

Reporting and Tracking Automated Messages

Last Modified on 07/26/2023 2:23 pm EDT

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

About

With the use of PMX+ Automated Messages, you will be able to run reports on certain statuses. You will also be able to track notifications when an appointment is canceled, and message details from within the patient's chart.

Reporting

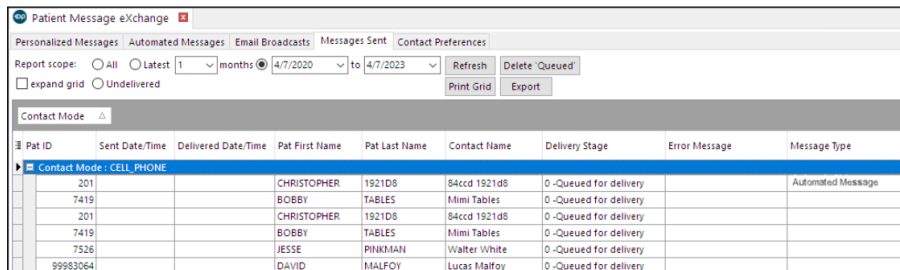
Reporting for Automated Messages includes both the Delivery and Appointment Cancellation Status.

User Permission Note

- To receive a message to your Direct Message inbox when an appointment is canceled, you will need to have **Direct Messaging** enabled, as well as the Global Preference **Track Appt Cancellation**.
- To review Appointment Cancellation Status Reports you will need to have **Database Viewer** enabled.

Delivery Status

To view the report on Delivery Status, navigate to **Practice Management > Patient Message eXchange > Messages Sent**.

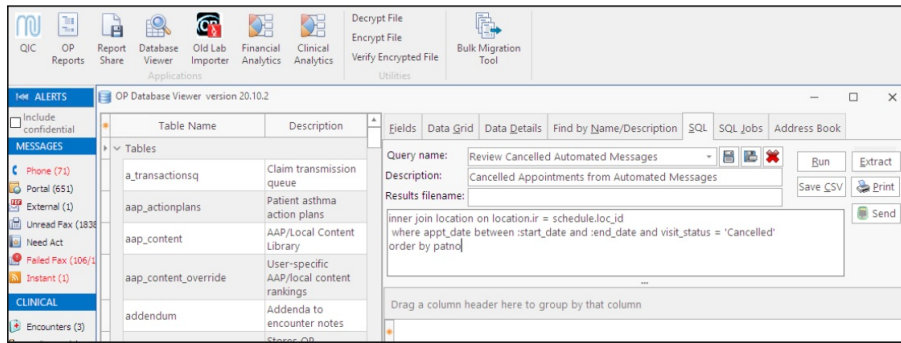


Pat ID	Sent Date/Time	Delivered Date/Time	Pat First Name	Pat Last Name	Contact Name	Delivery Stage	Error Message	Message Type
201			CHRISTOPHER	1921D8	84ccd1921d8	0 -Queued for delivery		Automated Message
7419			BOBBY	TABLES	Mimi Tables	0 -Queued for delivery		
201			CHRISTOPHER	1921D8	84ccd1921d8	0 -Queued for delivery		
7419			BOBBY	TABLES	Mimi Tables	0 -Queued for delivery		
7526			JESSE	PINKMAN	Walter White	0 -Queued for delivery		
99983064			DAVID	MALFOY	Lucas Malfoy	0 -Queued for delivery		

You can filter the **Message Type** to show only "Automated Message", and view the delivery details associated with that message. See the **Review PMX Messages Sent** section of the **Patient Message Exchange (PMX) to Confirm Appointments** for more details.

Appointment Cancellation Status (SQL)

To view the report on Appointment Cancellation Status, navigate to **Tools > Database Viewer > SQL tab**.



Run the following query to view all cancelled appointments between two dates.



Note: This query shows all cancelled appointments in the date range. They are not necessarily all appointments that were cancelled via the PMX+ modality.

To highlight and copy the code below to your clipboard, simply click the **Copy** button.

