

# PATIENT ENGAGEMENT

Effective and efficient communication from your EMR

# TODAY'S AGENDA

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About Cliniconex

---

Our services and how we're different

---

Q&A session

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# CLINICONEX HELPS CLINICS ENGAGE WITH MORE THAN TWENTY-FIVE THOUSAND PATIENTS EVERY DAY

5,000<sub>+</sub>

ACTIVE PROVIDERS SERVED

80<sub>+</sub>

SUB-SPECIALTIES SERVED

1,000<sub>+</sub>

CLIENTS ACROSS CANADA

750,000<sub>+</sub>

PATIENT ENGAGEMENTS PER MONTH

70%

REDUCTION IN NO-SHOWS  
AND OUTBOUND CALLS

5 HOURS

AVERAGE HOURS BEING SAVED BY  
STAFF PER WEEK

10<sub>+</sub> YEARS

RELIABLE, SECURE, & BATTLE-TESTED  
ENGAGEMENT PLATFORM

8 EMRS 1 EHR

# CLINICONEX IS **MORE THAN JUST A REMINDER TOOL**

Cliniconex is a **patient engagement platform**.

Our light-touch workflow engagement platform helps care providers **automate outreach and improve coordination** with key stakeholders; keeping them better informed throughout their healthcare journeys.

## **OUR MISSION: TO SIMPLIFY CARE COORDINATION**

To **simplify healthcare** for patients, families, providers and staff by **coordinating information exchanges** across today's complex and often disjointed healthcare experiences.



# OUR SERVICES, MAPPED TO HEALTHCARE JOURNEYS

## BEFORE

- Waitlist Management
- Booking Notifications
- Appointment Reminders
- Clinic Cancellation Notices
- COVID-19 Screening Measures
- Infection Control



## DURING

- Managing No-Shows
- Communicating Wait Times
- Infection Control



## AFTER

- Appointment Recalls
- Health Campaign
- Patient Surveys
- Preventative Care
- Infection Control



Hello,  
Just a friendly reminder about your appointment  
with us. To assist us, please confirm your  
appointment by clicking on the link image below.  
Thanks.

Your appointment is:  
Wednesday May 15  
1:15PM



call me



click to confirm appointment



cancel

Please arrive 10 minutes early for this appointment  
Please cancel your appointment 24 business hours  
in advance so that the time allotted can be given to  
others. For cancellation of Monday appointments,  
call the clinic on Friday during our business hours.  
For more information, visit our [Website](#).

ABC Family Clinic  
555 Somewhere St  
Toronto, Ontario  
A1A 1A1  
(555)555-5555



add to calendar

—ABC—  
FAMILY CLINIC

# PATIENT ENGAGEMENT SUITE

Reduce no-shows, increase revenue and lessen the  
burden on your staff

## **SENDING A MESSAGE FROM WITHIN YOUR EMR**



1 Schedule an appointment in your EMR

The screenshot shows a web browser window titled 'ADD APPOINTMENT - Microsoft Edge'. The URL is 'ec2serv1.cliniconex.com:8080/Oscar10\_12/appointment/addappointment.jpg?demographic\_no=1&name=ADAMS,PAM&chart\_no=1&firstDrop=false&message1'. The form is titled 'MAKE AN APPOINTMENT (Mike Hammer)'. It contains fields for Date (2016-05-26), Start Time (08:15), Duration (15), Last Name (ADAMS,PAM), Reason, Location, Creator (Duncan, Erica), Status (To Do), Type, Doctor (Duncan, Erica), Search, Notes, Resources, and Date Time (2016-5-26 12:31:28). There are buttons for 'Group Appt', 'Add Appt & Print/Preview', 'Add Appointment', '&Print', 'Cancel', and 'R'. Below the form is a 'Demographics' section with fields for Name, Address, Phone, and Email. To the right is an 'Appointment Overview' table.

Date	Start Time	Provider	Comments
2016-02-20	10:45:00	Hammer, Mike	
2016-01-23	08:00:00	Hammer, Mike	
2015-12-03	08:45:00	Hammer, Mike	
2015-12-03	08:30:00	Hammer, Mike	
2015-12-03	08:15:00	Hammer, Mike	Cancelled

2 Cliniconex automatically sends notifications to patients

3 Patients confirm or cancel appointments on their preferred device

4 Appointment statuses are automatically updated in your EMR schedule

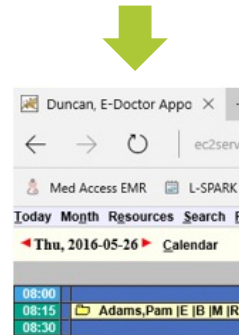
**WORKFLOW  
WITHOUT THE  
WORK**

1 Schedule an appointment in your EMR

The screenshot shows a web browser window titled 'ADD APPOINTMENT - Microsoft Edge'. The URL is 'ec2serv1.cliniconex.com:8080/Oscar10\_12/appointment/addappointment.jpg?demographic\_no=1&name=ADAMS,PAM&chart\_no=1&firstDrop=false&message1'. The form is titled 'MAKE AN APPOINTMENT (Mike Hammer)'. It contains fields for Date (2016-05-26), Start Time (08:15), Duration (15), Last Name (ADAMS,PAM), Reason, Location, Creator (Duncan, Erica), Status (To Do), Type, Doctor (Duncan, Erica), Search, Notes, Resources, and Date Time (2016-5-26 12:31:28). There are buttons for 'Group Appt', 'Add Appt & PrintPreview', 'Add Appointment', '&Print', 'Cancel', and 'R'. Below the form is a 'Demographics' section with fields for Name, Address, Phone, and Email. To the right is an 'Appointment Overview' table.

