



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

Preferred Contact Methods

Recalls:  Home Phone ▼

General: Home Phone ▼

Portal: ▼

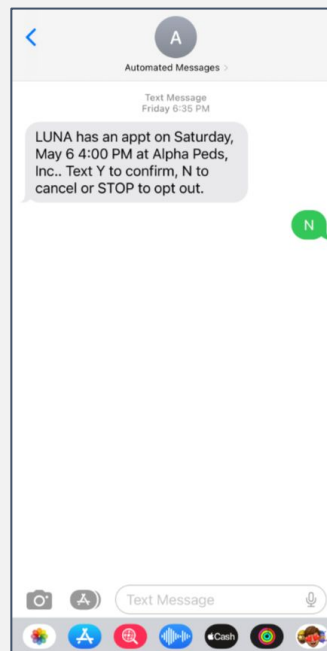
Reminders: Text to Cell ▼

Family Contacts Add Remove Inactivate

#	△	Name	Role/Reason	Authority	Res?
1		KIRA GRANGER	Mother	Joint	<input checked="" type="checkbox"/>

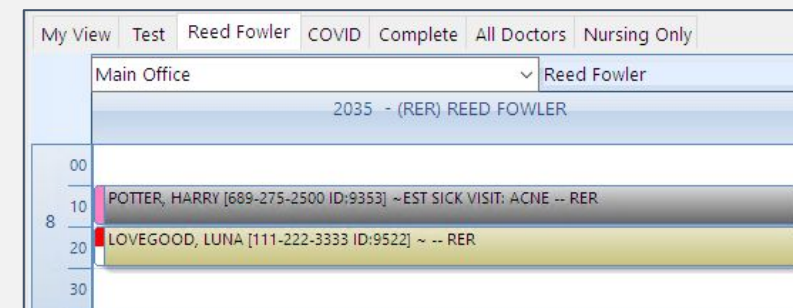
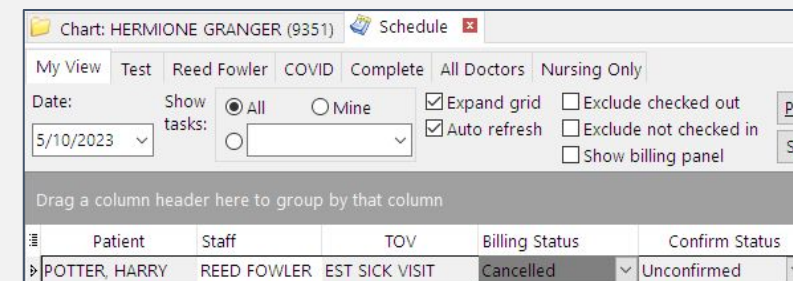
Parent responds

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



OP updates your schedule

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



Step 1

Step 2

Step 3

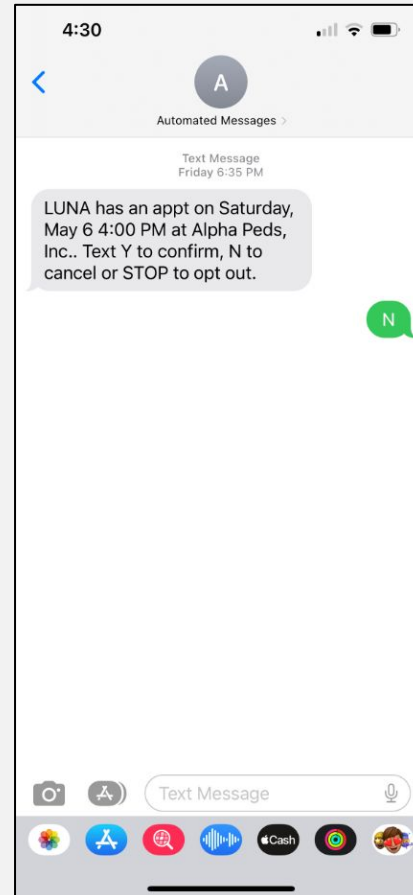
Want to increase your Delivery Rate?



