PMX+ Automated Messages QRG

Office Practicum

The PMX+ module allows you to set Automated Messages for Appointment Confirmations and Reminders. An Automated Message is a repetitive message that is scheduled for automatic delivery based on a set of criteria.

Note: Anything you add, edit, or delete in the Automated Messages tab applies only to the delivery of new Automated Messages and not any Personalized Messages sent independently from within the Personalized Message tab.

PMX+ Automated Messages Initial Setup and Configuration

Permissions

Once the PMX+ feature is enabled for your practice, verify that all System Administrators will automatically be granted access to view, create, edit, delete, disable and enable Automated Messages. You will need to manually add any additional permissions for users not in the System Admin user group.

Grant access to additional staff members:

1. Access the Security Administration window: **Admin ribbon** > **Security Administration**.
2. Drag the permission **Messaging_View_Automated_Messages** from the Permissions on the right side to the desired User on the left side of the Security Settings window.
3. Click **Close**.
4. To apply the permissions to the selected user, **Logout** of OP and log back in.
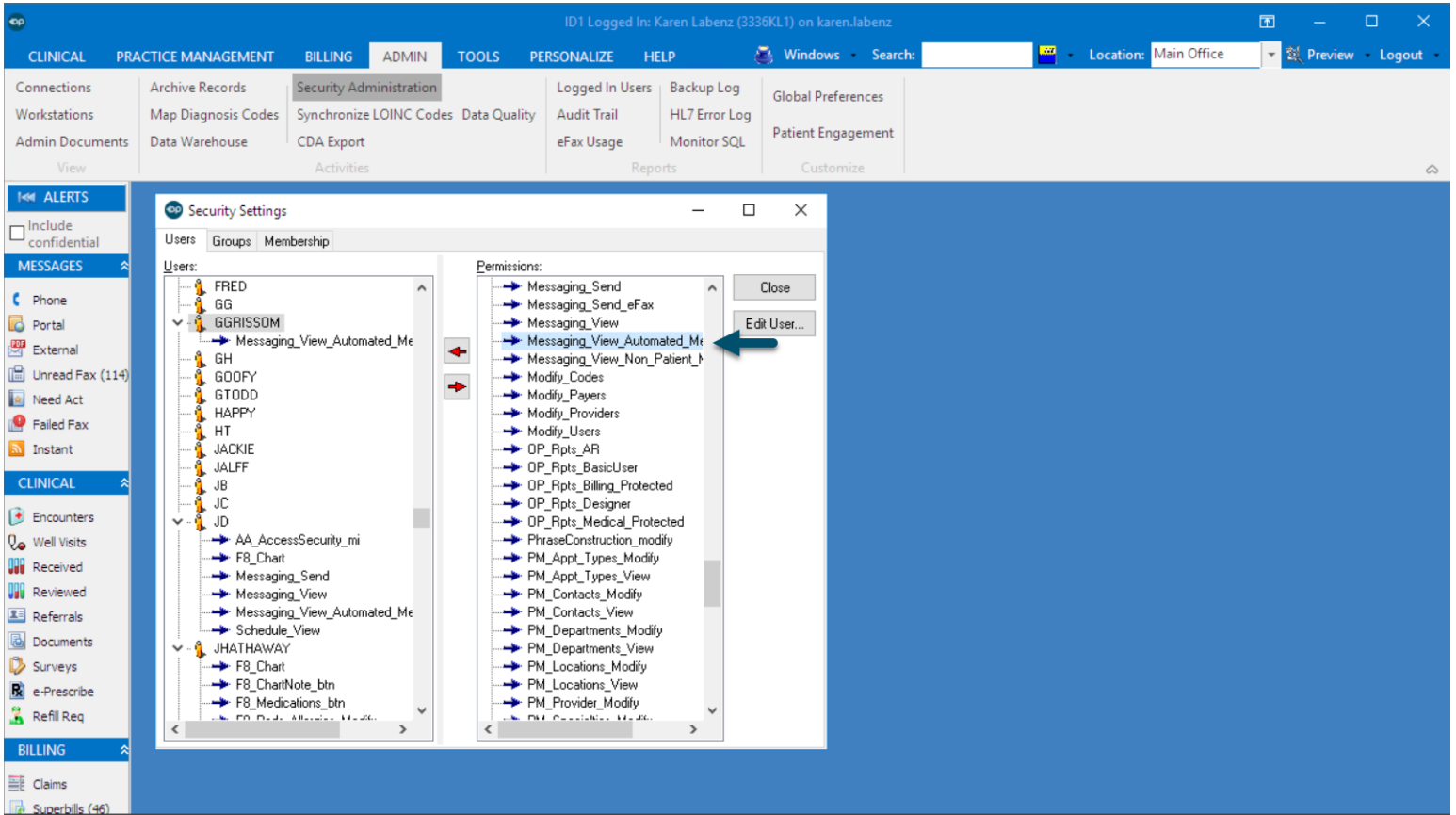
Verify Global Settings

The first time you access Automated Messages, you will want to verify the defaults for your Global Settings for Automated Messaging. These are message Delivery Rules that will apply to ALL of your Automated Messages.

