to an existing customer is 60-70%, while the success rate of selling to a new customer is 5-20%

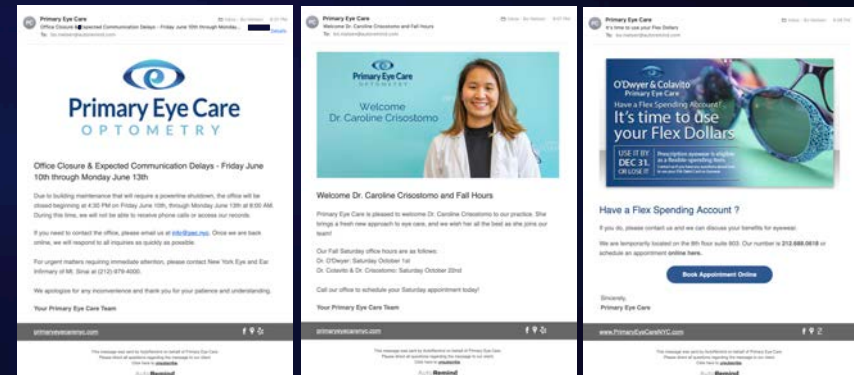
Being top-of-mind is a crucial component of making a sale

AutoRemind

Microlife

Stay top of mind

AutoRemind



Information

Soft Selling

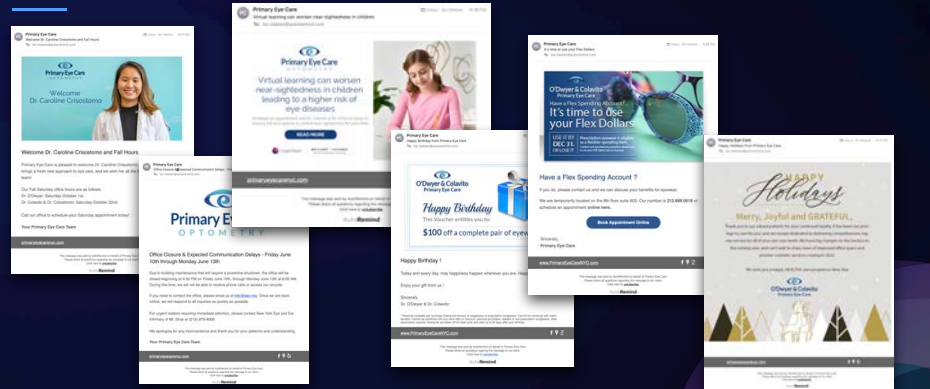
Selling

AutoRemind

Microlife

Stay top of mind

AutoRemind



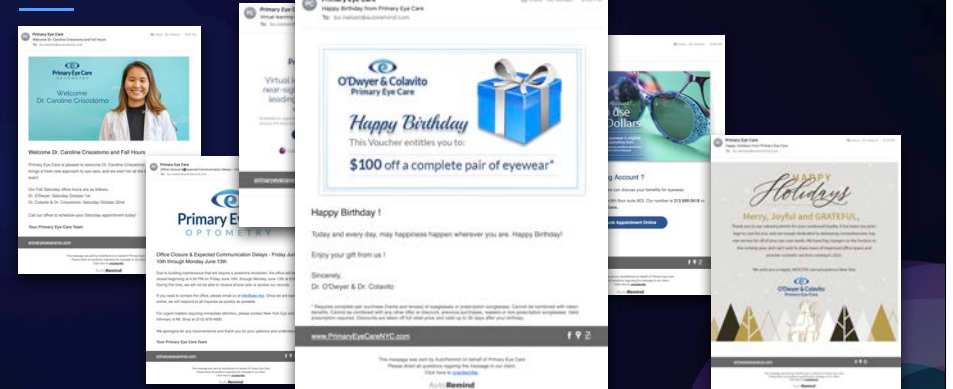
Send a message 5-6 times a year as a minimum. Get your company logo in front of patients

