

Twilio/SMS FAQs and Workaround

August 2023



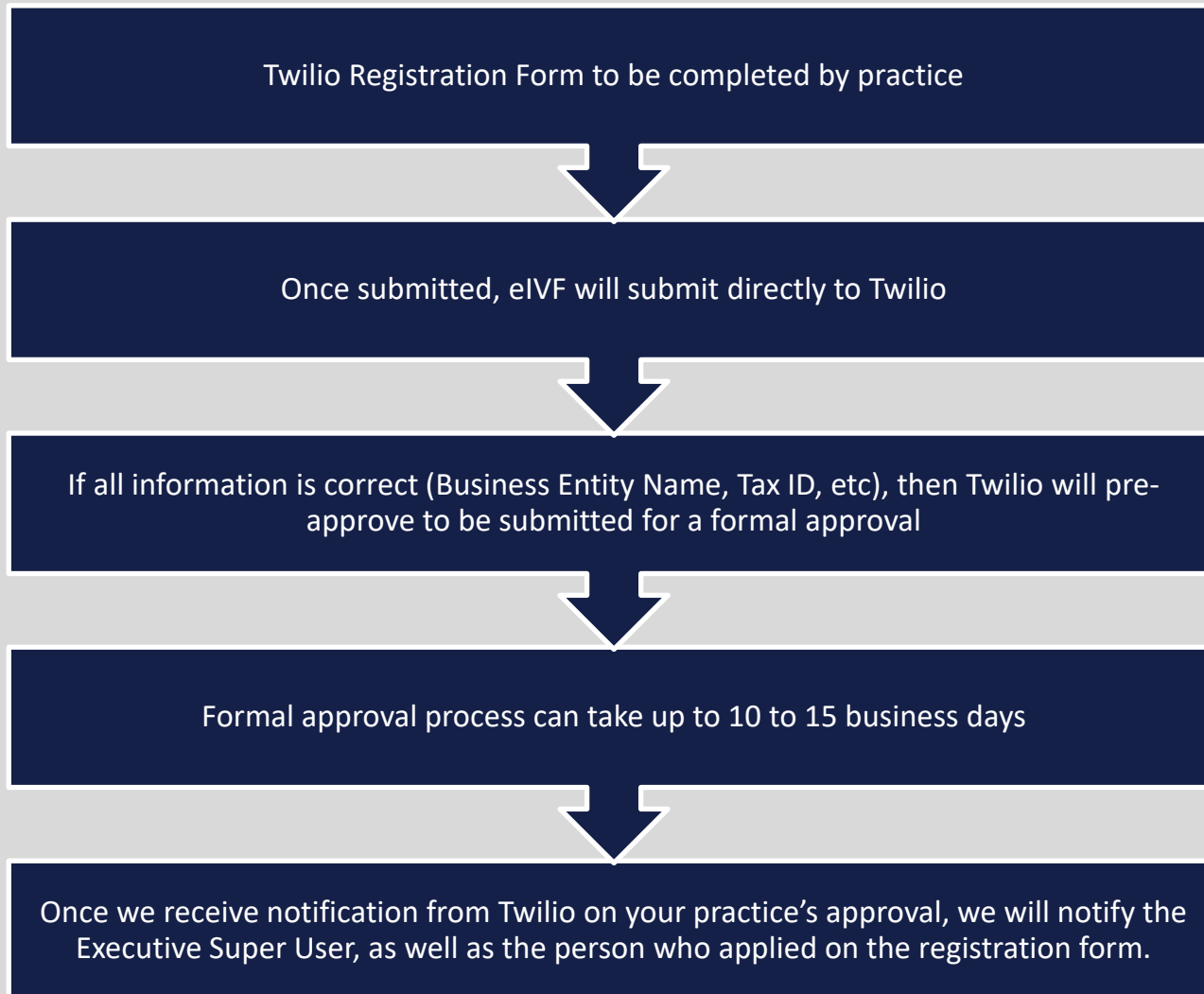
Security Updates



- To ensure compliance with industry's A2P 10DLC requirements, all carriers are requiring that business entities formally register to send out SMS messages.
- The A2P compliance allows businesses to send text messages to customers using a dedicated 10-digit phone number. The introduction of 10DLC compliance by major carriers in the United States aims to improve the overall messaging ecosystem, offering increased deliverability, reduced spam, and enhanced end-user security.



