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.

Overview

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.

You can enable this new feature in two locations in the EHR:

1. Patient’s profile
2. Appointment modal in the Scheduler

To enable this new feature, the Practice Fusion EHR requires that you:

1. 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.

2. Set your patient’s communication preferences. When they are made available, appointment reminders and messaging can be sent via email, SMS text, and/or voice. Once you have collected consent from a patient, you can select which of these methods your patient prefers.

Enabling this new feature in the patient’s profile

Step 1: Obtain and record patient consent

Once you have obtained written consent from your patients, you can go to their profile and record their consent by clicking the checkbox (see Graphic 1 below) in the “Practice to Patient Messaging” section of the Patient Profile to indicate that your practice has obtained and documented that the patient has agreed to receive practice messaging and reminders.
Graphic 1: Click checkbox if patient has agreed to receive practice messaging and reminders

The communication preference toggles for SMS text and voice in the “Practice to Patient Messaging section will be **disabled** until consent is obtained and recorded (see Graphic 2 below).

Graphic 2: Patient consent is needed to enable SMS text and voice reminders

Once the checkbox is clicked, you will see a confirmation that consent has been recorded, and the communication preferences toggles will be enabled (see Graphic 3 below).
Graphic 3: Patient consent has been recorded

You can also choose to “Revoke patient consent” for any patient as shown in Graphics 4 and 5 below. Revoking consent will disable practice-to-patient messaging for SMS text and voice for the patient. You can record consent again at any time.

Graphic 4: Revoke patient consent

Graphic 5: Confirm revocation of patient consent

Step 2: Set your patient’s communication preferences

Ask your patient to provide their communication preferences to you when you obtain consent to receive such messaging. You can select email, SMS text, and/or voice by turning each toggle ON as shown in Graphic 6 below.
Graphic 6: Select patient communication preferences

<table>
<thead>
<tr>
<th>PRACTICE TO PATIENT MESSAGING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ON</strong> Email reminders and messaging</td>
</tr>
<tr>
<td><strong>ON</strong> SMS mobile text reminders and messaging</td>
</tr>
<tr>
<td><strong>OFF</strong> Voice reminders and messaging</td>
</tr>
</tbody>
</table>

Enabling this new feature when scheduling an appointment

Consent can also be recorded when scheduling an appointment and editing the patient details as shown in Graphic 7 below. Follow the same steps as outlined above to obtain and record patient consent and select communication preferences.

Graphic 7: Recording patient consent in an appointment
Opting out of SMS or voice messaging

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 disabled the specific option and show a lock icon with the text, “Patient declined reminder type,” indicating the patient has opted out of SMS text and/or voice messaging (despite their initial consent) as shown in Graphic 8 below.

Graphic 8: Patient declined reminder type