Note: If your practice is transitioning from OP Notify, verify your Global Settings have been set to the appropriate default values you entered from OP Patient Notify "Settings".

1. Navigate to **Admin** > **Patient Engagement**.
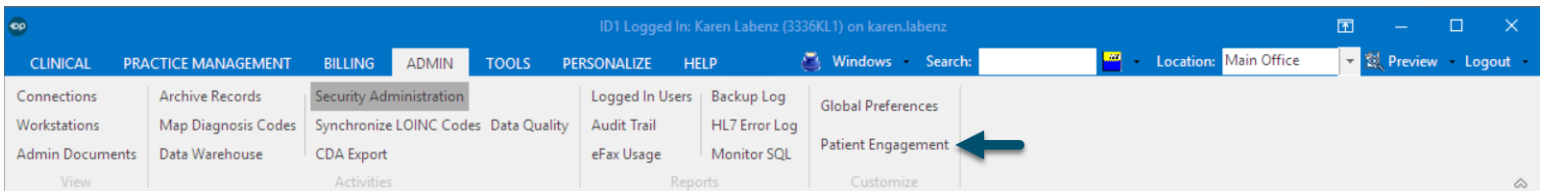
2. From the **Automated Messages** > **Global Settings** tab, confirm and/or configure the following setting where necessary:

- **Delivery Time:** Specific times that messages cannot be delivered before or after.
  - To change the times, type in the time of the desired delivery window in the **From** and **To** fields.
- **Delivery Days:** Specific days that messages will be delivered on.
  - To change the delivery days, click the checkboxes next to the days to select or deselect them as delivery days. Click the All checkbox to select All days.
- **Appointment Cancellation:** This setting designates how appointment cancellations are handled.
  - **Automatically Canceled**: By selecting this radio button, the appointments will be automatically updated on the schedule
  - **By Request**: By selecting this radio button, the patient must notify the practice directly. The practice staff must subsequently manually cancel the appointment for the Appointment to be removed from the schedule.
- **Track Appointment Cancellations:** Toggle to select if you want to receive a message when an appointment is canceled. If the toggle is on, you will be able to select the Department that will receive the message.
- **Appointment Cancellation Deadline:** This setting designates a deadline for when a patient must submit their Appointment Cancellation in order to stop further delivery of any automated messages for that particular Appointment.
  - To change the deadline, type in the number of hours/days in the text field, then select hours or days from the drop-down.
  - Select a maximum of 24 hours or 30 days.
- **Combine Appointment Confirmation and Reminders for siblings:** For parents with siblings who have appointments on the same day, at the same time.
  - **Toggle on** to allow a parent to confirm or cancel one or many Appointments from one link as opposed to multiple links for each child.

3. If you have made any changes, click **Save**.

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Global Settings | Automated Messages

Delivery Time:

From
08:00 am 🕐

To
08:00 pm 🕐

Delivery Days:

☑ All ☐ Sun ☑ Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri ☑ Sat

Appointment Cancellation (select only one):

◯ By Request ⦿ Automatically cancel

Track Appointment Cancellation (Receive a message when an appointment is canceled):

🔵 (toggle on)

Department (Select the recipient of this message):

Front Desk ▾

Appointment Cancellation Deadline:

Patients must cancel appointments within the timeframe below to end messages:

1   Hours

Combine Appointment Confirmation and Reminders for siblings:

🔵 (toggle on)
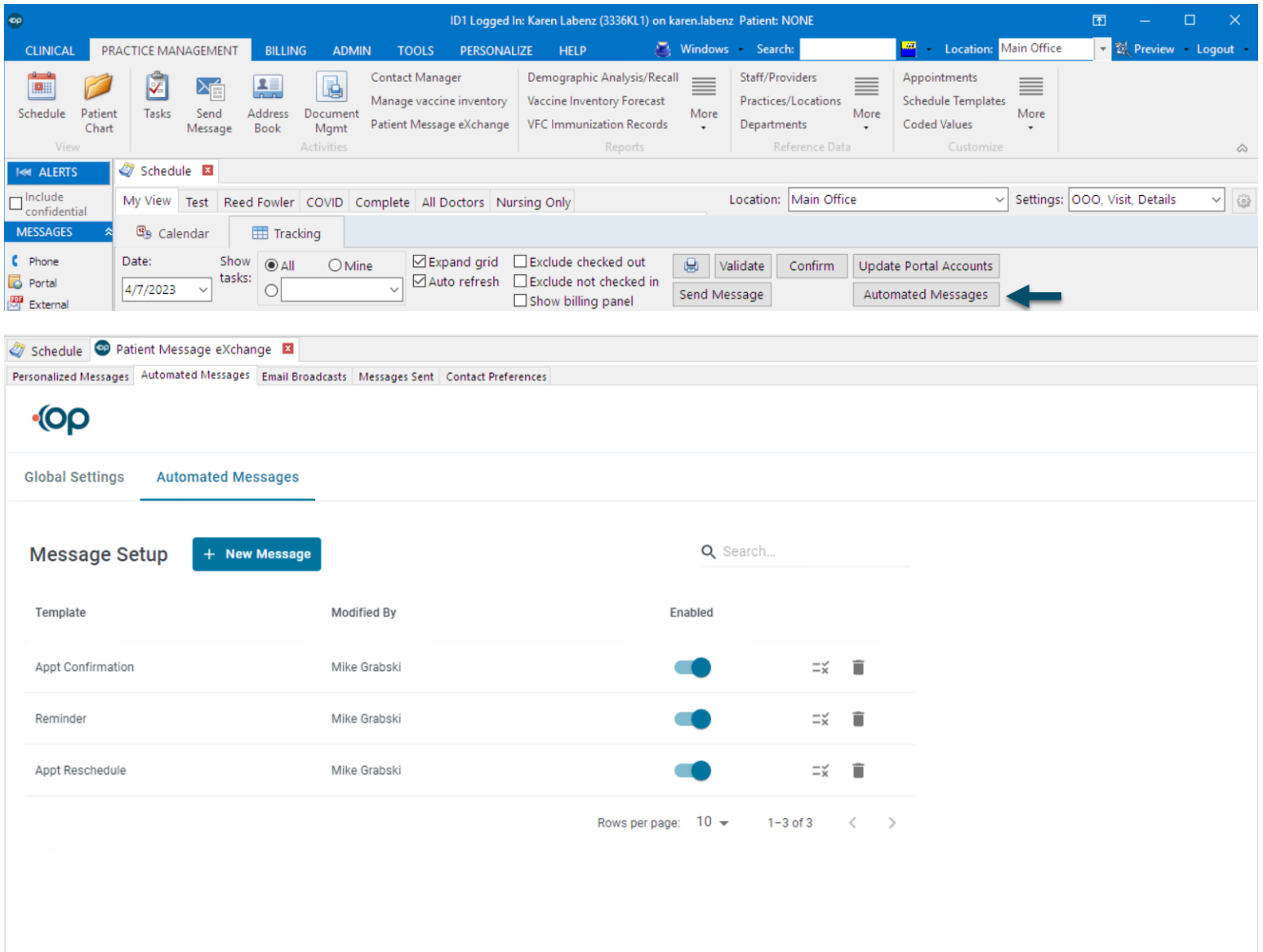
[Back to top](#)

Viewing Automated Messages

Regardless of your permissioning, you will be able to View Automated Messages. Users can view both active and inactive Automated Messages.

1. Open the **Patient Message eXchange** window from **Practice Management** > **Schedule** > **Tracking** > **Automated Messages**.

By default, the **Automated Messages** tab view will show:

- **Template**: Message Template Name