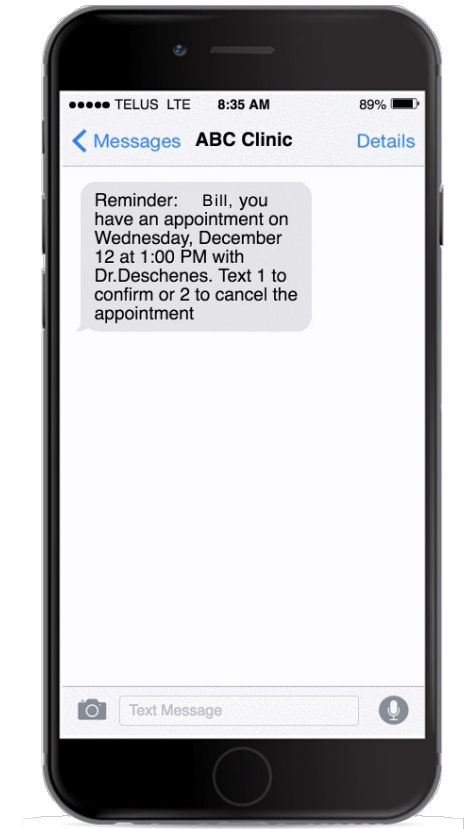
Date	Start Time	Provider	Comments
2016-02-20	10:45:00	Hammer, Mike	
2016-01-23	08:00:00	Hammer, Mike	
2015-12-03	08:45:00	Hammer, Mike	
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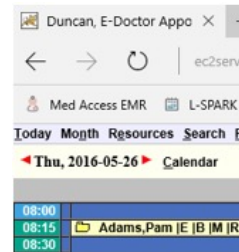


1 Schedule an appointment in your EMR

The screenshot shows a web-based form for scheduling an appointment. The form includes fields for Date (2016-05-26), Start Time (08:15), Duration (15), Last Name (ADAMS, PAM), Reason, Location, Creator (Duncan, Erica), Status (To Do), Type, Doctor (Duncan, Erica), Search, Notes, Resources, and Date Time (2016-5-26 12:31:28). There are buttons for 'Group Appt', 'Add Appt & Print/Preview', 'Add Appointment', '&Print', 'Cancel', and 'R'. Below the form is a table with patient demographics and an appointment overview.

Demographics		Appointment Overview	
Field	Value	Date	Start Time
MRN	222222222	2016-02-20	10:45:00
Address	410 Esplanade, Ladysmith, BC, V6G 1A2	2016-01-23	08:00:00
Phone	H: 773.828.0199 W: 250-555-6401	2015-12-03	08:45:00
Email	clintonex@gmail.com	2015-12-03	08:30:00
		2015-12-03	08:15:00

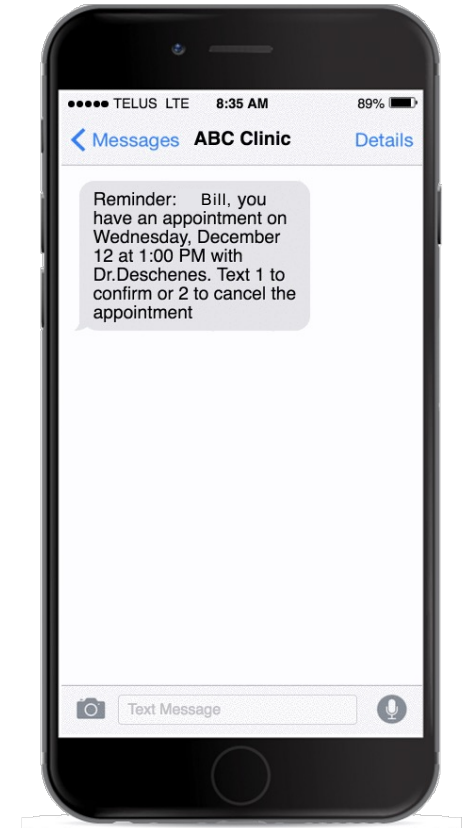
2 Cliniconex automatically sends notifications to patients



3 Patients confirm or cancel appointments on their preferred device



4 Appointment statuses are automatically updated in your EMR schedule



- 1 Schedule an appointment in your EMR

ADD APPOINTMENT - Microsoft Edge

ec2xenv1.cliniconex.com:8080/cxsar10\_12/appointment/addappointment.jsp?demographic\_no=1&name=ADAMS,PAM&chart\_no=1&firstDisp=false&msg=

### MAKE AN APPOINTMENT (Mike Hammer)

Date(Thu):	2016-05-26	Status:	To Do
Start Time	08:15	Type	
Duration (min):	15	Doctor:	Duncan, Erica
Last Name:	ADAMS,PAM	Search	1
Reason:		Notes:	
Location:		Resources:	
Creator:	Duncan, Erica	Date Time	2016-5-26 12:31:28

