

PATIENT COMMUNICATION TEMPLATES

Template Title	What it's used for
<u>First name(s) Last name - Medicare Health Fair Follow-Up Email</u>	Send to patients to gauge their availability for a tech check.
<u>Re: Medicare Health Fair Follow-up Email</u>	Once patient has provided their availability for a tech check, send this email with the date/time for the tech check that works for you.
<u>[Technology Check] Your Video Appointment Access Information</u> <u>[Technology Check] Your Phone Appointment Access Information</u>	Send to patient prior to the tech check. This has the Zoom meeting link you will be using during the tech check. Please send patient correct template (whether they are a strictly phone call patient or computer/tablet/phone app patient).
<u>Pre-Appointment Call Completed</u>	Send to patients once tech check is completed.
<u>[We're ready!] Your Video Appointment Access Information</u> <u>[We're ready!] Your Phone Appointment Access Information</u>	Send to patient on virtual health fair day. Please send patient correct template (whether they are a strictly phone call patient or computer/tablet/phone app patient).
<u>Pre-Appointment Call [Response Required]</u>	Send to patient if you cold-called them, but were not able to get into contact with them.

INITIAL TECH CHECK EMAIL -to send to patients to schedule a tech check

TEMPLATE TITLE: First name(s) Last name - Medicare Health Fair Follow-Up Email

Dear [INSERT FIRST NAME],

As Dr. Patel mentioned in his previous email (sent from rpatel@pacific.edu), we want to ensure that your future appointment at our Medicare Virtual Health Fair goes as smoothly as possible. As such, we would like to find a time to talk with you over Zoom and go over a few things, including doing a technology check. We would also like to collect a list of all your medications (prescription and over the counter) to help reduce the duration of your appointment. **Please do not send your medication list to us via email as we cannot guarantee its security.** We would like to speak with you and collect your medication list verbally through a secure meeting.

Can you please let me know a few days and times that work for you in the next week or two so that we can meet over Zoom? Specifically, let me know what times between the hours of noon-9pm each

day work best on your end. We will also need to know the phone number (including area code) or email address that you would like us to send the Zoom meeting information to. Once we hear back from you, we will then find a mutually convenient time on our end and let you know when you can expect more information.

Summary:

Please reply to this email and let us know:

- What days and times you are available in the next week or two so that we can do a technology check and collect your medication list?
- What phone number, including area code, or email address should we use to send you the Zoom meeting information for the technology check?

Thank you.

TECHNOLOGY CHECK –[for responding to patient availability] Email template

TEMPLATE TITLE: Re: Medicare Health Fair Follow-up Email

Hello [INSERT PATIENT NAME],

Thank you for indicating your availability for a technology check.

I will be meeting with you on [INSERT DATE] at [INSERT TIME/1 HOUR WINDOW]. Please keep an eye out on your [EMAIL OR TEXT MESSAGES] around that day and time as I will be sending you the Zoom meeting information prior to technology check. Once you receive this information, please log into the Zoom meeting. You will then be placed into a waiting room. You can stay in that waiting room until I let you into the meeting.

Please also have all your medications (prescription and over the counter vitamins or supplements) available so that we can collect this information from you.

We look forward to speaking with you soon!

Sincerely,

University of the Pacific School of Pharmacy's Medicare Program

Patients who do not answer tech check phone call

A. 1st missed call --> leave VM

"Hello this is University of the Pacific School of Pharmacy's Medicare Program team calling for [__pt name__]. We are reaching out to speak with you about your appointment and to ensure your appointment runs smoothly. Please call us back at (209) 910-3784, please leave your name and ask for __[student name]__. Thank you.

B. 2nd missed call --> leave VM (*same as above*) + send email (*below*)

Use template titled "Pre-Appointment Call [Response Required]"

TEMPLATE TITLE: Pre-Appointment Call [Response Required]

Dear _____,

Hello, this is the University of the Pacific School of Pharmacy's Medicare Program. We called you earlier and left a voicemail and wanted to follow up with this email to try to reach you. We are reaching out to speak with you regarding your appointment to ensure everything runs smoothly. Please call us back at (209) 910-3784 and leave your name and ask for __[student name]__, or reply to this email so we can schedule a conversation before your appointment. Thank you.

TECHNOLOGY CHECK -- [For Video Calls] Email/text message template to send meeting link information DURING YOUR TECH CHECK

TEMPLATE TITLE: [Technology Check] Your Video Appointment Access Information

Hello [INSERT PATIENT'S NAME],

This is the University of the Pacific School of Pharmacy's Medicare Program. We are ready to check your technology!

Please note: the email below is only for the technology check today – your appointment day meeting information will be different.

**Please click on the following meeting link to start your intervention: [INSERT MEETING LINK]
Please enter the following password when prompted to do so: [INSERT PASSWORD]**

You will be helped by [INSERT MEDICARE STUDENT'S NAME].

If I do not see you in the waiting room within 5 minutes of this email, I will call you to make sure you are not having technical issues keeping you from joining the meeting.