Registration Process



Twilio Registration Form

PracticeHwy/eIVF was recently made aware of random SMS failures which were caused by Twilio's anti-SPAM filter. To resolve this matter, we will need to formally register your business entity with Twilio. This registration is essential to ensure seamless SMS delivery and compliance with industry regulations.

By August 31, 2023, all businesses using Twilio's text messaging services are mandated to register their business entity. **If you choose not to register by August 31, you will lose the ability to send SMS messages to your patients and there is not a workaround available.**

To proceed with the registration, we will need you to submit your practice's Tax ID information below. Once we have received this information, we will initiate the registration process with Twilio on your behalf. Please note that Twilio is charging a one-time nominal registration fee, as well as a monthly charge, which will be determined based on your messaging volume. We will provide you with an estimate of these fees, which will be included in your monthly invoices going forward once we have the necessary information from Twilio. Note that this action is being taken by Twilio to conform to various state mandates concerning SPAM messaging.

We apologize for any inconvenience this issue may have caused and want to assure you that we are working diligently to resolve it promptly.

Company name *

Practice's Legal Business Entity Name *

Please note that this is the legal business entity name for your practice (ie: X Fertility, LLC dba ABC Fertility)

First name * Last name *

Email *

Deadline

- By August 31, 2023, all businesses using Twilio's text messaging services are mandated to register for A2P 10DLC.
- If you choose not to register by August 31, you will lose the ability to send SMS messages to your patients and there is not a workaround available to send out SMS messages.



- Twilio's nominal fees will become effective in September.
- These fees will be based on the volume of SMS messages transmitted by your practice.

One-time fees:

Brand Registration – For most eIVF practices, we are estimating a \$4 one-time fee.

Campaign Vetting – This administrative fee to validate the business is estimated as a one-time fee of \$15.

Re-Vetting Fees – Should a practice require re-submission due to practice or Tax ID information, which was submitted inaccurately, an additional on-time fee will be assessed.

Monthly fee:

Twilio's monthly campaign fee, contingent upon the volume of SMS messages, will range from \$1.50 to \$3.00 per month. We will know more where your practice fits in their monthly fee assessment, once the next quarterly statement for your practice is sent from Twilio. This monthly fee is in addition to your current fee of \$.05/SMS message

Workarounds

Email function



- Using the email function

Within Patient Explorer, click on web correspondence and select email and then send.

The screenshot displays the eIVF Patient Explorer interface. The main window shows a patient record for 'Female Demo S TEST (8300)'. A red box highlights the 'Email' icon in the top toolbar. A secondary window, 'SMS by Individual Patient', is open, showing the 'Email' tab selected. This window contains fields for patient information, date/time selection, and a 'Send' button, which is also highlighted with a red box. The 'Send SMS' button in the bottom left of the main window is also highlighted with a red box.

Summary - New

Date	To	Subject
04/07/2023 05:19 F	Group	
10/28/2022 01:24 F	8300 Female Demo S. TEST	RE: [8300] Female Demo S. TEST
09/12/2022 03:30 F	8300 Female Demo S. TEST	To: Female Demo S. TEST
09/12/2022 03:30 F		Priority: Normal
09/12/2022 02:47 F		Message
09/12/2022 02:47 F		
09/12/2022 02:47 F		
07/25/2022 06:00 F		
07/25/2022 06:00 F		
07/25/2022 08:55 A		
07/25/2022 08:55 A		
07/25/2022 08:51 A		
07/25/2022 08:51 A		
07/25/2022 08:51 A		
07/25/2022 08:51 A		

Send SMS

SMS by Individual Patient Ver. (1.00.03.59)

Patient Information
Name: Female Demo S TEST
Phone Number: (972) 247-3483(Text) (972) 247-3483(Voice)
Email: femaletest@eivf.net

Date/Time Selection
Date: Monday, August 7, 2023 Time: 8 : 00 AM

Messaging
Text **Email** Voice
Sender's Email: eivfreport@eivf.net Template: Lab Results
Email Subject: Lab Results
Email Content
Please call the office to get your lab results.

