Configuring the Patient Message eXchange

Last Modified on 11/08/2023 3:09 pm EST

Version 21.2

About

The sections below will walk you through how to set up different areas of OP for successful use of OP's Patient Message eXchange (PMX) to send Appointment Reminders, Recalls, and other on-demand messages to patients.

Assign User/Group Permissions

1. Make sure you are logged into OP as an Administrator.
2. Navigate to Security Administration: Admin tab > Security Administration button.
3. Assign the following permissions to **Users** or **Groups**:

   - **Message_Distribution_Create** – needed to create messages.
   - **Message_Distribution_View** – may view messages and set up templates.

4. Log out and back into OP to access the newly assigned area of the system.
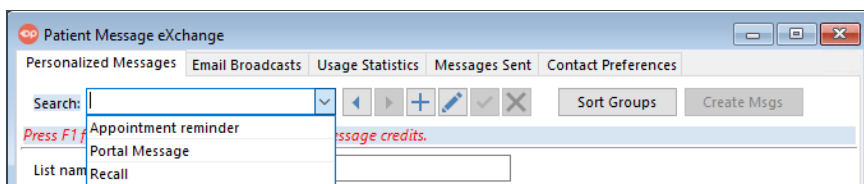
Confirm Correspondent Record Setup

1. Navigate to the Correspondents table: **Admin tab > Connections button.**
2. Locate the **BLI Messaging** Correspondent.
3. If the Login ID/Password fields are blank, contact **OP Support**.
4. If the Login URL is not listed, copy and paste the following: **https://weblaunch.blifax.com/POSTAPI/**.
5. *(If necessary)* Overwrite the value in the Interchange ID with the appropriate value. This overrides the default short-code value as assigned by the PMX service. **Do not overwrite this code unless you are sure you have the correct replacement Interchange ID**.
6. Click the **Save** button ✓ .

Add Provider Colloquial Names in the Staff Directory

1. Navigate to the Staff Directory: **Practice Management tab > Staff/Providers button.**
2. Select the **Provider** from the Staff Name list.
3. Click the **Edit** button.
4. In the Colloquial Name field, confirm or enter a **Colloquial Name** for the Provider. When entering "Doctor", do not abbreviate it as "Dr.". For example, enter Doctor Smith, not Dr. Smith.
5. Click the **Save** button.

Configure Message Templates

1. Navigate to the Patient Message eXchange: **Practice Management tab > Patient Message eXchange button**
2. Use the **Search** drop-down to select the template that should be used.

3. Select one of the four modes in which the message is to be sent and assign the Delivery Method:

- **Telephone**
- **Email**
- **Text Message**
- Paper Mail – the cost of US mail
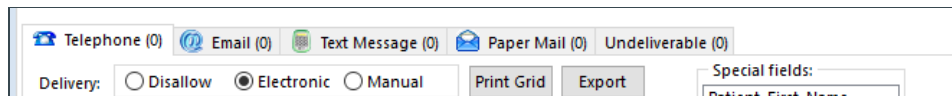
For each mode a delivery method can be assigned:

- **Disallow** – no messages sent in this mode

💡 **Tips for Practices who use InteliChart solutions (OP Notify and/or Patient Portal):**
- If your Practice has a Patient Portal and has the Portal Feature of Patient Configured Notifications enabled, make sure to set your Portal Message template to **Disallow** for all Delivery Methods so that parents/guardians and patients do not receive duplicate messages.
- If your Practice uses OP Notify for Appointment Reminder, make sure to set your Reminder template to **Disallow** for all Delivery Methods so that parents/guardians and patients do not receive duplicate messages.

- **Electronic** – messages for this mode are sent from the Patient Message eXchange
- **Manual** – messages for this mode can be sorted in the Patient Message eXchange but are sent privately

4. Click the **Export** button to export the list of patients who qualify for each mode.

Telephone Messages

- The **Reply To** field contains the number that shows on Caller ID so that the patient knows who is calling.
- There are 2 possible messages which can be received by the patient:
  - **Live Message** – read if a person picks up the phone
  - **Voicemail Message** – read if an automated machine picks up

Special Fields are provided for customization of the message. To add to the script for each type of message, enter the text and click the appropriate Special Field to include the placeholder in the script. To ensure the customer has a number to call back, it is always best to manually include the Reply To number in the Live and Voicemail messages as this does not have its own Special Field assignment.

