CQI Toolkit

Recalls - CAT4 via HotDoc Broadcast

phn
DARLING DOWNS
AND WEST MORETON
An Australian Government Initiative

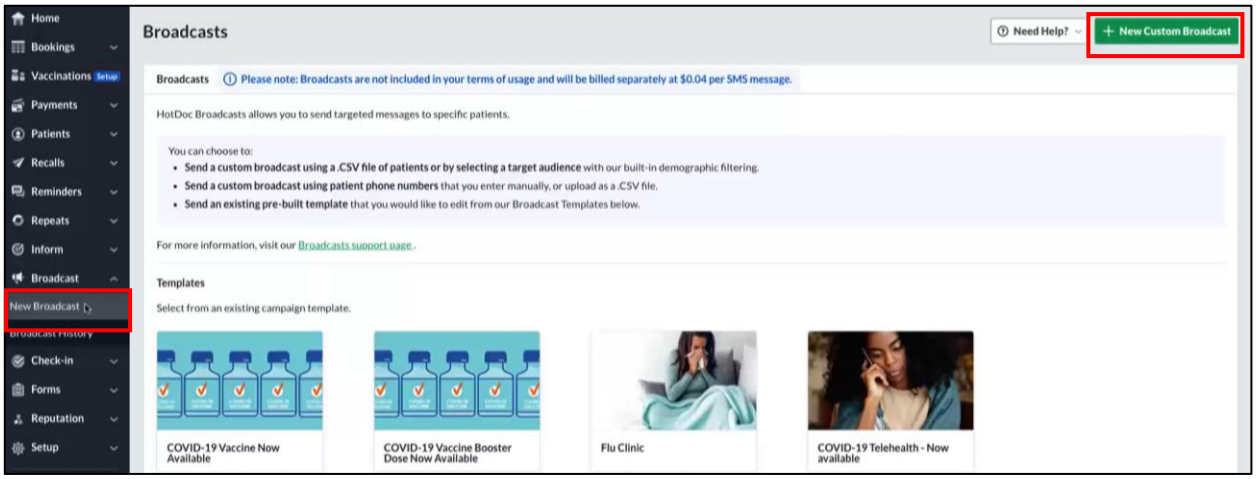
Local Integrated
Primary Health Care

Recalls (via HotDoc)

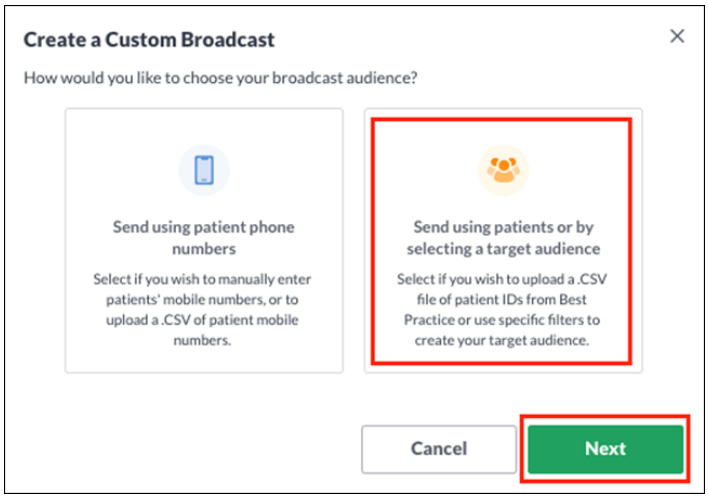
Streamline the recall process by leveraging filtered patient lists generated in CAT4 to send bulk recalls via HotDoc Broadcast, ensuring timely communication with relevant patients. This approach not only enhances patient care but also optimises practice workflow by integrating advanced filtering capabilities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

E: info@ddwmphn.com.au www.ddwmphn.com.au

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.

