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| Specialist clinics communication toolkit for health services |
| A guide to improving written communication to patients and referrers |
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#### Specialist Clinic Communication Toolkit Steering Committee

Thank you to all members of the steering committee for your helpful guidance and comments throughout the course of this project.

## Acknowledgement of Traditional Owners

The Department of Health acknowledges the Traditional Owners of country throughout Victoria and pays respects and recognises the contribution from their Elders past and present.

We proudly acknowledge the strength and resilience of First Nation peoples as the world’s oldest living culture and the contribution of generations of Aboriginal leaders who have fought tirelessly for the rights of their people and communities.

We acknowledge the distinct connection between gender inequality and colonisation, dispossession, stolen generations and other discriminatory government policies from the past. We also acknowledge that gender inequality is compounded by the impacts of westernised structures of colonisation that still exist in contemporary society, and the burden of intergenerational trauma that has been placed within the diverse Aboriginal communities of Victoria.

# Introduction

The Specialist clinics communication toolkit for health services provides specialist clinics at Victorian health services with common resources to promote consistent, respectful and clear communication with patients and referrers. These resources are available in this guide and at <https://[www.health.vic.gov.au/patient-care/specialist-clinics-communication-toolkit](http://www.health.vic.gov.au/patient-care/specialist-clinics-communication-toolkit)> where templates can be downloaded for use.

The toolkit contains a suite of easy-to-use communication templates for health services including letter templates for communication with patients and referrers about appointments and referral management.

The toolkit also contains information sheets for patients about specialist clinics, which have been translated into 22 community languages.

The resources have been developed using behaviourally informed principles and tips, as well as consumer insights and feedback to:

* encourage patients to attend their specialist clinic appointments
* encourage patients to cancel or reschedule if they are unable to attend
* remind patients to bring their appointment letter and come prepared to their appointment
* reduce costs for health services.

All resources that make up the toolkit are consistent with best practice principles in that they:

* are accessible and in plain language, and therefore easy to understand
* are patient-centred and consider the health literacy of Victorians, ensuring that they meet the needs of patients
* comply with requirements of the [Managing referrals to non-admitted specialist services in Victorian public health services](https://www.health.vic.gov.au/publications/managing-referrals-to-non-admitted-specialist-services-in-victorian-public-health) <https//www.health.vic.gov.au/publications/managing-referrals-to-non-admitted-specialist-services-in-victorian-public-health> policy so that mandatory communication points will be met.

This guide provides practical tips for designing letter and short message service (SMS) reminders that are most effective based on the evidence from what has been trialled in Victoria and in other jurisdictions.

# 1. Purpose

Specialist clinic services at public hospitals are a major part of the health system, providing millions of appointments to Victorians each year.

The Victorian Government recognises that people need to receive early advice on their treatment options. Missed appointments are a significant cost to the healthcare system, and patients who do not attend appointments miss out on valuable care. Improved and timely access to specialist clinics for people who need them is essential to meet this objective.

Healthcare services put considerable effort into sending reminders to patients ahead of their appointments to encourage people to attend, reschedule or cancel, and to take other actions such as bringing their appointment letter on the day.

We know that using behavioural insights can encourage more patients to take the appropriate action. The Behavioural Insights Unit has worked with several health services to revise and test their letter and SMS reminders using behaviourally informed principles.

# 2. Who should use this guide?

This guide can be used by anyone working at a health service who is responsible for sending written communication to patients and referrers.

The case studies focus on reminders to patients to encourage them to attend appointments, sent by letter or SMS. The principles equally apply to other forms of communication and underpin the full suite of template letters to patients and referrers as part of this toolkit for health services.

Section 3 provides a checklist to create effective communications that includes how these tips can be applied to letter reminders and SMS reminders.

If you’re interested in the results of the trials that were run with Victorian health services, see the case studies in section 4:

* reducing missed appointments with a reminder letter
* saving money by sending letters electronically
* reminding patients to attend
* helping patients bring their appointment letter.

# 3. More effective communications - checklist

Use these tips to make it easier for patients to understand and action your reminder.

#### Use plain English

This makes it easier for patients to understand the information you’re providing and what you want them to do. Explain any medical terms and avoid using jargon and abbreviations.