AutoRemind

Micro

Stay top of mind

AutoRemind



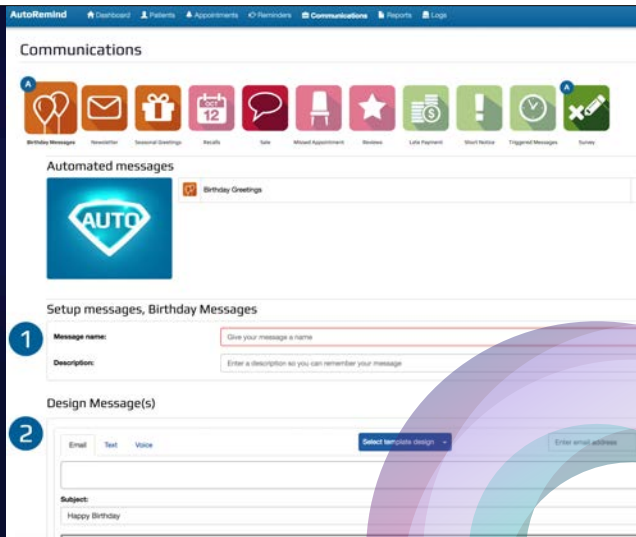
Send a message 5-6 times a year as a minimum. Get your company logo in front of patients

AutoRemind

Micro

Demo

It is easier than you think
 Make a newsletter in under 5 min
 Simple, Intuitive user interface



Bring patients back

Recalls

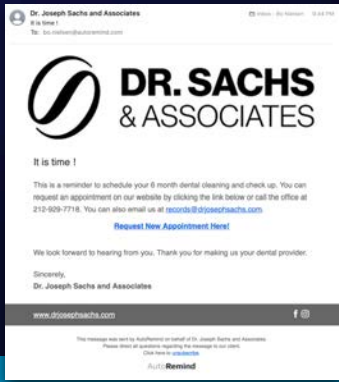
AutoRemind

Micro

Bring patients back

AutoRemind

Recalls/Follow Up in not just something dentists do



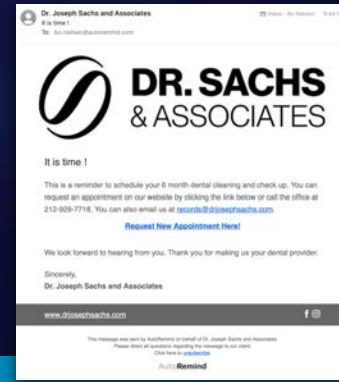
AutoRemind

Micro

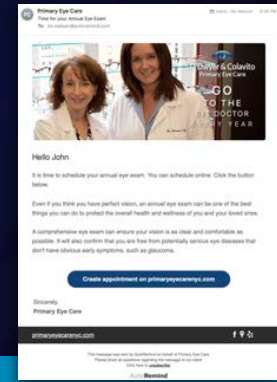
Bring patients back

AutoRemind

Recalls/Follow Up in not just something dentists do



AutoRemind

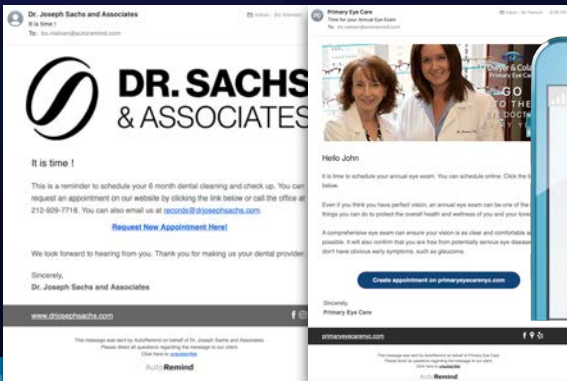


Micro

Bring patients back

AutoRemind

Recalls/Follow Up in not just something dentists do



AutoRemind

Micro

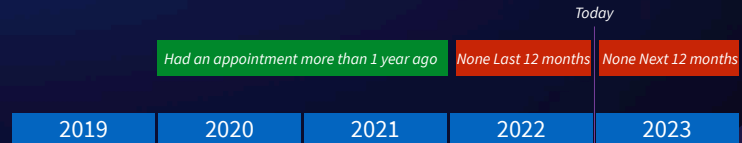
Bring patients back

AutoRemind

It is very simple to setup and run automatically

It does require some precision in schedule handling

Create an appointment type called ANNUAL EXAM



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Micro

Look good online

Website design and Reputation Management

Why?

