

Patient Message eXchange

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Version 14.19



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 credits to send and receive messages. Your message credits balance appears in the Personalized Messages, Email Broadcasts, and Messages Sent tabs.

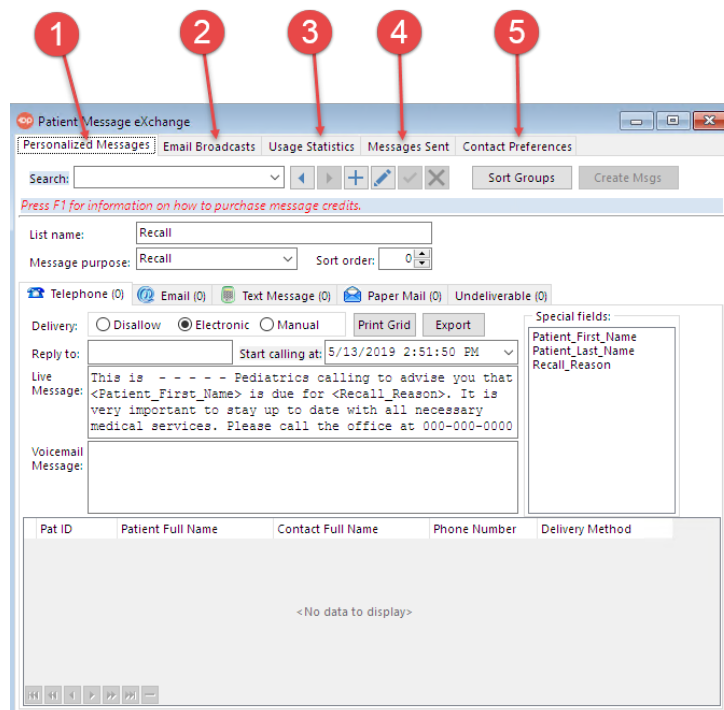
Once messages are created, you will be informed of the credit usage for each message type:

- **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.



The screenshot shows the 'Patient Message eXchange' window. Red circles with numbers 1 through 5 point to the following elements:

- 1: The window title bar.
- 2: The 'Personalized Messages' tab.
- 3: The 'Search' dropdown menu.
- 4: The 'List name' dropdown menu.
- 5: The 'Message purpose' dropdown menu.

The window interface includes the following components:

- Tabs:** Personalized Messages, Email Broadcasts, Usage Statistics, Messages Sent, Contact Preferences.
- Search:** A dropdown menu with a search icon.
- Buttons:** Sort Groups, Create Msgs.
- Instructions:** Press F1 for information on how to purchase message credits.
- Form Fields:**
 - List name: Recall
 - Message purpose: Recall
 - Sort order: 0
- Delivery Options:** Telephone (0), Email (0), Text Message (0), Paper Mail (0), Undeliverable (0).
- Delivery Method:** Radio buttons for Disallow, Electronic (selected), Manual.
- Buttons:** Print Grid, Export.
- Reply to:** Start calling at: 5/13/2019 2:51:50 PM.
- Live Message:** 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.
- Voicemail Message:** (Empty text area)
- Special fields:** Patient_First_Name, Patient_Last_Name, Recall_Reason.
- Table:**

Pat ID	Patient Full Name	Contact Full Name	Phone Number	Delivery Method
<No data to display>				

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	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.

Version 14.10

About the Patient Message eXchange

Path: Smart Toolbar > Schedule button > Tracking tab > Confirm button > Visible or All buttons.

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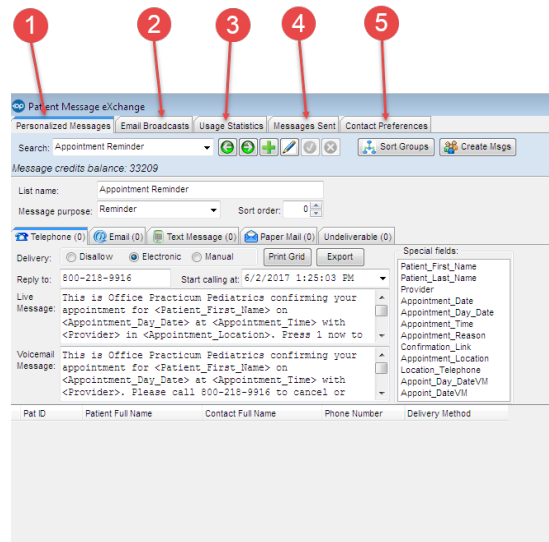
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1	Personalized Messages	The Personalized Messages tab creates messages with patient specific information. These messages are sent to patients using the patient message exchange.
2	Email Broadcast tab	In contrast to the Personalized Message feature in the Personalized Messages tab where messages are sent out with patient specific information, 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. You will not receive individual delivery receipts for an email broadcast. You will receive bounces and non-deliveries so you can update/correct your records. An example of an Email Broadcast: Flu Clinic date and time announcement.
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. Send messages are grouped by Contact mode (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.