All letter templates provided in this toolkit have a reading level of less than Grade 5 to 6, which is what you should be aiming for.

#### Keep it simple

This makes it easier for patients to action your reminder without feeling overwhelmed. Keep the information in your SMS or letter to the essential information about the appointment.

#### Letters should:

* be less than one page
* use a plain font (for example, Arial or Calibri) in a font size of at least 11
* use **bold** words for emphasis but **avoid** using *italics* or underlining or UPPER CASE.
* the key details of the appointment – where and when – should be clear to the patient at a glance. You can do this by creating plenty of white space and drawing attention using:
* a table to capture appointment information
* lists (dot points) to break down complex information
* logos and infographics to support text

Any additional information can be provided in a separate factsheet, such as the templates provided as part of this toolkit, which have also been translated into 22 community languages.

#### Personalise messages with the recipient’s and sender’s names

This attracts the attention of the reader and makes it more likely that they will take notice of the reminder. You should use the patient’s first name at the beginning of the letter or SMS reminder. You should also sign off with the first name of the staff member sending the reminder.

#### Make it easy for people to find their way

Hospitals can be confusing places to navigate if you don’t know your way around. By providing an easy-to-follow map on the back of any letter reminders, you can help to reduce patients’ potential concerns about finding their way and help them to arrive on time.

#### Make it easy for people to confirm, change or cancel their appointment

This makes it most likely that patients will follow through if they need to change or cancel their appointment. Even small hassle factors can have a big impact on the chances that someone will take an action. On letter reminders, provide a phone number and office hours. On SMS reminders, either provide a phone number or the option to reply to cancel or reschedule via return SMS.

#### Make it timely

This makes it more likely the patient will receive the reminder when they’re most likely to be receptive. If sending reminders by letter, then you need to factor in enough time for posting. If sending reminders by SMS, then you need to give enough notice for patients to make arrangements to attend or reschedule. We trialled sending letter reminders four weeks ahead of the scheduled appointment and SMS reminders two weeks in advance.

#### Consider sending SMSs instead of letters

SMS reminders are cheaper and easier to send. The results of our trials show they are just as effective as letters at encouraging patients to attend. You can also offer appointments via SMS rather than letter, as shown in the case study with Western Health.

#### Make it respectful

This helps to build a positive relationship with the patient. Respectful language presents information positively, checks the wording with patients to make sure it’s clear, and translates messages for non-English-speaking patients.

Patients told us they sometimes felt disrespected by punitive, abrupt or unclear language. Patients also told us about that phrase like ‘referral declined’ and ‘discharged from the clinic’ could be confusing.

#### Consider options that meet individual preferences

Communicating with patients about how they want to be contacted is essential to patient-centred care. Some patients prefer electronic information like SMSs, while others prefer paper-based information. Sending an initial SMS and following up by letter if there is no response is an effective way to meet the needs of both groups, as shown in the case study with Western Health.

## 3.1 Effective letter reminder

This section shows how behavioural principles have been applied to the template reminder letter to patients for new appointments.

**[**

**Health Service] Specialist Clinics**

Tel: 03 xxxx xxxx

Fax: 03 xxxx xxxx

Web: www.xxxxx

Email: xxxxx

Date

]

[

Mr P Patient

 Primary Street

00

Suburb 0000

Dear [First name],

You have a

**new appointment**

at the [Health Service] Specialist Clinics.

**Please bring with you:**

• this

**letter**

• your

**Medicare card**

• a complete list of current

**medicines**

you are taking

•

**relevant test results**

 or scans

• your

**general practitioner’s (GP’s)**

 name, address and phone number

• your advance care directive (if you have one).

**New appointment**

**Clinic**

**]**

**[**

**Clinic**

**Date**

**[**

**Day] [DD] [MMM] [YYYY**

**]**

**Time**

**[**

**]**

**HH]:[MM][AM/PM**

**Address**

**[**

**Health Service] Specialist Clinics**

]

[

Number, Street name, Suburb

[

Floor], [Building name

]

Reception] (turn over to see map

[

)

Please

**call us on (03) xxxx xxxx**

 between

 **x am – x pm Monday to Friday**

 if you need to cancel or

change your appointment.

