

# Communication Preferences

This is a resource to support Team UHN members who assist patients to set up how they want to receive communication from UHN. It outlines available options (e.g., appointment reminders, questionnaires) and highlights special considerations for certain message types.

Depending on the role (patient or a proxy), or portal activation status, the communication options available will differ and only relevant communication concepts will be displayed. For example, username and password settings won't be visible for patients without an active myUHN Patient Portal account.

**Documenting patient Communication Preferences in Epic is a crucial step to ensure patients consent to receive notifications and that they receive them in their preferred method.**

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## 1. Method of Communication

Patients can receive communication by:

### Mail



Manually or batch printed letters that are mailed to patients. These are available for appointment letters and research invites only.

### Text and Email



Text and email notifications with a padlock on the icon are mandatory and can't be turned off by users.

### myUHN Portal Notice



#### Staff / Hyperspace only

Patients DO NOT have access to myUHN Portal Notice preferences. Turn these ON only if necessary. If text and email are already selected, patients will receive multiple notifications about the same thing.

### Push



#### Patient / myUHN only

Staff DO NOT have access to Push notification options. Push option will appear in Communication Preferences on a patient's myUHN Patient Portal only if the patient downloads and signs into the myChart app from a mobile device.



**Mail, Text and Email** preferences are **synchronized between Hyperspace and myUHN Patient Portal**. Changes made by patients through myUHN Patient Portal are reflected in Hyperspace and vice versa.



If an email address or mobile phone number are on the record, patients will receive **default notifications**, even if their portal is not active. See [Description of Individual Categories](#) table below for default notifications.

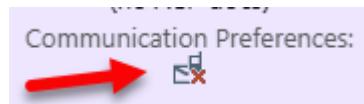
## 2. Hyperspace: Staff View

### 2.1. Accessing Communication Preferences

Open the patient record and click on the **Communication Preferences** link on the Storyboard:

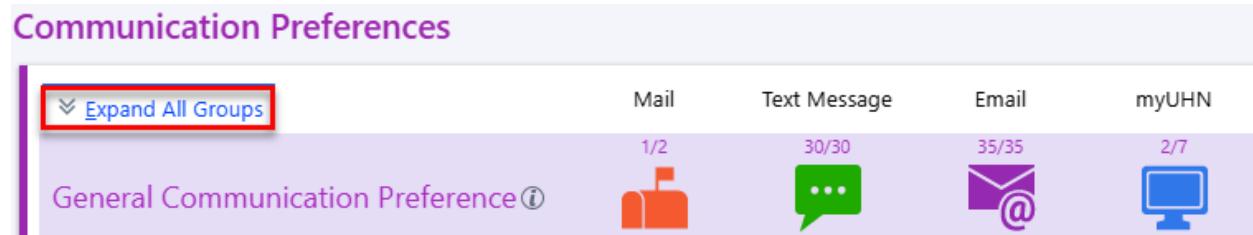


**Note:** A red X on the icon means the patient's Communication Preferences need to be reviewed.



If the **Communication Preferences** link is missing from your storyboard, please contact [virtualcare@uhn.ca](mailto:virtualcare@uhn.ca).

### 2.2. Reviewing and Confirming Changes

A screenshot of the 'Communication Preferences' interface. At the top, there is a button labeled 'Expand All Groups' with a red box and a red arrow pointing to it. Below this, there are four categories: 'Mail' (1/2 notifications), 'Text Message' (30/30 notifications), 'Email' (35/35 notifications), and 'myUHN' (2/7 notifications). Each category has an associated icon: a red envelope for Mail, a green speech bubble for Text Message, a purple envelope for Email, and a blue computer monitor for myUHN.

- View All Categories:** Click **Expand All Groups** (top left) to view/adjust individual preferences.
- Toggle Group Notifications:** Click the group media icon to turn all notifications in that group ON or OFF.
- Hovering** over icons will display how many notifications are selected.
- Greyed-Out Icons** indicate no communication method is selected.

