

Patient Message Exchange (PMX) to Confirm Appointments

Last Modified on 03/07/2023 12:26 pm EST

Version 20.2

Overview

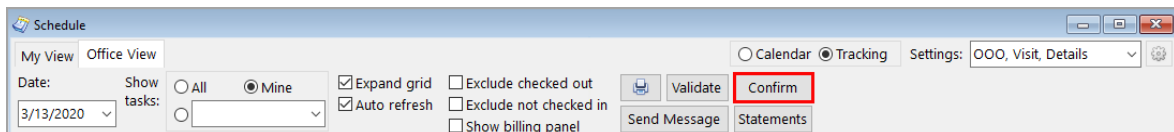
Once the Patient Message eXchange has been configured, Appointment Reminders can be sent. These messages can include a link for the parent to use to confirm the appointment. Keep in mind that messages will only be sent to those contacts who have a **preferred method of contact** listed.



Tip: It is strongly recommended to include the patient name, appointment date, appointment time, appointment location in the message, as well as the confirmation link in the message.

Confirm Appointments from Tracking Using PMX

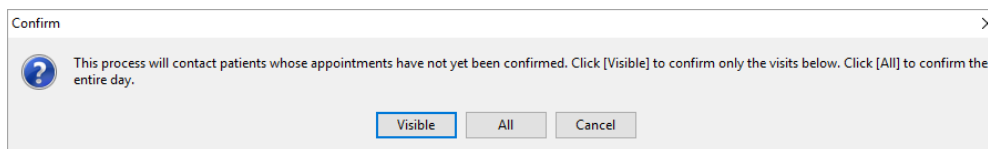
1. Navigate to the Tracking window: **Clinical, Practice Management, or Billing tab > Schedule button > Tracking radio button.**
2. Select the date for appointments you want to confirm.
3. Click the **Confirm** button.



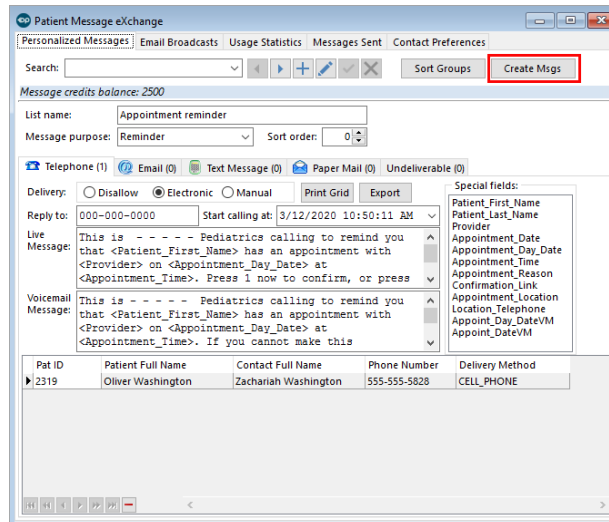
Warning:

- The following message is displayed if there is a missing Correspondent **record** preventing the confirmation link from being added: **"Error: PMX Confirmation Correspondent Record Missing"**.
- The following message is displayed if there is a missing Correspondent **field**: **"Error: PMX Confirm Correspondent field (field name) missing"**.

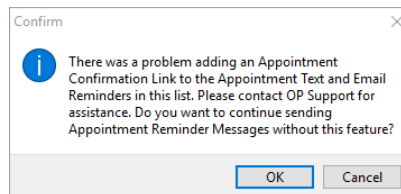
4. Select one of the following options in the confirmation window:



- **Visible:** Will list all patients on that the particular calendar view. The Patient Message eXchange window is displayed.
 - **All:** Will list all patients with appointments regardless of calendar view. The Patient Message eXchange window is displayed.
 - **Cancel:** Closes the confirmation window, and does not create a patient list or confirm appointments.
5. Click the **Create Msgs** button. Once messages are created you will be told how many credits you are using.
 - **Email message** = 1 credit
 - **Text message** = 3 credits
 - **Phone message** = 5 credits



Warning: The following message is displayed if there is a problem with Correspondent record necessary for Appointment Confirmations.