Send Close

eIVF Release 5.0 (Build 335.7) (w:367)[S] BILLING eIVF Admin

- Review and update active SMS templates
 1. Go to System Setup and click on SMS Template.
 2. If you only have the “Text” option enabled for each template, please click on the checkboxes to also add email as an option.
 3. Double-click on each template and make sure that "Disable" is not checked.
 4. On this same screen, also check the "email" option.

SMS Setup Example: CASE



CLICK HERE Say goodbye to running manual reports!
 Track your clinic's performance in real-time with eIVF's Fertility Vision.

469-565-2143
 eIVF Support

EIVF INSIDER EIVF PARTNERS

Home **System Setup** Patient Explorer Scheduling Lab Information Andrology Embryology Data Analysis Practice Management Log Off

Security SMS Templates Ver. (1.00.03.59)

ID	Purpose	Description	Text	Email	Phone	Visit Type Id	Priority	Inactive
6	Case	Instructions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	2	<input type="checkbox"/>
7	Case	Patient has not started evaluation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	4	<input checked="" type="checkbox"/>
8	Case	Patient has not completed evaluation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	5	<input checked="" type="checkbox"/>
9	Case	Correspondence is created	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	6	<input type="checkbox"/>
10	Case	Consent form is created	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	7	<input checked="" type="checkbox"/>
12	Case	Payment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	9	<input type="checkbox"/>
13	Case	Profile Completion	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11	11	<input checked="" type="checkbox"/>
14	Case	Medication Correspondence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	8	<input checked="" type="checkbox"/>

Billing SMS Status Log SMS Templates

New Close



Edit SMS Template ID: 6 Ver. (1.00.03.59)

Purpose: Case Task Code: INST-LETTER
 Description: Instructions Priority: 2

Disable Disable Disable

uncheck "Disable"

Text Email Phone
 Subject: New Instruction
 New Patient Instructions have been created for you in the eIVF patient portal. Please login to review. %PORTAL_LINK%
 New Patient Instructions have been created for you in the eIVF patient portal. Please login to review.
 %PORTAL_LINK%

Select "Email" option

How often?

ID	Frequency	Before / After	Days / Hours	Time to Deliver	Text	Email	P
47	Hour	After	1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
63	Day	After	1	10:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Bookmark
 %PATIENT_NAME%
 %SCHEDULE_TYPE%
 %SCHEDULE_DATE%
 %FACILITY_NAME%
 %SCHEDULE_DURATION%
 %PROVIDER_NAME%
 %PORTAL_LINK%
 %FACILITY_PHONE%

Inactive Save Close

Modified by: eivfadmin 8/9/2023 4:40:17 PM

SMS Setup Example: Visit type



SMS Templates Ver. (1.00.03.59)

ID	Purpose	Description	Text	Email	Phone	Visit Type Id	Priority	Inactive
3	Visit Type	New Consult	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	0	<input type="checkbox"/>
17	Visit Type	Consult	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	19	0	<input type="checkbox"/>
41	Visit Type	New Patient Visit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	457	0	<input type="checkbox"/>
51	Visit Type	CONSULT NEW 60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	89	0	<input type="checkbox"/>
54	Visit Type	New Skype Consult	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	489	0	<input type="checkbox"/>
59	Visit Type	New Patient	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	548	0	<input type="checkbox"/>

New Close



Edit SMS Template ID: 41 Ver. (1.00.03.59)

Purpose: Visit Type Visit Type Id: 457

Description: New Patient Visit

Text Disable

Email Disable

Phone Disable

Subject: Following up on your visit...

Dear Patient,

Thanks for recently visiting the office of % PROVIDER_NAME% at our % FACILITY_NAME% location on % SCHEDULE_TYPE%. As a small practice, we rely on your support and feedback to help us grow and improve. How was your visit with us?

Great! Review us on Yelp:
<https://www.yelp.com/biz/generation-next-fertility-new-york>

(31) characters left
Please reply 1 to confirm or call us to cancel.

How often?

