



# CQI Toolkit

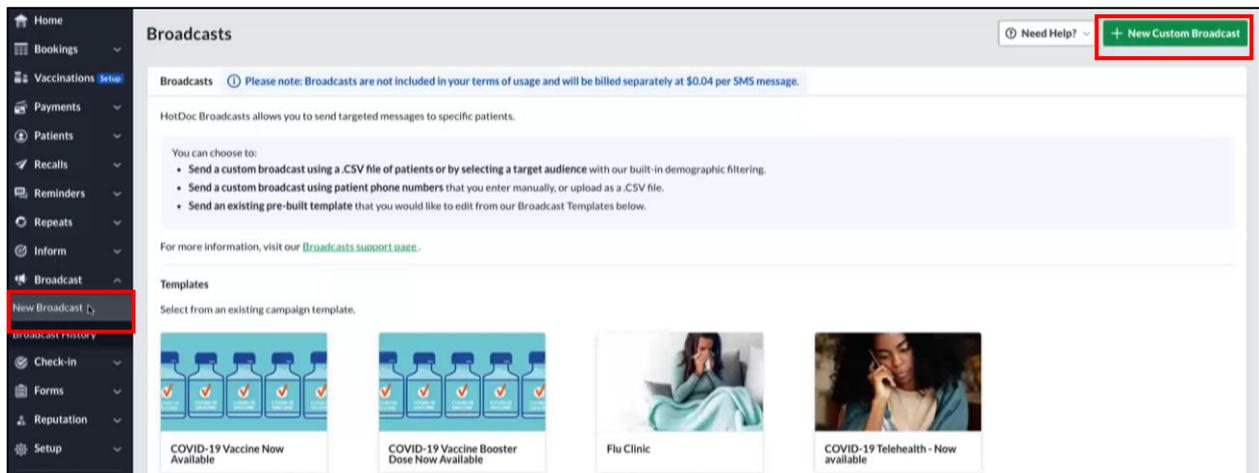
Recalls - CAT4 via HotDoc Broadcast

# Recalls (via HotDoc)

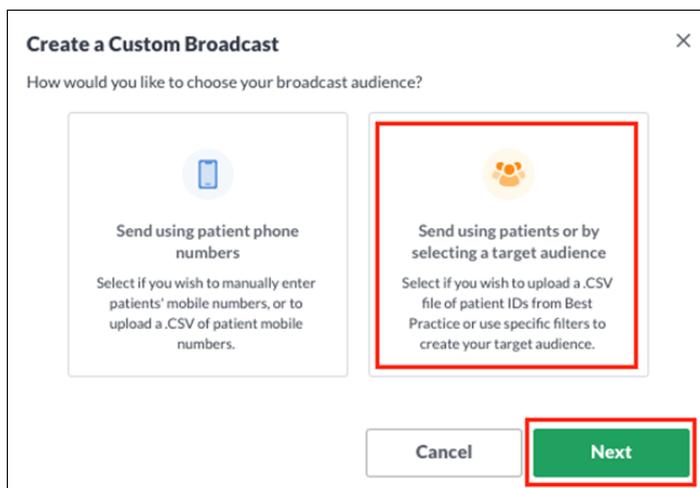
Streamline the recall process by leveraging filtered patient lists generated in CAT4 to send bulk recalls via HotDoc Broadcast, ensuring timely communication with relevant patients. This approach not only enhances patient care but also optimises practice workflow by integrating advanced filtering capabilities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

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

1. In your [HotDoc Dashboard](#) go to **Broadcasts > New Broadcast** on the left-hand side.
2. Here you can create a broadcast from scratch by clicking **New Custom Broadcast**.



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.

**Create Broadcast**

Need Help?

**Broadcast Information** ⓘ Broadcasts are not included in your terms of usage 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 [View here](#)

**Create Broadcast**

Customise the SMS copy and select which patient group receives the campaign.

**Broadcast Name**

Test Broadcast

**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

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.

- 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.

To create a broadcast enter a Broadcast name and customise the SMS content. Use our placeholders to help whilst customising.

