

Patient Engagement Timeline



Prior to Reopening

USE MESSAGE BROADCAST TOOLS

via text-to-speech and text message to let all patients know you are reopening and how you will prioritize the rescheduling of appointments. Consider customizing your communications based on patient groups such as those with chronic illnesses, those with scheduled appointments, and those whose appointments were previously canceled due to COVID-19.

BUILD DEDICATED HOTLINES AND ESTABLISH ONLINE CHAT

services to help field questions around reopening from patients, caregivers, and staff. Be sure to include answers to frequently asked questions such as which visits are now being scheduled, what to do if a patient missed an appointment, available options for telehealth visits, how to prepare for a telehealth visit, etc.

USE ONLINE SELF-SCHEDULING AND LIVE VOICE SCHEDULING SERVICES

to help patients reschedule missed appointments. Provide scheduling online and by phone to cater to the various needs of your patient populations. Send a text message with either a link to your online scheduling solution and/or your phone number to help patients take action.

USE LIVE VOICE SERVICES

to reach out to patients who haven't responded to previous text messages to reschedule their appointments. Be sure to communicate with patients in their preferred language to improve satisfaction and adherence.

USE NATURAL LANGUAGE QUERIES

to become more discoverable in search and put direct answers and calls-to-action on your website to attract and convert patients right in the search results.



Prior to Visit

USE AUTOMATED APPOINTMENT REMINDERS

to send text messages, emails, and voice communications to drive patient adherence. Look for solutions that bundle multiple upcoming reminders into a single communication to prevent message fatigue.

USE MESSAGE BROADCAST TOOLS

via text-to-speech and text message to send important instructions to patients to help them prepare for their appointment, complete the preregistration process, and submit their insurance information. Include instructions on new check-in and waiting room procedures.

USE MESSAGE BROADCAST TOOLS

to send a test link to patients who have scheduled a telehealth visit to practice using your technology. Technology should be tested several days prior to the appointment using the same device the patient or caregiver intends to use to conduct the telehealth appointment.

USE AUTOMATED REMINDERS

to send text messages, emails, and voice communications to patients that haven't completed important steps prior to their in-person or virtual visit. This includes reminding patients to complete the preregistration process, submit their insurance information, and/or test their telehealth technology, for example.



Day of Visit

USE MESSAGE BROADCAST TOOLS OR LIVE VOICE SERVICES

to pre-screen patients for COVID-19 symptoms. Your questionnaire should determine if patients have a fever, cough or shortness of breath, sore throat, or systemic symptoms like myalgias or chills. [Learn how you can use the CovidAware health risk assessment at no cost in 2020.](#)

USE TWO-WAY TEXT MESSAGING SERVICES

to communicate with patients during arrival and check-in. Text messaging services should be used for patients to notify you of their arrival as well as for you to provide arrival instructions and wait time information.

USE TWO-WAY TEXT MESSAGING SERVICES & MOBILE PAYMENTS

to send patients a link to securely pay their co-payment. Mobile payment options eliminate the need for patients and staff to touch money, cards, or payment devices in your practice.

USE TWO-WAY TEXT MESSAGING SERVICES

to communicate with patients that the practitioner is ready to see them. Text messages should include information on how to enter your facility and where to wait before being taken back to an exam room.

USE TWO-WAY TEXT MESSAGING SERVICES

to communicate with practitioners and let them know their patient has arrived and which exam room they are in.

USE LIVE VOICE SERVICES

to troubleshoot issues with telehealth appointments. Having a defined technical support strategy in place will make the process easier for you and your patients.



Post Visit

USE AUTOMATED OR LIVE VOICE INBOUND AND OUTBOUND CALLS, EMAIL, AND TEXT MESSAGING

to customize post-appointment survey campaigns and capture patient feedback for operational improvement.

GATHER ONLINE REVIEWS AUTOMATICALLY

to boost your search engine rankings and attract and convert prospective patients quickly.

USE INBOUND CALLS AND PROACTIVE OUTBOUND CALLS

to coordinate care for patients, retain them within your health system, and improve their adherence to referrals. Be sure to engage patients in their preferred language for improved patient satisfaction and referral adherence.

USE PROACTIVE OUTBOUND CALLS

to connect with patients or their caregivers within 24 to 48 hours of discharge and after scheduled follow-up appointment. Leverage clinical experts to clarify post-discharge instructions, medication administration, and care plan questions.

USE CLINICAL AND NON-CLINICAL LIVE VOICE, DIRECT MAIL, AND DIGITAL COMMUNICATIONS

in the patient's preferred language to educate and engage patient populations. Encourage patients to schedule, confirm, or reschedule appointments for preventative care screenings, wellness visits, vaccines, disease-specific and general education programs, virtual classes and events, and more.