New patients

80% referrals from other patients or via insurances

20% organically via Google, local advertisement, etc.

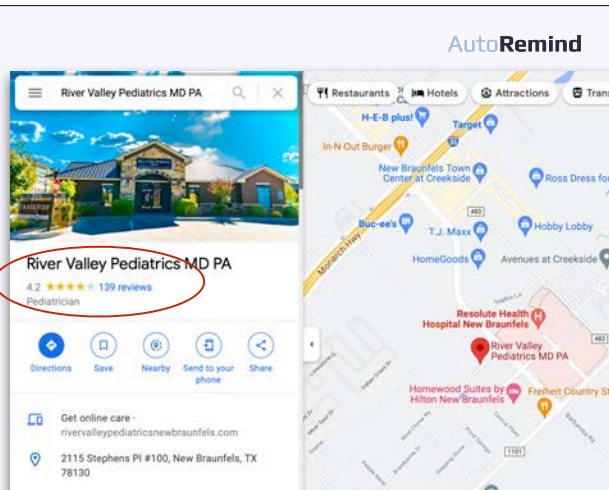
100% of new patients will check the healthcare office online. First Google then website

Reviews

Lets look at River Valley Pediatrics in New Braunfels, TX.

★ River Valley has **4.2 Stars** up from 3.7

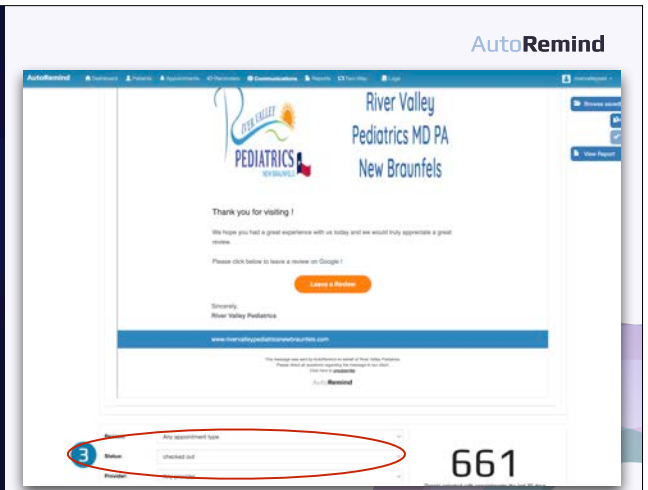
✍ They now have **139 reviews** up from 60



Reviews

Fully Automated after an appointment

You just need set the appointment type to 'checked out' in your schedule



I am afraid of getting bad reviews!

Can you remove bad reviews?

FTC

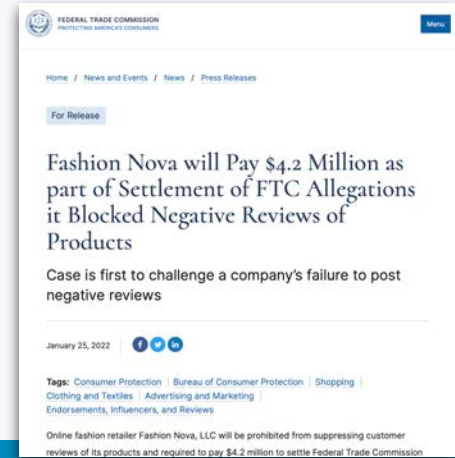
New FTC ruling

10 Major review systems got a warning

Focus on "Review Gating"

