

Accuro EMR Guide: Keeping Patients Informed with Broadcast Communications

Introduction

This guide will provide options for broadcast communications to your population of patients using tools already available to you in your EMR. Examples of use may be: changes to hours, locum coverage, disruption or changes in the modes of care delivery or important clinics news, your clinic can disseminate information quickly to patients.

Basic (Non-EMR) Broadcasting Options

1. Post updates on the clinic website and/or social media pages

For those clinics that have a website or social media page and have the ability to modify it as needed, encourage patients to regularly refer the website to get the most current information.

2. Update recorded voicemail greetings

Regardless of whether the phone system accepts messages, the greetings should provide the current information. Update it frequently (e.g., weekly, and include the date in the greeting), to reassure patients that this is source of current information. Consider directing the patients to a clinic, PCN or AHS website for additional information as needed.

3. Mass mail outs

Canada Post mail outs can be an option for mass communication. Although still a viable option for communications, it requires significant effort and cost when information changes or needs to be updated frequently. This method is used most often for communicating that a provider is closing a practice or retiring.

EMR Broadcasting Options

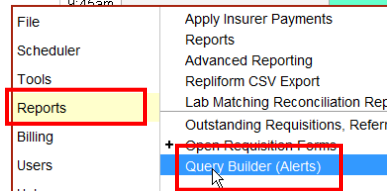
Accuro recommends “Accuro Patient Messaging” as an efficient way to send a mass communication to all patients for whom the clinic has an email address. If the clinic wants to use an external service (e.g., Mailchimp, Outlook, Gmail, etc.) for mass communications then use the workflow below to export an e-mail list from Accuro with the desired fields.

Exporting Patient Demographics

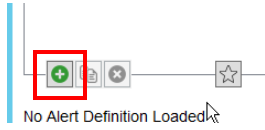
- 1) Go to the Accuro start menu



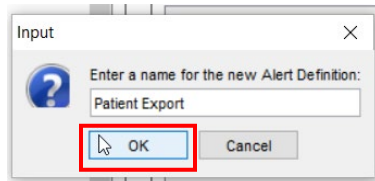
- 2) Select Reports
- 3) Select Query Builder (Alerts)



4) Click the green plus down at the bottom left hand side of the screen



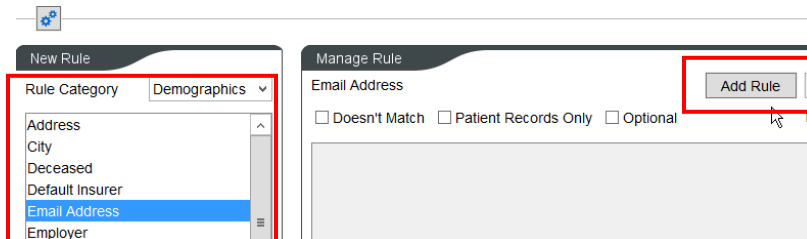
5) Name your report and click 'OK'



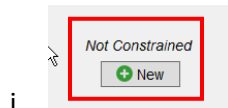
6) The report area on the right-hand side will now become editable

7) Now you need to choose what information you want to add into your report and add it into the top area of the screen that says 'Current Rules'

8) For example, if we want to include all patients' emails find Email Address on the side and click 'Add Rule'



Note: You do not need to add a constraint in the middle unless you are wanting to search for a specific email or for an email that contains a certain name

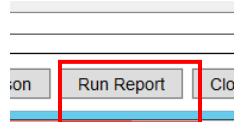


9) Once you click 'Add Rule' this will search all patients that have an email.
 a. If you want to search all patients that DO NOT have an email select the box that says, 'Doesn't Match' and press 'Update Rule'

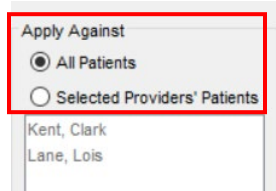
10) Follow through steps 8 & 9 with any other criteria you want to add
 In the below example include Email Address and Patient Name



11) Once you have added everything you want in your report click 'Run Report' at the bottom of the screen



12) From here you can search for specific providers patients by selecting 'Selected Providers Patients'



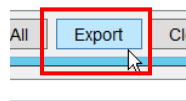
13) You also want to make sure everything on the right-hand side has a green check mark. The green check means that it will show up in the export. To change something to a green check double click on the red X



14) Click 'Run' down at the bottom

Note: If your clinic has been set up with Accuro Patient Messaging and you'd like to send your message directly from the EMR please jump to step 33. If you'd prefer to export a list of e-mail addresses that you can use outside the EMR continue with steps 15 through 32.

