

Send an Email Broadcast/Blast

Last Modified on 10/31/2024 12:04 pm EDT

Version 21.0

Overview

<u>Email broadcasts/blasts</u> are helpful when sending practice updates, alerts, or announcements. Think of it as an electronic version of a flyer that would be posted in the practice's waiting room! Prior to sending this mass message, first review the email template.

Ø

User Permission: To send an email broadcast, you must be assigned the permissions **Message_Distribution_Create** and **Message_Distribution_View**.

Create an Email Template

- 1. Navigate to the Patient Message eXchange window: Practice Management tab > Patient Message eXchange.
- 2. Click the Email Broadcasts tab.
- 3. Click the **Add** button + to create a new template.
- 4. Enter the following:
 - Start sending: This is when the email will be sent. When creating a new template, this field defaults to the current date/time.
 - Sender email: This field is ignored. Emails sent through the Patient Message eXchange will be sent by noreply@op.health.
 - Name: This field is ignored.
 - **Reply to**: Enter an appropriate contact email for your practice. This email address will automatically populate when a patient hits Reply to your message.
 - Subject: This is the subject line of the email.
 - Message: This is the body of the email.
- 5. Click the **Save** button .

Family Contact Requirements for Email Broadcasts

The following are the family contact requirements:

- · Home email
- The Res? checkbox is selected
- Preferred Contact Method > General

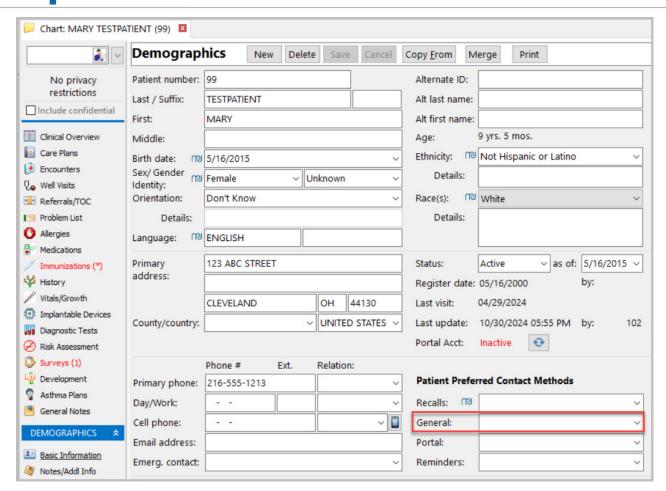
X

Note: The **Preferred Contact Method for General** must be completed either in **Basic Information** or **Family Contacts** (Recommended). The contact method can be set to **Home Email**, **Home Phone**, **Cell Phone**, or **Text to Cell** and the email broadcast will still be sent via email.

From Basic Information > Patient's Preferred Contact Methods Completing the General field in the Basic Information section will include any family contact with a home email listed and the Res? checkbox selected, in the recipient list for the email broadcast.



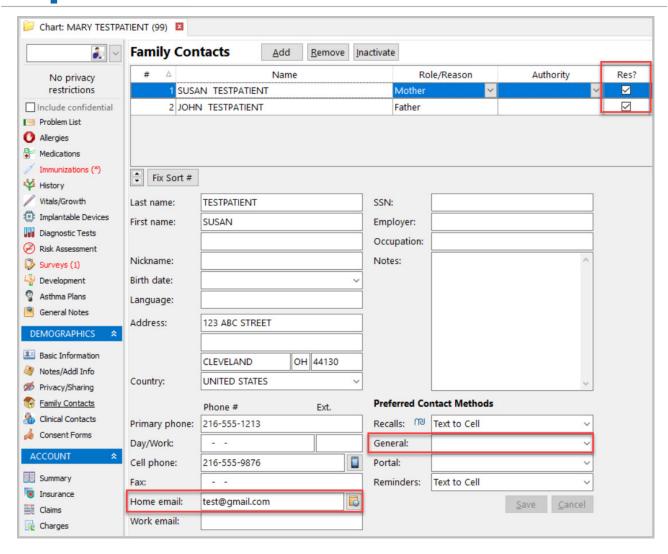




From Family Contacts > Preferred Contact Methods: Completing the General field for a family contact will only apply to that individual contact. Family contacts who have a home email listed and the Res? checkbox selected but do not have a Preferred Contact Method selected for General, will not be included in the recipient list for the email broadcast.







Define the Recipients of the Email

- 1. Navigate to the Demographic Analysis/Recall report: Practice Management tab > Demographic Analysis/Recall.
- 2. In the Patient Demographics tab, define the search criteria for which patients should receive the email.
- 3. Click the Send Messages button. The Patient Message eXchange window is displayed.
- 4. Click the Email Broadcasts tab.
- 5. Use the Search drop-down to select the email template to be used.
- 6. Click the Recipient List button to generate the list of recipients based on the criteria previously entered.
- Note: If families have more than one patient with the same email address OP will only send one email.
- 7. Click the **Broadcast** button. A confirmation window is displayed notifying you of how many message credits will be used to send the emails.
- 8. Click OK.
- Note: Individual delivery receipts are not received when sending an email broadcast. However, you will receive bounces and non-deliveries so that you can update/correct your records.