> **Note**: Within the Live Message, there is a **Press 1** option for the caller to confirm. There is also a **Press 2** option for the caller to be connected to someone at the office. This option may be added or deleted from the script according to the office hours.

Email Messages

- The **Reply To** field is used so the patient has the correct email address to send a response. The email address must be a legitimate address; otherwise, it could possibly be stored as Spam depending on the patient's email provider.
- In the message field script, there is a Confirmation Link that connects patients to the Practice's portal. This link will allow the patient to confirm their appointment online without calling on the phone.

Text Messages

- Text messages may not exceed 116 characters, so it is important to keep them brief by using abbreviations that may apply. All text messages are received from BLI Messaging, so a Reply To field is not available.
- Each practice has 2 options to include in the script regarding Confirmations:
  - **Confirmation Link** – used when most patients have a portal account and a smartphone
  - **Call-Back Number** – used when most patients do not have a portal account or a smartphone
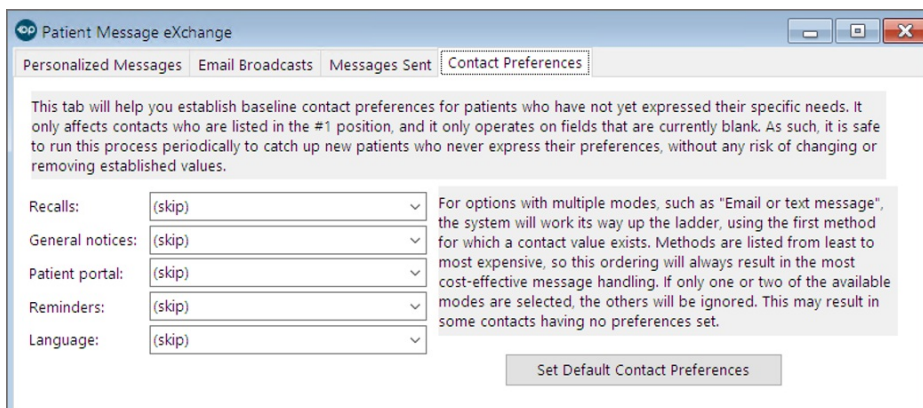
Paper Mail Messages

1. Mark the delivery as **Disallow** if your Practice will not be sending paper mail messages.

Assign Contact Preferences

1. From the Patient Message eXchange **(Practice Management tab > Patient Message eXchange button)**window, click the **Contact Preferences tab.** Preferences are set by the Practice to assign the contact preference only where no preference has been set.

2. Click the drop-down menu for each of the 4 Message Purposes and select from the list.
3. To apply the changes, click the **Set Default Contact Preferences** button.

> 📌 **Note**: Setting the default contact preference only affects the 1st contact within each chart. The contact's preference can be changed at any time from Family Contacts.

Set Contact Preferences for an Individual Patient's Contacts

1. Navigate to the Family Contacts section of the Patient Chart:**Clinical, Practice Management, or Billing tab > Patient Chart button > Family Contacts**.
2. Select the Primary Contact in the list (the contact with a Sort of 1).
3. Select the **Preferred Contact Method** for each field.
4. The best practice is to confirm or complete the contact information that you selected for the Preferred Contact Method, including the **Primary Phone** (home phone), **Cell Phone**, and **Home email**. This will ensure message can go out via PMX, which sends recall reminders.
5. *(Optional)* Repeat steps 2-4 for additional contacts.

📌 **Note**: Verify the below information to make sure the correct people are contacted.
- **Primary Phone** (home phone)
- **Cell Phone**
- **Home email**
- The **Res?** checkbox is selected.

Version 21.1

About

The sections below will walk you through how to set up different areas of OP for successful use of OP's Patient Message eXchange (PMX) to send Appointment Reminders, Recalls, and other on-demand messages to patients.

If you are contracted to use **OP Notify** through InteliChart for Appointment Reminders, the below setup in PMX should **not** be completed for Reminder message templates. However, the setup for Recall messages is managed in PMX.

