Automated Messages Setup and Permissions

Last Modified on 10/23/2023 4:31 pm EDT

This is a contracted feature. Contact solutions@officepracticum.com to learn about implementing this in your Practice.

About

Before you can begin creating Automated Messages, you will need to ensure you and your staff have the appropriate permissions. Once the Automated Messages feature is enabled for your practice, all System Administrators will automatically be granted access to view, create, edit, delete, disable and enable Automated Messages.

You will also need to do some initial setup and review of the Global Delivery Rules and the Template Delivery Rules.

Permissions

Once the PMX+ feature is enabled for your practice, verify that all System Administrators will automatically be granted access to view, create, edit, delete, disable and enable Automated Messages. You will need to manually add any additional permissions for users not in the System Admin user group.

User Permission Note: In order to use PMX+ Automated Messages, users must also have the basic PMX permissions. See the Configuring PMX article for more details.

Assign the following permissions to the **Users** or **Groups**:

- **Messaging_View_Automated_Messages**

Global Delivery Rules

Path: Admin > Patient Engagement

The first time you access Automated Messages, you will want to verify the defaults for your Global Settings for Automated Messaging. The Global Settings are message Delivery Rules that will apply to ALL of your Automated Messages.

Note: If your practice is transitioning from OP Notify, verify your Global Settings have been set to the appropriate default values you entered from OP Patient Notify "Settings".

1. Navigate to **Admin** > **Patient Engagement**. The **Global Settings** tab of Automated Messages will open.
2. Verify and update the settings. See the window map below for a detail description of each setting.
3. When finished, click **Save**.

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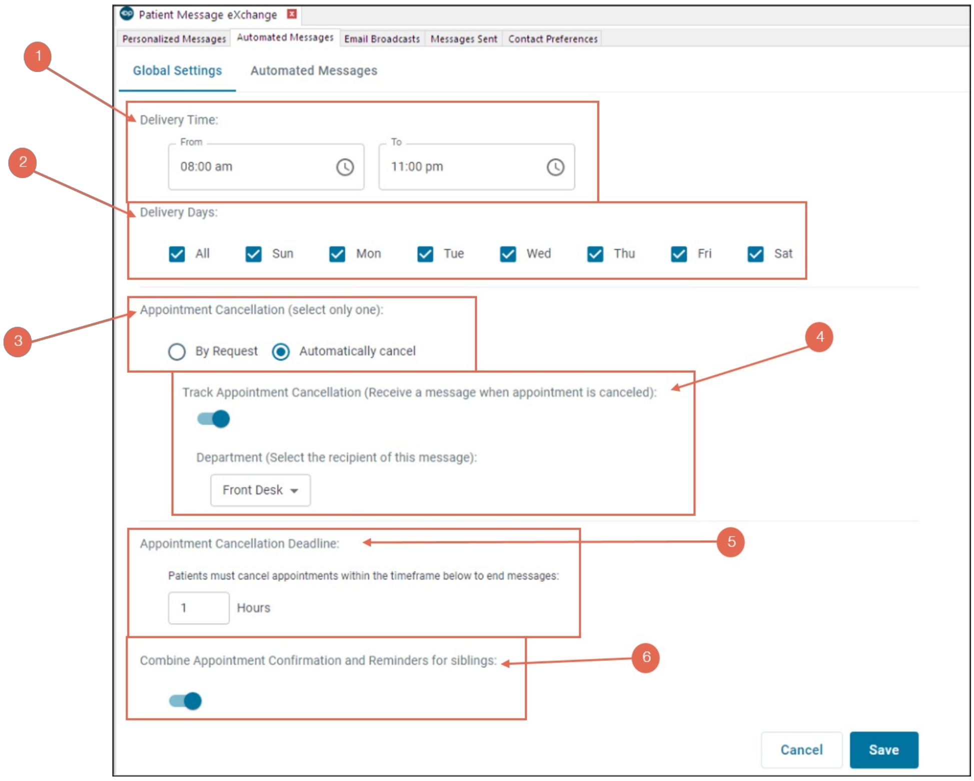