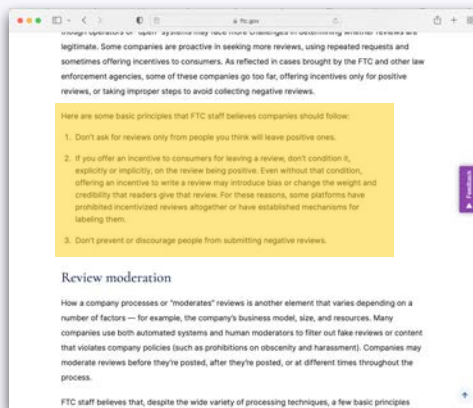
Google is following FTC

You can lose your Google business account and would not be found on Google



Reviews

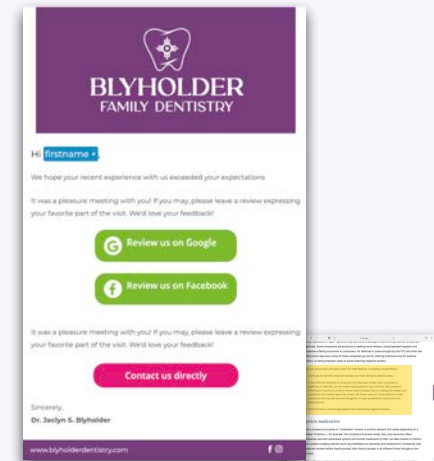
FTC Guidelines



<https://www.ftc.gov/business-guidance/resources/featuring-online-customer-reviews-guide-platforms>

Reviews

FTC Guidelines

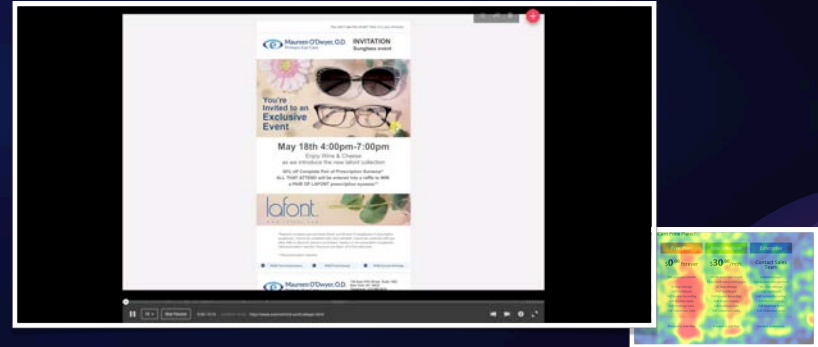


<https://www.ftc.gov/business-guidance/resources/featuring-online-customer-reviews-guide-platforms>

*After checking out independent reviews
the patients will visit your website*

Website

Understand what visitors do on your website. Be data driven.



Website

Understand what visitors do on your website



Google
Visitor Analytics

Google Analytics should be built-in to your website. It will record visitor's online actions

This will help you construct a website targeted to your audience's needs



Website demo

Website

Average person reads 238 word per minute.

This doctor's profile is about half of that.

Our Doctors

Maureen O'Dwyer, OD

Jennifer Colavito, OD

Caroline Cristostomo, OD

After earning my Bachelor of Arts degree in Biology from the University of Virginia, I went on to receive my doctorate at SUNY College of Optometry.

My clinical experiences include primary care, ocular disease, specialty contact lenses, and myopia management through rotations at Gouverneur Health Center, Ezra Medical Center and the University Eye Center in New York City.

I am very passionate about the work that I do and am committed to providing personalized and quality eye care to all of my patients and promoting ocular and visual health.

I am motivated to give back to my community and have volunteered for Vietnam Health Clinic providing vision care for underprivileged patients in rural areas in Vietnam. Outside of the office, I enjoy traveling, playing tennis, and trying new restaurants in the city.



Dr. Caroline Cristostomo
Optometrist

Streamline Rx Refill

Combine technologies

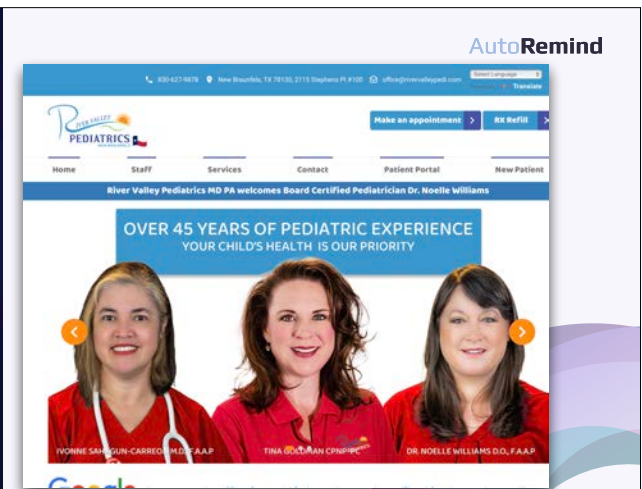
River Valley Pediatrics

Nursing staff took care of all phone calls

Customers are busy young parents

65-70% of site visitors are mobile users

Demo



Rules and Regulations

HIPAA, TCPA and CAN-SPAM

Disclaimer

AutoRemind is not a law firm, nor a legal advisory firm. The information contained in this presentation is provided as a courtesy only and should not be construed as legal advice.