We will do our best to serve you in a timely fashion during your session. We thank you for your

patience and understanding, and we look forward to seeing you!

Sincerely,
University of the Pacific School of Pharmacy's Medicare Program

TECHNOLOGY CHECK -- [For Strictly Phone Calls] Email/text message template to send meeting link information during tech check

TEMPLATE TITLE: [Technology Check] Your Phone Appointment Access Information

Hello [INSERT PATIENT'S NAME],

This is the University of the Pacific School of Pharmacy's Medicare Program. We are ready to check your technology!

Please note: the email below is only for the technology check today – your appointment day meeting information will be different.

Please call: [INSERT ZOOM PHONE NUMBER]

Enter Meeting ID: [INSERT MEETING ID]

Press # to skip participant ID

Enter Passcode: [INSERT PASSCODE]

You will be helped by [INSERT MEDICARE STUDENT'S NAMES].

If we do not see you in the waiting room within 5 minutes of this email, we will call you to make sure you are not having technical issues keeping you from joining the meeting.

We will do our best to serve you in a timely fashion during your session. We thank you for your patience and understanding and we look forward to seeing you!

Sincerely,
University of the Pacific School of Pharmacy's Medicare Program

POST TECH CHECK ----Email/text message template as physical proof of tech check and reminder of necessary items

TEMPLATE TITLE: Pre-Appointment Call Completed

Dear [INSERT PATIENT'S NAME],

Hello, this is the University of the Pacific School of Pharmacy's Medicare Program. Thank you for your time today. Your current appointment time is set for **[INSERT DATE/TIME]**. When we are ready for you, we will be sending you personal access information for your intervention. Please remember, the intervention information sent to you today was only for our technology check today. Please join the intervention through the same route we tested out today. For your appointment, please have the following materials prepared:

- Your New Medicare Card (red, white and blue card)
- All Current Medications (Prescription, Over-The-Counter, Vitamins, etc.)
- MyMedicare.gov login information (username and password)
 - If you need to reset your login information, please [click here to visit the MyMedicare.gov website](#) and [you can also click here for further instructions](#). You may also call 1-800-MEDICARE [1-800-633-4227] for further assistance.

Additionally, if you have a personal headset with a microphone, you will be able to hear the intervention better and will also ensure your privacy on your end of the computer screen. Please consider using one if possible to do so.

Attached you will also find our University's Privacy Practice Policy, also known as HIPAA. We are required to provide this to you in advance of your appointment. ([Please click here for additional languages of our HIPAA policy.](#))

Thank you so much for your time today. We hope this conversation helped to alleviate any hesitations or confusion you may have had about the virtual health fairs this year.

If you have any additional questions or inquiries, please feel free to contact us via email at MedicareClinics@pacific.edu, or phone at 209-910-DRUG [209-910-3784].

We look forward to working with you!

Sincerely,

University of the Pacific School of Pharmacy's Medicare Program

INTERVENTION DAY -----Email/text message template for COMPUTER/APP APPTS with meeting link for intervention day

TEMPLATE TITLE: [We're ready!] Your Video Appointment Access Information

Hello [INSERT PATIENT'S NAME],

We are ready to start your appointment! Please gather the following materials:

- Red, white, and blue Medicare card
- ALL prescription and over the counter medications
- MyMedicare.gov account username and password

Please click on the following meeting link to start your appointment: [INSERT MEETING LINK]

Please enter the following password when prompted to do so: [INSERT PASSWORD]

You will be helped by [INSERT MEDICARE STUDENTS' NAMES].

As an added level of security, you will first be placed in a waiting room. We will admit you to your unique intervention room when we see you have entered the waiting room. Please be patient, that process should not take long.

If we do not see you in the waiting room within 5 minutes of this email, we will call you to make sure you are not having technical issues keeping you from joining the meeting.

We will do our best to service you in a timely fashion during your session. We thank you for your patience and understanding and we look forward to seeing you!

Sincerely,

University of the Pacific School of Pharmacy's Medicare Program

INTERVENTION DAY ----- Email/text message template for STRICTLY PHONE APPTS with information link for intervention day

TEMPLATE TITLE: [We're ready!] Your Phone Appointment Access Information

Hello [INSERT PATIENT'S NAME],

We are ready to start your appointment! Please gather the following materials:

- Red, white, and blue Medicare card
- ALL prescription and over the counter medications
- MyMedicare.gov account username and password

Please call: [INSERT ZOOM PHONE NUMBER]

Enter Meeting ID: [INSERT MEETING ID]

Press # to skip participant ID

Enter Passcode: [INSERT PASSCODE]

You will be helped by [INSERT MEDICARE STUDENTS' NAMES].

If we do not see you in the waiting room within 15 minutes of this email, we will call you to make sure you are not having technical issues keeping you from joining the meeting.

We will do our best to service you in a timely fashion during your session. We thank you for your patience and understanding and we look forward to seeing you!

Sincerely,
University of the Pacific School of Pharmacy's Medicare Program