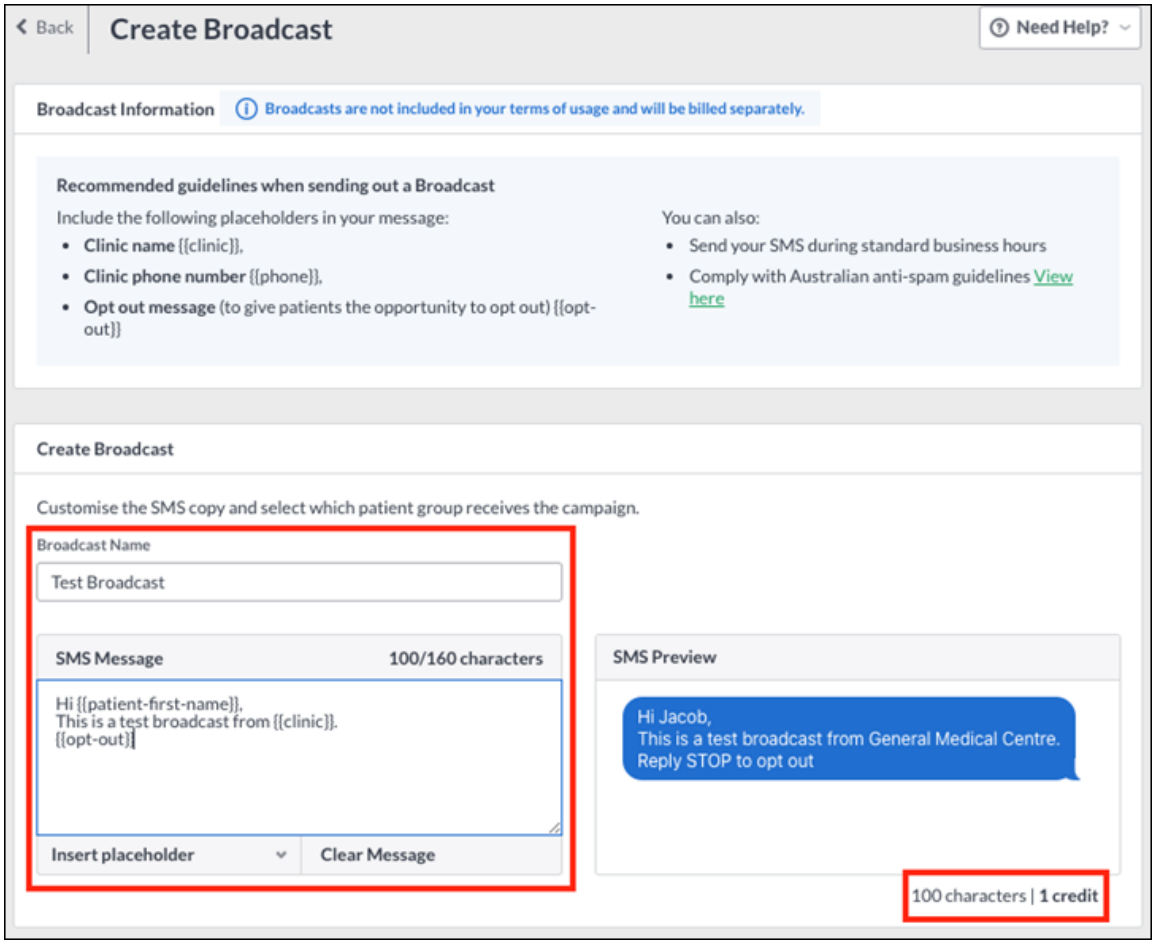
NOTE: It is recommended to insert placeholders (as highlighted below - see step 5) to make the SMS more personalised and legitimate.

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]

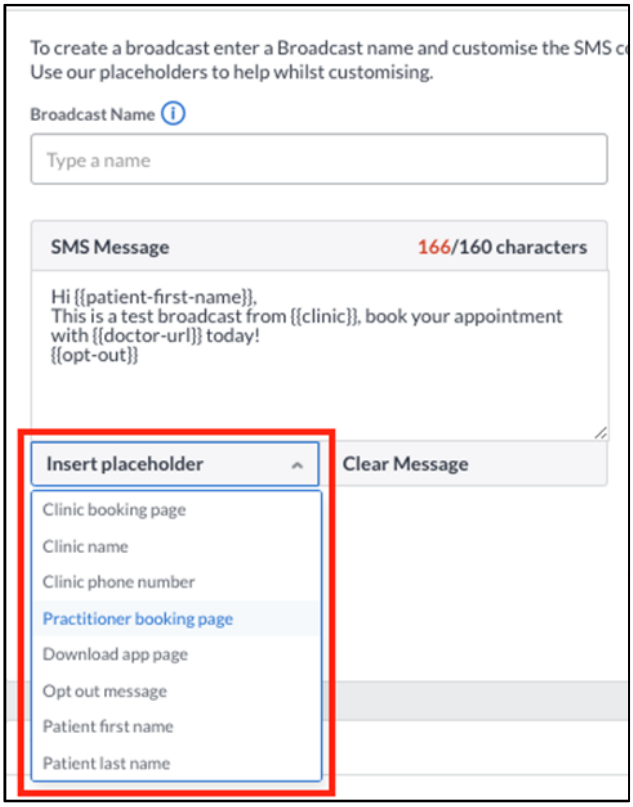
You will then see how many credits your message will use.