Your health is important to us. We look forward to seeing you.

Need an interpreter?

Call: (03) xxxx xxx

UR

barcode

**Your health service logo**

Yours sincerely,

First name

[

]

Manager

**1**

**3**

**5**

**7**

**2**

**4**

**6**

**8**

**9**

1. Use plain English and keep administrative information like the Unit Record (UR) number separate from the main text.
2. Personalise messages by starting the letter with a patient’s first name.
3. Keep it simple by including the translation service logo and using icons to help non-English-speaking patients.
4. Keep it simple by giving patients a checklist of items to bring.
5. Keep it simple by including appointment details in a table.
6. Keep it simple by including infographics to support text.
7. Make it easy by including a map on the back of the letter.
8. Make it easy for the patient to reschedule or cancel.
9. Personalise messages by signing off with a staff member’s first name.

**About appointments**

**What are specialist clinics?**

Specialist clinics are medical clinics where you can see specialist doctors, allied health

professionals or nurses about a specific health problem. You need a referral from your

general practitioner (GP), family doctor or other healthcare worker to see a specialist.

Specialist clinics are also called ‘outpatient’ clinics.

**What happens at a clinic appointment?**

A specialist doctor, allied health professional or nurse will talk to you about your health.

Sometimes you might see two or three health professionals in one visit. They may

arrange tests for you or other treatment. You can eat or drink before your appointment

unless we tell you not to.

**What if I can’t come to my appointment?**

Please tell us as soon as possible

**if you cannot come**

. You can contact us to cancel

or to make a new appointment. We can give your appointment to someone else who

can come. This helps us reduce waiting times for everyone. If you do not come to

**two appointments**

 and do not tell us beforehand, you will

**not be given another**

**appointment**

. You will need a new referral.

**How do I get ready for my appointment?**

You can write down any questions you want to ask your specialist. You can also bring

family members or a friend to your appointment. Please come prepared on the day of

your appointment. Bring a list of your medicines, relevant test results and scans, and

your GP’s name and address.

**What if I need extra support?**

Please tell us if you:

• have a disability

• need an interpreter or other cultural support

• need help with transport.

**What if I need an interpreter?**

Please tell us if you need an interpreter and we can provide one for your appointment.

Sometimes you may need to use a telephone interpreter. There is no cost to you if you

have a current Medicare card.

**Do I need to pay for my appointment?**

Patients with a current Medicare card do not need to pay. If you do not have a Medicare

Card or you are an overseas visitor, you will need to pay for your appointment.

**What happens after my appointment?**

Your specialist will tell you if they need to see you again. They will talk to you about

what will happen next and what you need to do.

We will share information about your care with your GP and other health professionals

involved in your care.

**10**

**11**

**12**

1. Keep it simple by having all additional information related to the appointment as a factsheet.
2. Make it respectful and accessible by providing translations of the factsheet in other languages. Ideally, print the translated factsheet on the reverse-side of the English factsheet.
3. Keep it simple using plain English and communicating the key or relevant information at that time. There are three factsheets that can be provided to patients at the ‘right’ point in time
* about new appointments
* about telehealth appointments
* abut wait lists.

## 3.2 Effective SMS reminders

This section shows how behavioural principles have been applied to writing effective SMS reminders, drawing on the behavioural science literature and messages that were trialled with Victorian health services.

Personalise and use reciprocity to reduce missed appointments

Example text

Hi [FirstName] you have an appointment at [HealthService] with the [ClinicName] on [date] at [time]. One of our specialists has made time in their diary to see you. Call [phone number] if you cannot attend. We look forward to seeing you – Kathryn [HealthService].[URN]

* Personalise messages by starting the SMS with the patient’s first name.
* Use reciprocity by showing patients that their specialist has made time in their diary to see them.
* Use the Messenger Effect by signing off with a staff member’s first name. We have used Kathryn as an example, but health services should use the name of a staff member with their service.

Ask the patient to commit to what they’ll bring what you need them to

Example text

Hi [FirstName], you have an appointment at [HealthService] with the [ClinicName] on [date] at [time]. Please reply YES that you will bring your appointment letter. Call [phone number] if you cannot attend. We look forward to seeing you.