ID	Frequency	Before / After	Days / Hours	Time to Deliver	Text	Email	P
18	Day	Before	7	12:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	
19	Day	Before	3	09:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
29	Day	Before	1	10:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
36	Day	Before	5	12:00 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
37	Day	Before	4	09:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	

Bookmark

%PATIENT_NAME%
%SCHEDULE_TYPE%
%SCHEDULE_DATE%
%FACILITY_NAME%
%SCHEDULE_DURATION%
%PROVIDER_NAME%
%PORTAL_LINK%
%FACILITY_PHONE%

Inactive

Save Close

Created by: eivfadmin 10/26/2018 3:33:58 PM Modified by: eivfadmin 8/9/2023 4:34:35 PM

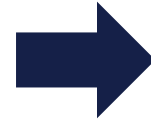
SMS Setup Example: General



SMS Templates Ver. (1.00.03.59)

ID	Purpose	Description	Text	Email	Phone	Visit Type Id	Priority	Inactive
1	General	Lab Results	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	<input type="checkbox"/>
55	General	Office Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	<input type="checkbox"/>

New Close



Edit SMS Template ID: 55 Ver. (1.00.03.59)

Purpose: General
Description: Office Closed

Text Disable
Our officie is currently closed due to weather.
Please call the office to reschedule.
(76) characters left
Please reply 1 to confirm or call us to cancel.

Email Disable
Subject: Office Closed
Our officie is currently closed due to weather.
Please call the office to reschedule.

Phone Disable

How often?

ID	Frequency	Before / After	Days / Hours	Time to Deliver	Text	Email	P
----	-----------	----------------	--------------	-----------------	------	-------	---

Bookmark

```
%PATIENT_NAME%  
%SCHEDULE_TYPE%  
%SCHEDULE_DATE%  
%FACILITY_NAME%  
%SCHEDULE_DURATION%  
%PROVIDER_NAME%  
%PORTAL_LINK%  
%FACILITY_PHONE%
```

Inactive

Save Close

Created by: eivfadmin 6/17/2019 3:52:36 PM | Modified by: eivfadmin 8/9/2023 4:28:33 PM

SMS Setup Example: Lab



SMS Templates Ver. (1.00.03.59)

ID	Purpose	Description	Text	Email	Phone	Visit Type Id	Priority	Inactive
18	Lab	Blood	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	0	<input type="checkbox"/>
19	Lab	Ultrasound	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	0	<input type="checkbox"/>

New Close



Edit SMS Template ID: 18 Ver. (1.00.03.59)

Purpose: Lab Visit Type Id: 1
Description: Blood

Disable Disable Disable

Text: You have %SCHEDULE_TYPE% schedule at %FACILITY_NAME% on %SCHEDULE_DATE%
(89) characters left
Please reply 1 to confirm or call us to cancel.

Email: Subject: Blood Test Reminder

Phone: You have %SCHEDULE_TYPE% schedule at %FACILITY_NAME% on %SCHEDULE_DATE%

How often?

ID	Frequency	Before / After	Days / Hours	Time to Deliver	Text	Email	P
4	Day	Before	1	10:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Inactive

Bookmark: %PATIENT_NAME%
%SCHEDULE_TYPE%
%SCHEDULE_DATE%
%FACILITY_NAME%
%SCHEDULE_DURATION%
%PROVIDER_NAME%
%PORTAL_LINK%
%FACILITY_PHONE%

