

CQI Toolkit

Recalls - CAT4 via HotDoc Broadcast





An Australian Government Initiative

Recalls (via HotDoc)

Streamline the recall process by leveraging filtered patient lists generated in CAT4 to send bulk recalls via HotDoc Broadcast, ensuring timely communication with relevant patients. This approach not only enhances patient care but also optimises practice workflow by integrating advanced filtering capabilities with automated recall systems

Creating a Broadcast (Bulk) SMS using Patient ID .CSV generated in CAT4

- 1. In your <u>HotDoc Dashboard</u> go to **Broadcasts > New Broadcast** on the left-hand side.
- 2. Here you can create a broadcast from scratch by clicking New Custom Broadcast.

👚 Home	Broadcasts (0. Navi Mala)
🔝 Bookings 🛛 🗸	
E Vaccinations Setup	Broadcasts ① Please note: Broadcasts are not included in your terms of usage and will be billed separately at \$0.04 per SMS message.
🗃 Payments 🛛 🗸	HotDoc Broadcasts allows you to send targeted messages to specific patients.
Patients ~	
🛛 Recalls 🛛 🗸	You can choose to: • Send a custom broadcast using a.CSV file of patients or by selecting a target audience with our built-in demographic filtering.
🗣 Reminders 🛛 🗸	Send a custom broadcast using patient phone numbers that you enter manually, or upload as a .CSV file. Send as a settling area built associated to be update the transmission of the settling of the
🔿 Repeats 🗸 🗸	 Send an existing pre-duit template that you would like to earl from our broadcast templates below.
🕑 Inform 🛛 🗸	For more information, visit our Broadcasts support page.
🥵 Broadcast 🔗	Templates
New Broadcast D	Select from an existing campaign template.
broadcast History	
🎯 Check-in 🗸 🗸	
💼 Forms 🛛 🗸	
🍰 Reputation 🗸 🗸	
曫 Setup 🗸 🗸	COVID-19 Vaccine Now COVID-19 Vaccine Booster Dose Now Available Flu Clinic COVID-19 Telehealth - Now available

3. If you you're creating a custom broadcast, select **Send using patients or by selecting a target audience** then **Next**.



4. Create a name for the Broadcast in the Name field and add your message.





Example Broadcast Name: Diabetes with no HbA1C recorded in the last 12 months.

Messaging content should be as concise as possible to reduce the number of credits.

NOTE: It is recommended to insert placeholders (as highlighted below - see step 5) to make the SMS more personalised and legitimate.

Hi [Insert Placeholder > Patient First Name],

Our records indicate that your HbA1c is now overdue.

Please contact the practice at your earliest convenience to book an appointment.

When booking your appointment please advise reception that you are responding to this text message.

[Insert Placeholder > Clinic name] [Insert Placeholder > Clinic phone number]

You will then see how many credits your message will use.

Back Create Broadcast	⑦ Need Help? ~
Broadcast Information ① Broadcasts are not included in your terms of u	isage and will be billed separately.
 Recommended guidelines when sending out a Broadcast Include the following placeholders in your message: Clinic name {{clinic}}, Clinic phone number {{phone}}, Opt out message (to give patients the opportunity to opt out) {{opt out}} 	You can also: Send your SMS during standard business hours Comply with Australian anti-spam guidelines <u>View</u> <u>here</u>
Create Broadcast Customise the SMS copy and select which patient group receives the ca Broadcast Name Test Broadcast	ımpaign.
SMS Message 100/160 characters Hi {{patient-first-name}}, This is a test broadcast from {{clinic}}. [{opt-out}]	SMS Preview Hi Jacob, This is a test broadcast from General Medical Centre. Reply STOP to opt out
Insert placeholder v Clear Message	100 characters 1 credit

Please note: Under the preview message box, you will see how many credits each message will use. One credit is equivalent to one SMS containing up to 160 characters.





5. You can add **placeholders** which **automatically populates information for you by clicking Insert placeholder and selecting drop-down menu and** select an option from the list.



6. Next, generate the Pen CS CSV file in CAT4, if you haven't already done so.

See below 'CAT4 Export Recall List' instructions.