**Demographics** [edit](#) Sex: F DOB: (1967-07-01)

**His:** 222222222

**Address:** 410 Esplanade, LadySmith, BC, V9G1A4

**Phone:** M 770 829 0198 W 250 555 6401

**Email:** cliniconex@gmail.com

Date	Start Time	Provider	Comments
2016-02-29	10:45:00	Hammer, Mike	
2016-01-23	09:00:00	Hammer, Mike	
2015-12-03	00:45:00	Hammer, Mike	
2015-12-03	09:30:00	Hammer, Mike	
2015-12-03	09:15:00	Hammer, Mike	Cancelled

## 2 Cliniconex automatically sends notifications to patients

The screenshot shows a web browser window with the address bar displaying 'ec2serv'. The page title is 'Duncan, E-Doctor Appo'. The browser's navigation bar includes back, forward, and refresh icons. The page content features a header with 'Med Access EMR' and 'L-SPARK'. Below this is a navigation bar with 'Today', 'Month', 'Resources', and 'Search'. The main content area displays a calendar for 'Thu, 2016-05-26' with a 'Calendar' button. A table of appointments is visible, with the first row showing a time slot of 08:00 and an appointment for 'Adams, Pam | E | B | M | R'.

3 Patients confirm or cancel appointments on their preferred device

08:00	
08:15	Adams, Pam   E   B   M   Rx
08:30	
08:45	

#### 4 Appointment statuses are automatically updated in your EMR schedule

PATIENT SEARCH RESULTS - Microsoft Edge

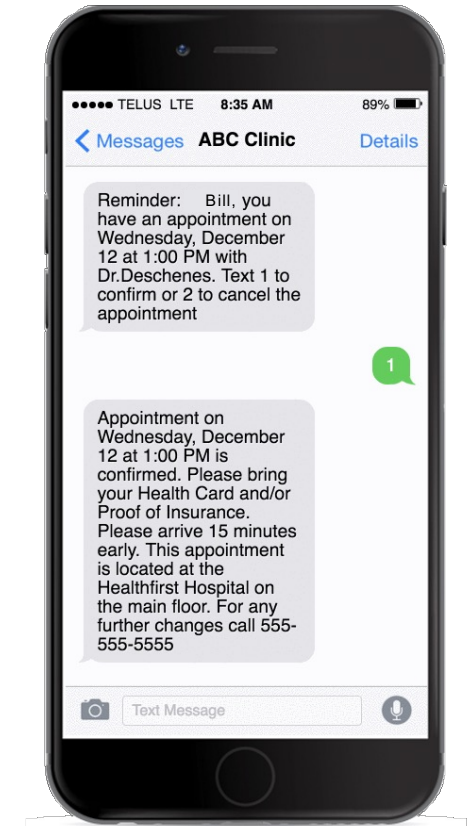
ec2serv1 clinicon.com:8080/Oscar10\_12/demographic/demographiccontrol.jsp?search\_mode=search\_name&keyword=&orderby=last\_name%2Cfirst\_name

### SEARCH FOR PATIENT RECORDS

By:  Input:

Results based on keyword(s):

Demopp' No		Name <sup>1</sup>	Chart#	X	DOB yyyy-mm-dd	Doctor	Res Sta	Pat Sta	Phone
2	E Rx	Adams, Eddy	M		1971-06-15	Duncan, Erica	AC		770-82-0198
1	E Rx	Adams, Pam	1	F	1967-07-01	Duncan, Erica	RO	AC	770-82-0198
3	E Rx	Adams, Terry	F		1954-06-15	doe, doctor			613-25-0560
4	E Rx	Doe, Jane	M		1971-06-15	doe, doctor			613-25-1122
5	E Rx	Smith, Mike V	M		1965-06-15	doe, doctor	AC		613-25-0946



# **WORKFLOW AUTOMATION, CONTENT LOGIC AND OTHER KEY DIFFERENTIATORS**



# WORKFLOW AUTOMATION DRIVES CUSTOMIZATION

## APPOINTMENT



ADD APPOINTMENT - Microsoft Edge

ec2serv1.cliniconex.com:1080/Oscar10\_12/appointment/addappointment.jpg?demographic\_no=1&name=ADAMT.PAM&chart\_no=1&firstDisp=false&message=

**MAKE AN APPOINTMENT (Mike Hammer)**

Date(Thu): 2016-05-26	Status: To Do
Start Time: 08:15	Type:
Duration: 15	Doctor: Duncan, Erica
Last Name: ADAMS, PAM	Search: 1
Reason:	Notes:
Location:	Resources:
Creator: Duncan, Erica	Date Time: 2016-5-26 12:31:28

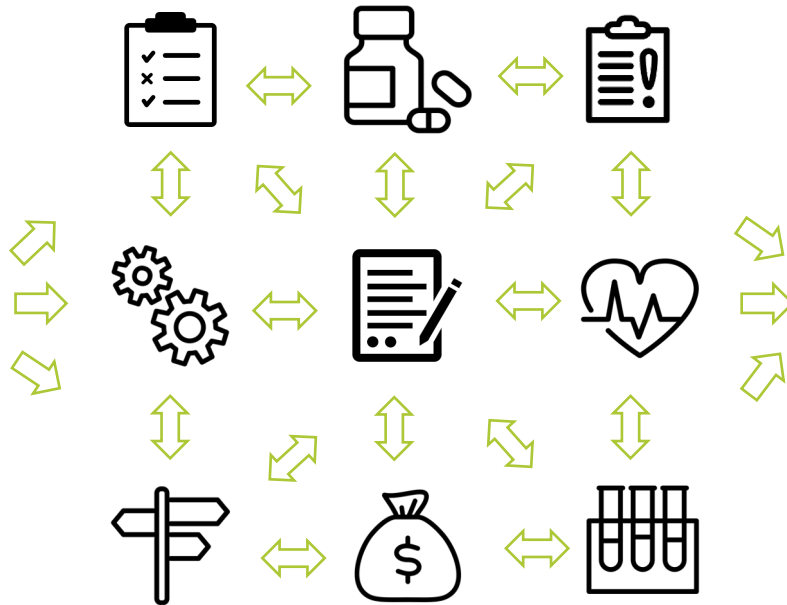
Group Appt | Add Appt & Print/Preview | Add Appointment | & Print | Cancel | R