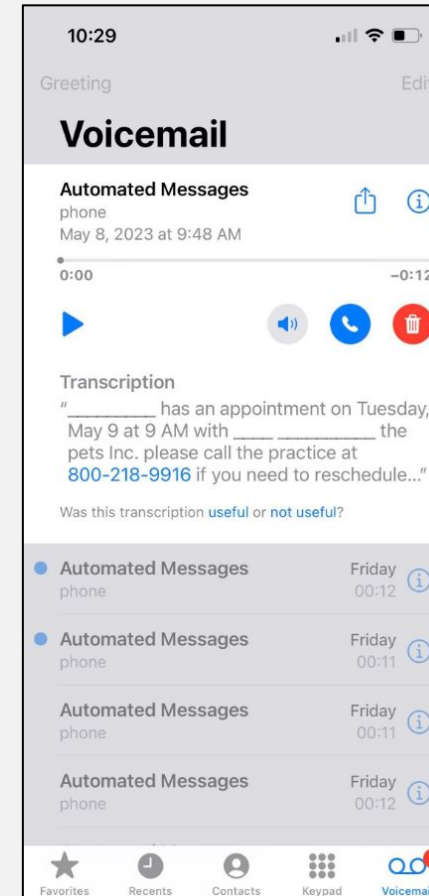
OP Patient Message Templates

- ✓ 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

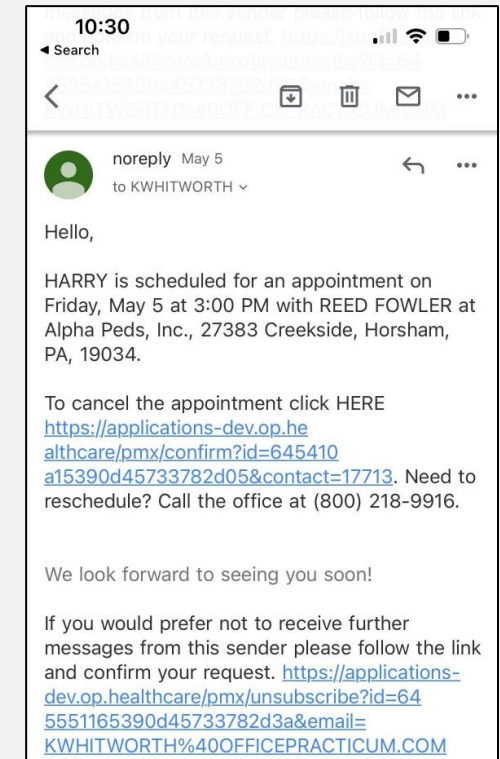
Text



Phone



Email



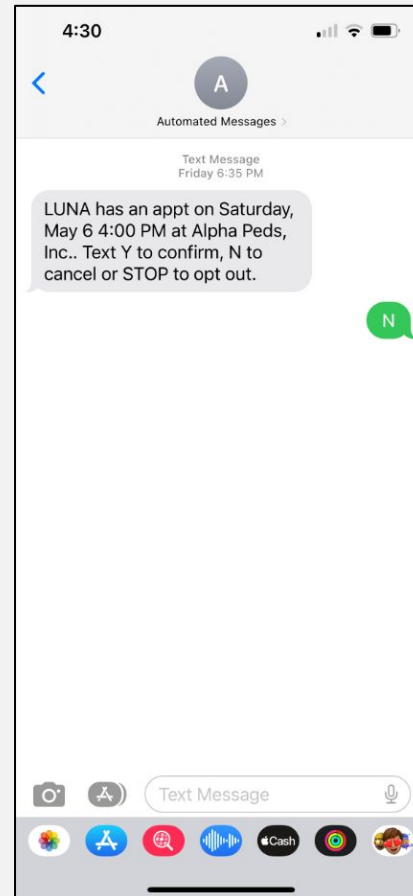
Yes, we said Spanish Templates



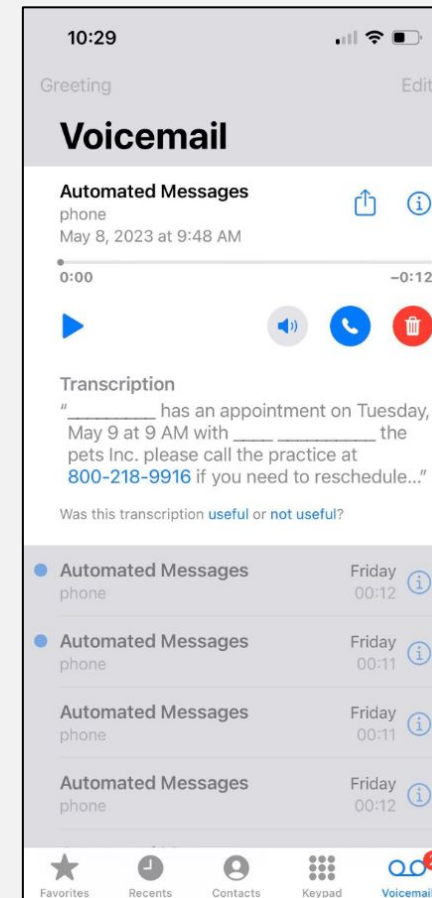
Nearly **42 million** People speak Spanish!