Generate your recall list in CAT4 and click **'Export'**.







The 'Patient Reidentification' window will appear.

Reide	ntify Report	[Patient Co	unt = 1220	0]									
Filterir	ng By: Femal	es, Age ≥ 25	and \leq 74,	Activ	e Patient, S	Selected: Ce	rvical Screening	g (HPV > 5	Years or Pa	p > 2 Years	i (No HPV),	Not Reco	rded)
ID	Surname	First Name	Known As	Sex	D.O.B (Age)	Address	City	Postcode	Phone (H/W)	Phone (M)	Medicare	Cervical Screening	Cervical Screening Date
6457	Surname	Firstname_27	Firstname_27	F	01/03/1973 (47)	12 John St	Suburb Town	2794	H:07 50505050 W:07 50509999	1234999999	12341234123 4	Not Recorded	
10384	Surname	Firstname_30	Firstname_30	F	01/03/1989 (31)	12 John St	Suburb Town	3981	H:07 50505050 W:07 50509999	1234999999	12341234123 4	Not Recorded	
6523	Surname	Firstname_44	Firstname_44	F	01/03/1969 (51)	12 John St	Suburb Town	2950	H:07 50505050 W:07 50509999	1234999999	12341234123 4	Not Recorded	
9983	Surname	Firstname_45	Firstname_45	F	01/03/1965 (55)	12 John St	Suburb Town	2995	H:07 50505050 W:07 50509999	1234999999	12341234123 4	PAP	29/03/20
1712	Surname	Firstname_51	Firstname_51	F	01/03/1984 (36)	12 John St	Suburb Town	4172	H:07 50505050 W:07 50509999	1234999999	12341234123 4	PAP	05/09/20
5415	Surname	Firstname_61	Firstname_61	F	01/03/1961	12 John St	Suburb Town	2542	H:07 50505050	1234999999	12341234123	Not	_

Click on the drop-down arrow next to the Floppy Disc 'Save' Icon. This is where you will select the 'CSV file' option.

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Please ensure that the patient count is manageable.

Your practice staff will need to have the capacity to receive x number of calls and be able to book x number of appointments. Smaller more manageable numbers are recommended as the total number of recalls is irrelevant to fulfilling PIP QI quarterly activity requirements. As long as you complete at least one QI activity each quarter and you are recording it for audit purposes.





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IMPORTANT

You will need to open the file and delete the first few rows so that the column titles are in the first row (See highlighted below - delete this) There should not be a blank first row. ID, Surname, First Name etc. All these titles should be the first row.

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2 Filtering By: Active Patient, Selected: Cervical Screenin	g (HPV > 5 Years or Pap > 2 Years	(No HPV))		
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CSV file example Pen CS CAT4		•		
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See below example of what the CSV file should look like at this stage.

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3	4807	Surname	Firstname	Firstname	F	01/01/198	12 John St	Suburb To	4430	H:07 5050	1.23E+09	1.23E+11	PAP	###
4	2728	Surname	Firstname	Firstname	F	01/01/194	12 John St	Suburb To	2759	H:07 5050	1.23E+09	1.23E+11	PAP	####
5	6307	Surname	Firstname	Firstname	F	01/01/197	12 John St	Suburb To	4055	H:07 5050	1.23E+09	1.23E+11	PAP	####
6	8031	Surname	Firstname	Firstname	F	01/01/198	12 John St	Suburb To	5523	H:07 5050	1.23E+09	1.23E+11	PAP	####
7	169	Surname	Firstname	Firstname	F	01/01/196	12 John St	Suburb To	5953	H:07 5050	1.23E+09	1.23E+11	PAP	####
8	5496	Surname	Firstname	Firstname	F	01/01/198	12 John St	Suburb To	2981	H:07 5050	1.23E+09	1.23E+11	PAP	###

Depending on your clinical software, please amended the CSV file in Column A, Row 1. See screenshot below.