Consent to be contacted by Care Team

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- **Consent for Contact:** If the patient does not have an active Patient Portal to adjust their preferences, use the [Electronic Communication Consent Script](#) to get their verbal consent before adjusting their preferences and confirming changes.
- **Verify Contact Info:** If the patient chooses text or email notifications, confirm their mobile number and email are correct.
  - **International mobile numbers** need to have the full country code in the phone number, such as +44 20 7946 0968.
  - **Two-Step Authentication codes can't be sent to international phone numbers.**



### 2.2.1. myUHN Two-Step Authentication and Contact Verification

After completing two-step verification in myUHN, a patient's email or mobile number is marked as verified in Epic.

- If staff update a patient's contact information (email or mobile), these changes are not automatically verified.
- Regular Epic notifications will go to the updated contact, but myUHN two-step verification codes will continue to be sent to the previously verified information.

Advise patients with **active myUHN accounts** to update their contact information directly from their portal as this will allow them to verify the new information.

Staff may continue updating contact details for patients **without active myUHN accounts** or for **new patients**. See the [myUHN Two-Step Verification Staff Tip Sheet](#) for details.

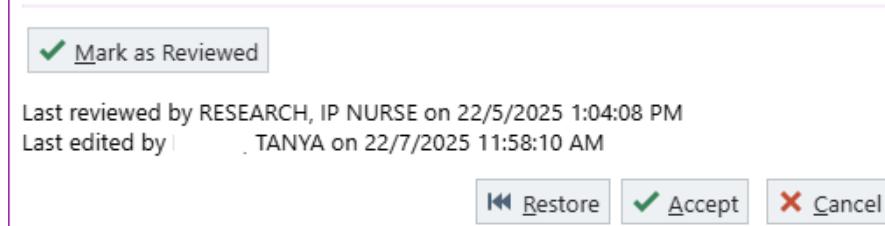
For assistance with updating communication preferences, you can refer patients to **myUHN Support: [myuhn@uhn.ca](mailto:myuhn@uhn.ca) or 416-340-3777**

## 2.3. Saving Changes

1. Click **Mark as Reviewed** button at the bottom left of the box.

The name of the staff member who reviewed the information, along with the date and time, is automatically recorded.

2. Click **Accept**



A screenshot of a software interface for managing document reviews. At the top left is a button labeled "Mark as Reviewed" with a green checkmark icon. Below this, a status message displays: "Last reviewed by RESEARCH, IP NURSE on 22/5/2025 1:04:08 PM" and "Last edited by TANYA on 22/7/2025 11:58:10 AM". At the bottom of the interface are three buttons: "Restore" (with a circular arrow icon), "Accept" (with a green checkmark icon), and "Cancel" (with a red X icon).

## 2.4. Individual Preferences

When deciding on which communications to send out using which method, each row has multiple options. The table below helps to explain the options.

Communication Preferences Individual Options Overview	
Consent to be contacted by Care Team	
Indicates if the patient <b>consents to receive communications from their UHN care team outside of the Epic system.</b>	
 Required to be <b>ON</b> in order for patients to receive UHN's Patient Reported Experience Measurement ( <b>PREM</b> ) questionnaire. See more in <a href="#">PREM section</a> .	
<b>Default is OFF for consent to be contacted by Care Team.</b>	
To Do and Care Journeys	
New Tasks and Care Journeys	
	<ul style="list-style-type: none"> <li>Notification sent when the patient is assigned a new Care Companion plan or when the new Care Journey is created.</li> <li>Will also be sent when the patient is enrolled in a new <b>clinical trial or research.</b></li> <li><b>Default ON for email.</b></li> </ul>
Task Due	
	<ul style="list-style-type: none"> <li>Used for <b>Care Companion</b> and <b>Medication tasks</b>.</li> <li>Notifications are sent when one or more tasks are due that day. If multiple Care Companion related tasks are due, the patient receives a single consolidated notification.</li> <li>Medication task notifications are sent separately and are not combined with Care Companion tasks.</li> </ul>
Updated Tasks and Care Journeys	
	<ul style="list-style-type: none"> <li>Notification is sent when changes are made to assigned Care Companion plan or when Care Journey is updated.</li> <li>Will also be sent when the patient is re-enrolled in research.</li> </ul>