Compliance with the laws and regulations mentioned should be undertaken solely in conjunction with your legal counsel.

Rules and Regulations


HIPAA - Patient information protection

TCPA - Telephone Consumer Protection. Fax/Phone/Texting

CAN-SPAM - Email Marketing

Messaging Strategy and Policy

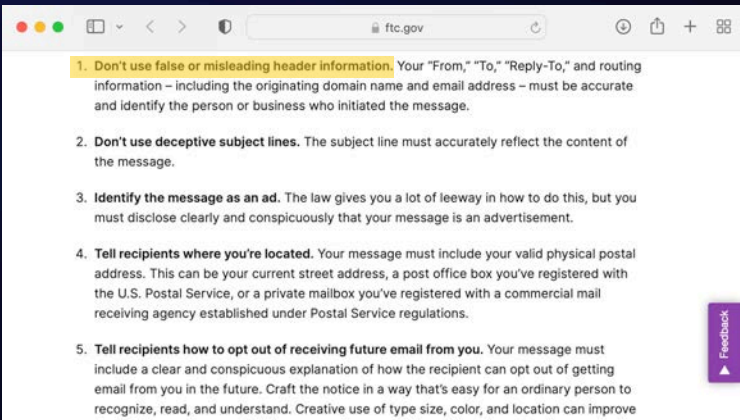
CAN-SPAM - Email Marketing (but also transactional)



The screenshot shows a web browser window displaying the Federal Trade Commission's website. The page title is "CAN-SPAM Act: A Compliance Guide for Business". The breadcrumb trail is "Home / Business Guidance / Business Guidance Resources". Below the title, there are tags for "Advertising and Marketing", "Online Advertising and Marketing", and "Privacy and Security". A section titled "Related Rules: CAN-SPAM Rule" contains the following text: "Do you use email in your business? The CAN-SPAM Act, a law that sets the rules for commercial email, establishes requirements for commercial messages, gives recipients the right to have you stop emailing them, and spells out tough penalties for violations. Despite its name, the CAN-SPAM Act doesn't apply just to bulk email. It covers all commercial messages, which the law defines as 'any electronic mail message the primary purpose of which is the commercial advertisement or promotion of a commercial product or service,' including email that promotes content on commercial websites. The law makes no exception for business-to-business email. That means all email - for example, a message to former customers announcing a new product line - must comply with the law. Each separate email in violation of the CAN-SPAM Act is subject to penalties of up to \$48,517, so non-compliance can be costly. But following the law isn't complicated. Here's a rundown of CAN-SPAM's main requirements."

