

Sending Family Surveys via SMS using Clinical Software & HotDoc

In response to COVID-19 restrictions and increased telehealth appointments the Royal Children's Hospital Research Ethics Committee (HREC 65955.5) has approved sending the SC4C Family/Caregivers survey via SMS to phone numbers associated with patients ≤18 years who have had a consultation at a SC4C participating practice within the practices allocated control month. The process to send these surveys via HotDoc is outlined below.

1. Create & Save a .csv file of patients who ≤18 years who have had a visit between a selected time frame (e.g., month, week, or other selected dates). Instructions on creating a .csv file from a patient search:

- **Medical Director** – [Search Patient Database](#)
- **Best Practice** – [Run a database search query](#)

Please note: The .csv file **must** have the **practice management system ID column included**, or it will not process. This should be present by default when exporting the file from your clinical software and should be labelled as following.

Medical Director: PATIENT_ID

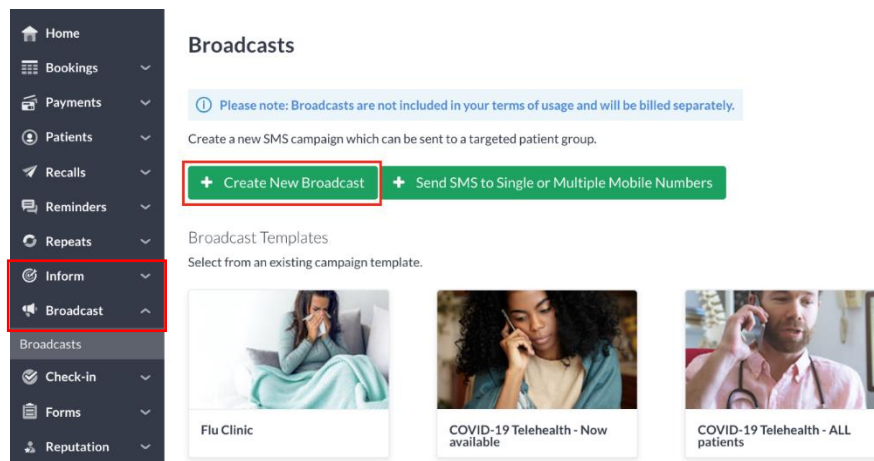
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	PATIENT_ID	TITLE	SURNAME	FIRSTNAME	ADDRESS	CITY	POSTCODE	PREF_ADD	DOB	GENDER	TRANSGEND	PHONE_HON	PHONE_WOI	PHONE_MoI	MEDICARENI	PENSION_NC	CHART_NO
2	123	AST															
3	456	MR															
4	78	MISS															
5	910	Mrs															
6	112	Mrs															

Best Practice: INTERNALID

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V		
1	INTERNALID	SURNAME	FIRSTNAME	MIDDLENAM	PREFERREDN	TITLE	ADDRESS1	ADDRESS2	CITY	POSTCODE	FULLADDRES	DOB	AGE	SEX	MEDICARENI	MEDICARELI	MEDICAREEX	RECORDNO	PENSIONNO	DVANO	HOMEPHON	WORKPH	
2	1234																						
3	5678																						
4	9101																						
5	4321																						
6	2743																						

2. Login to your [HotDoc Dashboard](#) using your login

2.1 In the HotDoc Dashboard, navigate to Broadcast > Broadcasts > Select Create New Broadcast.



Broadcasts

Please note: Broadcasts are not included in your terms of usage and will be billed separately.

Create a new SMS campaign which can be sent to a targeted patient group.

+ Create New Broadcast + Send SMS to Single or Multiple Mobile Numbers

Broadcast Templates

Select from an existing campaign template.

- Flu Clinic
- COVID-19 Telehealth - Now available
- COVID-19 Telehealth - ALL patients

2.2 Write your Broadcast, enter SC4C Family Baseline Survey as the name of the Broadcast (this name is for internal use, so you can see it in your history). **Enter the below message in the message field.**

<Participating GP Practice> is working with the <Royal Children's Hospital or Sydney Children's Hospitals Network> on a project to strengthen care for children in general practice. We are interested in your experience of care you've received.