Demographics	edit	Sex: F	DOB: (1967-07-01)
Hic: 222222222			
Address: 410 Esplanade, Ladysmith, BC, V90 1A0			
Phone: H 728.828.0198 W 250-555-5801			
Email: cliniconex@gmail.com			

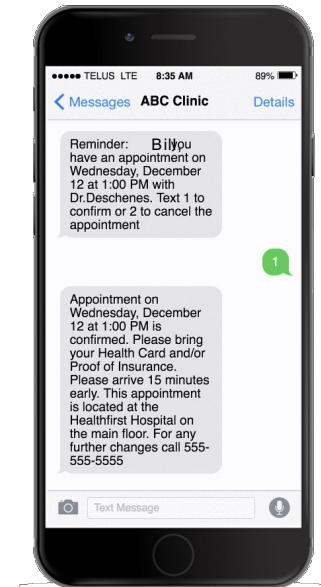
Date	Start Time	Provider	Comments
2016-02-20	13:45:00	Hammer, Mike	
2016-01-23	08:00:00	Hammer, Mike	
2015-12-03	08:45:00	Hammer, Mike	
2015-12-03	08:30:00	Hammer, Mike	
2015-12-03	08:15:00	Hammer, Mike	Cancelled



## RULES



## UNIQUE ENGAGEMENT



“If this, then that. If that, then this”.

# COMBINING MULTIPLE APPOINTMENTS

ONE PATIENT WITH 3  
APPOINTMENTS  
THE SAME DAY



APPOINTMENT 1



APPOINTMENT 2



APPOINTMENT 3

EMR

## OTHER SOLUTIONS



Text Message Today at 3:00 PM

"Reminder: Chris, you have an appointment on Wednesday December 12 at 1:00 PM with Dr.Deschenes."



Text Message Today at 3:11 PM

"Reminder: Chris, you have an appointment on Wednesday December 12 at 1:20 PM with Dr.Deschenes."



Text Message Today at 3:19 PM

"Reminder: Chris, you have an appointment on Wednesday December 12 at 2:00 PM with Dr.Deschenes."

MULTIPLE NOTIFICATIONS

**cliniconex**

with an autonomous rules engine  
configured to your clinic's workflows



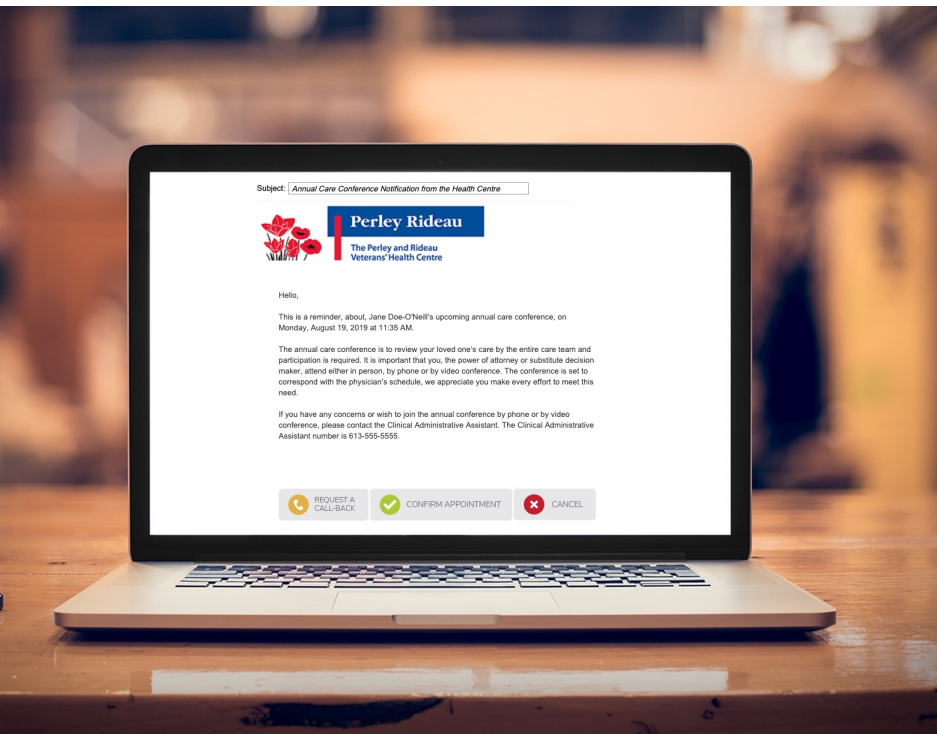
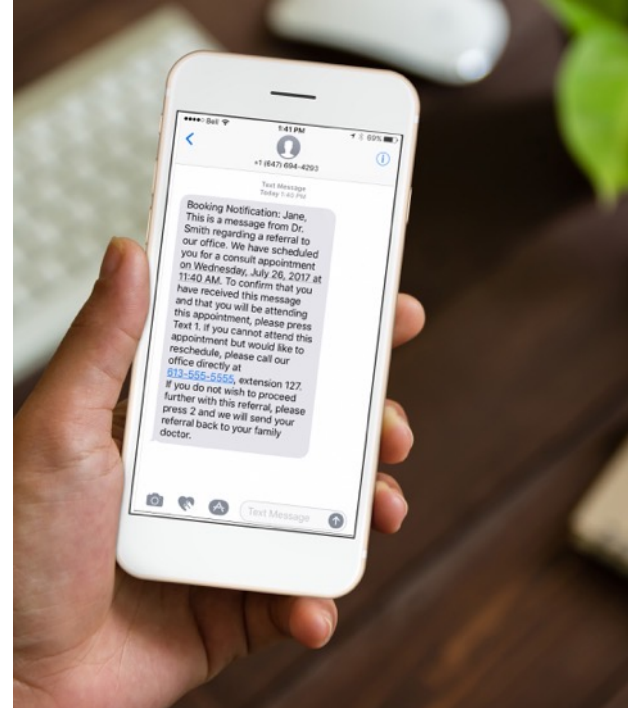
Text Message Today at 3:00 PM