Save Close

Modified by: eivfadmin 8/9/2023 4:51:55 PM

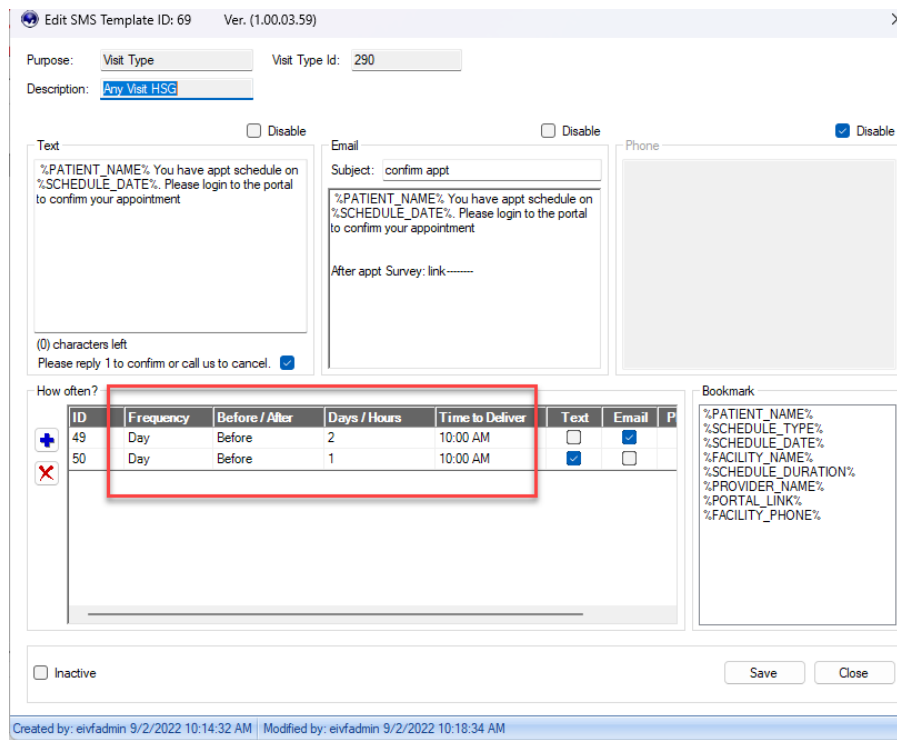
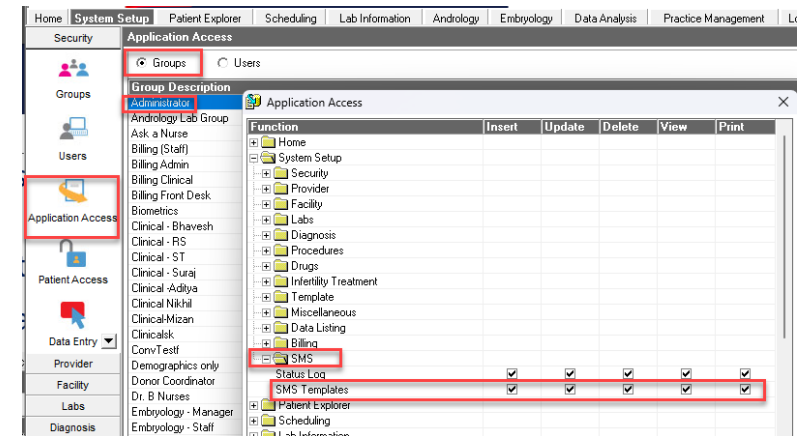
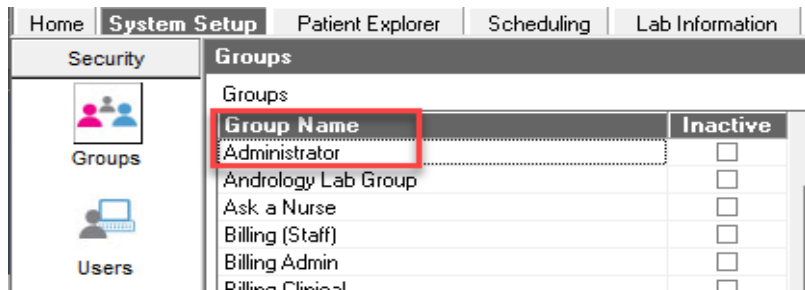
SMS Setup – How often?



You must be in the “Administrator” Group and the group must have “full permission” to edit SMS template. Please contact the Practice manager to grant this access.

If you are in the Administrator group and that section was grayed out, please submit a request to support@eivf.net to add/update the frequency.

Please include the SMS template name and detail of the change on the email.