- **Modified By**: User that last modified the Message
- **Enabled**: Enabled status (toggle Active/Inactive)
- **Edit button** ⊨ˇ : Allows you to edit the selected message.
- **Delete button** (Trash Can): Allows you to delete the selected message.
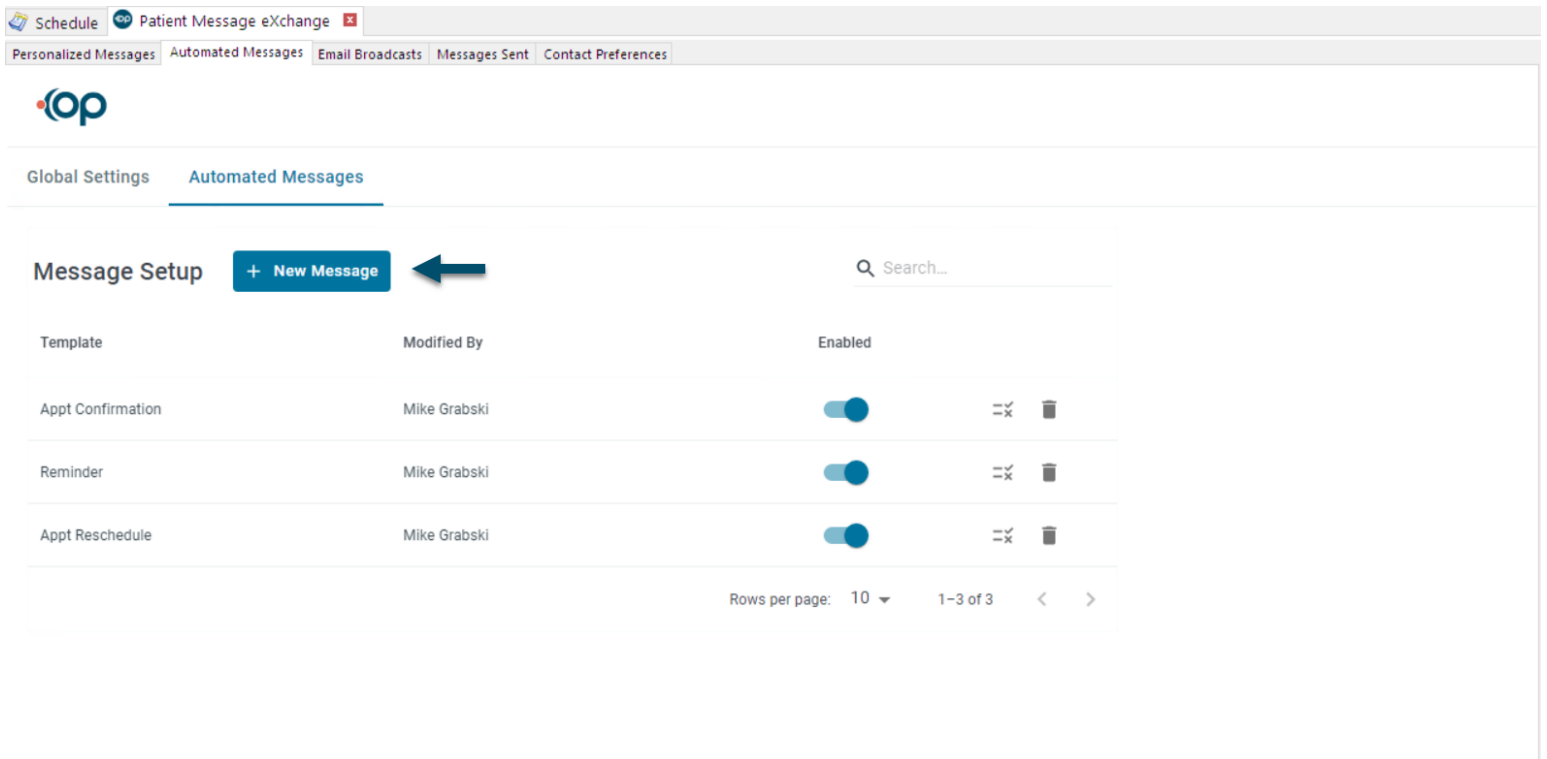
You can search for Automated Messages in the **Search** bar at the top right or **filter** and **sort** named columns by clicking the column header or the filter icon.