Reminder: Chris, you have multiple appointments on December 12th: with Dr. Deschenes at 1:00 PM, with Dr. Jones at 1:20 PM and with our dietician at 2:00 PM. Please arrive 15 minutes before your first appointment.

A SINGLE NOTIFICATION

# CUSTOMIZATION:

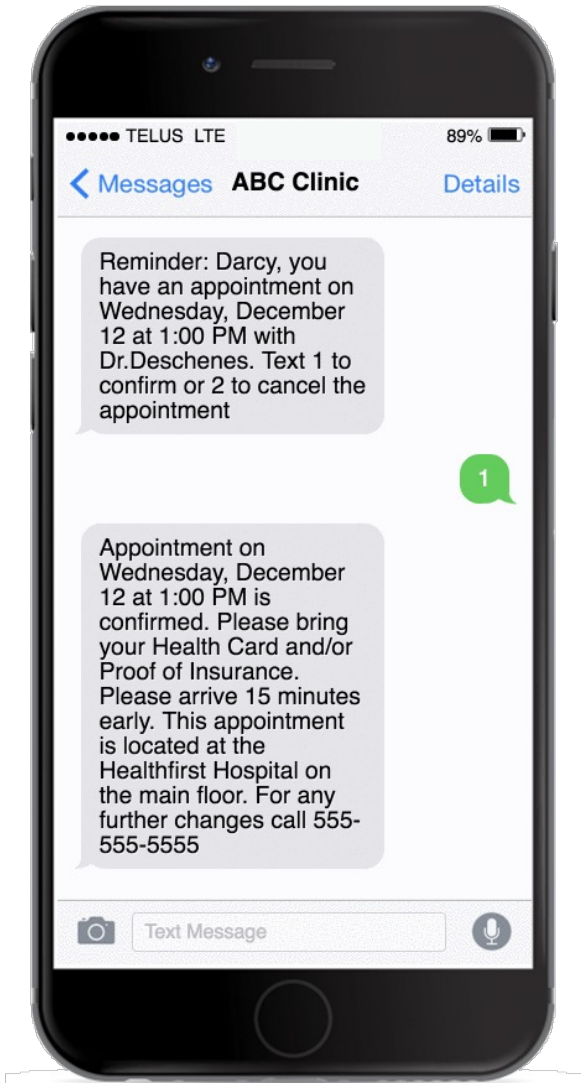
## EMPLOYING TECHNOLOGY WHILE RETAINING YOUR PERSONAL TOUCH




VOICE  
TEXT  
EMAIL



# CUSTOMIZE YOUR **MESSAGING AND BRANDING**



Confirm Your Appointment: Saturday, January 26 at 10:55 AM Inbox x


 **noreply@cliniiconex.com** noreply@cliniiconex.com via sendgrid.net Jan 25, 2019, 10:56 AM (6 days ago)


to me ▾

**YOUR LOGO**

Hello,  
This is a friendly reminder about your appointment with Dr. Doe-Smitherson. To assist us, please [confirm your appointment](#) by clicking the link or the image below.

Your appointment is:  
**Saturday, January 26**  
10:55 AM

 **CLICK TO CONFIRM YOUR APPOINTMENT**

 **CANCEL**

**SPECIAL INSTRUCTIONS:**  
Please bring your Health Card and/or Proof of Insurance. Please arrive 15 minutes early.

**LOCATION:**  
This appointment is located at our main office, 555 Main Street


**CANCELLATION POLICY:**  
Please note we require 48 hours' notice to cancel or change your appointment. Failure to provide proper notification will result in a charge.