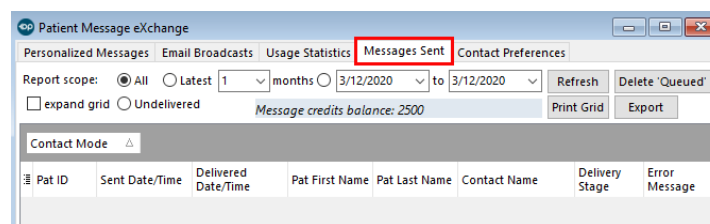


To continue sending the message(s) without the confirmation link, click **OK**. To abort the operation so that you can contact Support, click **Cancel**.

6. Click **OK**. The messages are sent.

Review PMX Messages Sent

1. Navigate to the Patient Message eXchange window: **Practice Management tab > Patient Message eXchange**
2. Click the **Messages Sent** tab.



3. Set the criteria for view Messages Sent using the Report scope settings located at the top of the window.
4. Click the **Refresh** button.
5. (If needed) Add additional columns, and/or sort the grid.

Examples:

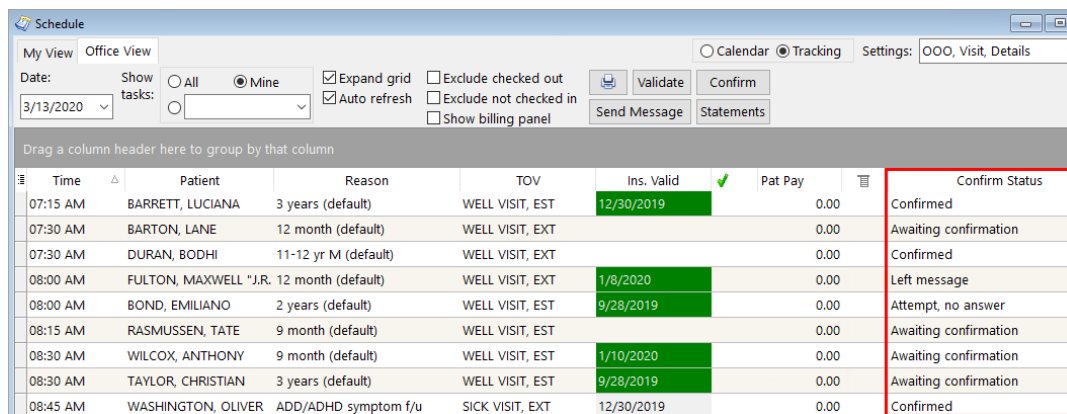


- To view the exact message sent with the patient's name and appointment time, include the **Message Data** and/or **Message Data VM** columns.
- To view the Delivery Stage of a message, include the **Delivery Stage** column and refer to the following stages:
 - 0: created but never delivered to third-party
 - 1: third-party accepted, no delivery report
 - 2: delivery report from third-party
 - 3: patient responded to message
 - 4: manual (not intended for electronic delivery)
 - 5: failure

Please note: It is possible that a delivered message skips stages if confirmation happens quickly. A call-out is made every 10 minutes to our third-party vendor for a report status on any messages still in stage 1.

Review Confirm Status in Tracking

As appointments are confirmed, the Confirmation Status column in the Tracking window is updated.



Time	Patient	Reason	TOV	Ins. Valid	Pat Pay	Confirm Status
07:15 AM	BARRETT, LUCIANA	3 years (default)	WELL VISIT, EST	12/30/2019	0.00	Confirmed
07:30 AM	BARTON, LANE	12 month (default)	WELL VISIT, EXT		0.00	Awaiting confirmation
07:30 AM	DURAN, BODHI	11-12 yr M (default)	WELL VISIT, EXT		0.00	Confirmed
08:00 AM	FULTON, MAXWELL "J.R.	12 month (default)	WELL VISIT, EXT	1/8/2020	0.00	Left message
08:00 AM	BOND, EMILIANO	2 years (default)	WELL VISIT, EST	9/28/2019	0.00	Attempt, no answer
08:15 AM	RASMUSSEN, TATE	9 month (default)	WELL VISIT, EST		0.00	Awaiting confirmation
08:30 AM	WILCOX, ANTHONY	9 month (default)	WELL VISIT, EST	1/10/2020	0.00	Awaiting confirmation
08:30 AM	TAYLOR, CHRISTIAN	3 years (default)	WELL VISIT, EST	9/28/2019	0.00	Awaiting confirmation
08:45 AM	WASHINGTON, OLIVER	ADD/ADHD symptom f/u	SICK VISIT, EXT	12/30/2019	0.00	Confirmed

