

Service Consent in Holly

Discover how the CTIA regulations will be applied to your patients



Holly

Your AI assistant

CS Team - customersuccess@nimblr.ai

Agenda

- CTIA regulations, why is this good for patients?
- How does Holly need to comply?
- What is changing in Holly's services?
- What needs to be done by the practice?
- Frequently Asked Questions

2023 Regulations



CTIA represents the U.S.
wireless communications
industry.

[Learn More Here](#)

CTIA regulations

What?

1. The **patient's consent** allows Holly to provide multiple SMS services on behalf of a **specific practice**.
2. Only the **patient** has the authority to **grant or revoke permission** to Holly.
3. This opt-in, or consent, **can't be shared**, sold/bought, or transferred to additional services or senders such as EHRs or other platforms.

Why is this good for patients?

1. **Protects** from unwanted messages.
2. **Prevents** messages from being sent to a wrong phone number
3. **Improves patient's trust** and confidence in your services.
4. **Increases adoption** of innovative SMS services.



[Learn More Here](#)

How does Holly need to comply?

1. We are classified in the **most flexible CTIA categories:** Conversational and informational.
2. The consent must be collected **on the practice's behalf** and clearly state the nature of Holly's service.
3. The consent can be collected via web, SMS, orally or written, but **proof of the consent** must be collected by Holly.

What is changing in Holly?

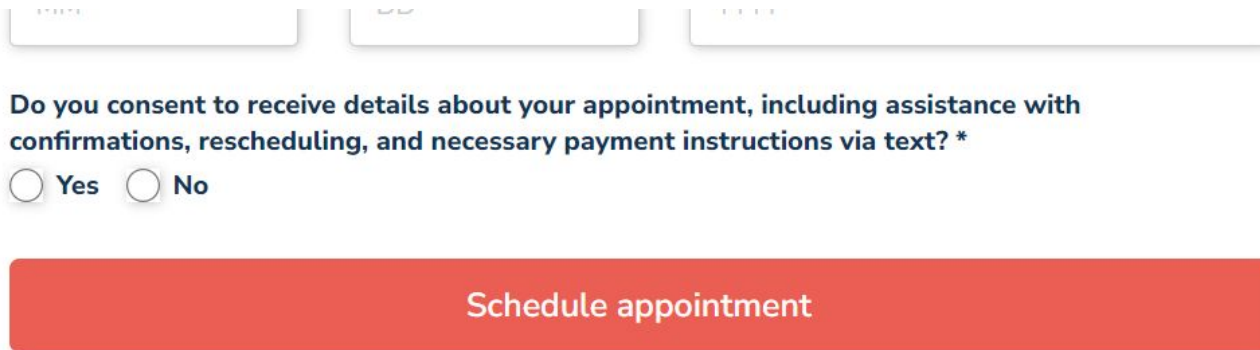
- **This is a one-time consent.** Once it is collected Holly will never ask for the consent again.
- A new section will be added in the **daily email report**. Showing the list of pending replies and opt-outs.
- Additional printed/digital material will be shared for all clients.

Patient Experience

The impact of your patient engagement
will be minimal or nonexistent.

The patient books on the web scheduler

This will be a mandatory question. If the patient replies 'No', they will be blacklisted and won't receive Holly's messages, but **the appointment will be effectively booked**. If the patient replies 'Yes', they won't receive the consent via text.



STREET

POSTCODE

PHONE

Do you consent to receive details about your appointment, including assistance with confirmations, rescheduling, and necessary payment instructions via text? *

☐ Yes ☐ No

Schedule appointment

The patient replies 'Yes' via SMS

The consent and the **appointment information will be sent** before being able to confirm.

Holly will not request consent again, regardless of the number of future appointments. This can happen via your web scheduler or SMS.

Will 👉 Remember your appointment is on Tuesday, Oct 24 at 10:00 AM CST. I'm ABC Clinic's virtual assistant. Here to provide key info, payment details, and assist with confirmations or changes. Please reply YES to continue. Send STOP to opt-out.

Yes, please 👍

Will, do you confirm attendance to your appointment on Oct 24 at 10:00 AM with ABC Clinic? (Yes/No).

Yes

The patient replies 'No' via SMS

The consent and the **appointment information will be sent** before being able to confirm.

We will **add the number to a blacklist**, and the patient will not receive any further communications. You will **receive a daily report** with this information.




Will, **remember** that your **appointment is on Oct 24 at 10:00 AM**. As ABC Clinic's virtual assistant, I will send you important details, payment instructions, and help you confirm and reschedule. Please reply YES to continue. Send STOP to opt-out.


No thanks

You have unsubscribed from all SMS communication from ABC Clinic. Reply START to resubscribe.

If the patient doesn't answer

Holly will send a second reminder with the appointment information and the consent. If there is still no response, Holly will ask for consent **again at their next appointment.**

 Will, remember that your appointment is on Oct 24 at 10:00 AM. As ABC Clinic's virtual assistant, I will send you important details, payment instructions, and help you confirm and reschedule. Please reply YES to continue. Send STOP to opt-out.

Will  Remember your appointment is on Tuesday, Oct 24 at 10:00 AM CST. I'm ABC Clinic's virtual assistant. Here to provide key info, payment details, and assist with confirmations or changes. Please reply YES to continue. Send STOP to opt-out.

Yes, please 

What needs to be done by the practice?

- **Written and verbal communication** is highly recommended to ease the transition.
- On-site communication with **printed material** is also recommended.

FAQ

I have other services asking for consent, can I ask the consent just once and use it for all?

- If you are currently obtaining consent for other services, there may be alternative methods available for you and your Holly. To explore your options, please contact us at support@nimblr.ai. Please note that this consent cannot be shared or transferred from other services or senders to Holly and proof of consent will be required.

Useful links

[Messaging Principles and Best Practices May 2023 - CTIA](#)

[Messaging compliance best practices](#)

[Carrier Consent Audit](#)

Will this affect our patient engagement?

- The impact of your patient engagement will be minimal or nonexistent, and your patients will always receive their appointment information. Although, there is going to be a period of transition when your patients start accepting the consent.

What if a patient opted-out and wants to restart the communication?

- If patients are already blacklisted, they can reactivate the messages by sending the word 'START' to your dedicated phone with Holly. This will enable Holly to send the consent message again, and the patients need to reply affirmatively once they receive it.

Is this going to affect the Self Scheduling?

- Only your web scheduler will require consent.
- Conversational scheduling won't be affected.
- If the patient starts the conversation with Holly there is no need to send the consent message.

Is this optional?

- Unfortunately no, this is a national regulation that applies to us and any other communication platform in the US.

Is this going to have additional costs?

- No. This is part of our global efforts to improve our service.