To view our complete Cancellation Policy, visit: [Cancellation Policy/Policies-fees](#)

For more details about the Health & Wellness Centre, visit: [Health & Wellness Centre](#)

**If you are receiving this e-mail in error, please contact the Health & Wellness Centre at (613) 555-5555.**

**Health & Wellness Centre**  
555 Main Street

 **ADD TO CALENDAR**

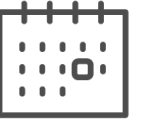
powered by  
 **cliniiconex**

# PATIENT ENGAGEMENT SUITE

More than reminders



# BOOKING NOTIFICATIONS



## OVERVIEW

Automatically send booking notifications once appointments have been booked

- Can be configured to only send for specific appointment types, by specialist or by location
- Work in your EMR as you normally would

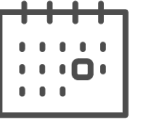
## BENEFITS

- Save staff time: no lengthy outbound calls
- Direct feedback: ask patients to confirm they will attend the appointment
- Lower no-show rates and increase clinic revenues by ensuring you're booked at capacity

## USE CASES

- Notify a patient when an appointment has been booked
- Commonly used by specialists when additional special instructions are required
- Can be used for referrals to the clinic, patients can accept or decline the referral

# BOOKING NOTIFICATIONS

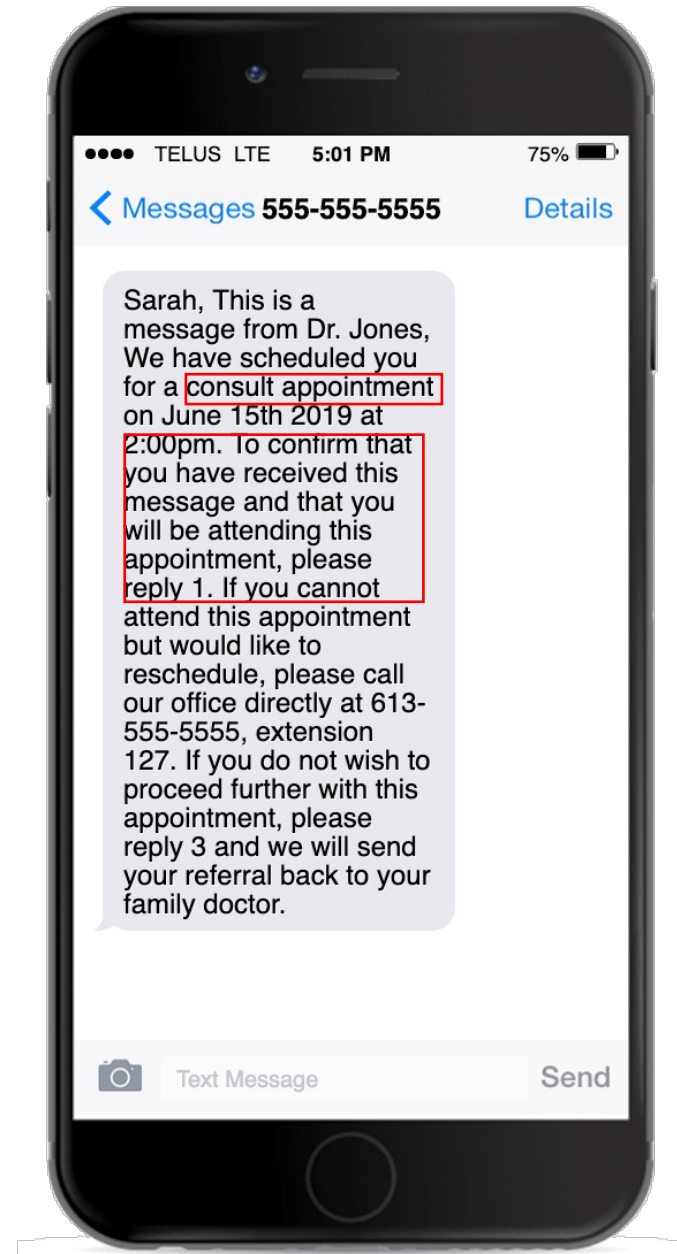


Schedule a New Appointment in  
your EMR



Cliniconex Automatically  
Sends a Booking Notification

- Triggered on appointment type, provider, location etc.
- Can be configured to require patient confirmation
- Can include any special messaging



# CLINIC CANCELLATIONS



## OVERVIEW

Automatically send a cancellation notice to affected patients from within your EMR.

- Staff control which appointment to send on
- Patients can acknowledge receipt of the cancellation and contact the clinic to re-book

## BENEFITS

- Save staff time: no lengthy outbound calls
- Staff are able to quickly and efficiently send out messages within minutes
- Require confirmation to ensure all patients are contacted be needlessly travelling

## USE CASES

- Notify a patient when an appointment needs to be cancelled
- Notify all patients for a full day when a provider is out of office due to illness, schedule changes, etc.
- Severe weathers conditions and clinic closures