Best Practice:	Medical Director:	Zedmed:
INTERNALID	PATIENT_ID	FILE_NUMBER
A B C D	A B C D	A B C D
1 INTERNALID SJRNAME FIRSTNAME MIDDLENAM	1 PATIENT_ID TITLE SURNAME FIRSTNAME	1 FILE_NUMBER_Branch Doctor Resource

Now click on 'Save'. Your CSV file should now successfully upload into the HotDoc Broadcast.





CQI Toolkit: Recalls – CAT4 via HotDoc Broadcast

 Upload CSV file of patient IDs. You can upload .CSV file of Patient IDs by clicking Browse Files to select a file or drag and drop this file directly from your computer into the blue box. Select Next step to continue.

Who are you sending to? How would you like to select your target audience?	 Recommended guidelines for uploading a .csv file Generate a .CSV file from Best Practice Only select active patients that have been to the practice in the past 12 months Only select patients that are 18 years and above If you have a big list, try to break it up into smaller batches (i.e. if 6,000 in total, break it up into 3 lists of 2,000 patients.) If you have any issues uploading your .CSV file visit our Broadcasts support page.
timated cost \$0.16 4 patients	Save draft Next step

- 8. You will now see a **full summary** of the details you selected for your broadcast. Here you can:
 - Send a demo message to yourself by entering your mobile number and clicking on the green Send demo button.
 - Save as draft to send later.
 - Click Send SMS to start sending.

	•	age and this be blied separately.
Estimated Cost \$0.16	Name test	SMS Preview
Number of recipients 4 Send to (target audience)	SMS's to send 4	Hi, This is a test broadcast from General Medical Centre. Reply STOP to opt out
Gender: Female		
Appointment after 10	0/08/2021, 12:00 AM	
 Appointment before 	24/11/2021, 12:00 AM	
 Appointment Types: I Pfizer, COVID-19 Vax 1s 	Flu Vaccine, COVID-19 Vaccine Dose 3 - t Dose, COVID-19 Vax 2nd Dose	79 characters 1 credit
Demo it on your phone		
Phone number	Send demo	





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9. Confirm the details of the broadcast are correct and select **Send Broadcast to x patients** button to begin sending the messages, otherwise select the **Cancel** button.

Are you ready to star	t sending your bro	adcast?	×
Sending this broadcast will S	SMS 4 of your patients a	and has an estimated cost of \$0.16	
	Cancel	Send Broadcast to 4 patients	

10. You'll then see the Broadcast details overview. If required, you can stop the broadcast from sending by clicking the click the **Stop sending broadcast**.

Cost 50.12	Date started	SMS Preview
itatus Pending Number of recipients 3/3	SMS messages sent () 0	This is a test Broadcast message from General Medical Centre. Reply STOP to opt out.
ient to (target audienc Appointment afte	e) rr 23/11/2021, 12:00 AM	84 characters 1 credit

11. If you selected for the Broadcast to start sending, you can view its status by clicking the <u>Broadcast</u> <u>History</u> option from the menu on the left.

Please note: Broadcast SMS's will not send if there are no recipients or if you are on legacy pricing and do not have enough credits to send all the messages. If you do not have enough credits, you can request a top up via the Request Top Up button in the top right corner of your HotDoc screen.

IMPORTANT

HotDoc Broadcast does not 'write back' to your clinical software once the SMS's have been sent. It is up to the practice to determine how best to proceed in relation to recording the relevant information in the patient's file. You should be mindful of your capacity to enter comms notes in the patient's file. This is also why it is recommended that you advise the patient to reference that they are booking the appointment because of the practice's SMS. This will prompt reception that the booking is as a result of the HotDoc Broadcast.





Acknowledgments

We would like to acknowledge that some material contained in this toolkit has been extracted from organisations including the Institute for Healthcare Improvement, the Royal Australian College of General Practitioners (RACGP), the Australian Government Department of Health, Pen CS, Train IT, and HotDoc.

The information in this Toolkit does not constitute medical advice and Darling Downs and West Moreton PHN accept no responsibility for information in this toolkit is interpreted or used.

Should the document require updating or if any errors are identified please contact your DDWMPHN Primary Care Liaison Officer or email practicesupport@ddwmphn.com.au

Darling Downs and West Moreton PHN, 2024







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