<https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business>

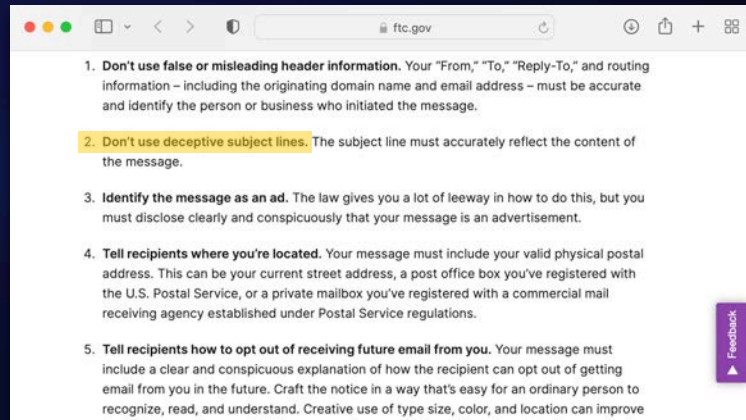
CAN-SPAM - Email Marketing

- 
1. **Don't use false or misleading header information.** Your "From," "To," "Reply-To," and routing information – including the originating domain name and email address – must be accurate and identify the person or business who initiated the message.
 2. **Don't use deceptive subject lines.** The subject line must accurately reflect the content of the message.
 3. **Identify the message as an ad.** The law gives you a lot of leeway in how to do this, but you must disclose clearly and conspicuously that your message is an advertisement.
 4. **Tell recipients where you're located.** Your message must include your valid physical postal address. This can be your current street address, a post office box you've registered with the U.S. Postal Service, or a private mailbox you've registered with a commercial mail receiving agency established under Postal Service regulations.
 5. **Tell recipients how to opt out of receiving future email from you.** Your message must include a clear and conspicuous explanation of how the recipient can opt out of getting email from you in the future. Craft the notice in a way that's easy for an ordinary person to recognize, read, and understand. Creative use of type size, color, and location can improve

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Micro

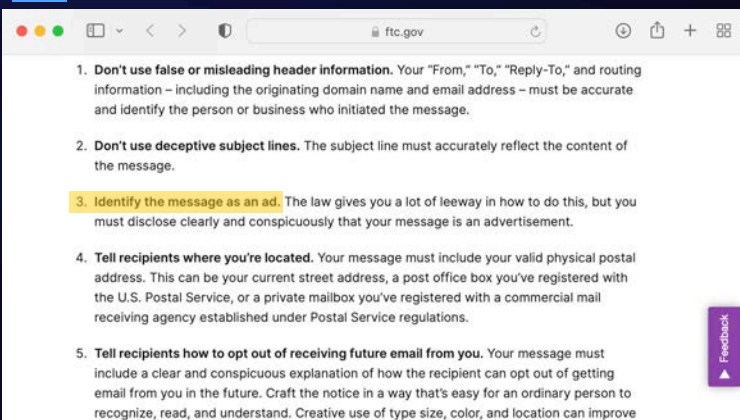
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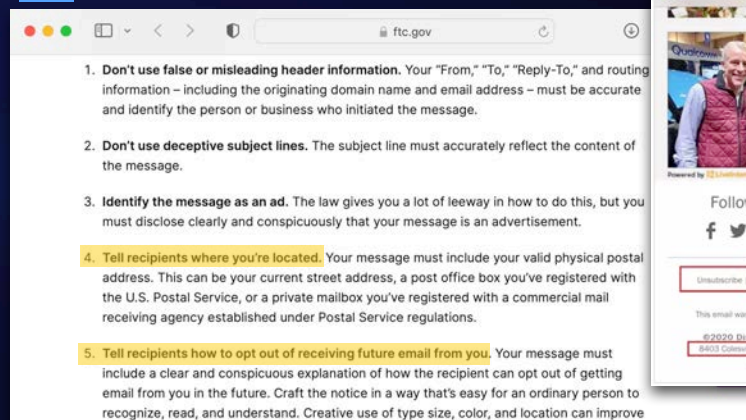
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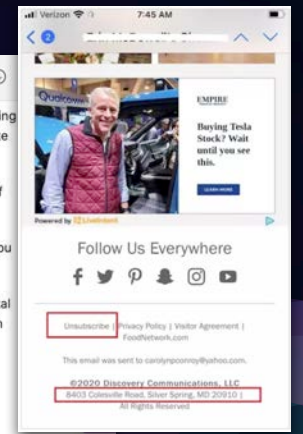
Micro

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TCPA - Telephone Consumer Protection. Fax/Phone/Texting

Telephone Consumer Protection Act 47 U.S.C. § 227

SEC. 227. [47 U.S.C. 227] RESTRICTIONS ON THE USE OF TELEPHONE EQUIPMENT

(a) DEFINITIONS.—As used in this section—

(1) The term “automatic telephone dialing system” means equipment which has the capacity—

(A) to store or produce telephone numbers to be called, using a random or sequential number generator; and

(B) to dial such numbers.

(2) The term “established business relationship”, for purposes only of subsection (b)(1)(C)(i), shall have the meaning given the term in section 64.1200 of title 47, Code of Federal Regulations, as in effect on January 1, 2003, except that—

(A) such term shall include a relationship between a person or entity and a business subscriber subject to the same terms applicable under such section to a relationship between a person or entity and a residential subscriber and

The Telephone Consumer Protection Act or TCPA compliance controls telemarketing calls, automated calls, pre-recorded calls, text messages, and unsolicited faxes.