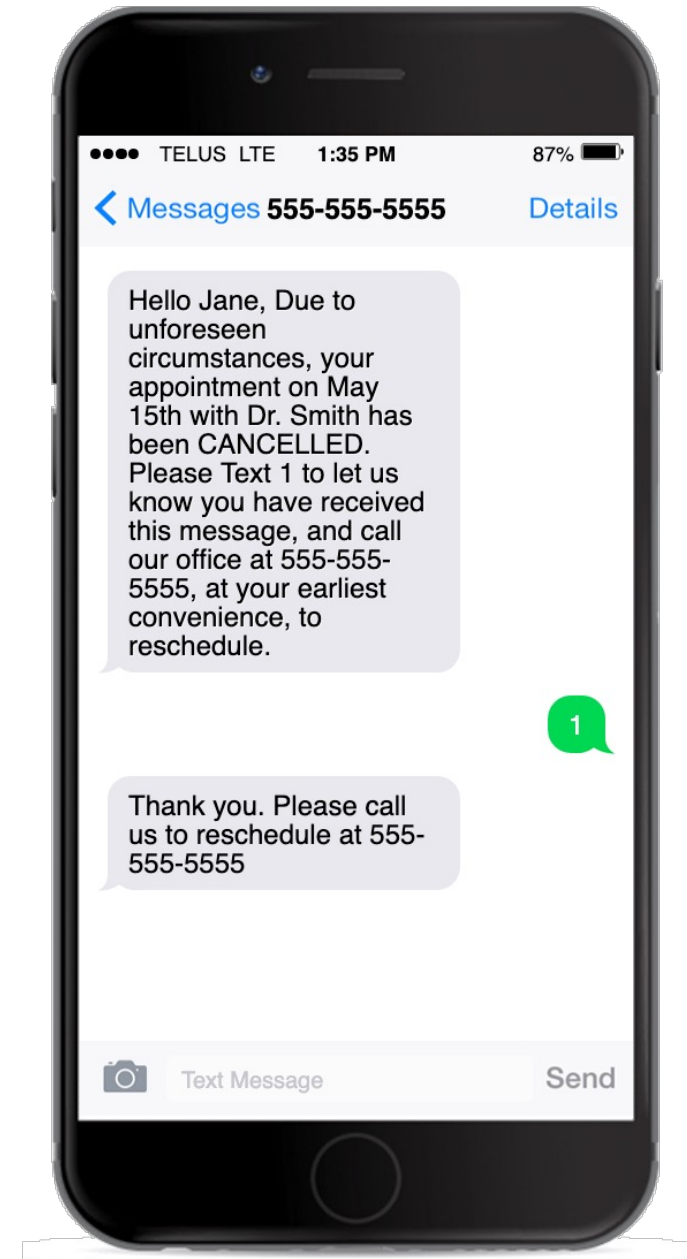
# CLINIC CANCELLATIONS

Cancel an appointment or group of appointments in your EMR

Cliniconex automatically sends notifications to your affected patients

Patients respond accordingly

A summary report is sent via email



# BULK NOTIFICATIONS



## OVERVIEW

Inform your entire roster or a targeted group of patients in a matter of minutes

- Staff control which patients to message, based on exported lists from the EMR
- “Manual” targeting

## BENEFITS

- Staff are able to quickly and efficiently send out messages within minutes
- Can lead to increased clinic revenue when used to generate appointment bookings
- Increased communication with patients

## USE CASES

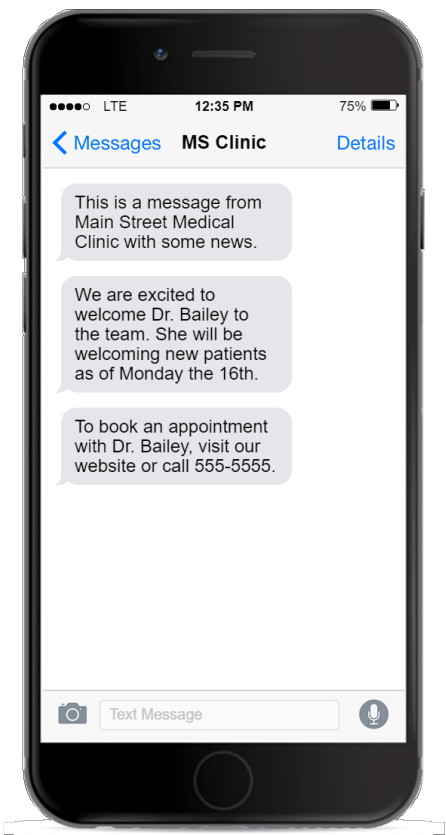
Notify a group of patients when

- Provider retirements
- Provider moves
- Change in clinic hours
- Accepting new patients
- Clinic policy changes
- Educational messages