Questionnaires	
Questionnaire Available	
Questionnaire Due Soon	
<ul style="list-style-type: none"> <li>Both notifications are sent for <b>series</b> questionnaires that are assigned to a patient through Orders.</li> <li><b>PREM</b> questionnaires are <b>not controlled</b> by this concept.</li> <li><b>Default ON for email</b> for both concepts</li> </ul>	
MyUHN Account Management (available options depend on myUHN active status)	
Account Locked	
	Triggered after multiple failed login attempts with incorrect password.
Contact Information Changed	
	<p>This notification is sent when a mobile number or email on record is updated by staff, the patient, or a proxy.</p> <p>When email address is updated, change notification will be sent to both: previous and the updated email.</p> <p><b>An active myUHN account is not required to receive these notifications.</b></p>
Device Linked	
	Sent when the patient downloads MyChart app and logs into their myUHN Patient Portal from a mobile device. The device used will be linked to their account.
New Link to Your Account	
	Sent when a patient links another health organization's portal to their myUHN account. Only Epic based portals can be linked this way.
Password Changed	
	Sent immediately after myUHN Patient Portal password has been changed.
Proxy Invite Confirmed	
	Sent after invited proxy accepts the invitation to access patient's myUHN Portal.

## Video Visits

### Video Visit Reminders

Text and email are turned **ON** by default and can't be turned off. These reminders contain video links and are sent:

- 1 hr before the appointment
- 15 min before the appointment
- 7 min after the appointment starts if the provider hasn't joined yet.
- **An active myUHN account is not required to receive these notifications.**
- **Default ON for text and email**

### Virtual Care Consent

If Virtual Visit Consent is missing from the patient's record, it will automatically be added as a step during eCheck-in for the patient to sign. If this option is enabled, staff can also email the consent form directly to the patient or attach it to a secure myUHN Patient Portal message.



Find more information about video visit reminders in the [Video Visits](#) section.

## Appointments

### After Visit Summary

- Patients are notified when After Visit Summary (AVS) becomes available on their myUHN Patient Portal. The AVS is generated once the visit is signed and provides an overview of the patient's hospital stay, emergency department (ED) visit or clinic visit.
- It includes details such as medication changes, education, important instructions to follow and future appointments.

### Appointment Letter

- If a clinic sends separate appointment letters, make sure this option is enabled as batch printing will not work otherwise.
- **Default ON for mail**

### eCheck-In Notifications

- These are sent two days prior to the appointment, and again the day before if the patient hasn't checked in already.
- **Contains a video link for MS Teams video appointments.**
- **Default is ON for email.**

## Appointments continued...

### Registration Link

- If selected, this option allows staff to send eCheck-In links manually from DAR or Appointment Desk view by clicking *Send Registration Link*:  [Send Registration Link](#)
- **Default is ON for text and email.**

### Scheduling Ticket

- Patients will receive an email when an invitation to schedule an appointment is sent to their myUHN Patient Portal.
- If not scheduled within 5 days, patients will receive automatic reminders to do so.
- Ticket Scheduling is currently available to Liver clinic patients only. [Digital demands](#) can be submitted if other clinics are interested.
- **Default is ON for email.**

### Status Changes: Scheduled, Changed, Cancelled/Rescheduled, Missed



- These notifications are sent immediately when appointments are scheduled, changed, canceled, rescheduled, or missed.
- **If turned OFF**, patients are much more likely to miss their appointments.
- **Default is ON for text and email.**

### Surgery Notifications

- Notification is sent to patients 3 days prior to the surgery reminding them of the surgery date. Depending on the surgery area, notification can also include surgery preparation instructions.