TCPA - Telephone Consumer Protection. Fax/Phone/Texting

Healthcare Treatment Purpose Exemption

In 2015, the FCC attempted to clarify certain issues raised by the healthcare industry concerning the TCPA's failure to keep up with emerging cell phone technology. As part of that attempt, the FCC issued a declaratory ruling which expanded the healthcare exemptions to cover cell phones, permitting healthcare providers to place autodialed and artificial/pre-recorded voice and text messages to cell phones, **without the consumers' prior express consent**, written or otherwise, in order to convey important “health care messages” as defined and covered by HIPAA. These exemptions include healthcare messages relating to:

- Appointments and exams
- Confirmations and reminders
- Wellness checkups
- Hospital pre-registration instructions
- Pre-operative instructions
- Lab results
- Post-discharge follow-up intended to prevent readmission
- Prescription notifications
- Home healthcare instructions

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TCPA - Telephone Consumer Protection. Fax/Phone/Texting

Healthcare Treatment Purpose Exemption

While this exemption allows calls to be placed without a consumer's prior express consent, the FCC also enumerated the following conditions to qualify for the exemption:

- A call or text message must be sent only to the cell phone number provided by the patient. The patient cannot be charged or have the call or text counted against the limits of his or her cellular telephone plan.
- The name and contact information of the healthcare provider must be stated at the beginning of a call or included in a text message.
- **The call or text message cannot include telemarketing, solicitation, or advertising content; cannot pertain to accounting, debt collection, or other financial information; and must comply with HIPAA privacy rules.**
- The message must be concise, generally one minute or less for calls and 160 characters or less for text messages.
- Healthcare providers may only initiate one call or text message per day, up to a maximum of three combined calls or text messages per week for each healthcare provider.
- Each message must offer recipients an easy way to opt-out of future messages, e.g., a voice-activated or key press-activated mechanism or a toll-free number for calls, and replying “STOP” for text messages.
- All opt-out requests must be honored immediately.

HIPAA - Patient information protection

Yes, HIPAA Requires Medical Records to Be Emailed to Patients if Requested

Daniel Solove
November 23, 2018



Have you ever asked your healthcare provider to send you medical records by email? Most likely, you've received the reply: "We can't do that. We can only fax them to you or provide you with a paper copy." This answer is wrong.

HIPAA's right for individuals to access their health information, 45 CFR § 164.524, provides:

The covered entity must provide the individual with access to the protected health information in the form and format requested by the individual, if it is readily producible in such form and format; or, if not, in a readable hard copy form or such other form and format as agreed to by the covered entity and the individual.



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HIPAA - Patient information protection

HHS.gov
U.S. Department of Health & Human Services

Health Information Privacy

I'm looking for...

HIPAA for Individuals | Filing a Complaint | HIPAA for Professionals | Newsroom

HHS > HIPAA Home > For Professionals > Privacy > Guidance Materials > Individuals' Right under HIPAA to Access their Health Information

HIPAA for Professionals

Regulatory Initiatives

Privacy

Summary of the Privacy Rule

Guidance

Individuals' Right under HIPAA to Access their Health Information 45 CFR § 164.524

This guidance remains in effect only to the extent that it is consistent with the court's order in *Ciox Health, LLC v. Azar*, No. 18-cv-0040 (D.D.C. January 23, 2020), which may be found at https://ect.dsd.uscourts.gov/cgi-bin/show_public_doc?2018cv0040-51. More information about the order is available at <https://www.hhs.gov/hipaa/our-work/individual-right-of-access/index.html>. Any provision within this guidance that has been vacated by the Ciox Health decision is rescinded.