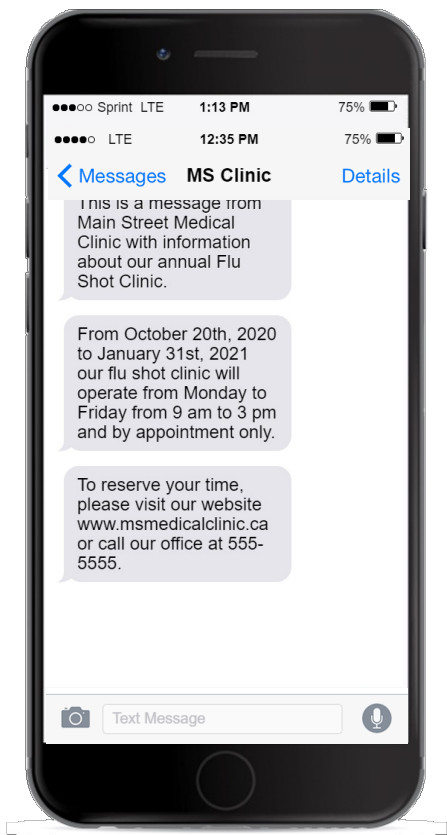


# NOTIFY PATIENTS OF **IMPORTANT CLINIC INFORMATION**

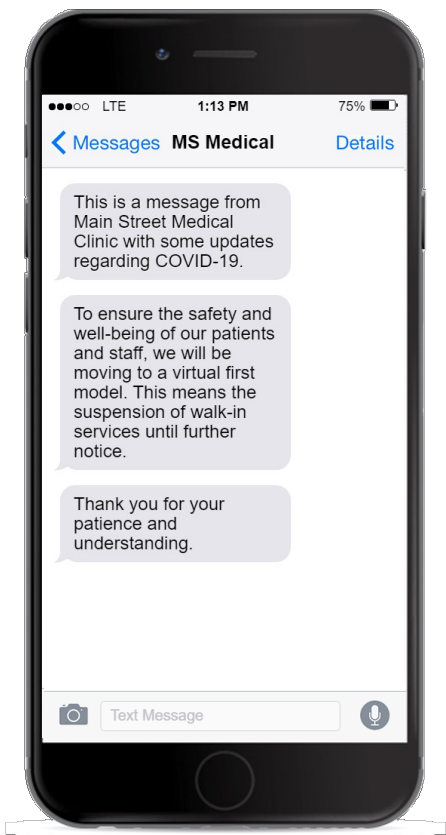
## New Provider



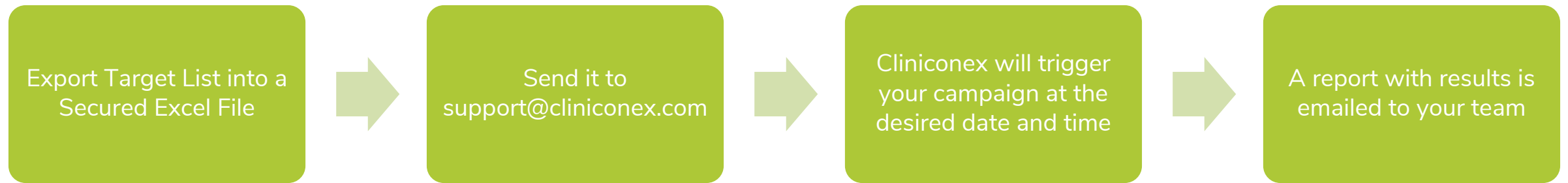
## Flu Shot Clinic



## COVID-19 Protocols



# BULK NOTIFICATIONS



# APPOINTMENT RECALLS AND PREVENTIVE CARE



## OVERVIEW

Target a group of patients using EMR demographics and appointment data

- Rules are created for your clinic to best fit your clinic's needs and processes
- “Automated” targeting

## BENEFITS

- Saves staff time: no lengthy outbound calls
- Staff are able to quickly and efficiently send out messages within minutes
- Direct feedback: ask patients to acknowledge receipt of the notification

## USE CASES

Notify a patient when they are due for

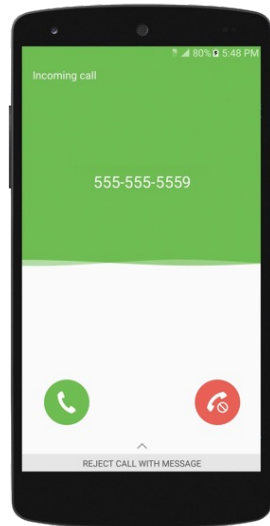
- Annual check-up
- Annual flu-shot
- 3 month follow-up after a special appointment type
- Annual PAP\*
- Mammogram testing\*
- Educational messages
- Birthday greetings & special offers

# SUMMARY

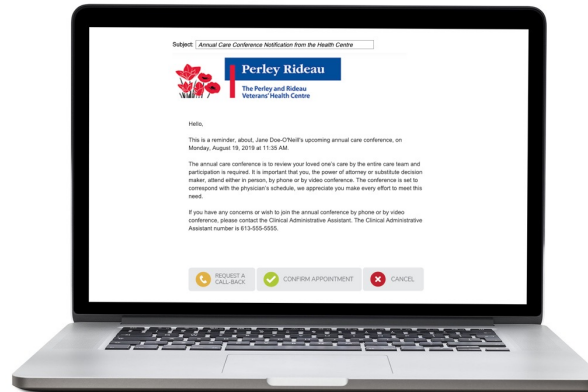
# PATIENT ENGAGEMENT PRICING

**\$0.37**  
per cycle

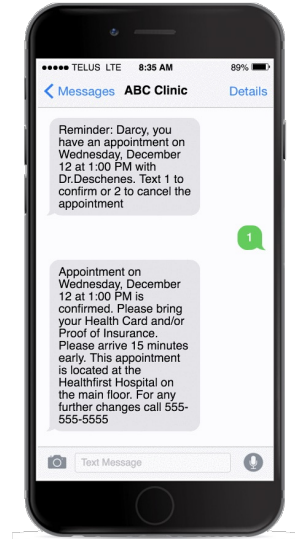
**ONE CYCLE IS**



**3** phone call attempts if needed  
(including voicemail on final attempt)



or, **1** email with  
confirmation message



or **1** text message with confirmation  
text message



# PATIENT ENGAGEMENT **PRICING**

Appointments per month	Cost per month	Number of no-shows avoided for Cliniconex to pay for itself
100	\$35	0.7
200	\$70	1.4
500	\$175	3.5
1000	\$350	7

**YOU CHOOSE** WHICH APPOINTMENT TYPES TO REMIND FOR AND CAN MODIFY AT ANY TIME

# WE PROVIDE SOLUTIONS THAT

## Get the right information

- To the right person
- At the right time

## And return responses

- To the right person
- At the care venue
- Without disrupting their workflow

## **AUTOMATED** **PATIENT ENGAGEMENT**

- ✓ Reduce no-shows
- ✓ Increase patient satisfaction & retention
- ✓ Decrease the burden on front-end staff
- ✓ Increase clinic revenue

**QUESTIONS?**

**Get In Touch**  
[sales@cliniconex.com](mailto:sales@cliniconex.com)