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.

E: info@ddwmphn.com.au www.ddwmphn.com.au

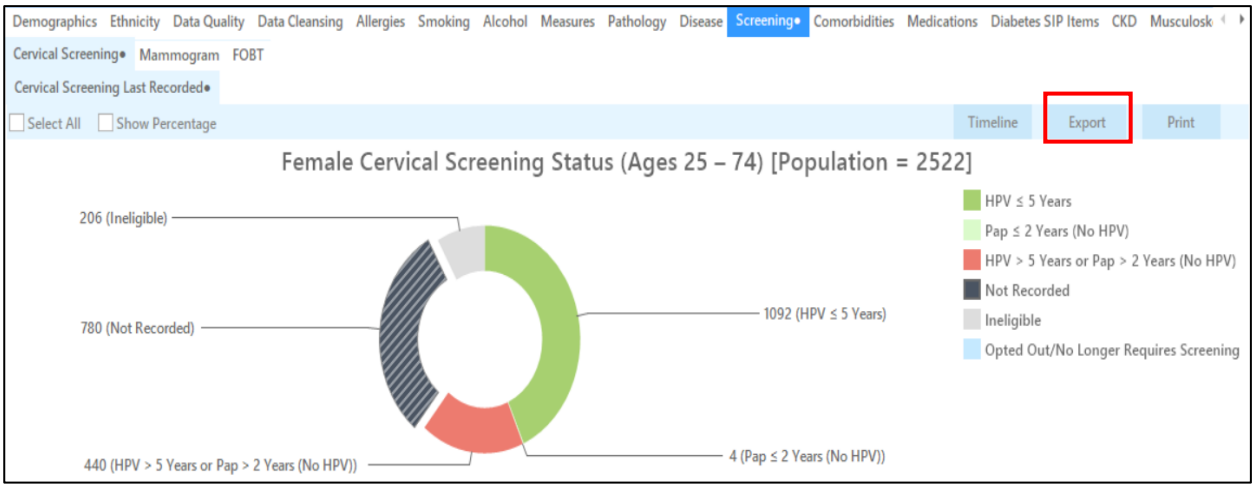
5. You can add **placeholders** which **automatically populates information for you by clicking Insert placeholder and selecting drop-down menu and** select an option from the list.



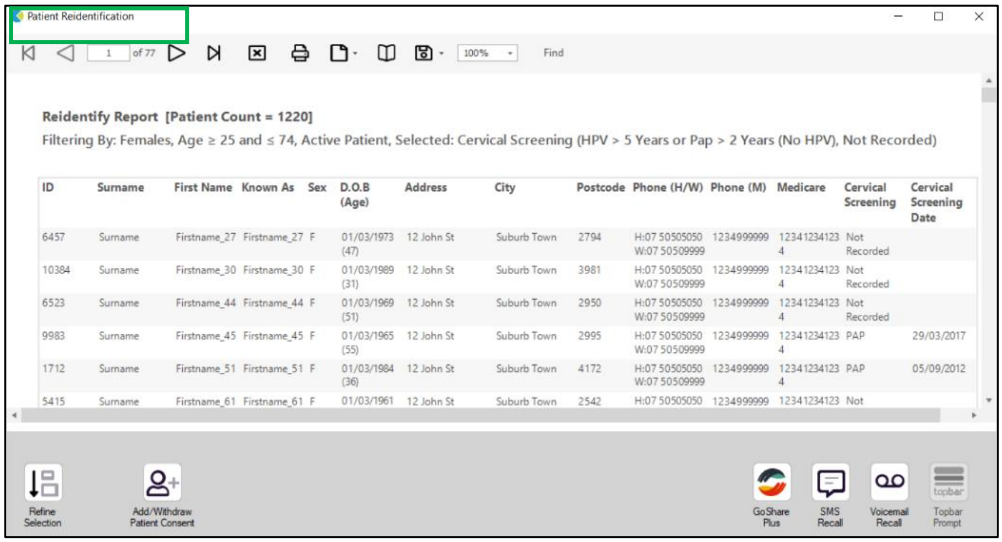
6. Next, **generate the Pen CS CSV file in CAT4,** if you haven't already done so.

