

PHO Query Message Communication

Steps on how to take the PHO reports and use them to communicate to patients on bulk.

1. Create the templates your require to communicate out to patients relevant to the specific campaign.

To do this go to Configurations > Mail Merge. Click on the plus.

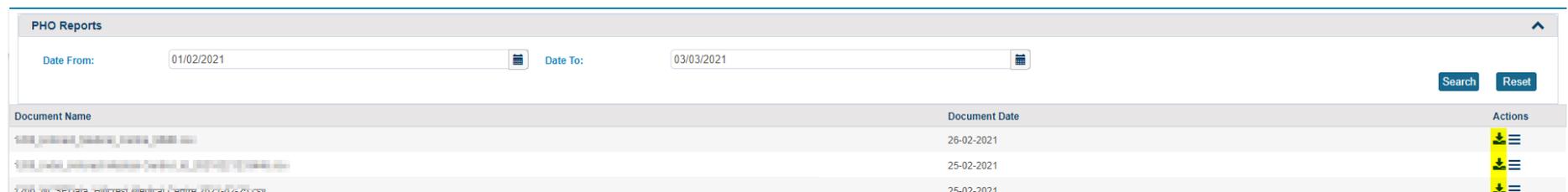
You will need to create a portal and direct email mail merge template, a letter template, and a SMS template.

For hints on how to complete this you will find this below

<https://indici-docs.atlassian.net/wiki/spaces/IUM/pages/805929482/PM+-+Adding+a+new+Template>

2. Retrieve the PHO report.

The PHO report is found under the Administration > PHO report. Select the report you would like to communicate to, under action click on download.



The screenshot shows a table titled "PHO Reports" with search filters and a list of reports. The filters are "Date From: 01/02/2021" and "Date To: 03/03/2021". The table has three columns: "Document Name", "Document Date", and "Actions".

Document Name	Document Date	Actions
1000_United_States_Medical_Center_20210226.xlsx	26-02-2021	Download icon
1000_United_States_Medical_Center_20210225.xlsx	25-02-2021	Download icon
1000_United_States_Medical_Center_20210225.xlsx	25-02-2021	Download icon

3. Filter the Report.

Review the data in the downloaded excel file to the patients you feel you would like to communicate with.

IMPORTANT NOTE

At times, the Ventures Data team may apply different rules to the query’s they write compared to what is applied to the query in the system. For example, they may have included casual population in their PHO report or be required to offer patients of a specific age. Please be mindful the below rules have been applied to the communication query within. You may need to adjust the query in indici accordingly to reflect this.

Indici advanced report builder rules that have been applied that may differ from the PHO query.

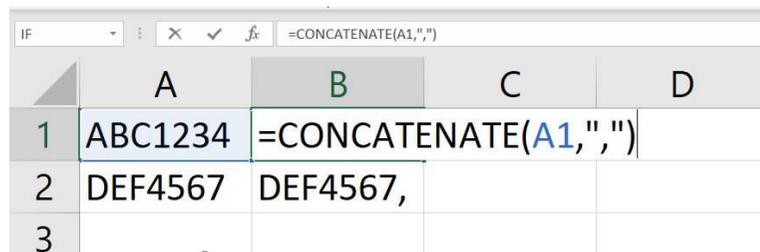
- Patient is Enrolled.
- Patient is Registered.
- Patient is Funded.
- Patient is alive.
- There are no age parameters set to this query.

4. Manipulate the report so that it behaves correctly in indici advanced report builder.

On the excel spreadsheet the has downloaded from the PHO report, add a column to the right of the column containing the NHI’s, place your curser into the box next to the first NHI and paste the below formula in the box. Then shift and cover the whole line and it will add a coma after each NHI.

```
=CONCATENATE(B2,",")
```

B2 Must be the Column and row that the other NHI is in. so, you may need to update the first formula to reflect the correct column. See below A1 is where ABC1234 is sitting.



	A	B	C	D
1	ABC1234	=CONCATENATE(A1,",")		
2	DEF4567	DEF4567,		
3				

The column that you then need to run is the one that has the comma's after each NHI, you will copy this group of NHI's and place them into indici.

In the future you may see a comma next to the NHI already present in the report for your practice, if you do then please skip the above step.

5. Open your in indici your advanced report builder.

Home > Advanced report builder

There are 4 reports there now for you to place NHI's into:

- **PHO Report Contact list for registered patient portal Query.**
- **PHO REPORT contact list for direct email query.**
- **PHO REPORT contact list for SMS Query.**
- **PHO REPORT contact list for Letter query.**

6. Into each report you will need to copy and paste the list of NHI's you want to communicate to.

To do this you will need to click on edit report.

20	PHO REPORT contact list direct email query	written to be able to contact patient who are not registered to the portal but have consented to receive direct email, place NHI in and send using message communication.	Reports	Indici	3/03/2021 2:08:50 PM	nikkisa001	<input checked="" type="checkbox"/>	
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7. Click on open in editor.