[Back to top](#)

Configure Delivery Rules for Automated Messages

All System Administrators will automatically be granted access to edit, delete, disable and enable Automated Messages. You will need to manually add any additional permissions for users not in the System Admin user group.

1. Open the **Patient Message eXchange** window from **Practice Management** > **Schedule** > **Tracking** > **Automated Messages**.
2. Click the **New Message** button.
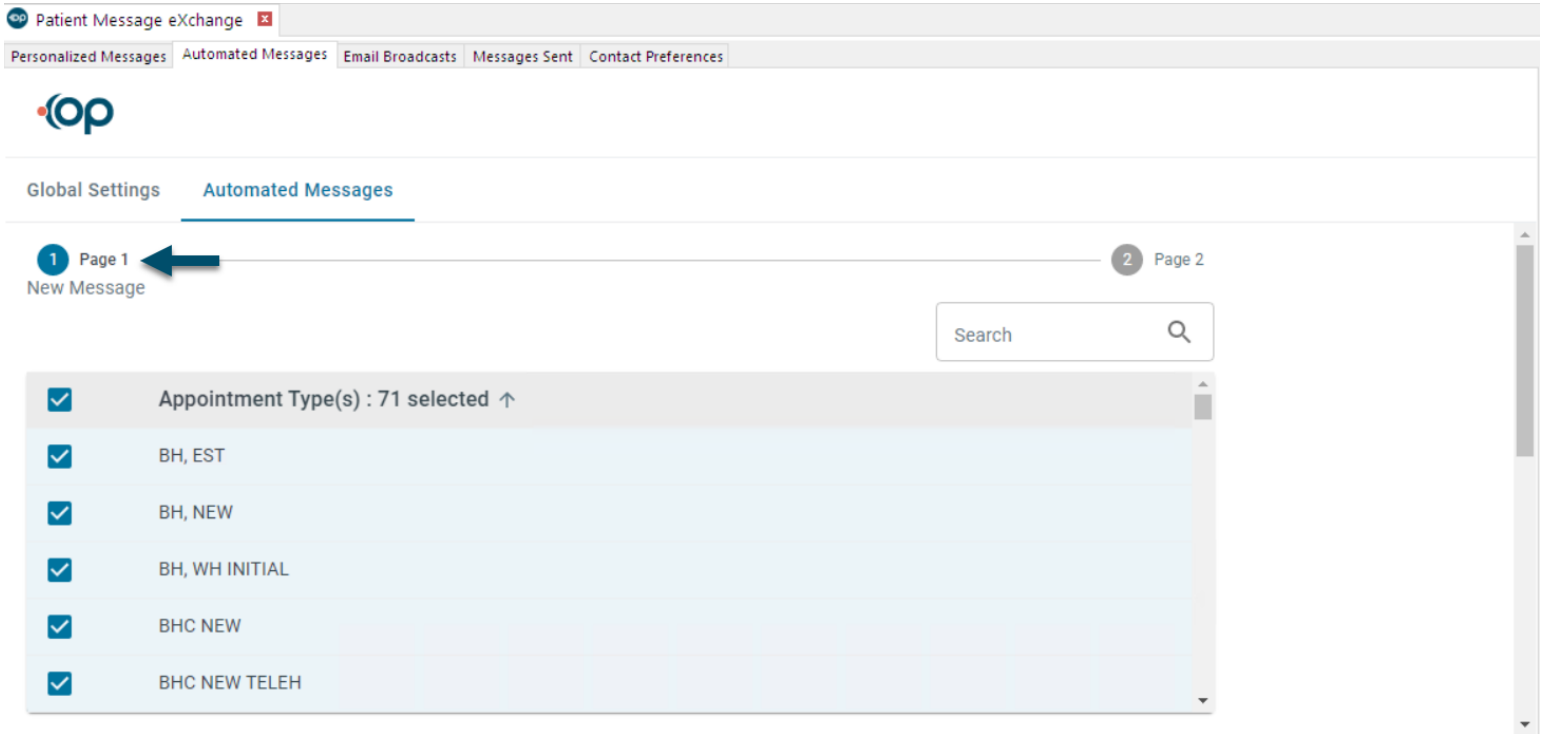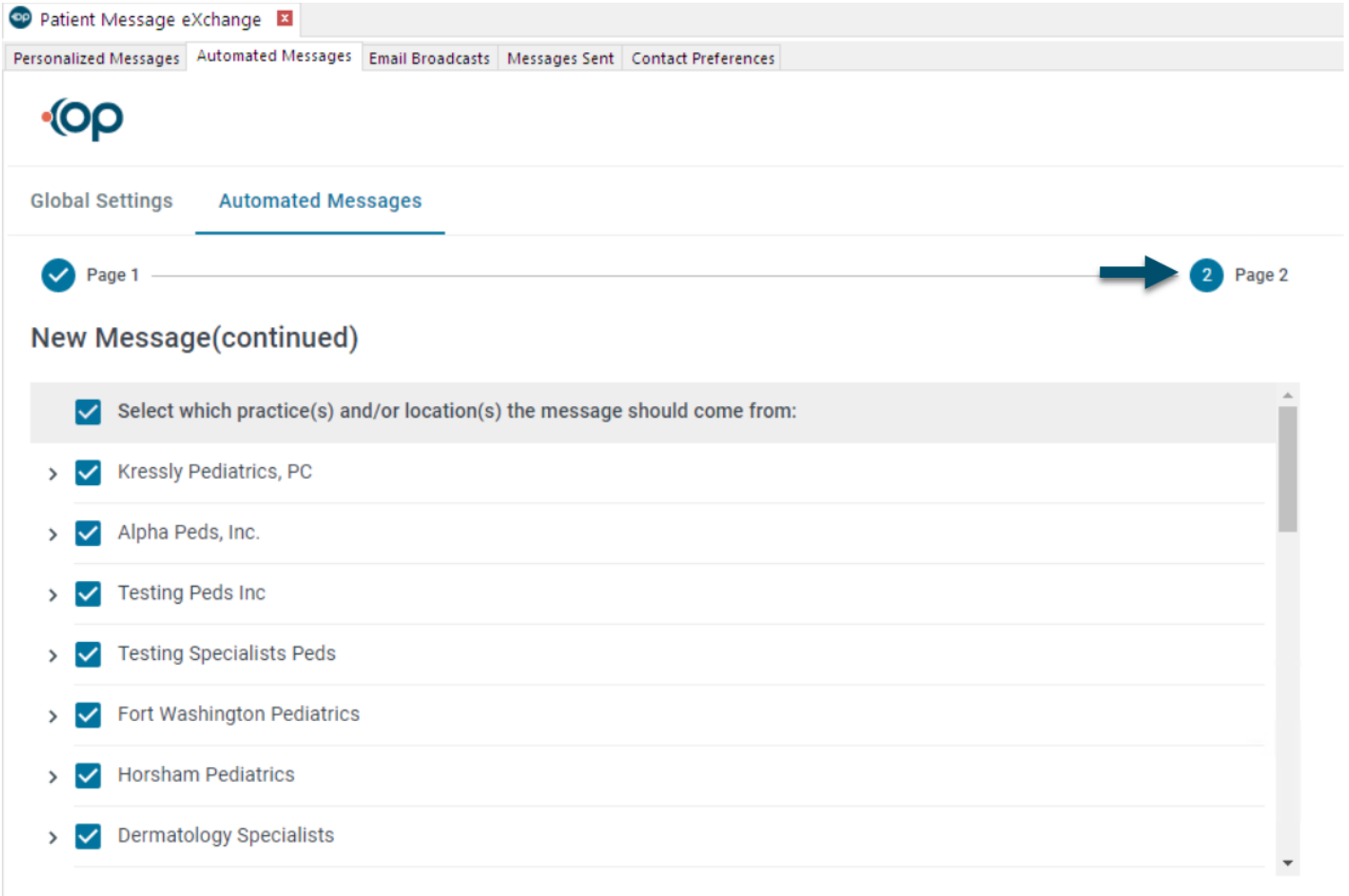
3. Once the New Message button is selected, the page view will automatically update to **Page 1** of 2 pages for creating a New Message.

