

UHDB Appointment Text Reminder Service Standard Operating Procedure

1. Overview

Standard Operating Procedures (SOPs) have been produced to provide clear, functional guidance for undertaking procedures. By utilizing these SOPs, users will support the business by following a uniform method of practice.

The appointment text reminder service informs patients when their next appointment is due. An initial reminder is sent out seven days prior to the appointment, and then a final reminder is sent 48 hours before the appointment.

This service significantly reduces the number of missed appointments, as each missed appointment costs the Trust money in terms of the time wasted for clinical staff but more importantly it means that the slot cannot be offered to another patient.

This Standard Operating Procedure (SOP) provides operational guidance, defines roles and responsibilities for all users.

This SOP will cover the following:

- Setting up of the appointment text reminder service
- Outlines the internal processes and staff responsibilities including: data extraction, sending text reminders
- Reporting complaints
- Patient Opt Out
- Clinic inclusions/exclusions

The Trust's appointment text reminder service is provided by:

- Healthcare Communications UK Ltd (HCC).

SOP Governance

Department: Patient Access

No of pages: 5

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Authorised by: Patient Access
Forum - Chair

Review date: January 2026

Frequency and Time frame: Bi-annual *Return due by 31st day of January*

3. Key indicators, output or purpose from this procedure

N/A

4. Data Source(s)

N/A

5. Process

- **How it works:**

In line with Data Protection Act regulations the Trust can use implied consent to extract patient mobile numbers from the NHS spine and use these to send appointment reminders to the patient. In order to meet Data Protection Act

regulations the Trust must ensure we publicise our use of implied consent and poster should be clearly displayed in all reception and waiting areas where text reminders are utilised.

- **How the data is extracted**

Each night, appointment details are extracted from Lorenzo and Meditech and processed through the trust's data warehouse. The following day, the appointments for 7 days in advance are extracted, along with any appointments that have been booked within the past 7 days that would have missed being picked up 7 days in advance, and also and cancelled appointment that would have been in the extract for 7 days in advance but are no longer booked, so do not need the 2nd reminder.

The patient mobile number is extracted directly from the telephone number fields on the telephone number fields on the patient summary on Lorenzo and patient demographics on Meditech.

If the mobile/landline fields are unpopulated in Lorenzo or Meditech, the reception teams ask the patient for these details and update the fields accordingly. This will then automatically update the NHS spine.

As a result of implied consent, staff are no longer required to do the following:

- Ask patients whether they want to opt into the text reminder service.
- Manually opt patients into the service.

[How to Opt a Patient Out of the Text Reminder Service](#)

If a patient wishes to opt back into the text reminder service (having previously opted out) services are to do the following:

- Change the patient's contact method preferences on Lorenzo, see Appendix 1 for instructions.
 - For Lorenzo, notify the Referral Processing Team providing the patient's name and hospital number. The Referral Processing Team will then ensure the patient is opted back into the service on the Service Provider's system.
 - For Meditech notify the Patient Access Centre Manager providing the patients name and hospital number. The Patient Access Centre Manager will ensure the patient is opted back into the service on the Service Provider's system.
- **Extracting mobile numbers and appointment details - Lorenzo**

All outpatient appointments are extracted from Lorenzo each evening at around midnight.

The following day the appointment data is linked to the Patient Master Index (PMI) to extract the mobile telephone number for the patient. Patients who have the "No Telephone Contact" option (see Appendix 1) in Lorenzo will be excluded at this point.

Reminders will then be sent out for all appointments where the clinic list code/specialty has not been excluded.

At 12:00 each day a file is produced for all appointments that take place 9 days later and this is saved in a secure location ready to be picked up and processed by the Service Provider's System.

The file produced also contains any appointments that have been cancelled between the data being sent to the Service Provider and the appointment date to prevent 2nd reminders being sent for cancelled appointments.

- **Extracting mobile numbers and appointment details – Meditech**

The patient details are all stored in Lorenzo, so when an appointment is booked on Meditech, a message is sent to Lorenzo, which prompts it to look up to the national spine and bring down the latest patient information, which includes their address and telephone number.

- **Clinic inclusions/exclusions**

Clinics will not be automatically included in the text reminder service. Upon completion of the clinic set up, Clinical Systems will send details back to the requester who will be responsible for informing all relevant staff/services. It will be the responsibility of Team Leaders to complete the e-form.