### Wait List Offer

- Patients on the wait list are notified when an opening is available. They can log into myUHN to accept or decline the offer.
- Currently enabled for UC Cancer Psychiatry only. [Digital demands](#) can be submitted if other clinics are interested.

### Billing

#### Balance Updates

- Notifications sent to patients when an outstanding balance has changed. Patients can see the update in their myUHN Patient Portal.

#### Billing Letter

- A letter to communicate billing related information to patients, such as CoPay letter or annual tax letter.
- **Default is ON for email.**

## Billing continued...

### Estimate Ready

- Notification sent when an estimate (prepay bill) is ready for the patient to review, submit to insurance or process prepayment. It can be prepared by the clinic or the billing office.
- **Default is ON for email.**

### New Statement

- Notification is sent when an official invoice is generated either automatically or by patient request.

## Results, Research, and Health Information

### Document to Sign

- Notification is sent when a document requiring the patient's signature becomes available in their MyUHN portal, usually attached to a visit during registration.
- **Default ON for email**

### Advance Care Planning

- A notification is sent when the Health Records department accepts or declines documents uploaded by the patient through myUHN (e.g., advance directives, legal documents or, power of attorney forms).

### Health Maintenance Reminders

- This preference is currently inactive, planned for future development.

### Medical Document Request

- Sent when medical documents the patient requested become available in their myUHN account.
- **Default ON for push notifications.**

### Research Participation Invitations

- Indicates how the patient prefers to receive research invitations. For more details, see the [Research](#) section.
- **Default ON for mail.**

### Test Results

- Sent when new or updated test results are available in myUHN.
- Notification settings can be adjusted to be sent once daily instead of after each individual result.

## Messages

### Bulk Communication

- Setting that is used to send research invitation to patients who consented to be contacted.
- Can be accessed from Hyperspace only, exclusively used by research.
- For details, see the [Research](#) section.
- **Default ON for myUHN Portal messaging**

### Letters

- Sent when a new letter becomes available in the myUHN.
- These letters are typically created as Letter Encounter in Hyperspace and are used to send documents to patient's portal such as work excuses, referrals, or similar.

