



Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

OP Mobile: Messages

Last Modified on 08/18/2020 2:28 pm EDT

Version 20.5

The content in this article is relevant to the New OP Mobile.

Overview

You can send messages from OP Mobile about OP patients or send messages to other users within the practice that are unrelated to a patient. You can also view the message history. When you log in to OP Mobile, Messages are displayed by default if you have the appropriate permissions.



User Permission: You need to be assigned the following permissions view and/or send Messages:

- Messaging_Send
- Messaging_View (You need to have the Messaging_View permission to be able to use the Messaging_Send permission)

Viewing Sent Messages (History)

From the *Messages* screen, select a message. You can use the arrows to navigate to more messages, 10 messages will be displayed per screen.

Compose a Message

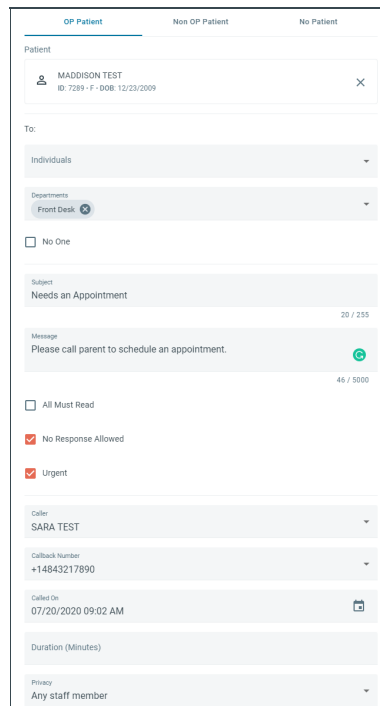


User Permission: You need to be assigned the Messaging_Send permission to see the Compose button and perform this functionality.

Send a Message about an OP Patient

1. From the *Messages* screen, click the **Compose** button. The *New Message* screen is displayed.
2. Perform a patient search to find the OP Patient. All patients that meet the search criteria are displayed. [Click here](#) for further information about searching for patients.
3. Select a patient that you are referring to in the Message (*Required*).
4. Select who you are sending the message to:
 - **Individuals:** Click the drop-down and select a user. If sending the message to more than one user, click the drop-down and select from the list. The users displayed in the drop-down list are only those that share the same location.
 - **Department:** Click the drop-down and select a Department. If sending the message to more than one department, click the drop-down and select from the list. Once a Department is selected and the Message is sent, the recipients are only those users that share the same location.
 - **No One:** Click the checkbox if documenting only. If selected, Individuals and Department are grayed out.
5. Enter a **Subject** for the Message.

6. Enter the **Message** body (*Required*).
7. Select any of the applicable checkboxes regarding the message:
 - **All Must Read:** All recipients of the message are required to read the message.
 - **No Response Allowed:** A response to the sender will not be permitted.
 - **Urgent:** The message will be flagged as urgent in OP Mobile Messages and will display as urgent in the Unread Phone tab in OP.
8. Click the drop-down arrow and select a **Caller** from the list. If the caller is not listed, type the caller name in the field. This is a free text field
9. The date and time the message is created will default in the **Called On** field. If a different date and time must be entered, click the calendar and select a *Called On* date/time.
10. Select a **Privacy** level from the drop-down list, the default is *Any Staff Member*.
11. Click the **Send** button ➤ .



Send a Non-OP Patient Message

The Non OP Patient message can be used for composing messages when covering for providers outside of the practice or when answering questions for a parent that has not registered their child with the practice.

1. From the *Messages* screen, click the **Compose** button. The *New Message* screen is displayed.
2. Click the **Non OP Patient** tab.
3. Enter the **First Name** and **Last Name** of the patient.
4. Enter the **Date of Birth** or click the **Calendar** and select a **Date of Birth**.
5. Select who you are sending the Message to (*Required*):
 - **Individuals:** Click the drop-down and select a user. If sending the message to more than one user, click the drop-down and select from the list. The users displayed in the drop-down list are only those that share the same location.
 - **Department:** Click the drop-down and select a Department. If sending the message to more than one department, click the drop-down and select from the list. Once a Department is selected and the Message is sent, the recipients are only those users that share the same location.
 - **No One:** Click the checkbox if documenting only. If selected, Individuals and Department are grayed out.
6. Enter a **Subject** for the Message.

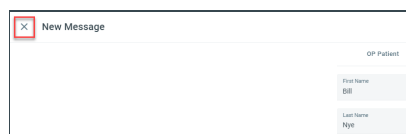
7. Enter the **Message** body (*Required*).
8. Select any of the applicable checkboxes regarding the Message:
 - **All Must Read:** All recipients of the message are required to read the message.
 - **No Response Allowed:** A response to the sender will not be permitted.
 - **Urgent:** The message will be flagged as urgent in OP Mobile Messages and will display as urgent in the Unread Phone tab in OP.
9. Click the drop-down arrow and select a **Caller** from the list. If the caller is not listed, type the caller name in the field. This is a free text field
10. Select a **Callback Number** from the drop-down list. The related Contact's Callback Numbers can be selected from the list. This field can also be used as a free text field.
11. The date and time the message is created will default in the **Called On** field. If a different date and time must be entered, click the calendar and select a *Called On* date/time.
12. Enter the length of the call in the **Duration (Minutes)** field.
13. Select a **Privacy** level from the drop-down list, the default is *Any Staff Member*.
14. Click the **Send** button.

Send a Message within your Practice (No Patient)

1. Select who you are sending the Message to (*Required*):
 - **Individuals:** Click the drop-down and select a user. If sending the message to more than one user, click the drop-down and select from the list. The users displayed in the drop-down list are only those that share the same location.
 - **Department:** Click the drop-down and select a Department. If sending the message to more than one department, click the drop-down and select from the list. Once a Department is selected and the Message is sent, the recipients are only those users that share the same location.
 - **No One:** Click the checkbox if documenting only. If selected, Individuals and Department are grayed out.
2. Enter a **Subject** for the Message.
3. Enter the **Message** body (*Required*).
4. Select any of the applicable checkboxes regarding the Message:
 - **All Must Read:** All recipients of the message are required to read the message.
 - **No Response Allowed:** A response to the sender will not be permitted.
 - **Urgent:** The message will be flagged as urgent in OP Mobile Messages and will display as urgent in the Unread Phone tab in OP.
5. (*Optional*) Enter a **Caller**, this is a free text field.
6. (*Optional*) Enter a **Callback Number**, this is a free text field.
7. (*Optional*) The date and time the message is created will default in the **Called On** field. If a different date and time must be entered, click the calendar and select a *Called On* date/time.
8. (*Optional*) Enter the length of the call in the **Duration (Minutes)** field.
9. Select a **Privacy** level from the drop-down list, the default is *Any Staff Member*.
10. Click the **Send** button.

Discarding a Message

1. Click the **X** in the top left corner of the screen to discard a Message.



2. If there is data in any of the fields for the message, a pop-up notification is displayed to confirm that you want to discard the Message.

Discard message?

This can't be undone and you will lose your draft.

[Cancel](#) [Discard](#)

3. Click the **Discard** button to discard the Message or click the **Cancel** button to continue writing your message.

[Click here to view all content for the new OP Mobile](#)