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

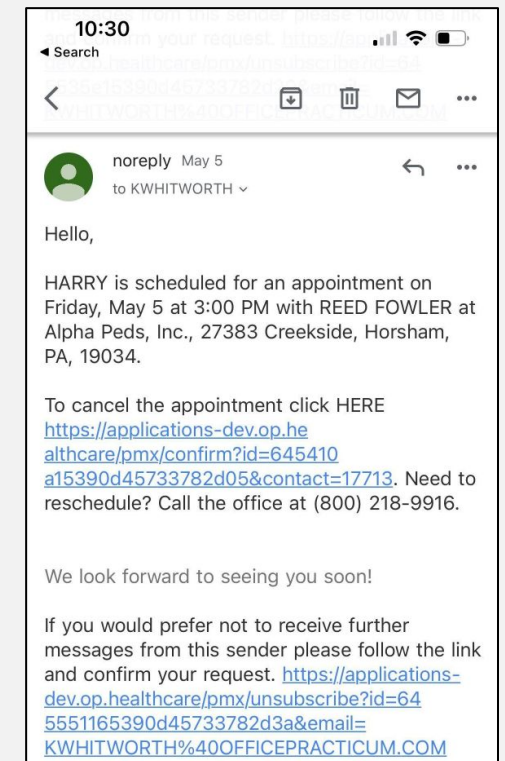
Text



Phone



Email



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

The screenshot displays the Office Practicum system interface. The top navigation bar includes tabs for CLINICAL, PRACTICE MANAGEMENT, BILLING, ADMIN, TOOLS, PERSONALIZE, and HELP. The ADMIN tab is active, and the Security Administration window is open. The Security Administration window shows a list of staff members in a table:

Staff Name	initial:	ID
Demo Doctor, MD	DD9	107
PERRY COX	TP	5555
William J. Mayfield, MD	WM	329
TEST DOCTOR	RKB	360
Arpita Patel	AP	365
Albert Davis	AD	369
TEST PWD	TPW	370
Ashley Schmuker	AS	371
KIM TEST KIM TEST	KMM	372
NEW NEW	NEW	373
Kasey Test	TK	374
Declan Owens	DO	376
new doctor	MMD	377
SAT DOCTOR	MMM	378
Rena Test	RT	379
Maggie Test	MT	380
Regina Falange	RF	381
Test key	KT	383
Test Nikey	TN	384
Omer Bokhari	OB	385
DANNIE TEST	DT	386
Wayne Best	OTP	1500

The Security Settings dialog box is open, showing the Users list and the Permissions list. The Permissions list includes the following items:

- MessageCtr_ArchiveBtn
- MessageCtr_ViewModifyForm
- Messaging_Allow_View_All_Messages
- Messaging_Send
- Messaging_Send_eFax
- Messaging_View
- Messaging_View_Automated_Messages
- Messaging_View_Non_Patient_Messages
- Modify_Codes
- Modify_Payers
- Modify_Providers
- Modify_Users
- OP_Rpts_AR
- OP_Rpts_BasicUser
- OP_Rpts_Billing_Protected
- OP_Rpts_Medical_Protected
- PhraseConstruction_modify
- PM_AppTypes_Modify
- PM_AppTypes_View
- PM_Contacts_Modify
- PM_Contacts_View
- PM_Departments_Modify
- PM_Departments_View
- PM_Locations_Modify
- PM_Locations_View

The "Messaging_View_Automated_Messages" permission is highlighted with a blue arrow.

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?

A screenshot of the 'Patient Message eXchange' web application interface. The page title is 'Patient Message eXchange' with a close button. There are five tabs: 'Personalized Messages', 'Automated Messages', 'Email Broadcasts', 'Messages Sent', and 'Contact Preferences'. The 'Automated Messages' tab is active. The 'Global Settings' sub-tab is selected. The form contains the following sections:

- Delivery Time:** Two time pickers. 'From' is set to '08:00 am' and 'To' is set to '08:00 pm'.
- Delivery Days:** A row of checkboxes for days of the week: All (checked), Sun (unchecked), Mon (checked), Tue (checked), Wed (checked), Thu (checked), Fri (checked), Sat (checked).
- Appointment Cancellation (select only one):** Two radio buttons: 'By Request' (unchecked) and 'Automatically cancel' (checked).
- Track Appointment Cancellation (Receive a message when an appointment is canceled):** A toggle switch that is turned on.
- Department (Select the recipient of this message):** A dropdown menu with 'Front Desk' selected.
- Appointment Cancellation Deadline:** A text input field containing '1' followed by the text 'Hours'. Above the input is the text 'Patients must cancel appointments within the timeframe below to end messages:'.
- Combine Appointment Confirmation and Reminders for siblings:** A toggle switch that is turned on.