HIPAA - Patient information protection

HHS.gov
U.S. Department of Health & Human Services

Health Information Privacy

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HHS > HIPAA Home > For Professionals > Privacy > Guidance Materials > Providing Access

Providing Access

Form and Format and Manner of Access

The Privacy Rule requires a covered entity to provide the individual with access to the PHI in the form and format requested, if readily producible in that form and format, or if not, in a readable hard copy form or other form and format as agreed to by the covered entity and individual. See 45 CFR 164.524(c)(2)(i). If the individual requests electronic access to PHI that the covered entity maintains electronically, the covered entity must provide the individual with access to the information in the requested electronic form and format, if it is readily producible in that form and format, or if not, in an agreed upon alternative, readable electronic format. See 45 CFR 164.524(c)(2)(ii). The terms "form and format" refer to how the PHI is conveyed to the individual (e.g., on paper or electronically, type of file, etc.) Thus:

- **Requests for Paper Copies** – Where an individual requests a paper copy of PHI maintained by the covered entity either electronically or on paper, it is expected that the covered entity will be able to provide the individual with the paper copy requested.
- **Requests for Electronic Copies** – Where an individual requests an electronic copy of PHI that a covered entity maintains only on paper, the covered entity is required to provide the individual with an electronic copy if it is readily producible electronically (e.g., the covered entity can readily scan the paper record into an electronic format) and in the electronic format requested if readily producible in that format, or if not, in a readable alternative electronic format or hard copy format as agreed to by the covered entity and the individual.
- Where an individual requests an electronic copy of PHI that a covered entity maintains electronically, the covered entity must provide the individual with access to the information in the requested electronic form and format, if it is readily producible in that form and format. When the

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
2. Our Use of Electronic Communications:

[insert healthcare provider name] uses electronic communications methods to communicate with patients regarding their healthcare. Some of the methods that we use are unencrypted and unsecured in nature, such as regular email service and/or text/SMS messaging. We use such unencrypted and unsecured methods of electronic communication only to communicate with patients about non-sensitive and non-urgent issues. All electronic communications to or from you may be made a part of your medical record to which you have access. We will not disclose electronic communications to or from you or your identifiable information to third parties without your consent, except as authorized by law. We are not liable for breaches of confidentiality caused by you or any third party. If you have a medical emergency, **CALL 911**. Do not use electronic means other than direct phone calls to communicate urgent medical problems or to discuss complex or sensitive information; please call our staff directly. Although we try to respond to email messages daily, we cannot guarantee that any particular email will be read and responded to within any particular period of time. It is your responsibility to follow up with our staff if you do not receive a timely response.

3. Risks of Using Electronic Communications:

You should be aware that the use of unsecured and unencrypted electronic communications has a number of risks that you should consider. These risks include, without limitation: (a) the risk of the electronic communication being circulated, forwarded, or broadcasted to unintended recipients; (b) the risk of misaddressing an electronic communication to an unintended recipient; (c) the risk backup copies of emails and text/SMS messages existing even after deletion; (d) the risk of such electronic communications being intercepted, altered, forwarded or used without authorization or detection; and (e) the risk of a third party breaching the confidentiality of such electronic communications. Please note that although we will use reasonable means to attempt to maintain the security and confidentiality of the electronic communications, we cannot make any guarantees, and, thus, disclaim any liability in connection with these risks, which you hereby acknowledge and accept.

By signing below, I acknowledge that I have read, understand, and accept the terms of this Consent Form.

AutoRemind 

confidentiality caused by you or any third party. If you have a medical emergency, **CALL 911**. Do not use electronic means other than direct phone calls to communicate urgent medical problems or to discuss complex or sensitive information; please call our staff directly. Although we try to respond to email messages daily, we cannot guarantee that any particular email will be read and responded to within any particular period of time. It is your responsibility to follow up with our staff if you do not receive a timely response.

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ages.”

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on medical
check-up
Messages
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3. Risks of Using Electronic Communications:


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By signing below, I acknowledge that I have read, understand, and accept the terms of this Consent Form.

[signature] _____
[email address]

[print name] _____
[mobile/cellular telephone number]

electronic
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ing health
via email,
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messages,
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Messages.

AutoRemind 


Start collecting contact information today

Make a messaging policy. Have a plan

Collect phone number and email information just like you collect insurance information

Electronic communication has come to stay and it is going to be more and more important for your business

Patients want it. Convenience is going to be king for access to both, information and practice staff

AutoRemind 

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Reminders
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- Appt. Reminders
- Short Notice
- Surveys
- Late Payment
- Triggered Messages

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- Reputation
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- Missed Appointments
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FREE TRIAL



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