Patient Messages Mailbox Released on January 2023 Table of Contents

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*If a setting is not available, please contact your Coach to enable the setting. Note: New features may not be available on all servers until the feature rollout is complete.

Patient Messages Mailbox

This new feature allows the practice the ability to be more transparent with patient communications internally as well as provide better patient experiences when interacting with the clinician outside the clinic setting. Practices are able to set up more general mailboxes such as for their billing department, scheduling questions, and/or any communications that may not be provider specific. This gives the practice more flexibility on how patients can communicate with them through messages.



To view the Patient Messages Mailbox:

- 1. Click on Workbench
- 2. Then click on Patient Messages Mailbox



Alternatively, this can also be accessed via the message icon in the dashboard ticker.

Mailbox Usage



To start a patient conversation within a mailbox:

- 1. Select the Mailbox
- 2. Click on + New Conversation
- 3. Type in the **Patient's name** on the search box

Select To begin a	Patient a new conversation please select a patient	×
Patient	t	
	Patient Test (Legal Name) - he/him/his	
8	Pat Rally (Chosen Name) - he/him/hisAmount Amount Am	

- 4. Select the Patient from the list
 - a. The search box will display relevant accounts that show the **Patient's Full name, Preferred pronoun, Date of Birth, and Account number** to ensure that the correct Patient is selected.

Welcome, SANDBOX DEMO Tue 07/2	20/21 10:48 PM Antarctica	a/Casey (Logout)					\$* ** ** ** ??
Schedule Billing and EHR Document and Bill V Home Mailbox 🗵	Vorkbench + Search +	Reports + Config + Files + Versions + Help +	 What's New? 				Tabs + 🗙 🧵
Mailbox 🛱 Design P	ractice 👻						
SELECT MAILBOX	Active 👻	CONVERSATIONS	Active 👻	Patient Test &? > Open Chart	 VRC75439 29 y/o, Male 	➡ Jan 01, 1993 ≌ sankeeta@espoc.com	 123456786 / 74839703 Street 12, Details 3
•		Patient Test No messages	7/24/22	CONVERSATION BETWEEN Patier	nt Test ←		
					Enter your mess	age below	
+ New Mailbox		+ New Conv	ersation	Start typing			@ >

Once selected, the user can send a message to the patient by typing in the **empty textbox** at the bottom of the page. Messages can either be via text format, or users can also send attachments when needed.

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SELECT	MAILBOX	Ac	tive 👻	CONVERSAT	TIONS	Act	ve 👻	Mary Clare &? 7 Open Chart	 VRC75439 9 y/o, Female 	📩 Jan 01, 2019 ≌ sankeeta@espoc.com	📞 123456786 / 74839703 🏫 Street 12, Details 3
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	Alex Jones	:	>		ary Clare	07/24/2022	:				
0	😤 Bob Brown	:	>	Ba Bio	ae Nilson bood test tesults	7/24/22	:		Supday, July '	24 2022	
	📲 Dr Green	:	>		ona Lambert st message	07/24/2022	:		Sunday, Sury 2	-4, 2022	Helle Merry
	🕰 Dr Joe	:	>	Е ма	arie Clare	07/24/2022	:				Bob Brown 11:31 AM
	📽 Dr John	:	>		arie Clars	7/24/22	:				Here is your test results.
	📽 Dr Sandy	:	>	Pa Got	atient Test	7/24/22	:				Kor Cha 11:31 AM
	📲 Dr Test	:	>	Na Hel	ally Tally	7/24/22	:	Hello, Dr John 11:35 AM			
								Document.docx 👱			
								See you all then!			e >
	+ New Mailbox				+ New Conv	ersation					

When several mailboxes are set up, a **blue shading** will indicate the currently selected conversation.



By default, **all mailboxes will be visible** to the users. If they select a mailbox that they have not subscribed to, the user will be prompted to subscribe to the mailbox to see and interact with the conversation.