4. Complete the following required fields:

    a. **Appointment Type**: Select the checkbox next to one or more individual appointment types, or select the checkbox next to **Appointment Type(s)** to select all.

    b. **Message Template**: Click the drop-down and select a message template from the list.

5. The **Message Preview** section will show a preview of the message based on the template selected.

    a. Click the **sms**, **email**, or **voice** tabs to view the previews.

    b. Click the **language** drop-down to see a preview of the message in the selected language.

    Note: The language the message will be sent in is based on the recipient's language preferences. Selecting from the drop-down here only shows a preview of the message in that language.

6. Click the **Next** button.

7. The page view will automatically update to page 2 of 2 pages for creating a New Message:

PMX+ Automated Messages QRG

8. Complete the following fields:

   a. **Practice(s) and/or Location(s)**: This field is required. Click the checkbox next to one or more practice(s) or location(s) the message should come from.

   b. **Provider(s)** *(optional)*: Click the checkbox next to one or more provider(s) the message should come from.

   c. **Message Duration**: The **Start Date** field is required. If no **End Date** is entered, the message will continue indefinitely.

9. Click the **Save** button.
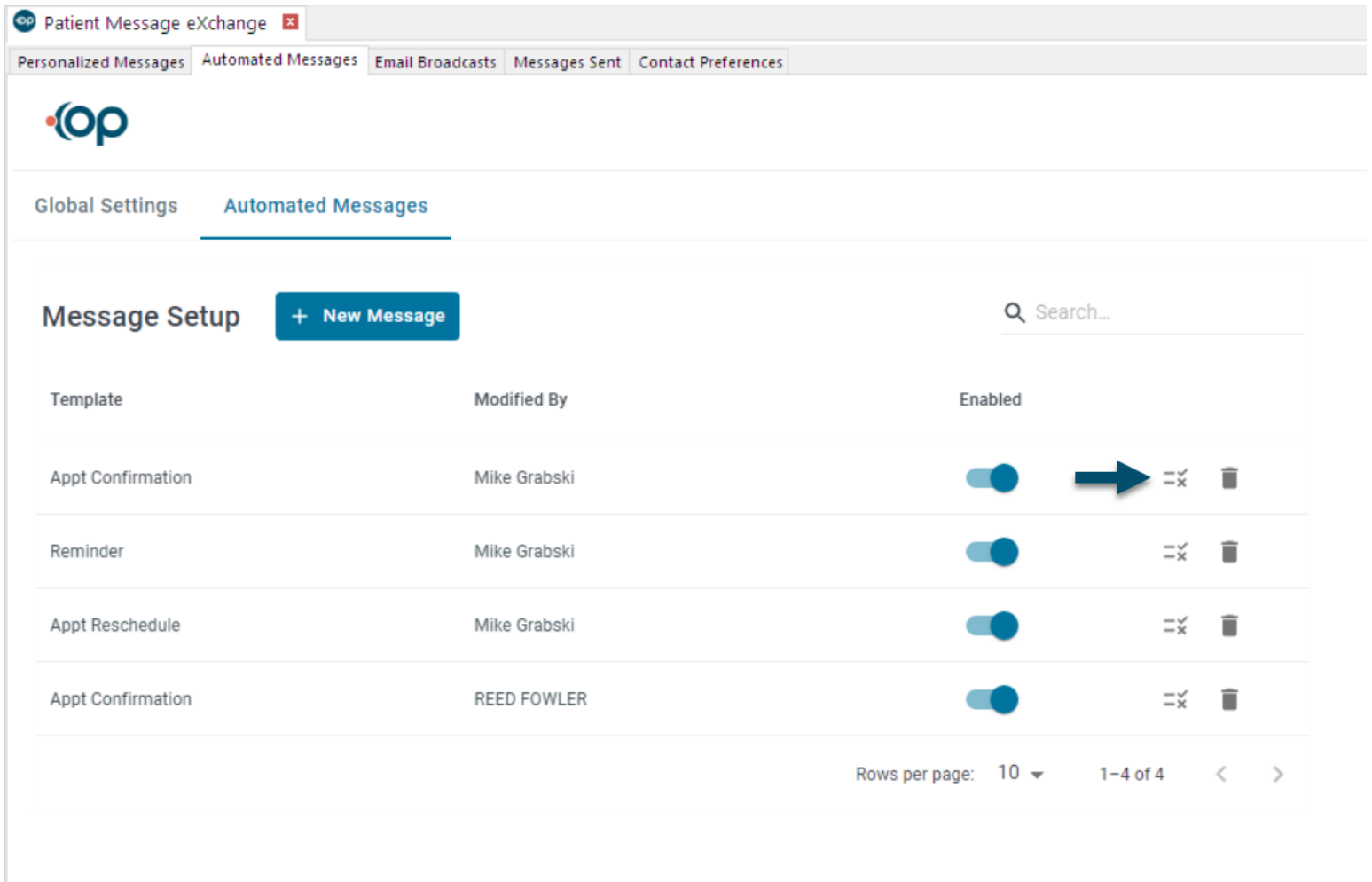
10. You will be taken back to the list of Automated Messages. The Automated Message you just created will be listed, and will be queued for delivery based on the criteria selected.

