

USING DIGITAL TECHNOLOGY: Ways for Family Planning Providers to Improve Appointment Scheduling and Reminders

The health care and technology landscapes are rapidly changing. To attract new clients, retain existing ones, and improve overall client satisfaction, it is important to assess your existing systems and update accordingly with digital technology solutions, such as online appointment scheduling and text message appointment reminders. This job aid can help family planning providers with the process of adopting digital technology for family planning appointments while ensuring compliance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA), the main federal law that protects health information.

A note about the digital divide: Before adopting new digital technology solutions make sure to consider the gaps and disparities in internet and technology access, device ownership, and digital literacy among your family planning client population. These solutions are intended to supplement, not replace, existing practices and to promote increased engagement with new and existing clients.



Online Appointment Scheduling

Clients increasingly expect digital options for appointment scheduling and appointment reminders. A recent survey found that phone-based scheduling declined in popularity by 12% over the past five years—with the highest preference for online appointment scheduling among Millennials (59%).¹

Online appointment scheduling may also increase efficiencies for family planning providers, especially for those experiencing front desk staff shortages.

Family planning providers interested in adopting an online appointment scheduling solution must ensure compliance with HIPAA and prevent unauthorized access to or disclosure of protected health information (PHI).

When evaluating an online appointment scheduling solution, family planning providers should consider the online system's ability to:

- **Confirm a client's identity** through user authentication. Authentication ensures that a client provides proof of identity before being allowed access to PHI and can be achieved through the use of a password or a PIN.
- **Set access controls** that limit access to only the minimum PHI required. Access controls should provide unique login credentials and a designated level of access for each staff based on their job function.
- **Employ audit logs** that monitor who accesses client data—including when and for how long. Audit logs help establish normal access patterns and can assist in detecting unauthorized access or data breaches.
- **Encrypt data** to prevent unauthorized access. Encryption converts data into an unreadable form that requires a decryption key to access it. It is the strongest form of digital protection and is required for securing PHI.
- **Sign a Business Associate Agreement (BAA)** with the vendor that outlines HIPAA compliance for the “covered entities” and the protections that secure PHI.

¹ Kyuus. 2021 Client Access Journey Report. Available at: <https://www.kyruus.com/hubfs/Kyruus%20-%202021%20client%20Access%20Journey%20Report.pdf>

Online appointment scheduling systems can be implemented using a range of approaches. For instance, a family planning provider may choose to:

- **Adopt a stand-alone online appointment scheduling solution or integrate into existing platforms.**
An increasing number of electronic health records (EHRs) and client portals include online appointment scheduling capabilities. Family planning providers who utilize EHRs and client portals may wish to inquire about the availability of this feature. If an existing EHR or client portal does not include these capabilities, or if a stand-alone solution is preferred, family planning providers should prioritize third-party online appointment scheduling solutions that can automatically and securely transfer appointment data to already-existing systems.
- **Adopt a fully automated approach or an approach that employs manual reviews and approvals.**
An increasing number of systems support true self-scheduling, granting clients after-hours access and utilizing an automated waitlist to fill cancellations. If a family planning provider is not ready for this level of automation, many systems support appointment requests that staff must review and respond to prior to booking. Over time, patterns may help refine online appointment scheduling and move to a fully automated approach. To minimize the need for staff to intervene, it is also important to describe appointment types in plain language, so clients can easily identify the type of visit to request. Always inquire about the vendor's ability to support the appointment types a family planning provider needs.



Text Appointment Reminders

The most common reason for missed appointments (“no-shows”) is that clients forget or are unsure that they have an appointment.² The best way to reduce no-shows is to make the appointment the same day as the appointment. The second-best way is to provide multiple, well-placed appointment reminders. Voice appointment reminders are often ineffective since phone calls from unrecognized numbers are rarely answered and voicemails may not be accessible. Clients increasingly prefer to communicate via text; adding text appointment reminders may help reduce missed appointment rates.

Appointment reminders are considered part of treatment and can be made without an additional HIPAA authorization.³ However, clients should be offered the opportunity to opt-in or opt-out of text appointment reminder—and family planning providers may wish to obtain consent. See the RHNTC’s [Text Reminder Consent Form](#) for an example.

To ensure compliance with HIPAA and prevent unauthorized access to—or disclosure of—PHI, the information in text messages should be limited to the:

- Appointment date
- Appointment time
- Provider’s name
- Appointment location
- Options and steps for canceling or rescheduling

² Ullah S, Rajan S, Liu T, Demagistris E, Jahrstorfer R, et al. (2018) Why do clients miss their appointments at primary care clinics? J Fam Med Dis Prev 4:090. Available at: doi.org/10.23937/2469-5793/1510090

³ HHS.gov. (2015). Are appointment reminders allowed under the HIPAA Privacy Rule without authorizations? [online] HHS.gov. Available at: <https://www.hhs.gov/hipaa/for-professionals/faq/286/are-appointment-reminders-allowed-under-hipaa-without-authorization/index.html>

Factors to consider when evaluating a text appointment reminder solution include the ability to:

- Customize messages, including offering messages in languages other than English
- Bi-directionally communicate with clients
- Confirm, cancel, or request to reschedule from the appointment reminder
- Integrate with existing EHRs and client portals

Other considerations include ensuring:

- The text messaging solution contains correct client information and contact details.
- Clients are prompted to regularly verify their contact information.
- Clients have the ability to select their preferred method of contact and to opt-out of specific contact methods.

For more information on using health information (IT) technology to provide comprehensive, high-quality, and well-documented care that addresses barriers and realizes value, visit the Health Information and Technology, Evaluation and Quality (HITEQ) Center at <https://hiteqcenter.org>. Recommended resources include [The Health Center CIO's Guide to HIPAA Compliant Text Messaging](#) and the [Texting for Better Care Toolkit](#).

[RHNTC's Grantee Spotlight on Maine Family Planning](#) provides one example of a Title X provider's approach to assessing and adopting new digital technologies, including online appointment scheduling and text appointment reminders.