See below 'CAT4 Export Recall List' instructions.

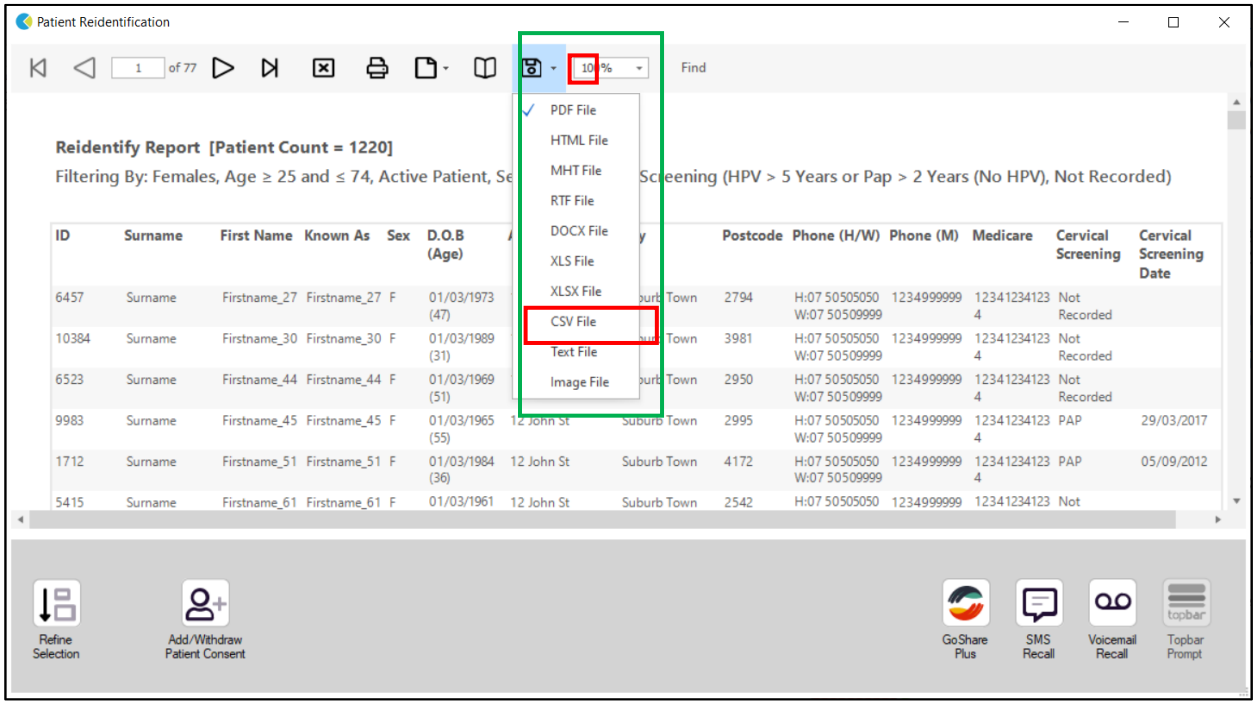
Generate your recall list in CAT4 and click **'Export'**.



The 'Patient Reidentification' window will appear.