[Back to top](#)

Edit the Delivery Rules for a Configured Automated Message

You have the ability to edit Automated Messages. All existing Automated Messages are displayed in the Automated Message tab in a list view.

1. Navigate to the **Patient Message eXchange** window > **Automated Messages** tab.

2. Select the **Edit button** ≡✓ next to the desired Automated Message.
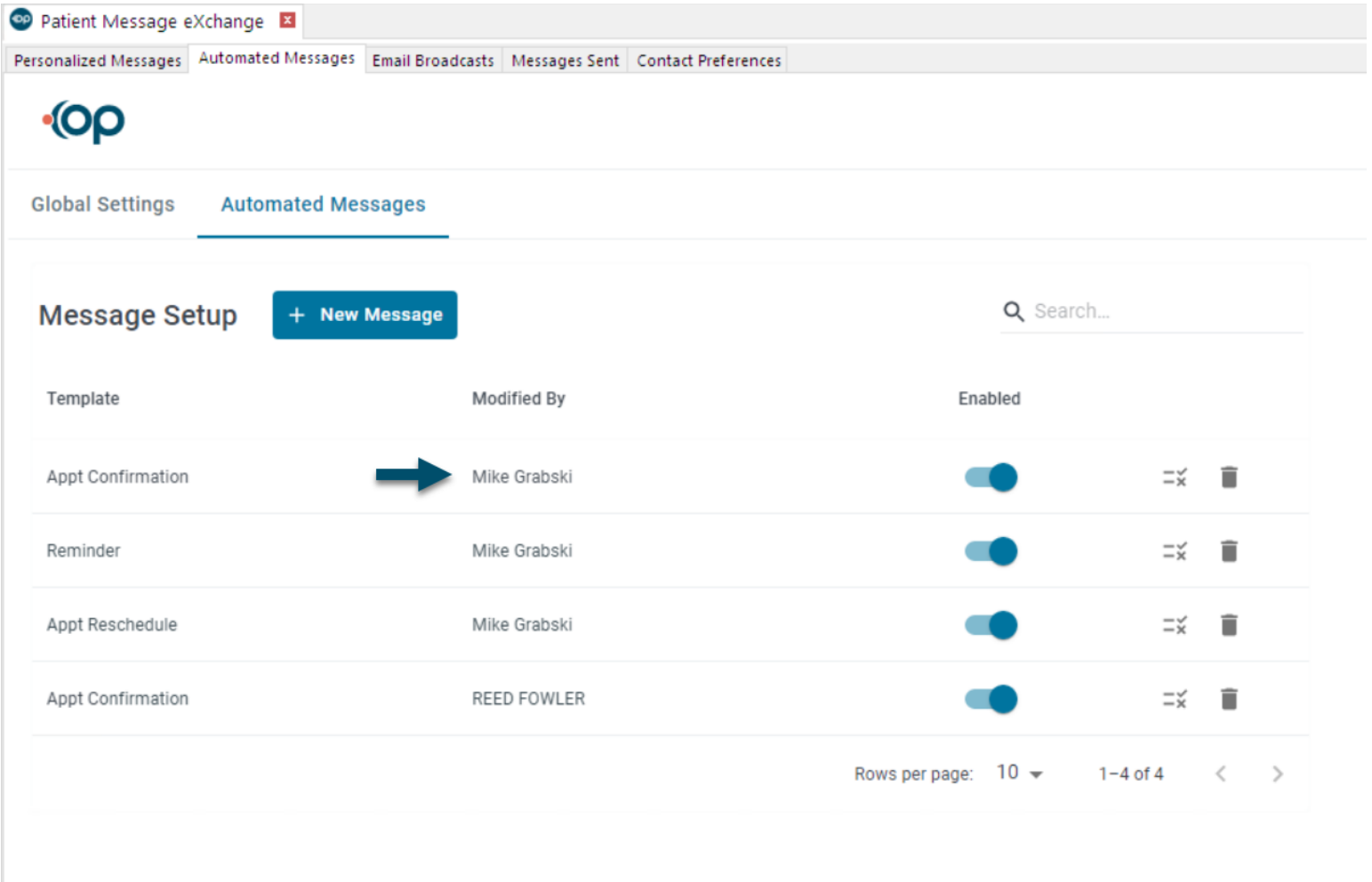
3. Make the desired changes on Page 1.
4. Click **Next**.
5. Make the desired changes on Page 2.

6. Click **Save**.
7. The updated Automated Message appears in the list view:

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[Back to top](#)

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Delete a Configured Automated Message

You have the ability to delete one or many Automated Messages. All existing Automated Messages are displayed in the Automated Message tab in a list view.

