

# Patient Message eXchange

Last Modified on 05/09/2024 10:45 am EDT

Version 21.2



This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

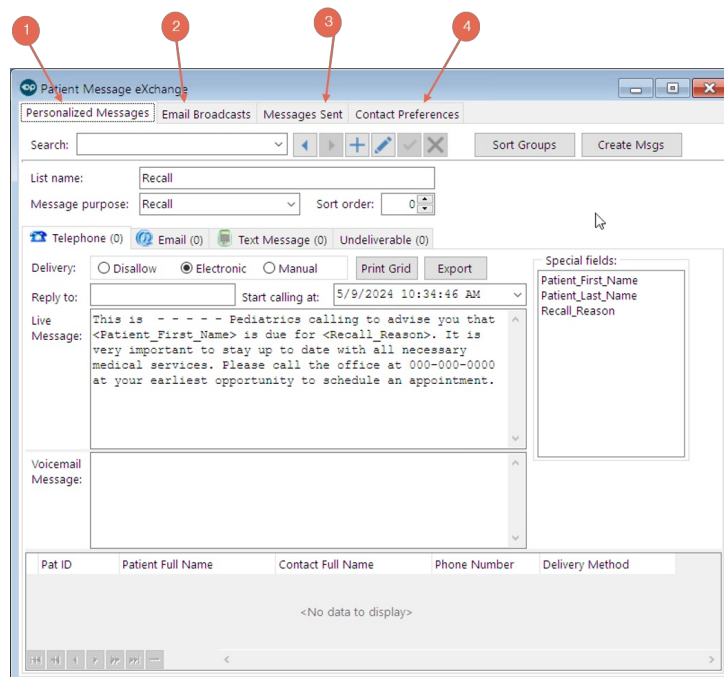
## About the Patient Message eXchange

**Path: Practice Management tab > Patient Message eXchange button**

The Patient Message eXchange is a feature that allows you to contact groups of patients, with customized bulk messages, through a variety of communication channels. Use of our Patient Messaging eXchange requires a flat monthly fee for unlimited messages.



**Note:** Keep in mind that messages will only be sent to those contacts who have a preferred method of contact listed.



The screenshot shows the 'Patient Message eXchange' window. Callout 1 points to the 'Personalized Messages' tab. Callout 2 points to the 'Search' field. Callout 3 points to the 'List name' field. Callout 4 points to the 'Message purpose' dropdown. The window includes fields for 'List name' (set to 'Recall'), 'Message purpose' (set to 'Recall'), and 'Sort order' (set to '0'). It also has buttons for 'Sort Groups' and 'Create Msgs'. Below these are delivery options: 'Telephone (0)', 'Email (0)', 'Text Message (0)', and 'Undeliverable (0)'. The 'Delivery' section has radio buttons for 'Disallow', 'Electronic' (selected), and 'Manual', along with 'Print Grid' and 'Export' buttons. The 'Reply to' field is empty, and the 'Start calling at' field is set to '5/9/2024 10:34:46 AM'. The 'Live Message' field contains a template: 'This is - - - - Pediatrics calling to advise you that <Patient\_First\_Name> is due for <Recall\_Reason>. It is very important to stay up to date with all necessary medical services. Please call the office at 000-000-0000 at your earliest opportunity to schedule an appointment.' The 'Voicemail Message' field is empty. On the right, a 'Special fields' list includes 'Patient\_First\_Name', 'Patient\_Last\_Name', and 'Recall\_Reason'. At the bottom, a table header shows columns: 'Pat ID', 'Patient Full Name', 'Contact Full Name', 'Phone Number', and 'Delivery Method'. The table body is empty, displaying '<No data to display>'. Navigation buttons are at the bottom left.

## Patient Message eXchange Map

Number	Section	Description
1	Personalized Messages	The Personalized Messages tab creates messages with patient-specific information. These messages are sent to patients using the Patient Message eXchange.

2	Email Broadcast tab	The Email Broadcast tab delivers the same email (not patient-specific) to a list of unique email addresses using a message template. New Messages or previously used messages can be used in the email broadcast. Individual delivery receipts for an email broadcast are received as are bounces and non-deliveries so you can update/correct your records. An example of an Email Broadcast is to announce a Flu Clinic date and time.
3	Messages Sent	The Messages Sent tab displays the message sent report for a specified time period. Sent messages are grouped by the Contact method (email, text, phone, work email, work phone). This report can be printed and exported.
4	Contact Preferences tab	The Contact Preferences tab helps you establish the default contact preferences for patients who have not yet expressed contact preferences for specific needs.

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## About the Patient Message eXchange

**Path: Practice Management tab > Patient Message eXchange button**

The Patient Message eXchange is a feature that allows you to contact groups of patients, with customized bulk messages, through a variety of communication channels. Use of our Patient Messaging eXchange requires credits to send and receive messages. Your message credits balance appears in the Personalized Messages, Email Broadcasts, and Messages Sent tabs.

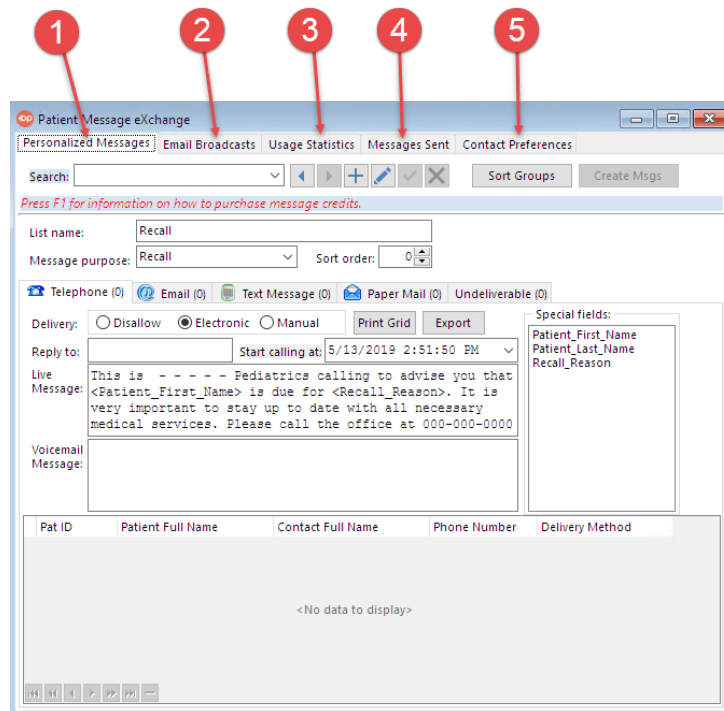
Once messages are created, you will be informed of the credit usage for each message type:

- **Email message** = 1 credit
- **Text message** = 3 credits
- **Phone message** = 5 credits

See the [Patient Message Exchange Credit Plan](#) for messaging credit plan information.



**Note:** Keep in mind that messages will only be sent to those contacts who have a preferred method of contact listed.



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3	Usage Statistics	The Usage Statistics tab lists the credits purchased and the credits used for the Patient Message eXchange. You can check the status of message credit purchases and buy credits in this tab.
4	Messages Sent	The Messages Sent tab displays the message sent report for a specified time period. Sent messages are grouped by the Contact method (email, text, phone, work email, work phone). This report can be printed and exported.
5	Contact Preferences tab	The Contact Preferences tab helps you establish the default contact preferences for patients who have not yet expressed contact preferences for specific needs.