Correspondence – Auto Text notification

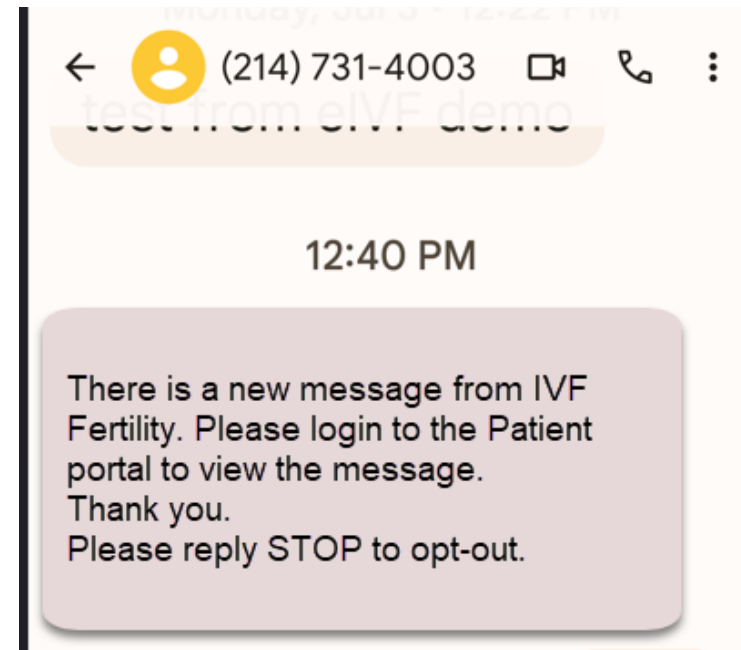
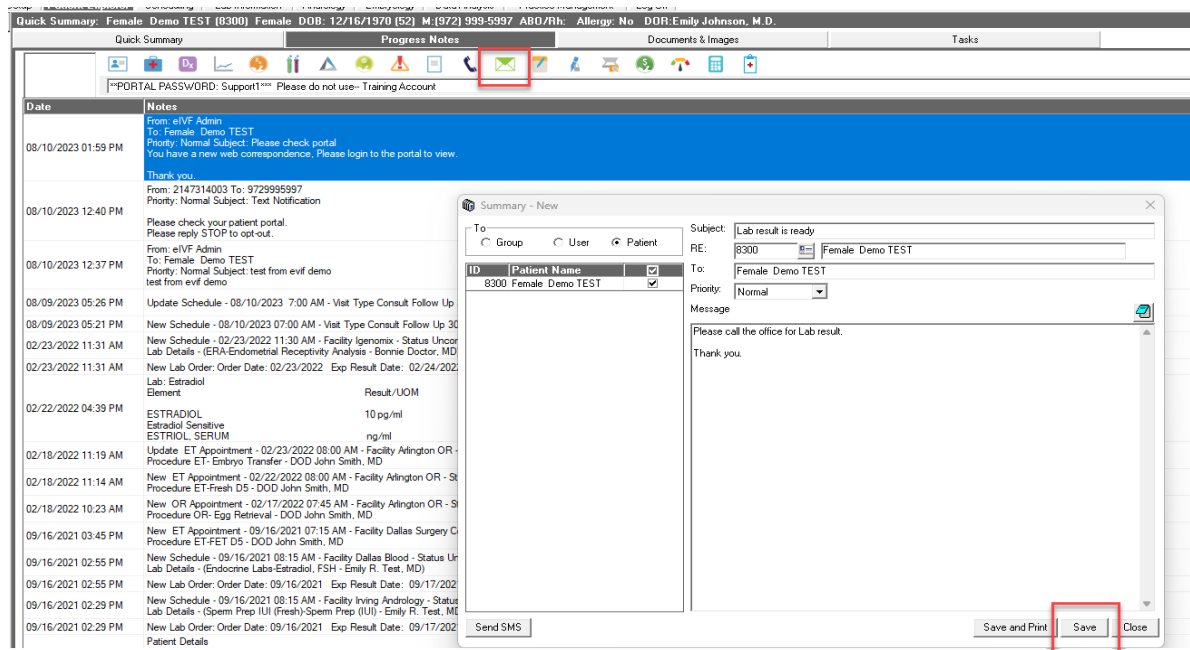


There is no option for auto email notification. The user will have to use the workaround option and manually create a SMS-Email to notify the patient.

The auto text notification for web correspondence is tied to 2 configurations. Both 22013 and 22014 must be turned on.

- Configuration 22013 – Send SMS Notice is ON
- Configuration 22014 – SMS Notice Message. The clinic must provide a custom message

“There is a new message from IVF Fertility. Please login to the Patient portal to view the message. Thank you.”