Copy

```
select patno, fname, lname, appt_date, code1, loc_name from schedule
inner join register on register.patno = schedule.patno
inner join location on location.id = schedule.loc_id
where appt_date between :Start_date and :End_date and visit_status = 'Cancelled'
order by patno
```

Tracking

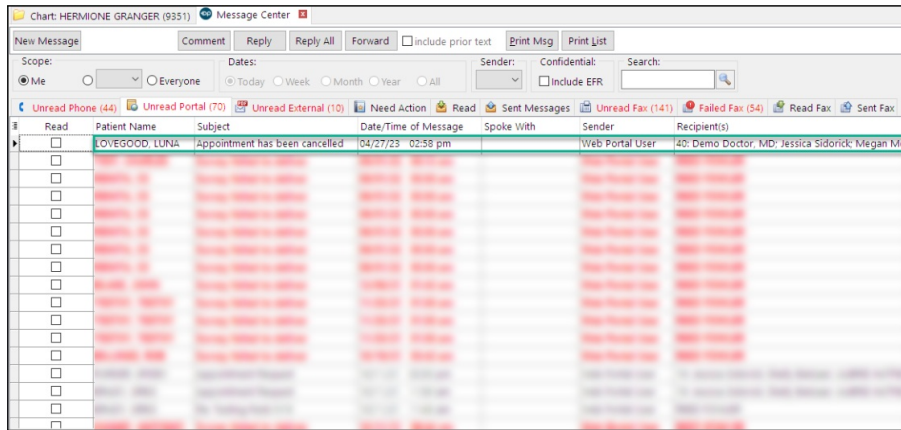
In addition to reporting, we have also included easy tracking for your automated messages that include notifications when an appointment is canceled and message details from within your patient's chart.

Cancellation Message

To view the notification received when an appointment is cancelled, navigate to **Message Center > Unread Portal**.



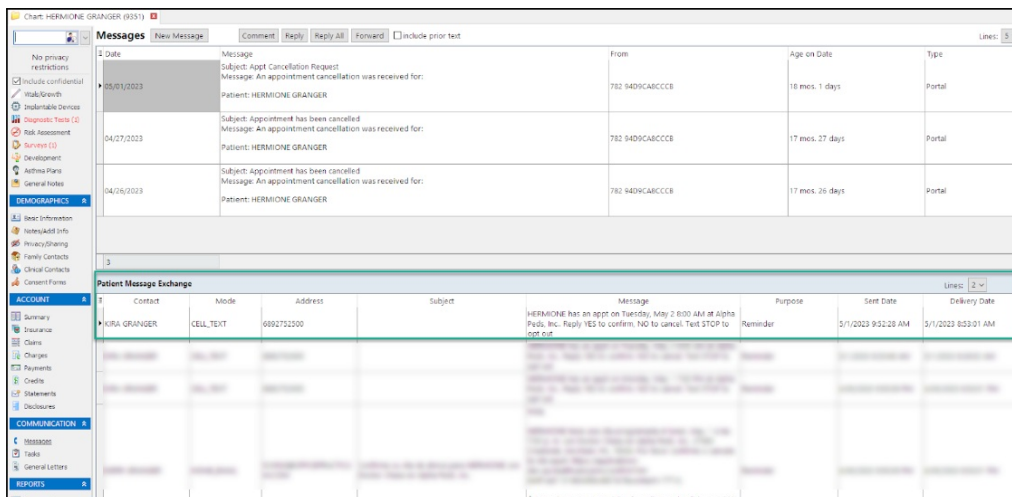
Note: You will only be able to receive tracking notifications if you have enabled the **Track Appointment Cancellations** toggle in the Automated Messaging [Global Delivery Settings](#).



Read	Patient Name	Subject	Date/Time of Message	Spoke With	Sender	Recipient(s)
<input type="checkbox"/>	LOVEGOOD, LUNA	Appointment has been cancelled	04/27/23 02:58 pm		Web Portal User	40: Demo Doctor, MD: Jessica Sidorick; Megan Mo...

Automated Message Details in the Patient Chart

To view the details of the Automated Messages sent to a patient, navigate to the **Patient's Chart > Messages > Patient Messages eXchange** section. You will be able to see the **Contact** it was sent to, the **mode** of the notification (Cell, Text; Email; etc.), the **message details**, the **Purpose**, and the **Sent** and **Delivery** dates.



Date	Message	From	Age on Date	Type
05/01/2023	Subject: Appt Cancellation Request Message: An appointment cancellation was received for: Patient: HERMIONE GRANGER	782 9409CABCCCB	16 mos. 1 days	Portal
04/27/2023	Subject: Appointment has been cancelled Message: An appointment cancellation was received for: Patient: HERMIONE GRANGER	782 9409CABCCCB	17 mos. 27 days	Portal
04/26/2023	Subject: appointment has been cancelled Message: An appointment cancellation was received for: Patient: HERMIONE GRANGER	782 9409CABCCCB	17 mos. 26 days	Portal

Contact	Mode	Address	Subject	Message	Purpose	Sent Date	Delivery Date
KIRA GRANGER	CELL,TEXT	6892722500		HERMIONE has an appt on Tuesday, May 2 8:00 AM at alpha Peds, Inc. - Reply YES to confirm, NO to cancel. Text STOP to opt out	Reminder	5/1/2023 9:52:28 AM	5/1/2023 8:53:01 AM