# OP Notify to PMX+ Automated Messages Migration: What You Need to Know

Last Modified on 09/06/2023 3:10 pm EDT

## About

The functionality previously delivered via **OP Notify** and OP's **Patient Message eXchange** is being improved so that you can manage all of your patient messaging for reminders and recalls directly from within OP.

> **Current OP Notify users will be migrated to the new PMX+ Automated Messages service** meaning you and your team will no longer need to log into a separate system when you want to make changes— all settings and configurations will now be available directly in OP.

Bringing this functionality in-house means quick and easy template setup, reducing the time it takes to set up automation, and also enables us to release improvements and updates, such as new templates, more frequently.

## What Can I Do To Prepare?

Now that the migration process is underway, there are several things you and your team can do to prepare:

1. Review all PMX+ related communications and ensure each is forwarded to the member(s) of your team responsible for managing your OP Notify settings.
2. Those team members should review all educational content available and prepare any questions they may have.
3. They can then review the recorded PMX+ Webinar hosted by the Training Team.
4. **For On-Prem customers**: Be sure that you are on the most up-to-date versions of OP and OPEN, with PMX+ specifically requiring the following:
   - OP v22.2+
   - OPEN v22.6+

## What Do We Need To Do After Migration Begins?

To simplify the setup process, we'll be importing your global settings from Intelichart into OP for you, so after you've received your email notifying you that your practice has had PMX+ Automated Messages turned on, you can begin the process of reviewing those settings and selecting your new templates.
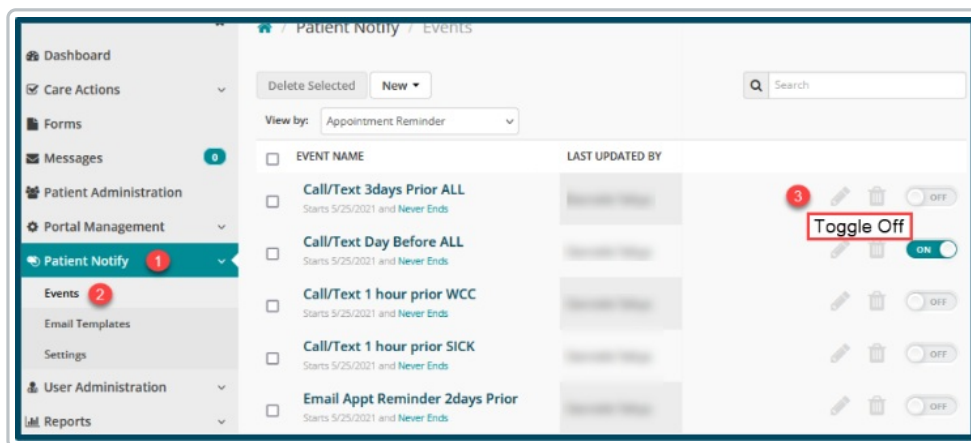
The entire migration process should take just four easy steps:
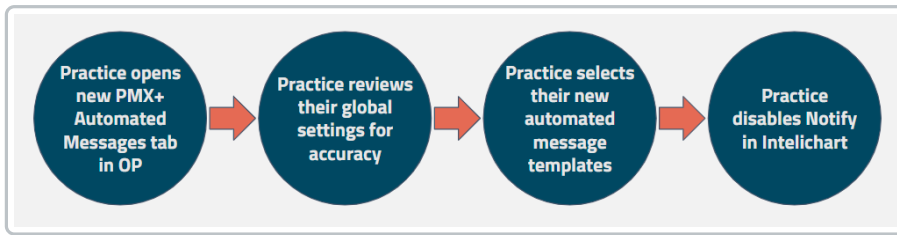
You can watch a more detailed overview of this process in **our new quick tip video**.

## How Do I Disable OP Notify Events in Intelichart? (New!)

Disabling your OP Notify settings in Intelichart is painless, straightforward, and can be done in minutes.



To disable your **Events**:

1. From your main Dashboard after logging into Intelichart, select **Patient Notify** on the left navigation.
2. Click on **Events**.
3. Any events that are currently active should be disabled by toggling the button to the **Off** position.

> 📌 **Note**: We highly recommend that you **disable** (following the instructions above) rather than delete your events so that you can retain the ability to run reports on any of your previous Notify activity.

## Why Is This Migration Happening?

Integrating the functionality previously delivered out of an external platform prompts so many benefits for your team, from both a workflow and feature perspective.

| Anti-Spam Templates | Spanish-Language Templates | Standardized Delivery Cadence | Native Workflow |
|---|---|---|---|
| Our clinical team has standardized the templates and had them approved by downstream carriers to further reduce the risk of your messages being identified as spam. | Our newly vetted templates, in addition to the anti-spam language, were also made available in Spanish! Any family contact in the patient's chart with Spanish as their preferred language will receive them automatically. | We worked with our team of Clinical Subject Matters experts to determine the most effective delivery cadence to seamlessly deliver messages at set intervals that parents are most likely to respond to. | Not only is your workflow streamlined by the fact that you never need to leave OP for these tools, but this also enables us to release improvements and updates, such as new templates, more frequently. |

## What Resources Do I Have Access To?

We have myriad resources to support you and your team as you prepare for and complete this migration process, including **help articles and videos**, and a recorded webinar.

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| 📄 **Help Content** <br> Written/Video documentation |
| PMX+ Automated Messages Overview |
| Automated Messages Setup and Permissions |
| Configure Delivery Rules for Automated Messages |
| Reporting and Tracking Automated Messages |
| Automated Messages Overview (Quick Tip Video) |
| Parent/Patient Experience (Quick Tip Video) |
| Setup and Configuration (Quick Tip Video) |
| PMX+ Automated Messages On-Demand Webinar |

## General Tips and Recommendations

When reviewing your global settings and selecting your templates for the first time, here are some general tips and recommendations that may help you further optimize your use of PMX+.

- **Create a group** for the permission **Messaging_View_Automated_Messages** to be set for anyone in the office outside of the system admin that may also need access to automated messages.
- **Set the hours** for automated messages to queue so that they **match your practice's office hours** - i.e. set for 5pm if the practice closes then so that the patient/caregiver does not receive any messages after 5pm.
  - This helps ensure that someone is there if they need to call the practice with a question.
- **Set cancellation requests** to be processed **automatically** rather than requiring your staff to intervene to manually update the schedule each time.
- **Create a new group** specifically set to receive the notifications automatically sent when cancellation requests are received.
  - This could be the same group set up for the permissions in the first recommendation.

## Frequently Asked Questions

### How will my patients be contacted?

Phone numbers that patients/caregivers will receive messages (call or text) from:

- English: 1-855-654-2681
- Spanish: 1-855-604-1055

### Why can't we free-write our automated messages?

Our Product team went through a rigorous vetting process with the new templates to ensure they are compliant with the **CAN SPAM Act** to **maximize delivery rates** and **minimize rejections for SPAM**, helping to ensure your patients and their caregivers receive the messages you send.

On-demand messages can still be created under the Personalized Messages tab in PMX, however these messages cannot be automated. We are seeking your feedback on any additional templates that your practice uses frequently for recurring or automated messages so that they may be incorporated in future releases.

## Are there any plans to...

- **Automate patient recalls?** Yes! We are planning to automate recalls in a future phase of this project.
- **Add more languages besides Spanish?** Yes! We are currently scoping out the top requested languages.