* Ask the patient to commit to bring something important with them, such as their letter or Medicare card. Be careful to not overwhelm them with things to bring.

Send letters electronically to save money. Keep the SMS simple

Example text

Hi [FirstName], you have an appointment at [HealthService]. Your appointment letter is here [link]. The password is your postcode. We look forward to seeing you.

* Consider sending the reminder by SMS instead of letter and including the letter as an embedded link.
* Keep it simple by removing the UR number altogether or including it at the end if necessary.

#### What is the Messenger Effect?

The messenger effect is the tendency to judge the quality of information based on who is sending the message, regardless of the message itself. For example, juries can be influenced by the performance of an actor reading a witness testimony, even though they know the actor has nothing to do with the crime, the trial, or the witness.

# 4. Case studies

## Reducing missed appointments with a reminder letter, Northern Health

We partnered with Northern Health to reduce the share of patients who miss appointments. We did this by sending a group of patients a behaviourally informed reminder letter ahead of their appointment. Other patients did not receive a reminder letter (business as usual). Both groups received an appointment confirmation letter at the time the appointment was first made.

The letter helped patients attend their appointment by:

* using **plain English**
* keeping it **simple** by:
* giving patients a **list of items** to bring
* removing unnecessary information such as legal reminders
* including the **translation service logo** and using icons to help non-English-speaking patients
* making it **easy** for people to find their way by printing **a map** on the back of the letter
* making it **timely**, allowing enough time for patients to cancel, reschedule or organise to attend. In this trial, we sent a reminder letter **four weeks before** the appointment.

Our results (see Figure 1) suggest that sending the letter made a big difference. Patients who received a reminder letter were 8.95 per centage points less likely to miss their appointment, falling from nearly 28 per cent to just under 19 per cent. Given the high cost of missed appointments to healthcare services, this simple reminder represents a cost-effective improvement.

Note: The ‘Letter’ group was significantly more likely to attend than the ‘No Letter’ group (p < 0.05), controlling for patients’ gender, age, and other demographic factors.

Figure 1: Attendance rate at Northern Health during the study

Attended

Did not attend

Rescheduled

Cancelled

%

0

%

20

%

40

%

60

%

80

%

5.48

%

4.97

%

9.06

%

8.17

%

18.74

27.69

%

66.73

%

59.17

%

No letter

Letter

Like many health services, Northern Health overbooks specialists to account for likely missed appointments. However, this does not fully avoid the cost of missed appointments. If all the patients do arrive, then patients must wait for longer. Specialists must also work overtime or spend less time with each patient. It’s far better if patients attend, cancel or reschedule.

## Sending letters electronically, Western Health

Every year, Victorian health services spend millions of dollars sending letters to patients. To save money and contact patients sooner, Western Health tested sending patients an SMS with an embedded link to a PDF version of their appointment letter.

Starting in March 2019, Western Health sent this SMS to all patients who had an urgent or six-week review appointment, as well as to any patient who did not attend or rescheduled a previous appointment. Western Health tracked which patients didn’t click the embedded link and followed up with a call or a letter to ensure these patients were contacted about their appointment.

The Behavioural Insights Unit worked with Western Health to ensure the new SMS led to as many patients attending their appointment as a letter in the mail. We found that patients who clicked the link to receive their appointment letter were just as likely to attend (87.43 per cent) as those who didn’t click (87.17 per cent). More than two-thirds of patients clicked the link.

The new SMS saved money. Western Health estimates that offering appointments via SMS saved 62 per cent compared with sending appointment letters only in the post.

The new SMS also saved time. Western Health reported that the SMS reduced the time to create an urgent appointment from five minutes to one minute 30 seconds. The SMS also reduced the time to create a non-urgent appointment from eight minutes to three minutes. Western Health also reported that the SMS provider was able to send follow-up letters in five business days – twice as fast as standard mail’s 10 business days.

Western Health reported that many patients preferred the SMS to the letter. Younger and middle-aged patients preferred to read the SMS when it was convenient. Patients were more likely to read an SMS than take a call or check voicemail.