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

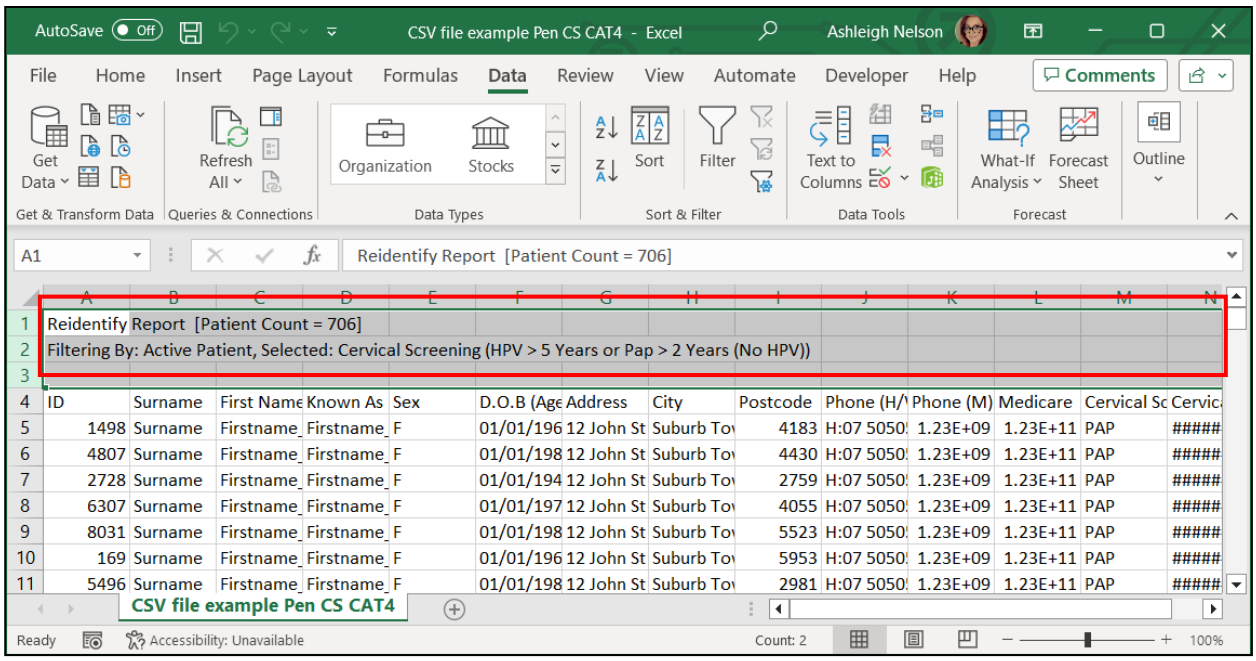


Please ensure that the patient count is manageable.

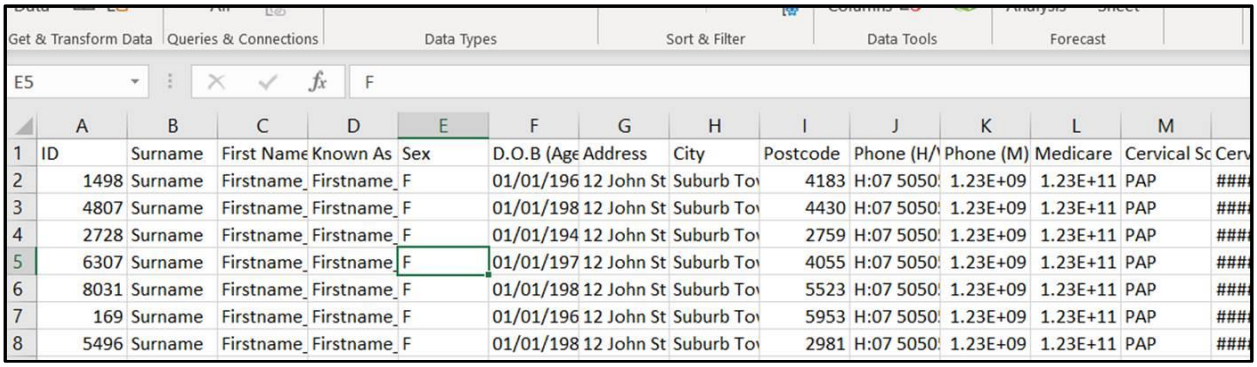
Your practice staff will need to have the capacity to receive x number of calls and be able to book x number of appointments. Smaller more manageable numbers are recommended as the total number of recalls is irrelevant to fulfilling PIP QI quarterly activity requirements. As long as you complete at least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

IMPORTANT

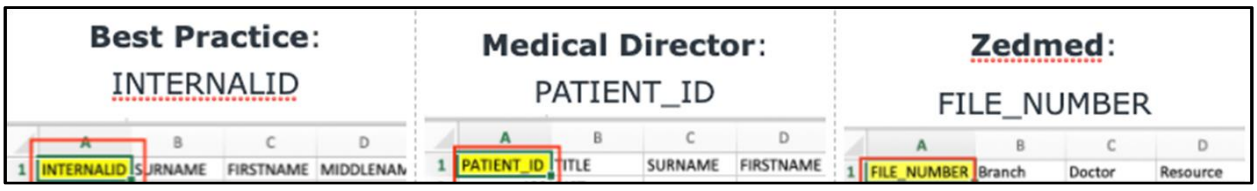
You will need to open the file and delete the first few rows so that the column titles are in the first row (See highlighted below - delete this) There should not be a blank first row. ID, Surname, First Name etc. All these titles should be the first row.