Please click below to complete this short, anonymous survey. Participating will not affect care from your GP or any hospital.

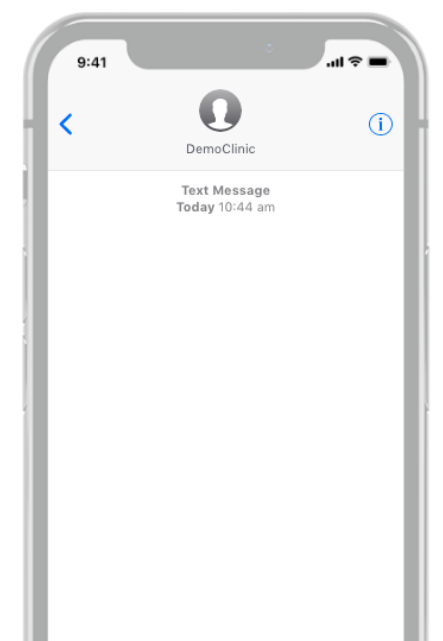
<https://redcap.link/czx08oum>

Questions? Contact strengtheningcare@mcri.edu.au

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

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}}
- Send your SMS during standard business hours
- Comply with Australian anti-spam guidelines. [View here](#)



Name (internal use only)

SC4C Family Baseline Survey

Message

Type your message here

*<Participating GP Practice> is working with the <Royal Children's Hospital or Sydney Children's Hospitals Network> on a project to strengthen care for children in general practice. We are interested in your experience of care you've received.
Please click below to complete this short, anonymous survey. Participating will not affect care from your GP or any hospital.
<https://redcap.link/czx08oum>
Questions? Contact strengtheningcare@mcri.edu.au*

Insert placeholder

Clear

160 characters | 1 credit

3. After you've written message, scroll down, click Upload and locate the .csv file on your computer.

Who are you sending to?

[Upload .CSV](#) Select Target Audience

Recommended guidelines for selecting your target audience [Need Help?](#)

- Generate a .csv list 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.)

Upload Patient IDs using a .csv file

[Upload](#)

- Once drafted, you will see an estimate of the number of credits that will be used by the Broadcast SMS. If you are happy with this, select **Next** to see a final preview of the message.

Who are you sending to?

Upload .CSV [Select Target Audience](#)

Age of audience

Between -

Gender Female Male

OR

Birthdate of audience

Between -

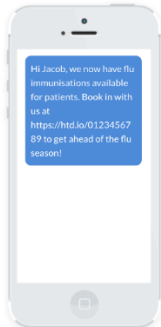
Send to patients regardless of opt out status in Best Practice.

Estimated cost: \$2.40

- Review Broadcast** will show a summary of your message and estimate of the number of credits you will use. You can send a free demo of the message to your phone by entering your mobile number and clicking on the **Send demo**.

- Bookings
- Patients
- Recalls
- Reminders
- Repeats
- Inform
- Broadcast
- Check-in
- Forms
- Setup
- Resources & Posters
- Support Centre
- Remote Support
- Log Out

< Back
Review Broadcast



Flu clinic

Age: Between 18 - 75 years old

Gender: female

Respect opt out: Yes

Estimated cost: \$1.32

Number of patients: 11

Demo it on your phone?

Estimated cost: \$1.32

- You can either **Save as draft** for sending later or, click **Send Broadcast** if you're ready to send.

Please note: Broadcast SMSs will not send if there are no recipients or if you are on legacy pricing and do not have enough credits to send all of 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 screen.

HotDoc Clinic Support References

- [How to upload a .csv file for a Broadcast](#)
- [How to create a Broadcast SMS](#)
- [Sending Broadcasts to one or multiple mobile numbers](#)