

How do I obtain and document patient consent for text and voice appointment reminders and messaging?

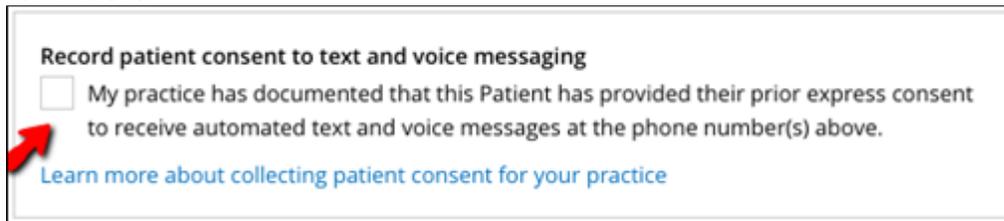
Read this article to learn more about patient consent for text and voice appointment reminders and messaging and where to document this consent in the Practice Fusion EHR.

In the Practice Fusion EHR, you will soon be able to send your patients appointment reminders and messaging via SMS mobile texting or voice telephone calls in addition to the email appointment reminders already available for your use.

To enable this new feature, the Practice Fusion EHR requires that you first confirm and record that a patient has **provided their consent to receive such messaging** to document your compliance with the Telephone Consumer Protection Act (TCPA). **Please note that it is your practice's responsibility to comply with the TCPA and obtain the consent of each patient to whom you wish to send SMS text or voice messaging prior to sending such messaging.** You should consult with your legal counsel for advice specific to your practice before engaging in messaging, but a general recommendation is that you obtain prior express consent **in writing** from each patient by including, for example, clear language in your practice's intake forms regarding appointment reminders and text messaging, and then **retaining the patient's consent for your records.**

Once you have obtained written consent from your patients, you can go to their profile and record their consent by clicking a checkbox (see **Graphic 1** below) to indicate that the practice has obtained and documented that the patient has agreed to receive practice messaging and reminders (see **Graphic 2** below).

Graphic 1: Click checkbox if patient has agreed to receive practice messaging and reminders

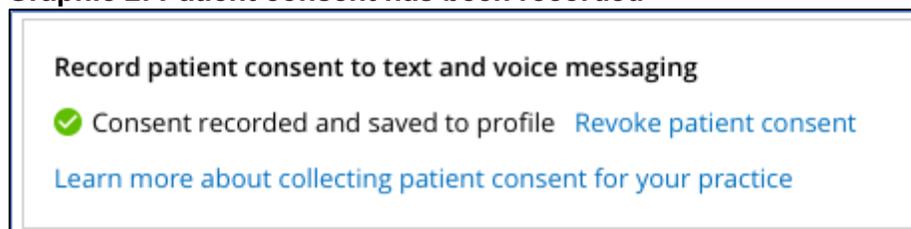


Record patient consent to text and voice messaging

My practice has documented that this Patient has provided their prior express consent to receive automated text and voice messages at the phone number(s) above.

[Learn more about collecting patient consent for your practice](#)

Graphic 2: Patient consent has been recorded



Record patient consent to text and voice messaging

✔ Consent recorded and saved to profile [Revoke patient consent](#)

[Learn more about collecting patient consent for your practice](#)

Consent can also be recorded when scheduling an appointment and editing the patient details as shown in **Graphic 3** below.

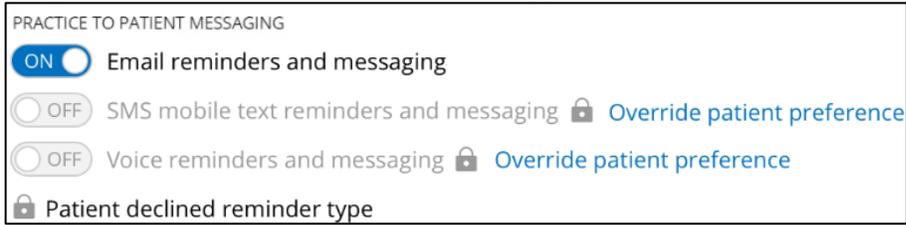
Graphic 3: Patient consent in scheduler

Unless consent is recorded in the Practice Fusion EHR, the toggles in the patient profile under “PRACTICE TO PATIENT MESSAGING” will be disabled as shown in **Graphic 4** below.

Graphic 4: Patient consent is needed to enable SMS text and voice reminders

A patient can opt out of SMS text or voice messaging at any time by replying “STOP” to the text or voice message. If the patient opts out, it will turn the consent into a lock, indicating the patient has opted out of SMS text and voice messaging (despite their initial consent) as shown in **Graphic 5** below.

Graphic 5: Patient declined reminder type



Alternatively, if you click “Revoke patient consent” as shown in **Graphic 6** below, this revocation will disable practice-to-patient messaging for SMS text and voice for this patient, reverting the toggles back to “OFF” as shown in **Graphic 4**.

Graphic 6: Revoke patient consent