15) Once you have run the report you can click 'Export' down at the bottom to export an Excel spreadsheet.

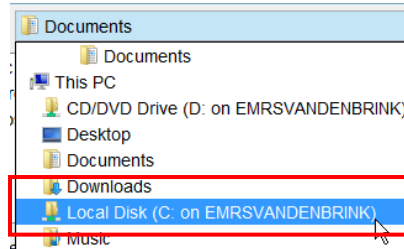


16) Since the report will contain patient data it will recommend you encrypt this report and create a password

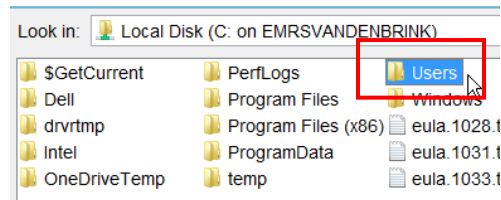


17) Once you add in the password you must select where you want this report to save. If you have a local database proceed to step 21. If you are an ASP client refer to steps 18– 21 on how to locate your hard drive on your computer.

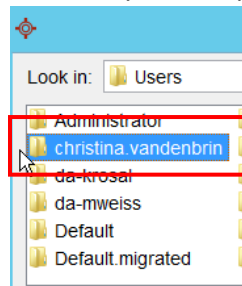
18) First locate your 'Local Disk' or your C: drive



19) Next click on the 'Users' Folder

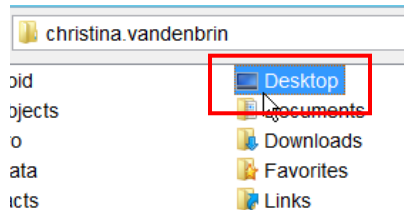


20) Find the name of your computer. For example, your name or 'front desk 1'

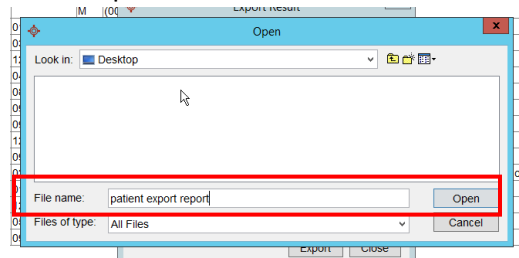


a.

21) Now you are in your computer. You can choose the folder location you want this report to go into. In the example below the 'Desktop' is selected as the preferred location.

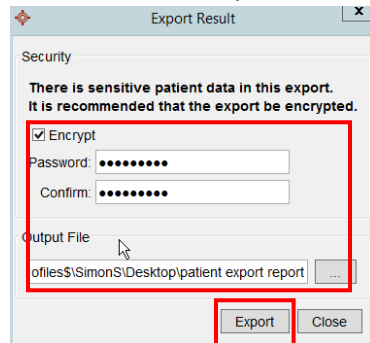


22) Next label the report in 'File Name'

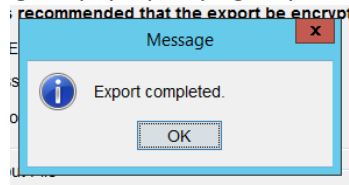


23) Click 'Open'

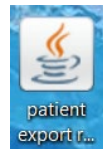
24) When you have added the password and where you would like to save it click 'Export' again



25) You will get a pop up saying 'Export Complete'



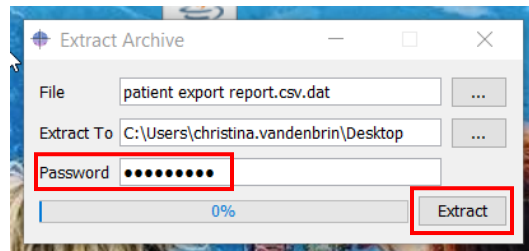
26) When you go to the file location when you saved your report you will see an icon similar to the one below