Patients

Patient portal: Confirm appointment

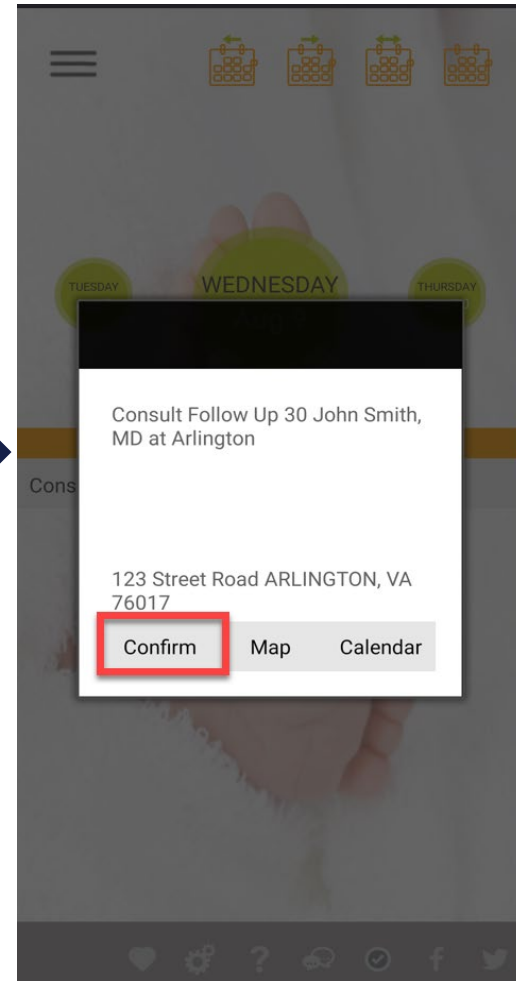
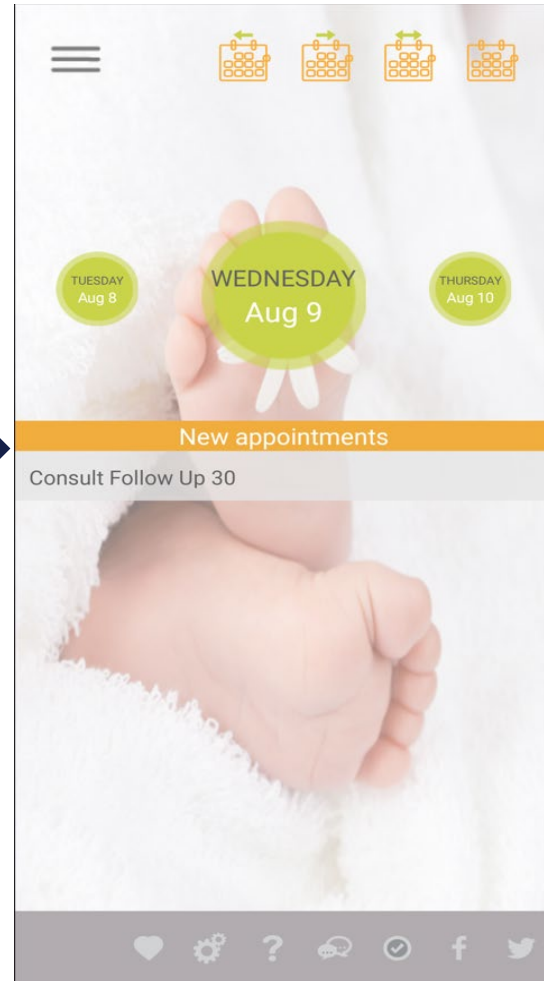
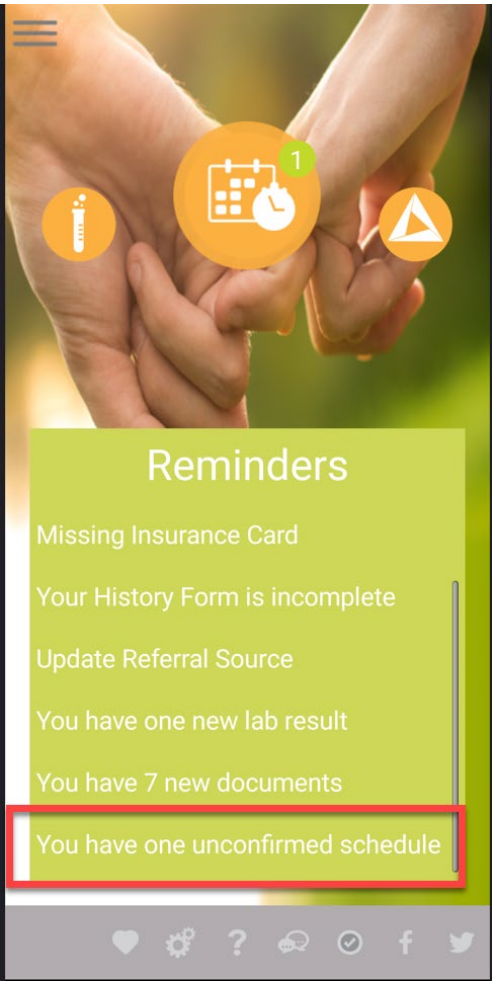