Mailbox 🕮 Dev Practice 234 🗣						
SELECT MAILBOX	Act	ive 👻				
Alex Jones	*	>				
Arhmand Traller		>				
🕑 🕾 Bob Brown	:	>				
🔲 📲 Dr Green		>				
🔲 📲 Dr Joe		>				
📮 📲 Dr John		>				
🔲 📲 Dr Sandy		>				
Dr Test		>				
+ New Mailbox						

The mailbox view can be filtered by using the **Show Subscribed Only** toggle at the top left corner of the screen.

SELECT MAILBOX	Active 👻
A Show Subscribed Only	

This allows for less mailbox clutter and provides the option to view unsubscribed mailboxes only when necessary.

Note: In the Patient's Chart summary, users will be able to view and send patient messages even if they are not subscribed to the mailbox.

Active and Deactivated Mailboxes

Users can change their mailbox to show **Active** or **Deactivated** Mailboxes by clicking on the drop-down menu and selecting their preferred view.

Home Mailbox 🗵			
Mailbox	Dev Practice	234 ¬	•
SELECT MAILB	OX	Act	ive 🔺
Show Subscr	Active		
📮 👒 Ale	E Deactivated		
📮 📲 Arh	mand Traller	:	>
🙂 🗠 Bo	b Brown	:	>
🔲 🛥 Dr (Green	8 0 0	>
📮 🗠 Dr .	Joe	0 0 0	>
📮 🗠 Dr .	John	*	>
📮 📲 Dr S	Sandy	0 0 0	>
📮 🗠 Dr 1	Test	0 0 0	>
📮 ×≌i Cal	vin	•	>
📮 😤 Dr 、	Jack	8 8 9	>
🔲 × 🖧 Ma	rtin Berry	8 8 9	>
	+ New Mailbox		

1. Only Mailbox Admins can Deactivate a mailbox by clicking on the **Deactivate** option from the three-dot menu.



When a mailbox is deactivated:

- It becomes unavailable for all subscribers
- Patients will no longer be able to message the mailbox.
- 2. Deactivated mailboxes will appear as grayed out. Only Mailbox Admins can Activate a deactivated mailbox by clicking on the **Activate** option from the three-dot menu.

SELECT MAILBOX	Deactivated 👻	
🗵 📽 Dr Lily	: >	
🗷 🙁 Dr Mary	• >	
🗵 😪 Dr Red	C Activate	



All subscribers have the option to **Archive** a conversation.

Archived conversations can be reactivated by:

- ➤ Sending a message to a patient.
- Receiving a message from a patient.
- Reactivating it from the archived conversations list.



If the user has access to multiple practices, they can easily switch mailbox views by clicking on the current practice. A dropdown will display all the available practices to easily switch between practice mailboxes.

Mailbox Admin Setup

Only Mailbox Admins will be able to set up the mailbox for their practice, the setup process will not be available to the rest of the users.

Practice Owners or Administrators are able to give account permissions to users.

Welcome, Dr. DEV PHYSICIAN 1 - Smith Fri 01/27/23 03:49 PM ES	T (Logout)	\$ + 115 + 521 + · · · · · Ø?
Schedule Document and Bill Billing - Workbench - Search - Reports	Config - Files - Versions - Apps Help - What's New?	Tabs 🗸 🛛 🕐
Home Access Control 🗷	My Profile/Change Password	
Access Control List 2	3rd Party Services	Reload 🕂 New 💽 🖶
Access Control Type Person	2 System 3 User Management Task Checklists	Control anted By

To do so:

- 1. Click on Config
- 2. Hover over System
- 3. Hover over User Management
- 4. Click on Access Control

A list of all users for the practice will then be displayed.

Welcome, Dr. DEV PHYSICIAN 1 - Smith	Thu 01/26/23 09:46 AM EST (Logout)			[] S • 114 • 521 • • • • •
Schedule Document and Bill Billing - Workbench - Home Access Control #	Search + Reports + Config + Files + Versions + A	pps Help - What's New?		Tabs 🗸 🕺 🔋
Access Control List @				C Reload + New 🚯 👼
Access Control Type	Person	Provider Id	Date Granted	Granted By
XDOC_DELETE	devtrainingtesting	123456789DEV	12/28/22	jpancoast
XDOC_DELETE	raymundo	123456789DEV	10/27/22	devphysician1
XDOC_DELETE	devuserjmadia	123456789DEV	10/27/22	devphysician1

Select the user that you wish to grant access as Mailbox Admin.