Broadcast Name (i)

Type a name

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**SMS Message** 166/160 characters

Hi {{patient-first-name}},  
This is a test broadcast from {{clinic}}, book your appointment with {{doctor-url}} today!  
{{opt-out}}

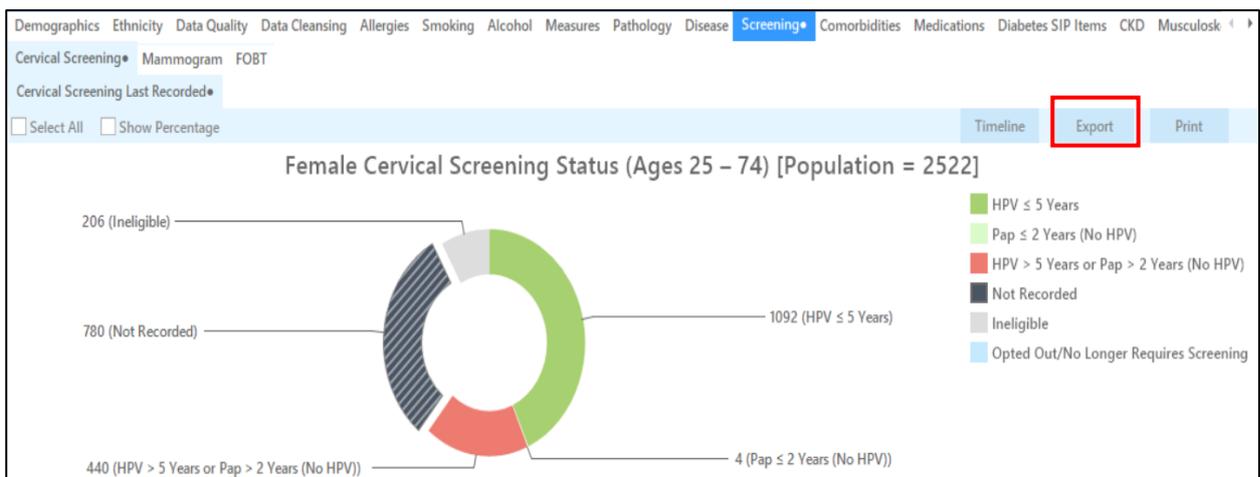
**Insert placeholder** Clear Message

- Clinic booking page
- Clinic name
- Clinic phone number
- Practitioner booking page
- Download app page
- Opt out message
- Patient first name
- Patient last name

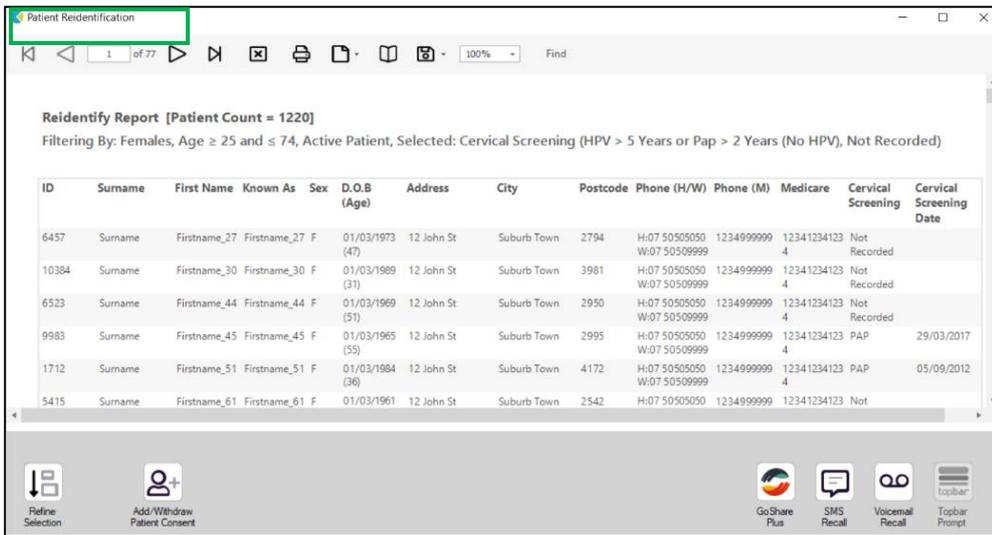
- Next, **generate the Pen CS CSV file in CAT4**, if you haven't already done so.

See below 'CAT4 Export Recall List' instructions.