Modify Report

Report Name:

Description:

Category:

Sub Category:

VisibleTo:

Page Size:

Report Query:

```
SELECT DISTINCT Patient.FullName AS "Patient Full Name", Patient.NHINumber AS "Patient NHI Number", Patient.ProfileID AS "Patient ProfileID", Patient.ProfileID AS ProfileID FROM dbo.Patient AS Patient WHERE ( Patient.EnrollmentStatus = 'Confirmed Enrolment (C)' AND Patient.PortalRegistrationStatus <> 'Registered' AND Patient.Email IS NOT NULL AND Patient.IsConsentToPrivateEmailAddress IS NOT NULL AND Patient.RegisterStatus = 'Registered (R)' AND Patient.FundingStatus = 'Funded(F)' AND Patient.IsAlive = 1 AND Patient.NHINumber in
```

Delete

Graph

Log

Copy

Pivot

View

Edit

Is Active HighCare Indici Enabled Chart Enabled

Update
Delete SQL Query
Open In Editor
Close

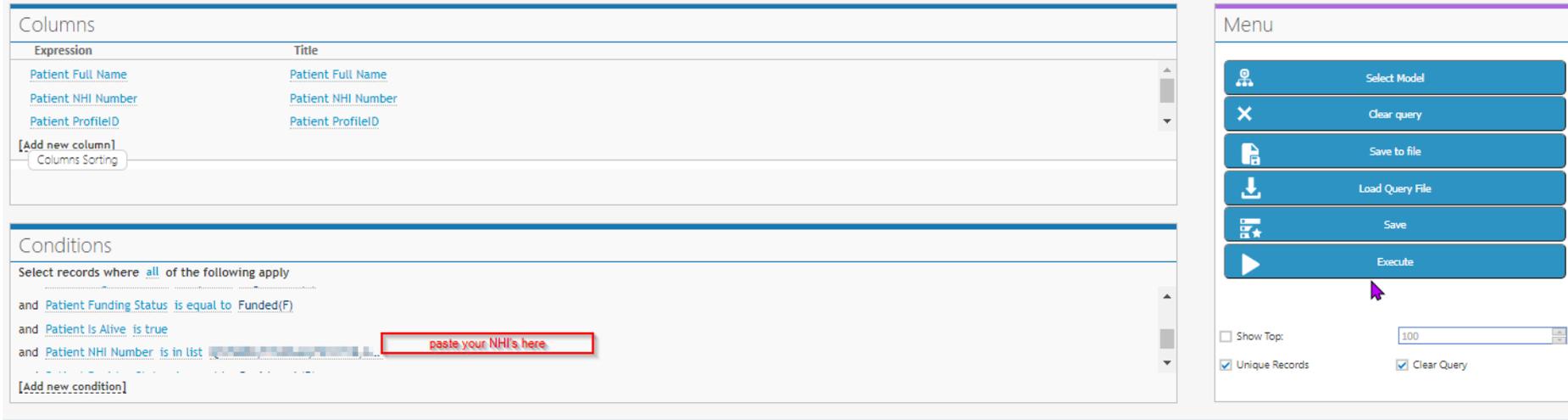
Modify the report and press Update button to save changes.

8. Update the NHI list

Under the conditions tab you will see a condition that is **patient NHI Number is in list**, it will have in the box aaa111, aaa111, the first time you use it click on the aaa111, and delete them both. – The next time you use it is will have the previously saved NHI’s in this field.

9. Paste the NHI List

Then paste the new NHIs in this field from the spreadsheet.



The screenshot shows a query builder interface with three main sections:

- Columns:** A table with two columns: 'Expression' and 'Title'. It lists 'Patient Full Name', 'Patient NHI Number', and 'Patient ProfileID'. There is an '[Add new column]' button and a 'Columns Sorting' dropdown.
- Conditions:** A section titled 'Select records where all of the following apply'. It contains three conditions:
 - and Patient Funding Status is equal to Funded(F)
 - and Patient Is Alive is true
 - and Patient NHI Number is in list
 There is an '[Add new condition]' button at the bottom.
- Menu:** A vertical list of buttons: 'Select Model', 'Clear query', 'Save to file', 'Load Query File', 'Save', and 'Execute'. Below the buttons are checkboxes for 'Show Top: 100', 'Unique Records', and 'Clear Query'.

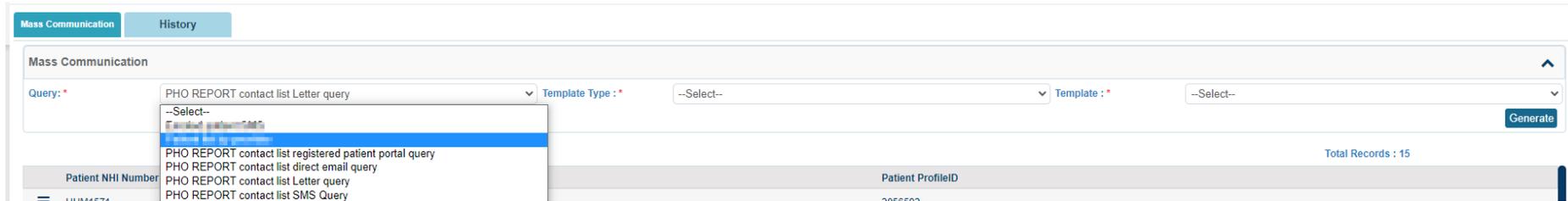
10. Once the NHIs are in the field, click on execute.

11. Click on save.

12. You will need to paste the same NHI's into all 4 queries, execute and save each one.

Once you have done that you are ready to use these queries for the purpose they were designed for, bulk message a group of patients using the most cost-effective time appropriate mechanisms to communicate.

You will see these queries in the message communication area, if you align them with the correct template you have created for the purpose of the query/ campaign and click send you will either send a portal email, direct email, SMS or generate a letter on bulk.



The great thing is you can just reuse the queries again and again, just replace the NHI's for communicating with a different set of patients and you can run the query again.

To reuse the same query for a different set of NHI's please edit the same query, delete the list of NHI's that will have saved with the previous list of NHI's and replace them with a new set from the latest report execute and save. Repeat the steps for all 4 queries and you can rerun the same process again for a different campaign.