Personalized Messaging Tips

There are a couple of simple guidelines to follow to ensure your messages are not being marked as spam by your patients/parents. You can also make your messages personalized to ensure readability. Below are a couple of tips to help ensure the delivery of your patients important healthcare messages:

- Make sure your message content is clear and concise. Example of a clear text message:

<Patient_First_Name> has an appt <Appointment_Day_Date> @ <Appointment_Time>, <Practice name> <Appointment_Location>. Please confirm or cancel HERE <confirmation link>

- Do not include any forbidden URLs. Examples of forbidden URLs:

bit.ly	linki.la
9qr.de	lnkd.in
alturl.com	minm.xyz
app.link	ow.ly
http://bc.vc/bit.do	rb.gy
itly.com	rebrand.ly

http://itly.com/	s2r.co
bitly.ws	serveirc.com
budurl.com	http://shrtco.de/
clicky.me	http://t.ly/
cutt.ly	tiny.cc
is.gd	tinyurl.com
lc.chat	

Version 20.0

Overview

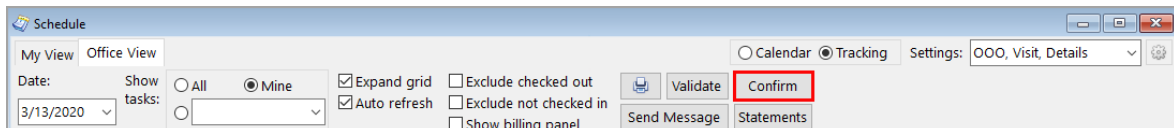
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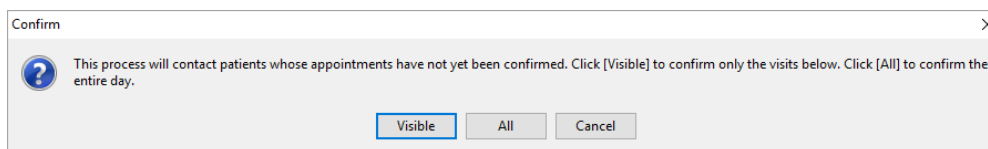
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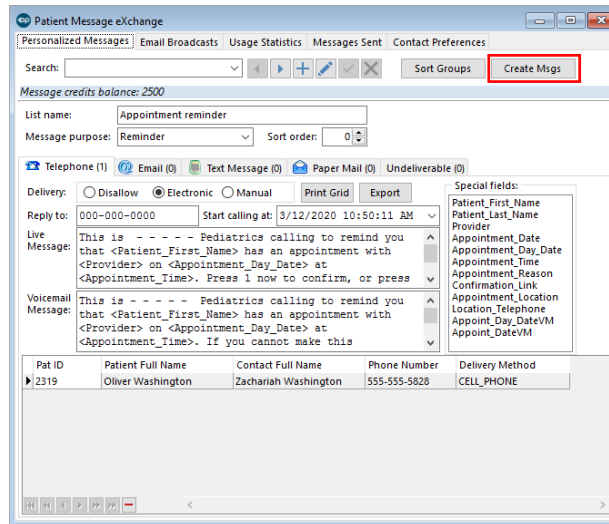
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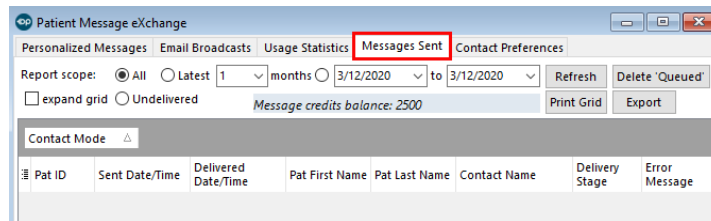
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Schedule

My View Office View

Date: 3/13/2020

Show tasks: All Mine

Expand grid Exclude checked out

Auto refresh Exclude not checked in

Show billing panel

Settings: OOO, Visit, Details

Drag a column header here to group by that column

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