

# Send an Email Broadcast/Blast

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

Version 21.0



## Overview

Email broadcasts/blasts 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.



**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](mailto: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**



**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.

Chart: MARY TESTPATIENT (99)

No privacy restrictions
☐ Include confidential

Clinical Overview
Care Plans
Encounters
Well Visits
Referrals/TOC
Problem List
Allergies
Medications
Immunizations (\*)
History
Vitals/Growth
Implantable Devices
Diagnostic Tests
Risk Assessment
Surveys (1)
Development
Asthma Plans
General Notes
DEMOGRAPHICS
Basic Information
Notes/Addl Info

Demographics
New
Delete
Save
Cancel
Copy From
Merge
Print

Patient number: 99
Last / Suffix: TESTPATIENT
First: MARY
Middle:
Birth date: 5/16/2015
Sex/ Gender Identity: Female
Orientation: Don't Know
Details:
Language: ENGLISH

Alternate ID:
Alt last name:
Alt first name:
Age: 9 yrs. 5 mos.
Ethnicity: Not Hispanic or Latino
Details:
Race(s): White
Details:


Primary address: 123 ABC STREET
Status: Active as of: 5/16/2015
Register date: 05/16/2000 by:
Last visit: 04/29/2024
Last update: 10/30/2024 05:55 PM by: 102
County/country: CLEVELAND OH 44130 UNITED STATES
Portal Acct: Inactive

Phone #
Ext.
Relation:

Primary phone: 216-555-1213
Day/Work:
Cell phone:
Email address:
Emerg. contact:

Patient Preferred Contact Methods
Recalls:
General:
Portal:
Reminders:

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.



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### Family Contacts

Add Remove Inactivate

#	Name	Role/Reason	Authority	Res?
1	SUSAN TESTPATIENT	Mother		<input checked="" type="checkbox"/>
2	JOHN TESTPATIENT	Father		<input checked="" type="checkbox"/>

Fix Sort #

Last name: TESTPATIENT SSN:

First name: SUSAN Employer:

Nickname:  Occupation:

Birth date:  Notes:

Language:

Address: 123 ABC STREET

CLEVELAND OH 44130

Country: UNITED STATES

Phone # Ext. Preferred Contact Methods

Primary phone: 216-555-1213 Recalls: ☒ Text to Cell

Day/Work: - - General:

Cell phone: 216-555-9876 Portal:

Fax: - - Reminders: Text to Cell

Home email: test@gmail.com Save Cancel

Work email:

## 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.