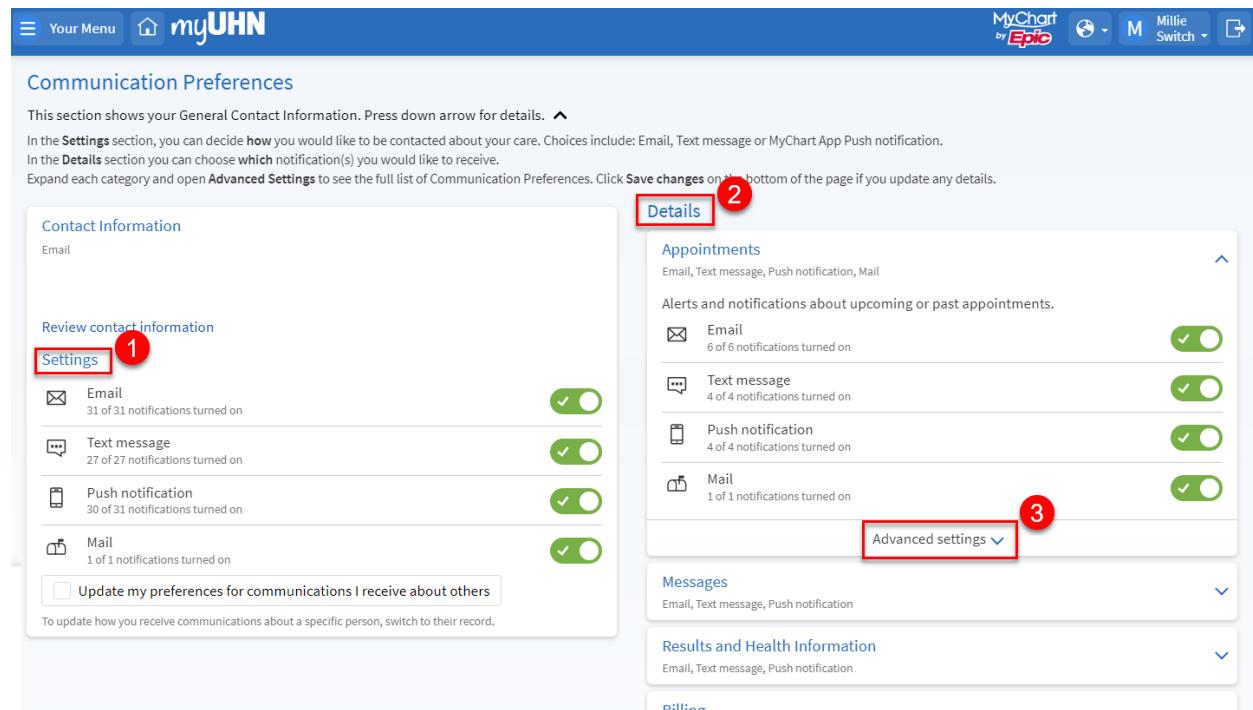
### New Message

- Sent when a new message becomes available in myUHN Patient Portal. These messages could be secure communication from the clinic, automatic appointment schedule/cancel/change updates, new questionnaires and such.
- **Default ON for email**

### 3. myUHN Patient Portal: Patient View

As in Hyperspace, patients can manage their preferences at three levels: General **Settings** (1), category **Details** (2), and individual level from **Advanced settings** (3).

**MyChart App Push notifications are not accessible from Hyperspace.** Only the patient can manage these, and the Push Notifications option appears in Communication Preferences **only after** they download and sign into the MyChart app.



Communication Preferences

This section shows your General Contact Information. Press down arrow for details. ^

In the **Settings** section, you can decide **how** you would like to be contacted about your care. Choices include: Email, Text message or MyChart App Push notification.

In the **Details** section you can choose **which** notification(s) you would like to receive.

Expand each category and open **Advanced Settings** to see the full list of Communication Preferences. Click **Save changes** on the bottom of the page if you update any details.

**Contact Information**

Email

**Review contact information**

**Settings** 1

Email 31 of 31 notifications turned on (green switch)

Text message 27 of 27 notifications turned on (green switch)

Push notification 30 of 31 notifications turned on (green switch)

Mail 1 of 1 notifications turned on (green switch)

Update my preferences for communications I receive about others

To update how you receive communications about a specific person, switch to their record.

**Details** 2

**Appointments**

Email, Text message, Push notification, Mail

Alerts and notifications about upcoming or past appointments.

Email 6 of 6 notifications turned on (green switch)

Text message 4 of 4 notifications turned on (green switch)

Push notification 4 of 4 notifications turned on (green switch)

Mail 1 of 1 notifications turned on (green switch)

**Advanced settings** 3

**Messages**

Email, Text message, Push notification

**Results and Health Information**

Email, Text message, Push notification

**Routine**



Patients can be directed to the myUHN YouTube channel to watch: [How to change communication preferences on myUHN Patient Portal](#) for guidance on setting their contact preferences.



They can also contact myUHN Patient Portal Support by 416-340-3777 or [myUHN@uhn.ca](mailto:myUHN@uhn.ca).

