**Using Technology to Engage with Members**

A Guide for Care Coordinators

Members are using smartphones and tablets with more frequency and proficiency. A Care Coordinator can use these tools to help the member engage with their care and to maintain communication with them.

**Understanding Limits of Technology**

Technology has its limits. Here are a few things to consider prior to using these tools with members:

* Check with your organization and health plan on their technology policies, especially texting policies as this is an evolving area.
* Never send PHI over a non-secure, unencrypted communication tool.
* If using your personal cellphone, consider how you want to use it with members.
* Know your member, and what methods of communication support healthy boundaries.

**Assess Member Comfort Level and Preferences**

It’s important to understand the member’s comfort level with technology. Ask them questions like:

* What technology do you have? Do you use it? How Often?
* What is the best way to contact you? Texting, calling or email? Which to you prefer?
* What apps do you use? Do you know how to find contacts and use the calendar or reminders on your phone?
* Make sure to document the member’s preferences and permission to use the technology, texting or secure email.

**Simple Tips for Using Technology**

Help the member set up some useful tools that can support your work together. If they have a smartphone, there are several tools that could be useful, it’s important to let them do it so they can learn how to do it.

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| Add Yourself to Contacts | * Use the naming convention “[Name of MCO] Care Coordinator XX”.
* Be sure to include Care Coordinator and name of MCO, but work with member on the naming convention easiest for them to remember how look you up
* Include your picture in the contact so your picture displays when you call.
* Ask if the member has a previous health plan care coordinator contact information in their phone, and replace it if appropriate.
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| Set Up Reminders | * Show the member how to set up one-time and recurring reminders.
* Set up reminders for them to take their medication or call their daughter.
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| Set Up Calendar Events | * Show the member how to set up calendar events.
* Schedule your next phone call or visit and help put it on their calendar.
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| Using Notes | * Show the member the Notes app.
* Explain how they could use this app for to-do lists or to keep a list of questions to ask their doctor.
* Take pictures of key documents so they always have them available:
	+ Picture of the Care Coordinators business card
	+ Picture of health plan ID card (front and back)
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| Texting | * If you and the member is comfortable with texting, clarify when texting with you is appropriate.
* For example, text to let the member know you are on your way or that you would like to give them a call.
* Keep texts short and never include PHI.
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| Emailing | * Many members have email addresses and it can be a simple way for them to communicate with you.
* Anything with PHI must be sent securely. Explain what a secure email is, and set up a secure email account. Practice sending a secure email to the member to make sure they can open it.
* Examples of email communications:
	+ Sending the finished care plan (securely)
	+ Health education information, resources or videos.
	+ Appointment reminders for upcoming visits
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| Video Calls | * If the member prefers using FaceTime or other video call platforms, these can be used for brief check in calls or other communications you would do via telephone.
* For HRA, care planning, or other visits telehealth guidelines, refer to your organization’s policies.
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| Online Accounts | * Assist the member in setting up online accounts:
	+ Health plan websites or online accounts can be used to view member handbooks, review claims history, and find a provider.
	+ Clinic online accounts, such as myChart, host information on the members care such as lab results or upcoming appointments.
* Many members have access to telehealth apps, such as Doctors on Demand or virtual. Assess the member’s comfort and appropriateness of using this technology and show them how to use it.
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| Online Resources | * There are great resources and videos online that members can access for their care.
* Check with your organization on the types of resources to send to members.
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