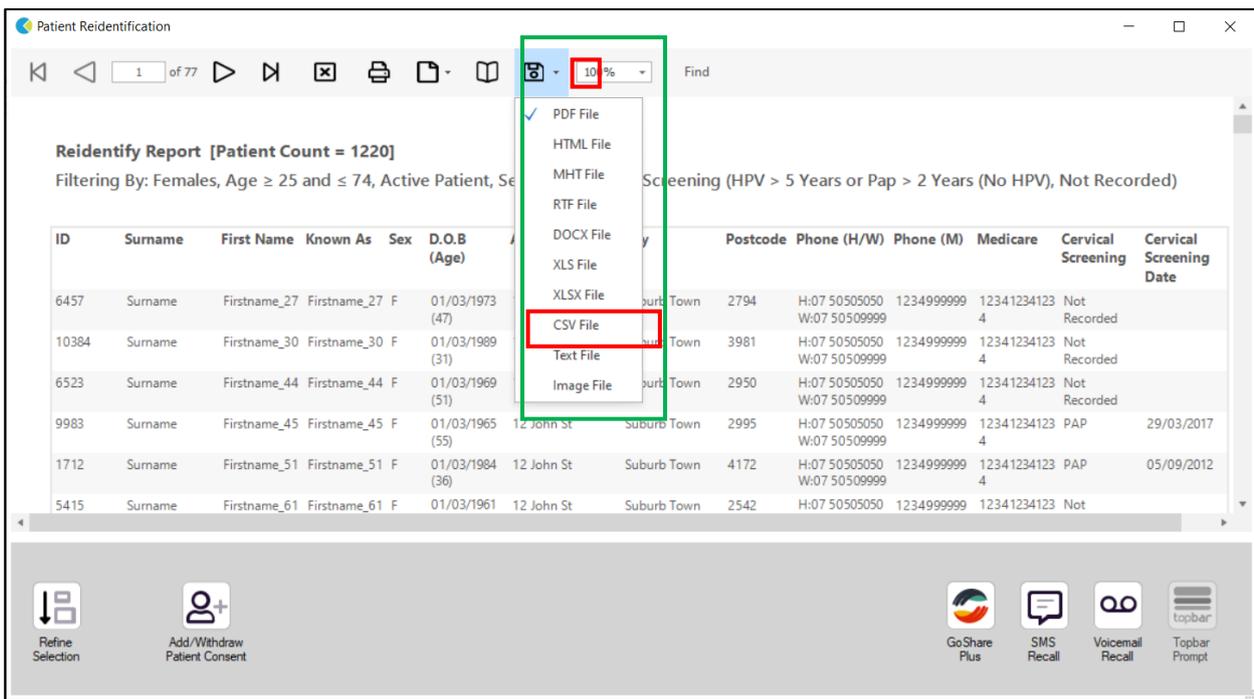
Generate your recall list in CAT4 and click **'Export'**.



The 'Patient Reidentification' window will appear.