## 4. SPECIAL CONSIDERATIONS

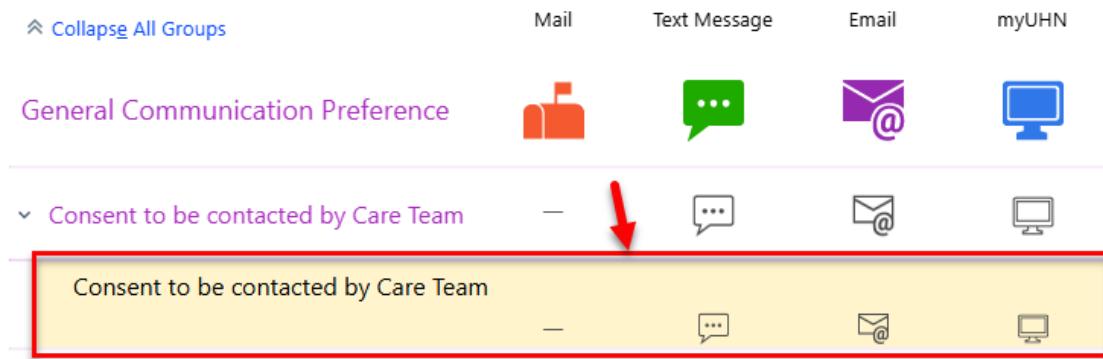
### 4.1. Patient Reported Experience Measurement (PREM) Questionnaires

UHN sends patient experience questionnaires by email once patients have consented to receive communications from their care team outside of Epic.

**NOTE:** PREM questionnaires are sent anonymously through a UHN approved digital platform. They are not sent through the myUHN patient portal or Epic.

For patients to receive UHN's PREM Questionnaire:

1. **Obtain consent:** Read the provided [script](#) to confirm if the patient agrees to be contacted.
2. **Verify Contact Info:** Ensure the patient's email and mobile number on record are accurate.  
**NOTE:** If patients no longer want to receive surveys, they can reach out to [yourexperience@uhn.ca](mailto:yourexperience@uhn.ca).
3. **Confirm Communication Preference:** Make sure the preferred method is selected under *Consent to be Contacted by Care Team*.



For more PREM information, refer to [UHN Patient Reported Experience Measurement Strategy](#).



#### Important: myUHN Two-Step Verification

After completing two-step verification in myUHN, a patient's email or mobile number is marked as verified. Staff updating them will not automatically verify those contacts and, until verified, two-step verification codes will go to old, verified email.

Please refer to: [2.2.1. myUHN Two-Step Authentication and Contact Verification](#).

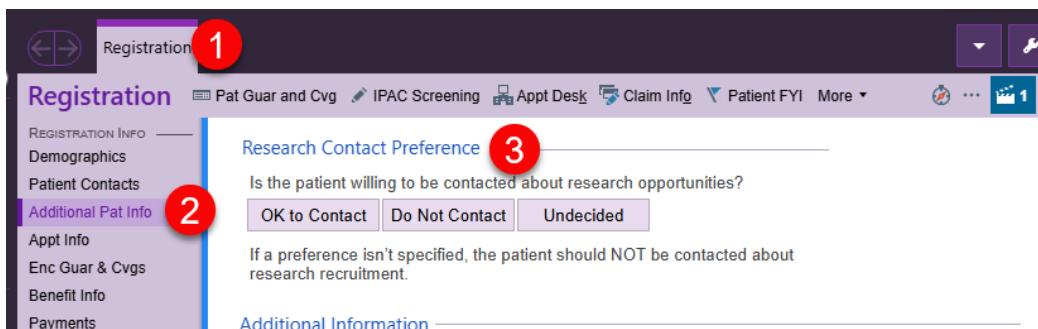
## 4.2. Research

### 4.2.1. Indicate Consent to Be Contacted by Research

Patients can choose to be contacted by research staff about studies they may qualify for. Their consent is recorded in Epic and displayed under “OK to Contact?”.