Assign User/Group Permissions

1. Make sure you are logged into OP as an Administrator.
2. Navigate to Security Administration: Admin tab > Security Administration button.
3. Assign the following permissions to **Users** or **Groups**:

- **Message_Distribution_Create** – needed to create messages.
- **Message_Distribution_View** – may view messages and set up templates.

4. Log out and back into OP to access the newly assigned area of the system.

Confirm Correspondent Record Setup

1. Navigate to the Correspondents table: **Admin tab > Connections button.**
2. Locate the **BLI Messaging** Correspondent.
3. If the Login ID/Password fields are blank, contact **OP Support**.
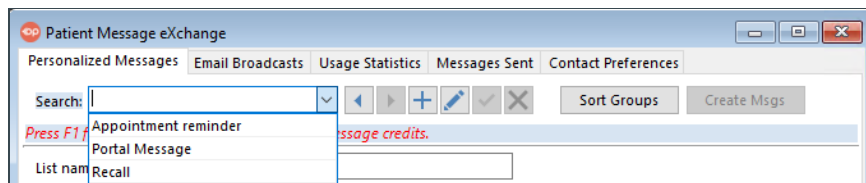4. If the Login URL is not listed, copy and paste the following: **https://weblaunch.blifax.com/POSTAPI/**.

5. *(If necessary)* Overwrite the value in the Interchange ID with the appropriate value. This overrides the default short-code value as assigned by the PMX service. **Do not overwrite this code unless you are sure you have the correct replacement Interchange ID**.

6. Click the **Save** button ✓ .

Add Provider Colloquial Names in the Staff Directory

1. Navigate to the Staff Directory: **Practice Management tab > Staff/Providers button.**
2. Select the **Provider** from the Staff Name list.
3. Click the **Edit** button.
4. In the Colloquial Name field, confirm or enter a **Colloquial Name** for the Provider. When entering "Doctor", do not abbreviate it as "Dr.". For example, enter Doctor Smith, not Dr. Smith.
5. Click the **Save** button.

Configure Message Templates

1. Navigate to the Patient Message eXchange: **Practice Management tab > Patient Message eXchange button**
2. Use the **Search** drop-down to select the template that should be used.

3. Select one of the four modes in which the message is to be sent and assign the Delivery Method:

- **Telephone** – 5 credits
- **Email** – 1 credit
- **Text Message** – 3 credit
- Paper Mail – the cost of US mail

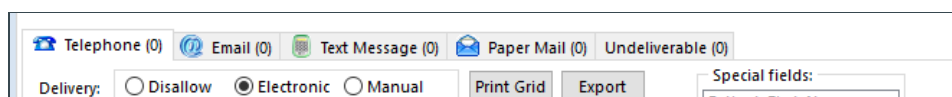For each mode a delivery method can be assigned:

- **Disallow** – no messages sent in this mode

💡 **Tips for Practices who use InteliChart solutions (OP Notify and/or Patient Portal):**
- If your Practice has a Patient Portal and has the Portal Feature of Patient Configured Notifications enabled, make sure to set your Portal Message template to **Disallow** for all Delivery Methods so that parents/guardians and patients do not receive duplicate messages.
- If your Practice uses OP Notify for Appointment Reminder, make sure to set your Reminder template to **Disallow** for all Delivery Methods so that parents/guardians and patients do not receive duplicate messages.