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

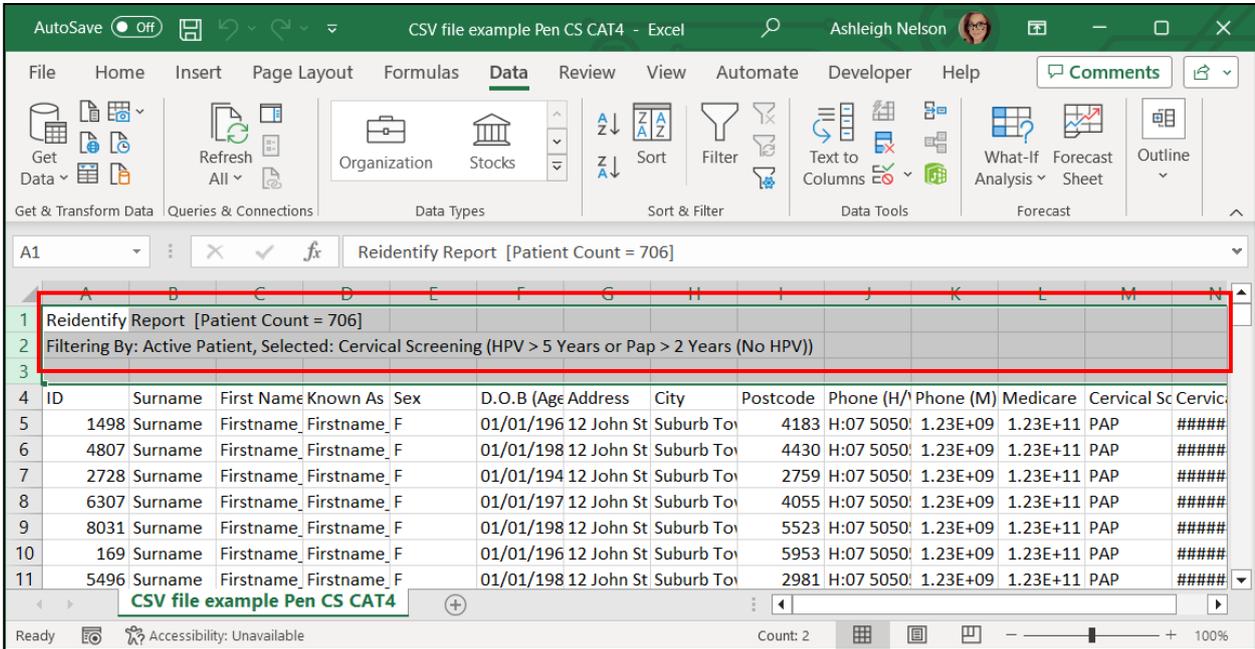


Please ensure that the patient count is manageable.

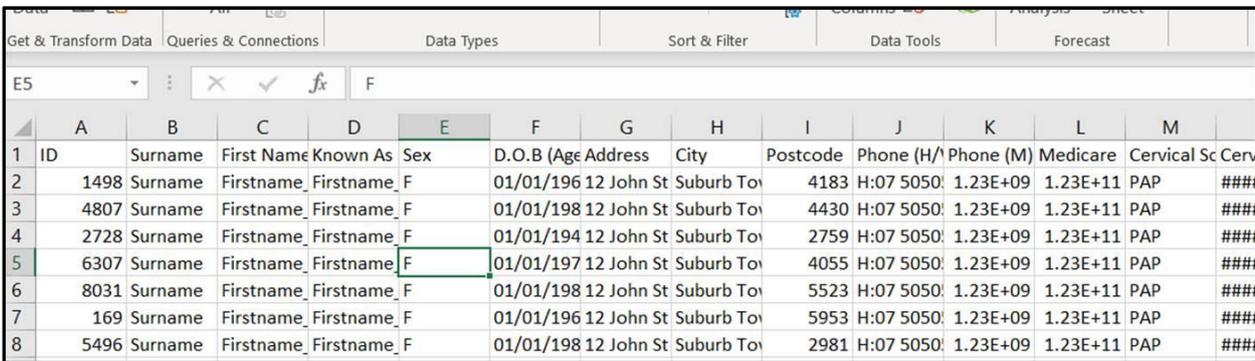
Your practice staff will need to have the capacity to receive x number of calls and be able to book x number of appointments. Smaller more manageable numbers are recommended as the total number of recalls is irrelevant to fulfilling PIP QI quarterly activity requirements. As long as you complete at least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

**IMPORTANT**

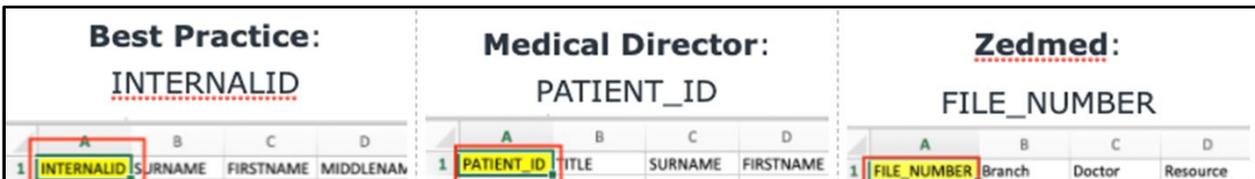
You will need to open the file and delete the first few rows so that the column titles are in the first row (See highlighted below - delete this) There should not be a blank first row. ID, Surname, First Name etc. All these titles should be the first row.



See below example of what the CSV file should look like at this stage.



