

PMX+ Automated Messages





Agenda

- 1. Overview
- 2. How do they work?
- 3. Increase Delivery Rates
- 4. Spanish Templates
- 5. Permissions
- 6. Getting started
- 7. Bulk Delivery Preferences
- 8. Delivery Reporting

Automated Messages



What is an Automated Message?

- A recurring patient message
- Scheduled for automatic delivery based on a set of user and system defined criteria
- Delivered in a standard message template via your contacts preferred language (English or Spanish)

How will they help my practice?

- → Reduce No shows
- → Reduce Manual touch points via text, email and phone
- → Reduce Manual updates to the schedule
- → Increase Number of Patients contacted
- → Increase Appointment Responses captured

How do they work?



OP sends message to Parent

Once Automated Messages are enabled, Appt Confirmations will be automatically delivered to any family contact that has a "Reminder" contact preference set

| Recalls: 10 | Home Phone | ~ |
|-------------|--------------|---|
| General: | Home Phone | ~ |
| Portal: | | ~ |
| Reminders: | Text to Cell | ~ |

| Family Contacts | | <u>A</u> dd | <u>R</u> emove | Inactivate | | | |
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| | 1 | KIRA GRANGER | Mother | r | Joint | | |

Step 1

Parent responds

Parents will receive the message via their preferred contact method (text, email or phone) with the option to confirm or cancel the appointment



Step 2

OP updates your schedule

OP will automatically capture and process the parents response by updating the schedule and Billing Status

| 📁 Chart: | HERMI | ONE G | RANGER (| 9351) | 🧳 Schee | dule 🗵 | | | | |
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Step 3

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Want to increase your Delivery Rate?



OP Patient Message Templates Text Regulatory conformant 3rd party carrier approved Automatically formats message to text, email or phone based on the family contact's "Reminder" preference Automatically formats message to Spanish or English based on the family contact's "Language" preference

4:30 ul 🕆 🗖 Automated Message: Text Message Friday 6:35 PM LUNA has an appt on Saturday, May 6 4:00 PM at Alpha Peds, Inc.. Text Y to confirm, N to cancel or STOP to opt out. 0.

| hone | |
|---|---|
| 10:29 | 🗢 🗊 |
| Greeting | Edit |
| Voicemail | |
| Automated Messages phone May 8, 2023 at 9:48 AM | Û Ū |
| 0:00 | -0:12 |
| | S 📵 |
| May 9 at 9 AM with pets Inc. please call the pra 800-218-9916 if you need 1 Was this transcription useful or not | ent on Tuesday, the ctice at to reschedule" useful? |
| Automated Messages | Friday 00:12 |
| Automated Messages | Friday 00:11 |
| Automated Messages | Friday 00:11 |
| Automated Messages | Friday 00:12 |
| | |

Recents Contacts Keypad Voicemail

Email



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Yes, we said Spanish Templates



Nearly **42 million** People speak Spanish!

- Language preference pulled from family contacts
- Translated by Spanish Speaking OP Team Members
- All templates available for delivery in text, email and voice

Text



Phone 10:29 Voicemail Automated Messages Û (i) phone May 8, 2023 at 9:48 AM 0:00 -0:12 Î Transcription has an appointment on Tuesday, May 9 at 9 AM with _____ the pets Inc. please call the practice at 800-218-9916 if you need to reschedule ..." Was this transcription useful or not useful? Automated Messages Friday (i) Automated Messages Friday (1) Friday (1) Automated Messages Automated Messages Friday (i)

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Voicemail

Keypad

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Contacts

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Recents

Email 10:30 🗢 🔳 ◄ Search \square ₽ ... noreply May 5 5 to KWHITWORTH ~ Hello HARRY is scheduled for an appointment on Friday, May 5 at 3:00 PM with REED FOWLER at Alpha Peds, Inc., 27383 Creekside, Horsham, PA, 19034. To cancel the appointment click HERE https://applications-dev.op.he althcare/pmx/confirm?id=645410 a15390d45733782d05&contact=17713. Need to reschedule? Call the office at (800) 218-9916. We look forward to seeing you soon! If you would prefer not to receive further messages from this sender please follow the link and confirm your request. https://applicationsdev.op.healthcare/pmx/unsubscribe?id=64 5551165390d45733782d3a&email=

KWHITWORTH%400FFICEPRACTICUM.COM

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Permissions



System Administrator

 Automatically granted the appropriate permissions to view, create, edit, delete and enable/disable Automated Messages

All other staff

 System Admin roles must designate the "Messaging_View_Automated_Messages" permission set

| CLINICAL PF | RACTICE MANAGEMENT | r BILLING | ADMIN TO | OLS P | PERSONALIZE HI | ELP | | | | | | | |
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Getting Started | Tab 1