1. Navigate to the **Patient Message eXchange** window > **Automated Messages** tab.
2. To delete one Automated Message, click the **trash icon** next to the desired message.

3. Click **Delete**.

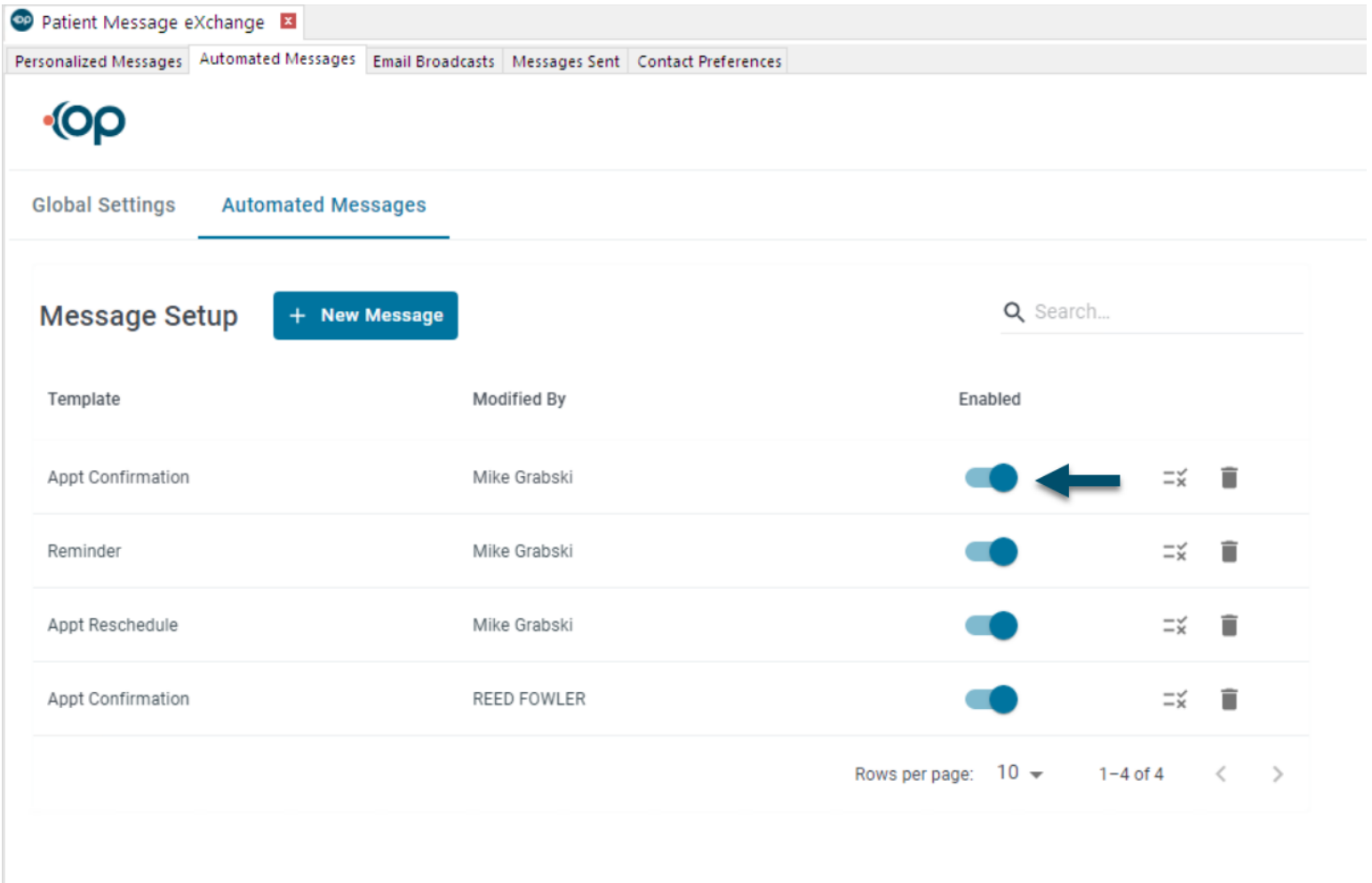4. The remaining existing Automated Message(s) appear in the list view.

[Back to top](#)

Disable/Enable a Configured Automated Message

You have the ability to disable and enable Automated Messages. All existing Automated Messages are displayed in the Automated Message tab in a list view. Users can delete one or many Automated Messages.

Disable a Configured Automated Message

1. Navigate to the **Patient Message eXchange** window > **Automated Messages** tab.

2. Click the **toggle icon** next to the desired message to disable it.

3. Click **Disable**.

4. The desired message is now disabled. The Automated Message associated with the Message Template will no longer be queued for delivery.

Enable a Configured Automated Message

1. Navigate to the **Patient Message eXchange** window > **Automated Messages** tab.

2. Click the **toggle icon** next to the desired message to enable it.

Page 12

3. Click **Enable**.

4. The desired message(s) are now enabled. The Automated Message(s) associated to the Message Template will now be queued for delivery

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[Back to top](#)

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