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

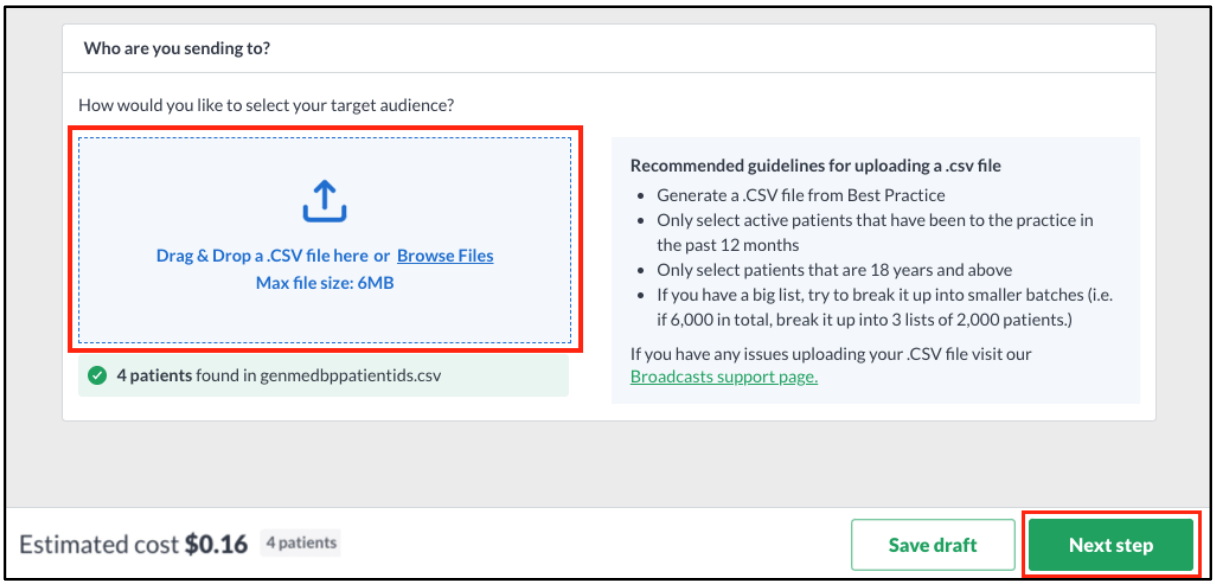


Depending on your clinical software, please amended the CSV file in Column A, Row 1. See screenshot below.