Global Settings

- **Delivery Time:** What time of day would you like to reach your contacts?
- **Delivery Days:** What days of the week would you like to reach your contacts?
- **Appointment Cancellation:** Do you want OP to automatically intercept parent responses and cancel the appointment on the schedule for you? OR would you like OP to send you a notification of a cancellation and your staff manually cancels it?
- **Appointment Cancellation Deadline:** 24 hour max for parent to send in cancellation
 - **Track Appointment Cancellation** (Receive a message when an appt is cancelled)
- **Combine Appointment Confirmation and Reminders for Siblings:** If siblings have appointments scheduled on the same day, do you want parents to receive one consolidated message?

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Getting Started | Tab 2



Message Templates

Appt Type: Here you can send Confirmations for Reminders to ALL appt types, or deselect specific appointment types to exclude them from messages Page

- Message Template: You will have 4 Standard Message Templates in English and in Spanish via text, email and phone for:
 - Appointment Confirmations 0
 - Appointment Confirmations with a fee Ο
 - Reminders 0
 - Reminder to Re-schedule Ο
- **Practice/Location and/or Provider**: Appointments that are affiliated to the practice/location and or provider that are selected
- **Message Duration:** When will these messages begin sending and what is the intended end date, if any?

| Page 1 | | | | | | |
|--|---------------------------------|---------------------------|----------------------|-------------------|-------------|------|
| New Message | | | | | | |
| | | Search | Q | | | |
| Appointment Type(s) 个 | | | * | | | |
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| Just an regular checkup | | | | | | |
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| Message Body: | > 🔽 Dermatology Spe | cialists | | | | - |
| Sme Email Voice | | | | | | |
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| | 04/21/2023 | End | Date | | | |
| | If no end date is entered, t | the message will continue | indefinitely. | | | |
| | | | | | Back Cancel | Save |

Bulk Delivery Preferences



How do I make sure my contact method and language preferences are defined?

- For any parents that do not have a contact or language preference set, you can set bulk preferences for both in the "Contact Preferences" tab
- This feature is really valuable for our new Standard Templates as your messages can now be delivered in Spanish

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| M ALERTS | 问 Chart: HERIV | IIONE GRANG | ER (99982 | 🛛 🎯 P. | atient M | lessage eXch | ange 🗵 | |
| Include confidential | Personalized Mes | sages Automa | ted Messages | Email Bro | adcasts | Messages Se | nt Contact Preferences | |
| MESSAGES C Phone (74) Portal (636) | This tab will help needs. It only aff As such, it is safe any risk of chang | you establish t fects contacts w e to run this pro ging or removin | baseline contac ho are listed in cess periodical g established v | t preferen the #1 po ly to catch alues. | ces for p osition, a up new | atients who ha nd it only oper patients who | ave not yet expressed their rates on fields that are curre never express their preferer | specific ently blank. nces, without |
| External (1) | Recalls: | (skip) | | ~ | For opti | ons with multi | ple modes, such as "Email o | r text |
| 🔡 Unread Fax (1758 | General notices: | (skip) | | ~ | first met | hod for which | a contact value exists. Meth | nods are listed |
| Need Act | Patient portal: | (skip) | | ~ | from lea in the m | st to most exp ost cost-effect | ensive, so this ordering will ive message handling. If on | always result ly one or two |
| 🧐 Failed Fax (106/1 | Reminders: | (skip) | | ~ | of the an This may | vailable modes | are selected, the others wi | Il be ignored. |
| 🔊 Instant (1) | Language: | (skip) | | ~ | | | | |
| CLINICAL | | | | | | Set Defau | It Contact Preferences | |

Delivery Reporting



Track the Delivery of your messages

- The "Delivery Stage" column in our Sent Messages tab will update in real time as your messages progress from creation to delivery
- If your family contacts' Reminder preference is "Text to cell" but there is not a valid cell phone recorded, we will display an error message indicating there is no valid cell phone
- You can aslo track cancellation responses via the Message Center > Unread Portal tab

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|---|-----------------|---------------------|---|---|--|--|---------------|------------------|
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| I Read | Patient Name | Subject | Date/Time of Message | Spoke With | Sender | Recipient(s) | |
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www.officepracticum.com

Now you can...

Set and forget Appointment Confirmations + Reminders with increased Delivery Rates

Send important patient outreach to your family contacts who speak Spanish

Go for a nice walk on your break because you saved so much time enabling Automated Messages







We want to hear from you!

Feedback form



(800) 218-9916 Ext 1415

amonaghan@officepracticum.com