We tested three versions of the SMS to encourage patients to attend their appointment. None of the SMS reminders were more effective than the others; around 87 per cent of patients who received their appointment letter via SMS attended their appointment, regardless of which SMS they got.

Simple reminder

You have an appointment at Western Health. Your appointment letter is here at <https://q1z.cc/_yHZdk>. The password is your postcode.

Personalisation of reciprocity

Hi [FirstName] you have an appointment at Western Health. One of our specialists has made time in their diary. We have attached your appointment letter is here at <https://q1z.cc/_yHZdk>. The password is your postcode.

We look forward to seeing you – Susan, Western Health

Please bring your letter

You have an appointment at Western Health. We have attached your appointment letter here <https://q1z.cc/_yHZdk>. The password is your postcode. Could you please bring your phone with this letter to your appointment?

#### Recommendation

Explore opportunities to embed links in SMSs.

Embedded links in SMS messages are an opportunity for health services to help patients to come better prepared for their appointments. Health services can use embedded links to send patients instructions for their appointment. For example, health services may send patients an SMS with links to a sleep diary or medication list they must complete.

#### Recommendation

Explore using SMS to reach vulnerable cohorts.

SMS provides an opportunity for health services to reach disadvantaged patients. Letters have difficulty reaching patients who move often, have no fixed address or are otherwise challenging to reach via letter. In addition to the environmental and financial benefits of sending fewer letters, for some cohorts, SMS may be a more effective mechanism to notify them of their appointment.

## Reminding patients to attend, St. Vincent’s Hospital Melbourne

All health services want patients to attend their appointments. Patients who do not attend (DNA) miss out on valuable care and are a significant cost to the healthcare system. We worked with St Vincent’s Hospital Melbourne to reduce missed appointments. We tested redesigned SMS reminders to encourage more patients to attend their appointment.

The Personalisation and Reciprocity SMS encouraged patients to attend by:

* **personalising** messages by starting the SMS with the patient’s first name
* demonstrating **reciprocity** – we noted that the specialist had made time in their diary to see the patient, creating a sense that the specialist had done something for the patient that they should reciprocate by attending the appointment
* using the **Messenger Effect** by ending the SMS with a St Vincent’s staff member’s name – this made the message more personal.

The What to Bring SMS nudged patients to attend by helping them prepare by **reminding** them what to bring.

In this trial, the Personalisation and Reciprocity SMS had the highest rate of attendance (Figure 2). Patients who got that SMS were 0.50 per centage points less likely to miss their appointment compared with those who received the standard SMS. However, the result was not statistically significant.

Patients seemed to prefer the Personalisation and Reciprocity SMS over the other SMSs. The patients who received this SMS were twice as likely to reply: ‘Thank you’, ‘Yes’ or ‘I’ll be there’ compared with other SMSs.

Our results also suggest that the SMS telling patients everything that they had to bring to their appointment may have increased missed appointments. Patients who got the What to Bring SMS were 1.1 per centage points more likely to miss their appointment compared with those who received the standard SMS. However, the difference was not statistically significant.

Figure 2: Share of patients who did not attend their appointment during the study

%

0

%

20

40

%

%

60

100

%

80

%

10.40

17.90

71.10

10.90

18.50

70.60

12.00

20.90

67.10

Personalisation

and reciprocity

SMS

Standard

SMS

What to

bring SMS

Attended

Cancelled or rescheduled

Did not attend

Note: There was no statistically significant change in the rate of missed appointments between any of the SMSs.

#### Recommendation

We recommend that health services trial sending an SMS reminder based on personalisation and reciprocity. Health services should test the SMS before rolling it out to establish whether the message reduces missed appointments at their service.

#### Recommendation

When asking patients to do something in advance of their appointment, we recommend that health services only ask patients to do one thing – multiple requests may dissuade some patients from attending. Instead, health services should itemise everything patients need to bring on their appointment letter.

## Helping patients bring their appointment letter, St Vincent’s Hospital Melbourne

Like many health services, St Vincent’s needs patients to bring their appointment letter to their appointment. The letter alerts patients that they have an appointment, and clinicians use the letter to record the appointment outcome for other staff. However, as many as 30 per cent of patients don’t bring their letter. Front desk staff must print these patients a new letter, taking time away from other duties.