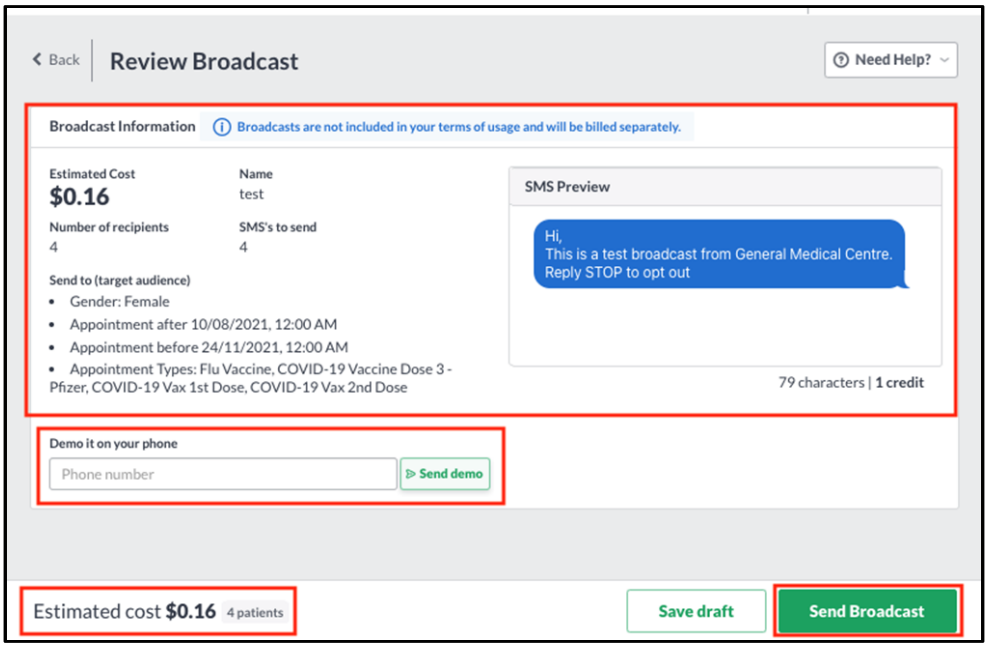


Now click on 'Save'. Your CSV file should now successfully upload into the HotDoc Broadcast.

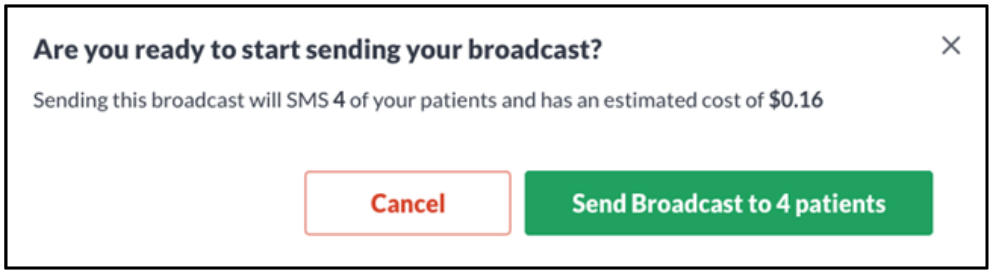
7. Upload CSV file of patient IDs. You can **upload .CSV file of** Patient IDs by clicking **Browse Files** to select a file or **drag and drop** this file directly from your computer into the blue box. Select **Next step** to continue.



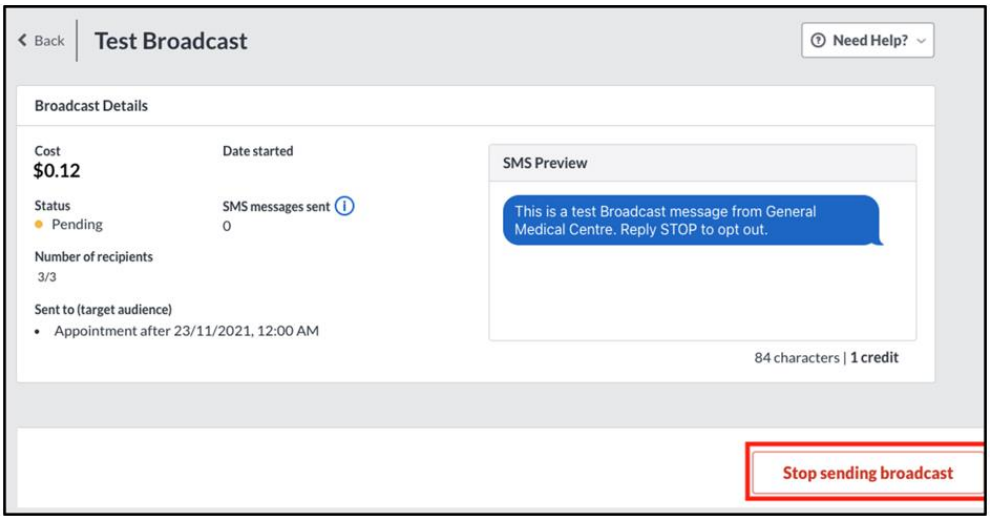
8. You will now see a **full summary** of the details you selected for your broadcast. Here you can:
   - **Send a demo message** to yourself by entering your mobile number and clicking on the green **Send demo** button.
   - **Save as draft** to send later.
   - Click **Send SMS** to start sending.



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@ddwmphn.com.au

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phn
DARLING DOWNS
AND WEST MORETON

An Australian Government Initiative

E: info@ddwmphn.com.au

P: 07 4615 0900

W: www.ddwmphn.com.au

Darling Downs Office

Level 1, 162 Hume Street
(PO Box 81),
Toowoomba QLD 4350

West Moreton Office

Level 5, World Knowledge Centre,
37 Sinnathamby Boulevard,
Springfield Central QLD 4300

Local Integrated
Primary Health Care

ABN 51 605 975 602