The home page of the eIVF patient portal. At the top, it says "eIVF Billing Demo Welcomes Female Demo S. TEST". There are navigation tabs for Home, Lab Results, Flowsheet, History (8), Prescriptions, Documents (7), Messages, and Billing. A large banner shows "Wednesday August 09" and "GO to my SCHEDULE" with a calendar icon and a "1" notification. A "Reminders" box on the left lists several items, with "You have 1 unconfirmed appointment(s)" highlighted in red. A blue box on the right says "Be approved for fertility financing in seconds!" with three checkmarks.

The "My Appointments" page. It shows a calendar for August 2023 with the 10th highlighted. An appointment for "8/10/2023 06:45 AM" is listed as "Consult with Doctor Test, MD at Forney" with a "CONFIRM" button. A "Confirm Appointment" button is shown below the appointment. A "Reminders" box at the top lists several items, including "You have 1 unconfirmed appointment(s)".

The "Modify Provider Appointment" form for appointment SID: 67009. It shows patient details (ID: 8300, Name: Female Demo S. TEST) and appointment details (Visit Type: Consult, Location: Forney, Date: 08/10/2023, From Time: 06:45 AM, To Time: 07:15 AM, Duration: 30). The "Schedule Status" is set to "Confirmed by Patient via Patient Portal" and is highlighted with a red box. There are buttons for Insurance, ProcedureSch, Welcome Kit, Label, Delete, Save, and Close. A footer note says "Created by eivfadmin on 08/09/2023 04:55 pm Last Modified by female on 08/09/2023 05:03 pm".

eIVF Mobile Apps: Confirm an appointment



Modify Provider Appointment SID: 66793

Patient ID: 8300 Patient Name: Female Demo TEST

Visit Type: Consult Follow Up 30

Location: Arlington

Date: 08/10/2023

From Time: 07:00 AM

To Time: 07:30 AM

Duration: 30

Phone Type	Phone	Ext
Mobile	(972) 999-5997	

Schedule Status: Confirmed by Patient via Patient Portal

Notes

Generate Task due on 08/09/2023 for Self Preauthorized

Insurance ProcedureSch Welcome Kit Label Delete Save Close

Created by eivfadmin on 08/09/2023 05:21 pm Last Modified by female on 08/09/2023 05:26 pm

Patient Portal: Signing Consent form



Selecting email or Voice option to get the confirmation code.

(Note: We are unable to remove Text option from the screen since it is tied to Demographic)

A screenshot of a web browser displaying a consent form. The browser's address bar shows "1 of 1 page" and "Fit to Width". The page header includes the eIVF logo and the address: "Practicehwy, 11494 Luna Rd, Dallas, TX 75225". The form title is "Training Consent Form". Patient information is displayed: "Patient Name: Female Demo TEST, Patient ID: 8300, Date of Birth: 12/16/1970, Age: 52". On the right side, there is a "Next" button with a right arrow. Below it, a message states: "In order to sign your document, you will need confirmation code. How would you like to receive your confirmation code?". Three radio button options are listed: "Text: (xxx) xxx-5997", "Voice: (xxx) xxx-5997", and "Email: a***@eivf.net". The "Email" option is selected and highlighted with a red rectangular box. A green "Send" button is located below the options.

From: Administrator@ivf.com
Sent: Tuesday, August 8, 2023 2:04 PM
To: [Redacted]
Subject: Patient Portal: Confirmation Code

Confirmation Code: 865784 Service is provided by eIVF. Please do not reply to this message. Thank you.