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



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



Drag & Drop a .CSV file here or [Browse Files](#)  
Max file size: 6MB

✔ 4 patients found in genmedbpatientids.csv

**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](#).

Estimated cost **\$0.16** 4 patients

Save draft

Next step

- 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.

< Back
Review Broadcast
Need Help? ▾

**Broadcast Information** ⓘ Broadcasts are not included in your terms of usage and will be billed separately.

Estimated Cost	Name	<div style="border: 1px solid #ccc; padding: 5px;"> <p>SMS Preview</p> <div style="background-color: #00aaff; color: white; padding: 5px; border-radius: 10px; display: inline-block;">                     Hi, This is a test broadcast from General Medical Centre. Reply STOP to opt out                 </div> </div>
<b>\$0.16</b>	test	
Number of recipients	SMS's to send	
4	4	

Send to (target audience)

- Gender: Female
- Appointment after 10/08/2021, 12:00 AM
- Appointment before 24/11/2021, 12:00 AM
- Appointment Types: Flu Vaccine, COVID-19 Vaccine Dose 3 - Pfizer, COVID-19 Vax 1st Dose, COVID-19 Vax 2nd Dose

79 characters | 1 credit

Demo it on your phone

➤ Send demo

Estimated cost **\$0.16** 4 patients

Save draft

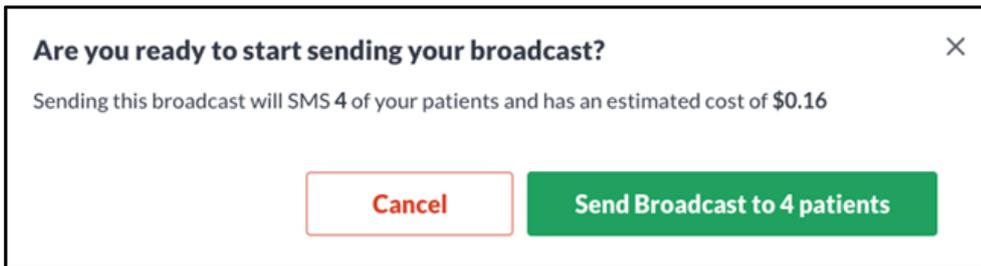
Send Broadcast

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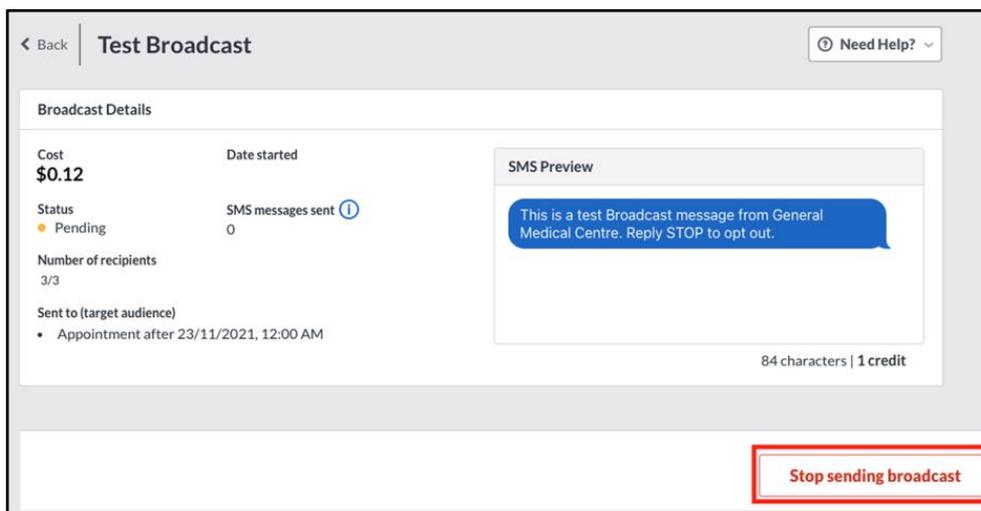
E: info@ddwmpnh.com.au [www.ddwmpnh.com.au](http://www.ddwmpnh.com.au)



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.



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**.



11. If you selected for the Broadcast to start sending, you can view its status by clicking the [Broadcast History](#) 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@ddwmpnh.com.au](mailto:practicesupport@ddwmpnh.com.au)

**Darling Downs and West Moreton PHN, 2024**



# phn

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AND WEST MORETON

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