We partnered with St Vincent’s Hospital Melbourne to help patients bring their letter to their appointment. To do this, we sent one group of patients a behaviourally informed reminder letter before their appointment. We sent another group an SMS asking them to confirm that they’ll bring their letter. All patients received an initial appointment letter.

The reminder letter helped patients bring their letter to the appointment by:

* making it **easy** to bring the letter by sending a letter closer in time to their appointment than the initial appointment letter
* including a **checklist** of items to bring
* being clear that patients had to bring the letter to the appointment by putting it at the top of the checklist.

The SMS encouraged patients to bring their letter to the appointment by:

* **personalising** messages by starting the SMS with a patient’s first name
* prompting patients to make an **implementation intention** to bring the letter (we asked patients to please reply YES that they will bring their letter) using the **Messenger Effect** by ending the SMS with a St Vincent’s staff member’s name.

Our results (see Figure 3) suggest that the reminder letter made a big difference. Patients who got the reminder letter were 12 per centage points more likely to bring their letter than patients who didn’t get the reminder letter. Our results excluded patients who cancelled, rescheduled or did not attend their appointment.

Figure 3: Reminder letter: Share of patients who brought their letter to St Vincent’s during the study

0

%

20

%

40

%

60

%

%

100

80

%

29.38

71.10

17.26

82.74

Did bring

their letter

Did not bring

their letter

Note: The ‘Reminder Letter’ group was significantly more likely to bring their letter than the ‘No Reminder Letter’ group (p < 0.01) controlling for patients’ gender, age and other demographic factors.

Our results (see Figure 4) suggest that the SMS asking patients to confirm that they’ll bring their letter also made a difference. Patients who got this SMS were almost 5 per centage more likely to bring their letter than patients who got the standard SMS reminder. Our results excluded patients who cancelled, rescheduled or did not attend their appointment.

Figure 4: Reminder SMS message: Share of patients who brought their letter to St Vincent’s during the study

0

%

20

%

40

%

60

%

%

100

80

%

30.40

69.60

25.50

74.50

Did bring

their letter

Did not bring

their letter

Note: The ‘Reminder Letter’ group was significantly more likely to bring their letter than the ‘No Reminder Letter’ group (p < 0.01) controlling for patients’ gender, age and other demographic factors.

Standard reminder SMS

Reminder: St V’s Specialist Clinics [Location] [date] @ [time]. UR[URN]. Appointments are very valuable, call 9231 3475 if you cannot attend so we can give it to someone else that needs it.

Please bring your letter SMS

Hi [FirstName], you have an appointment at St Vincent’s Specialist Clinics [Location] [date] @ [time]. One of our specialists has made time in their diary. Please respond YES that you will bring your appointment letter. Call 9231 3475 if you cannot attend. We look forward to seeing you – Kathryn, St Vs UR[URN]

#### Recommendation:

Explore opportunities to embed links in SMSs.

Include a request in the SMS reminder for patients to prepare one important thing for their appointment.

Our results show that the reminders prompted patients to prepare for their appointment. For our trial, this meant bringing the letter. Reminders could also help patients do other things to prepare for their appointment. For example, health services could send patients a letter or an SMS reminder to bring their scans, complete a sleep diary or fast before an operation.

#### Recommendation

We recommend that health services only remind patients about what’s most important. Other testing at St Vincent’s suggests that send patients an SMS with a long list of things to bring may reduce attendance rates. Be careful not to overload patients with requests.

# Resources

#### What are behavioural insights?

Behavioural insights help us understand how people make decisions. The approach draws on psychology, behavioural economics, human-centred design and systems thinking to better design, develop and implement public policies. Behavioural insights recognise that humans are not the entirely ‘rational actors’ that traditional economics and public policy design often assumes.

Our decisions can be affected by seemingly irrelevant things such as how information is presented or what others are doing, and we don’t always follow through with what we intend to do, even when we know those things would be in our best interest.

#### Behavioural Insights Unit

The Behavioural Insights Unit is part of the Department of Premier and Cabinet’s Public Sector Innovation Branch.

We work collaboratively across the public sector to deliver projects, trials and interventions that improve outcomes for Victorians.



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