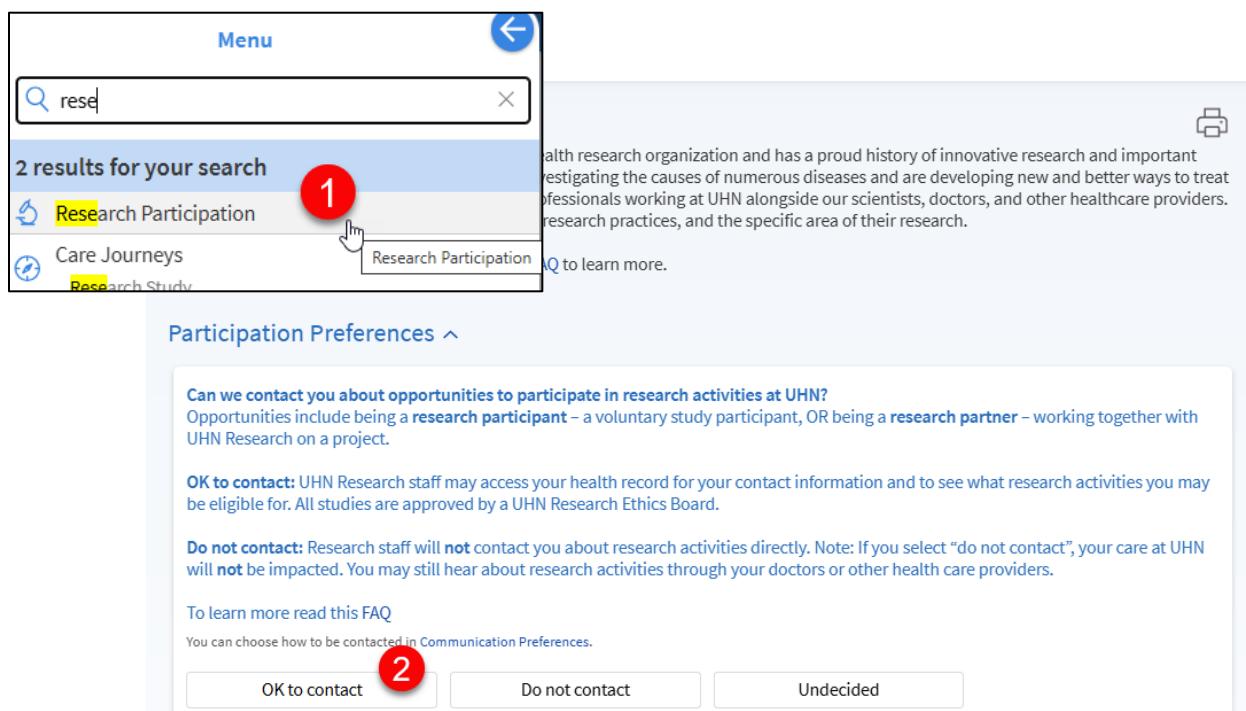
Consent can be recorded by research staff in Hyperspace, or by a patient from their myUHN Patient Portal.

- **In Hyperspace by Team UHN**



- **In myUHN Patient Portal by a patient**

Patients can navigate to **Research Participation** in the myUHN patient portal menu to access Participation Preferences and record their consent.



## 4.2.2. Relevant Communication Preferences

- **Research Participation Invitations:** Ensure the patient's preferred method of receiving research invitations is selected.

▼ Results, Research, and Health Information

				
Document to Sign	—			—
End-of-Life Planning	—			—
Health Maintenance Reminders	—	—		
Research Participation Invitations				—
Test Result	—			—
Receive a notification once per day				
<input type="checkbox"/>				

- **To Do and Care Journeys.** Patients enrolled in research studies or clinical trials can view a detailed overview of their participation in the *Care Journeys* section of the portal. This includes study descriptions, future and past visits, research team contacts, and consent documents. Relevant notifications to turn ON are:

- **New Tasks and Care Journeys** - sent when patients enrolled in a study and
- **Updated Tasks and Care Journeys** – sent if patients re-enrolled in a study

▲ Collapse All Groups	Mail	Text Message	Email	myUHN
▼ To Do and Care Journeys	—			—
▶ New Tasks and Care Journeys	—			—
Task Due	—			—
▶ Updated Tasks and Care Journeys	—			—

- **Bulk Communication.** To send research invitations through myUHN Messaging, Bulk Communication must be selected. This option is visible in Hyperspace only.