27) Double click to open the report up

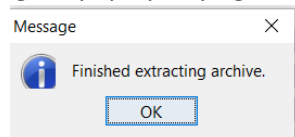
28) It will ask you to put your password in again

29) Click 'Extract'

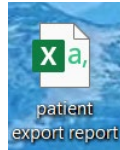


i. From here you can also change the location of the extract

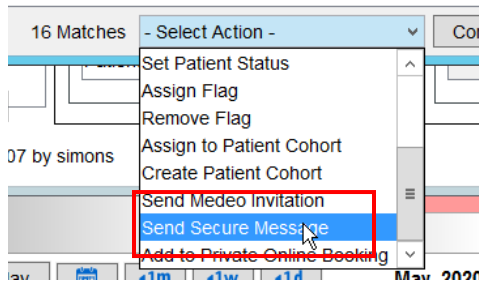
30) You will get a pop up saying 'Finished extracting archive', click "OK".



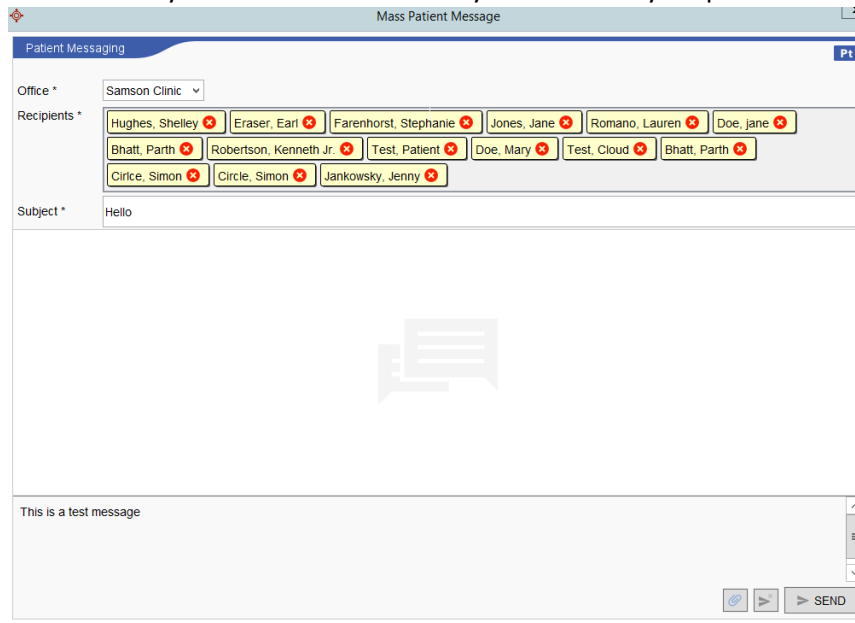
31) Now you will see an Excel file in the file location where you sent the extract



- 32) You can now open the Excel spreadsheet and manipulate the information
- 33) **If your site has been set up with Accuro Secure Messaging you can directly send a mass message to all your patients emails from within the EMR**
- 34) At the bottom of the report there is an option to select an action from the drop down
- 35) From here you would want to select 'Send Secure Message'

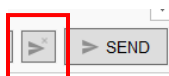


- 36) *If you want to send it to every patient you need to select all their names before hitting 'Send Secure message'. The easiest way to do so is pressing CTRL + A*
- 37) Finally, you can add the subject of the message and the body of the message. You can also attach a document if you would like to send any forms out to your patients.

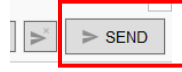


The patients will not see each other's email addresses

- 38) If you want to send the message *closed*, meaning the patient cannot respond click the arrow with an X.



- 39) If you want to send an *open* message, meaning the patient can respond click the arrow without the X



Add-ons

Medeo Virtual Care and Patient Messaging

Medeo is a virtual care platform that offers secure patient messaging to help reduce the strain on physicians and other medical staff. To see how it works, watch the video [here](#).

Medeo is available as a standalone, or fully integrated within Accuro, and offers a full suite of virtual care modules. In addition to Patient Messaging, Online Appointment Booking and Video Visits are also available. Contact your Accuro representative for more information.

Acknowledgement

The creation of this guide was a joint effort between Accuro and the Alberta Medical Association Accelerating Change Transformation Team.