- **Electronic** – messages for this mode are sent from the Patient Message eXchange
- **Manual** – messages for this mode can be sorted in the Patient Message eXchange but are sent privately
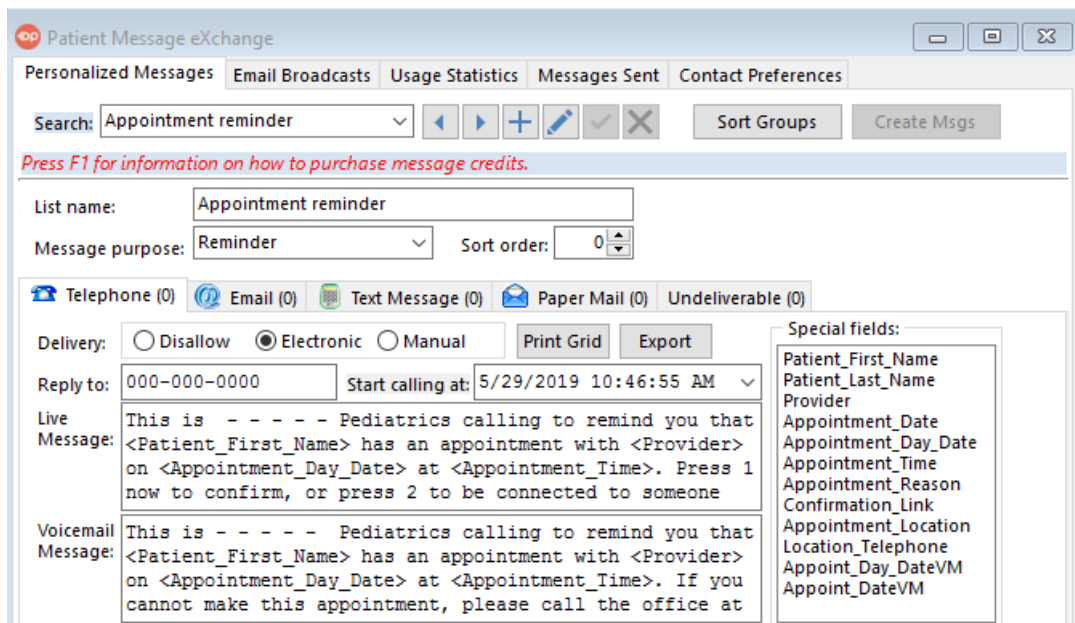

4. Click the **Export** button to export the list of patients who qualify for each mode.

Telephone Messages

- The **Reply To** field contains the number that shows on Caller ID so that the patient knows who is calling.
- There are 2 possible messages which can be received by the patient:
  - **Live Message** – read if a person picks up the phone
  - **Voicemail Message** – read if an automated machine picks up

Special Fields are provided for customization of the message. To add to the script for each type of message, enter the text and click the appropriate Special Field to include the placeholder in the script. To ensure the customer has a number to call back, it is always best to manually include the Reply To number in the Live and Voicemail messages as this does not have its own Special Field assignment.

> **Note**: Within the Live Message, there is a **Press 1** option for the caller to confirm. There is also a **Press 2** option for the caller to be connected to someone at the office. This option may be added or deleted from the script according to the office hours.

Email Messages

- The **Reply To** field is used so the patient has the correct email address to send a response. The email address must be a legitimate address; otherwise, it could possibly be stored as Spam depending on the patient's email provider.
- In the message field script, there is a Confirmation Link that connects patients to the Practice's portal. This link will allow the patient to confirm their appointment online without calling on the phone.

Text Messages

- Text messages may not exceed 116 characters, so it is important to keep them brief by using abbreviations that may

apply. All text messages are received from BLI Messaging, so a Reply To field is not available.

- Each practice has 2 options to include in the script regarding Confirmations:
  - **Confirmation Link** – used when most patients have a portal account and a smartphone
  - **Call-Back Number** – used when most patients do not have a portal account or a smartphone

Paper Mail Messages

1. Mark the delivery as **Disallow** if your Practice will not be sending paper mail messages.

Assign Contact Preferences

1. From the Patient Message eXchange **(Practice Management tab > Patient Message eXchange button)** window, click the **Contact Preferences tab.** Preferences are set by the Practice to assign the contact preference only where no preference has been set.

2. Click the drop-down menu for each of the 4 Message Purposes and select from the list.
3. To apply the changes, click the **Set Default Contact Preferences** button.

> 📌 **Note**: Setting the default contact preference only affects the 1st contact within each chart. The contact's preference can be changed at any time from Family Contacts.

Set Contact Preferences for an Individual Patient's Contacts

1. Navigate to the Family Contacts section of the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Family Contacts**.
2. Select the Primary Contact in the list (the contact with a Sort of 1) and select the **Preferred Contact Method** for each field.

3. *(Optional)* Repeat the above step for additional contacts.

Note: Verify the below information to make sure the correct people are contacted.

- Authority is set to either Joint or Exclusive.
- The Res? checkbox is selected.