▼ Messages	—			
Bulk Communication	—	—	—	

For more information about Research, see the following resources:

- [Guidance Doc: OK to Contact Research](#)
- [Research User Update OK to Contact in Epic \(Quick Start Guide\)](#)
- [Manage Research Patients Quick Start Guide](#)
- [Patient Resource: FAQ Research Activities and Participation Preferences](#)

### 4.3. Video Visits

There are two types of links used for MS Teams video visits.

1. **Epic-Generated MS Teams Links** – Video links patient and provider are using are generated automatically within Epic. Patient is connecting from myUHN or through the link provided in email or SMS system notifications.
2. **Manual MS Teams Group Links** – Clinics manually generate and send links to patients.

The following Video Visit reminders are sent **only for Epic-Generated MS Teams links**.

#### Video Visit Reminders

▼ Video Visits	—			
Video Visit Reminders	—			—
Virtual Care Consent	—	—		

**Video Visit Reminders** are turned **ON** by default and can't be disabled. They include video links and are sent:

- 1 hr before the appointment
- 15 min before the appointment
- 7 min after the appointment start if the provider does not join



**These reminders are sent to all patients, including those without an active myUHN account. If a valid email address or mobile number is on file, the patient will receive the notification.**

**Virtual Care Consent.** If Virtual Visit Consent is not on the record, it is automatically added as a step to eCheck-in for patient to sign. If this option is turned ON, staff can also email the consent to a patient or send it through myUHN as a message attachment.

#### eCheck-In Notification

- eCheck-in notifications are sent two days prior to the appointment and if a patient did not finish eCheck-in, it is sent again the day before the visit.
- They contain a **video link for MS Teams video appointments that are using Epic generated links**.
- They are turned ON by default but can be controlled from Hyperspace or myUHN Patient Portal.

▼ Appointments				
After Visit Summary	—			—
Appointment Letter		—		
Clinic Announcements	—			—
eCheck-In Notifications	—			—

## APPENDIX: Email Notifications Timeline and Email Subject

(italicized)

All notifications (Email, Text, Push and myUHN Notice) follow the same timeline. **If a patient has all notifications enabled for the same event, they will receive the same notification multiple times.**



For notification samples, please contact [virtualcare@uhn.ca](mailto:virtualcare@uhn.ca)

<b>Appointment Scheduled</b>	<b>Notification sent</b>
<i>Appointment scheduled</i>	Immediately
<b>Patient/Clinic Cancels the Appointment</b>	
<i>Appointment Cancelled</i>	Immediately
<b>Reminder</b>	
<i>UHN Appointment Reminder</i>	7 days before
<b>eCheck-In Reminder</b>	
Depending on appointment modality: <ul style="list-style-type: none"> <li>• <i>Link for upcoming virtual visit and eCheck-in</i> (contains link)</li> <li>• <i>Check in for your upcoming visit</i> (for in person)</li> <li>• <i>Check in for your upcoming telephone visit</i></li> </ul>	2 days before
If patient did NOT eCheck-in after the first reminder, the second one sent	1 day before
<b>Video Reminders (contain links for MS Teams appointments)</b>	
<i>Video Visit Today</i>	1 hr before
<i>Join your Video Visit Now</i>	15 min before
<i>Provider Running Late</i> (sent if provider didn't join 7 min after the scheduled time)	7 min after
<i>Invitation to Join Video Visit</i> (provider sends a link from Hyperspace)	immediately
<b>Appointment Notes</b>	
<i>New After Visit Summary Available</i>	Immediately after visit is signed
<b>Other</b>	
<i>Signup information for myUHN</i> (signup email sent from Hyperspace)	Immediately
<i>Appointment Missed</i>	End Of Day (EOD) batch
<i>New Test Result</i>	Test resulted
<i>Mobile Number Changed</i> (when mobile number on record changed)	Immediately
<i>Email Change Notification</i> (when email on record changed)	Immediately
<i>New Device Linked to your MyChart Account</i> (after patient downloads and signs into the app the first time on that device)	After successful login
<i>You have a new billing statement in MyUHN</i> (can be paid from Patient Portal)	Immediately
<i>New Message</i>	Immediately