Number	Section	Description
1	**Delivery Time**	Time of Day you want your messages to be delivered. To change the times, type in the time of the desired delivery window in the From and To fields.
2	**Delivery Days**	Specific days that messages will be delivered on. To change the delivery days, click the checkboxes next to the days to select or deselect them as delivery days. Click the All checkbox to select All days.
3	**Appointment Cancellation**	This setting designates how appointment cancellations are handled. • **Automatically Canceled**: By selecting this radio button, the appointments will be automatically updated on the schedule. • **By Request**: By selecting this radio button, the patient must notify the practice directly. The practice staff must subsequently manually cancel the appointment for the Appointment to be removed from the schedule.
4	**Track Appointment Cancellations**	Toggle to select if you want to receive a message when an appointment is canceled. If the toggle is on, you will be able to select the Department that will receive the message.
5	**Appointment Cancellation Deadline**	This setting designates a deadline for when a patient must submit their Appointment Cancellation in order to stop further delivery of any automated messages for that particular Appointment. To change the deadline, type in the number of hours in the text field. You can select 1-24 hours before the appointment for the cancellation deadline. Setting it to 1 hour before the appointment would give the patient the most amount of flexibility for cancelation, and setting it to 24 hours would give the patient the least amount of flexibility.

6	**Combine Appointment Confirmation and Reminders for siblings**	For parents with siblings who have appointments on the same day, at the same time. Toggle on to allow a parent to confirm or cancel one or many Appointments from one link as opposed to multiple links for each child.

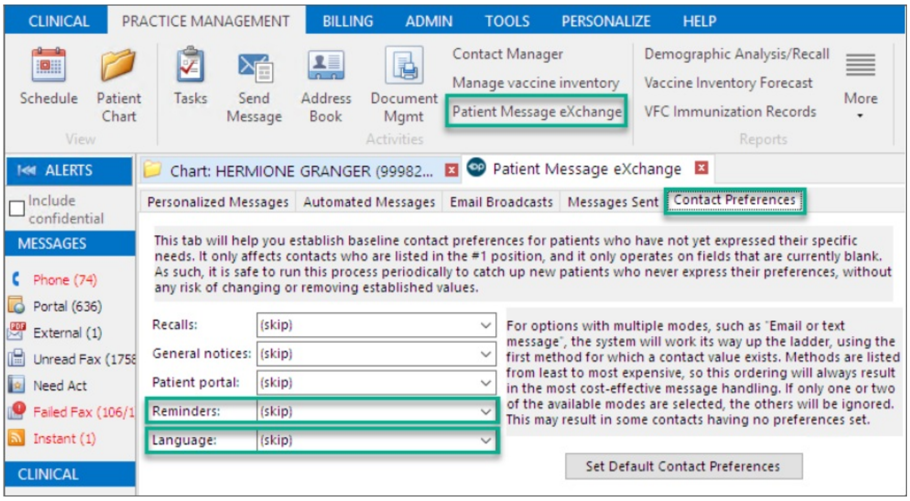
Assign Contact Preferences

Path: Practice Management > Patient Message eXchange > Contact Preferences tab

For any parent(s)/guardian(s) in your kiddos family contacts that do not have a contact type o**Language** preference set for **Reminders**, you can now set bulk preferences for both. These preferences will apply to the delivery of Automated Messages as well as Personalized Messages.

For more information, and instructions on how to assign bulk delivery preferences, please see the**Assign Contact Preferences** section of the Configuring the Patient Message eXchange article.

> **Note**: This only affects contacts who are listed in the #1 position, and assigns the contact preference only where no preference has been set (blank field).



Contact Requirements

Below are the Contact requirements for PMX+. Please note that the requirements for both tools are different.

- **Authority**: Set to "Blank/null", "Joint", or "Exclusive"
- **Preferred Contact Methods**: Completed (Email, Text, Call)
- **End Date**: The End Date on a Family Contact must be blank in order for messages to go out
- **Second Contact**: If a second contact was listed and they do not want to have a message:
    - Updated the **Authority**
    - Set the **Preferred Contact Method** to "No Contact"

You'll notice that **Resides** is not required for PMX+ but IS required for PMX. Since the contact requirements are different for both tools, it is recommended to still complete the setup of PMX for contacts and fill out the Resides with if you intend to send one-off messages.