To establish whether your department/clinic is using the service, contact a member of the Data Warehouse Team.

When deciding whether a clinic is suitable for the text reminder service you should consider:

- Flag clinics that are not held on the hospital site – they will need a different location.
- Exclude open appointment clinics
- Exclude Visual Fields Clinics
- Exclude clinics where Lorenzo (PAS) is not used as the scheduler but rather as activity recording

[New Clinics to be Included in the Text Reminder Service - Lorenzo & Meditech](#)

- **New Clinic Exclusions**

As clinics will no longer be automatically included there is no need to take any action.

The Clinical Systems Team will keep a log of requests and at the end of each week transfer the data onto a spread sheet that is sent to the Information Systems team Data Warehouse Team.

- **Existing Clinic Exclusions**

If an already existing clinic needs excluding from the text reminder service, contact a member of the Data Warehouse Team, providing the clinic code and confirmation of exclusion via the generic email address uhdb.datawarehouse@nhs.net

The Data Warehouse Team will then exclude this clinic from the data extraction. If a clinic later needs to be opted back into the system, contact a member of the Data Warehouse Team providing the clinic code and confirmation of inclusion via the generic email address.

Non Lorenzo specialties

If a specialty wants to utilise text reminder but use a different booking System to Lorenzo, the specialty should contact a member of the Data Warehouse Team. The Data Warehouse Team will initially need to extract and test the data from the booking system. Whether a specialty can utilise the Text Reminder Service will be dependent on the quality of the data extracted.

- **Text Reminder templates and Frequency**

Where appropriate, patients will receive an initial text reminder of their appointment 9 & 7 days prior to the appointment.

A final reminder will then be sent to the patient 48 hours prior to their appointment.

Within the body of the initial text reminder patients will be informed of the date, time and location of their appointment. The contact telephone number will also be included if the patient needs to query, rearrange or cancel their appointment.

Patient will not have the option to replying to the reminders.

- **Standard Trust text reminder templates:**

Example a) Adult First Reminder (sent 7-days prior to appointment)

You have a [--Specialty--] apt at [--location--] on [D/M/YY] at [HH:MM]. Call [Area Tel] if you need to rearrange or cancel

Example b) Child First Reminder (sent 7-days prior to appointment)

Your child has a [--Specialty--] apt at [--location--] on [D/M/YY] at [HH:MM]. Call [Area Tel] if you need to rearrange or cancel

Example c) Adult Final Reminder (sent 2-days prior to appointment)

Reminder of your [--Specialty--] apt at [--location--] on [D/M/YY] at [HH:MM]. Please refer to your appointment letter for details

Example d) Child Final Reminder (sent 2-days prior to appointment)

Reminder of your [--Specialty--] apt at [--location--] on [D/M/YY] at [HH:MM]. Please refer to your appointment letter for details

All script templates are held and are the responsibility of the Data Warehouse Team.

- **Exemption Templates**

If necessary, it is possible to set up exception (bespoke) templates for individual clinic codes which include different wording to the standard templates (e.g. providing directions or specific appointment instructions). Contact the Data Warehouse Team to set this up.

- **Sending ad-hoc text messages to patients**

On occasions there'll be a need to contact patients where text messaging is deemed the most appropriate form of communication, when we need to contact patients at short notice, for example clinic cancellation due to sickness or industrial action.

Example [Scripts](#) to be used when sending ad-hoc text messages.

All communication is to be sent through the Trust's text reminder provider Healthcare Communication LTD "Envoy" platform. No communication is to be sent from other Trust mobile devices.

To gain access to the "Envoy" platform please contact uhdb.datawarehouse@nhs.net

Envoy user guide: <https://www.youtube.com/watch?v=ZFTGP2dshcE>

- **Complaints**

If a patient contacts the clinic/department to make a complaint or raise a concern regarding the text reminder service and the issue cannot be addressed within the clinic/department, refer the patient to the Patient Advice & Liaison Service (PALS)

7. Sign off (separation, supervision, authorisation)

Stage/ purpose	Name and role	Date (how/ where evidenced)
Peer review:	Patient Access Forum	January 2024
Supervisor/ Lead review:	Head of Planned Care Performance	January 2024
Information Asset Owner/ Trust Lead:	Head of Centralised Outpatient Administration Services	January 2024