At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

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
- **Message Template:** You will have 4 Standard Message Templates in English and in Spanish via text, email and phone for:
 - Appointment Confirmations
 - Appointment Confirmations with a fee
 - Reminders
 - Reminder to Re-schedule
- **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?

The screenshot shows the 'New Message' configuration interface. It includes a search bar at the top right. Below it is a list of appointment types with checkboxes: 'Appointment Type(s)' (checked), 'Appointment with long name', 'Appointment without solution', 'Just an regular checkup', 'Just to see doctor from the stree Just to see doctor from the street', and 'Long Appointment'. A 'Message Template' dropdown is set to 'Appointment Confirmation Only'. The 'Message Preview' section shows a preview of the message body: '<Patient_First_Name> has an appt <Appointment_Day_Date> @ <App Please confirm or cancel HERE <confirmation link>'. Below the preview are tabs for 'Sms', 'Email', and 'Voice'. A language selection dropdown is set to 'English'. The 'Include provider(s) the message should come from (optional):' section has a search bar and a list of providers with checkboxes: 'Provider : 293 selected' (checked), '360F 96493' (checked), '70D20C4738FB4DA9CAD4' (checked), 'A02C37E41C3C216C' (checked), 'APPT Resource Testing' (checked), and 'AR TEST' (checked). The 'Message Duration' section has a 'Start Date' field set to '04/21/2023' and an 'End Date' field. A note states: 'If no end date is entered, the message will continue indefinitely.' At the bottom right are 'Back', 'Cancel', and 'Save' buttons.

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

A screenshot of the Office Practicum software interface. The top navigation bar includes tabs for CLINICAL, PRACTICE MANAGEMENT, BILLING, ADMIN, TOOLS, PERSONALIZE, and HELP. Below this, there are various icons for functions like Schedule, Patient Chart, Tasks, Send Message, Address Book, Document Mgmt, Contact Manager, and Demographic Analysis/Recall. The main content area shows a patient chart for 'HERMIONE GRANGER (99982...)'. The 'Contact Preferences' tab is selected, displaying a form with dropdown menus for 'Recalls', 'General notices', 'Patient portal', 'Reminders', and 'Language', all currently set to '(skip)'. A 'Set Default Contact Preferences' button is visible at the bottom right. A text box explains that this tab helps establish baseline preferences for patients who haven't expressed their preferences yet.

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 also track cancellation responses via the Message Center > Unread Portal tab

Patient Message eXchange

Personalized Messages Automated Messages Email Broadcasts Messages Sent Contact Preferences

Report scope: All Latest 1 months 4/7/2020 to 4/7/2023 Refresh Delete 'Queued'

expand grid Undelivered Print Grid Export

Pat ID	Sent Date/Time	Delivered Date/Time	Pat First Name	Pat Last Name	Contact Name	Delivery Stage	Error Message	Message Type
Contact Mode: CELL_PHONE								
201			CHRISTOPHER	1921D8	84ccd 1921d8	0 -Queued for delivery		Automated Message
7419			BOBBY	TABLES	Mimi Tables	0 -Queued for delivery		
201			CHRISTOPHER	1921D8	84ccd 1921d8	0 -Queued for delivery		
7419			BOBBY	TABLES	Mimi Tables	0 -Queued for delivery		
7526			JESSE	PINKMAN	Walter White	0 -Queued for delivery		
99983064			DAVID	MALFOY	Lucas Malfoy	0 -Queued for delivery		

Chart: HERMIONE GRANGER (9351) Message Center

New Message Comment Reply Reply All Forward include prior text Print Msg Print List

Scope: Me Everyone Dates: Today Week Month Year All Sender: Confidential: Include EFR Search:

Unread Phone (44) Unread Portal (70) Unread External (10) Need Action Read Sent Messages Unread Fax (141) Failed Fax (54) Read Fax Sent Fax

Read	Patient Name	Subject	Date/Time of Message	Spoke With	Sender	Recipient(s)
<input type="checkbox"/>	LOVEGOOD, LUNA	Appointment has been cancelled	04/27/23 02:58 pm		Web Portal User	40: Demo Doctor, MD: Jessica Sidorick; Megan Mor
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

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