Person sandboxdemo VERICLE/EHR - (SANDBOX) SANDBOX Access Control Types * Description

Scroll down to find **MAILBOX_ADMIN_PERMISSION** and select it.

PHI_EXPORT_SUMMARY_CONFIG_TIMEFRAME
PHI_EXPORT_SUMMARY_CREATE
MAILBOX_ADMIN_PERMISSION
TICKET_CATEGORY
POS_CFG_EDIT
OWNER

Click on **Save** and it should give the selected user access as a mailbox admin in order to set up and manage mailboxes.

Click on the dropdown below the username.

Mailbox Admin Management

Mailbox Admins can configure mailbox subscriptions for all users within the practice from the Logins configuration page.



To do so:

- 1. Click on **Config**
- 2. Hover over Practice
- 3. Click on Logins

Schedule Document and	Bill Workber	nch - Search -	Reports -	Config • Files • Versions • Apps Help • What's New?	Tabs 🕶	×	L
Home Logins 🗷							
Login Manager Reload L	ogins New L	ogin Reset	Office IP Add	esses Set Office Code Hide Inactive Logins ?			
Logins				drann - Active			
Print Cov Showing 0 of	0 -			Name DOC TORDAN			
Finit Csv Showing 9 of	9 •						
Login	Name	Role	Updat	Email kenneth@clinicmind.com			
				Phone			
drann	DOC TO	PHYSICIAN	01/26/23	Can Del Alerts 🗹			
Inaydn	JUSEPH	PHYSICIAN	10/12/23	Office Code 223445789			
daedalus test		PHYSICIAN	10/03/22	Role PHYSICIAN			
drmak	ASHLEY	PHYSICIAN	08/25/22	Physician ID DT12321 - DOC TORRAN			
cschumann	CLARA S	PHYSICIAN	08/15/22	Kiosk Banner			
rbuckley	ROBIN B	PHYSICIAN	08/10/22				
mbusby	MATT BU	OFFICE_M	08/02/22	Mailbox Access Configure			
mwheeler	MIKE WH	. EMPLOYE	07/07/22	User Settings IP Addresses Providers Access			
				Print Csv Showing 120 of 120 - Ø			
				Type A Value Default Description			
				feature_toggle.fix_xdoc_pdf3 T T			
				integration.bcws.clerk_key			
				integration.cash_practice.clerk_key			
				integration.medappz.person_key			
				integration.merchant_service.clerk_key			
				login.two_factor_auth_key_verified F F			
				login.two_factor_auth_shared_key			
				Iogin.two_factor_email_auth_enabled F F options: T and F. If it is T and	id normal 2f		
				messages.provider_app.pusn_notification_enabled F F Allow push notifications on	Provider m		
				monitor, patient, referral, can crose_licket r r Setting to (1) rue allows this oauth expiration, time, seconds 1800 1900 Amount of time in accorde	before an O		
				oduri.expiration_time_seconds 1000 1800 Amount of time in seconds	beiore an O		_

From the Logins page, simply click on the user from the list on the left hand side of the screen, and click on **Configure** beside Mailbox Access.



A list of all practices the user has access to will be shown.

From here Mailbox Admins can subscribe the user to all mailboxes for the desired practice by clicking on the **practice toggle**.

 Dev Practice Dr John's Mailbox Dr Green's Mailbox Dr Green's Mailbox Dr Manson's Mailbox Dr Judy's Mailbox Dr Judy's Mailbox Dr Tompson's Mailbo	Mailbox	Access		×
Dr John's MailboxImage: Comparised of the	^ 曲□	Dev Practice	6 Select	ted
Dr Green's Mailbox<Dr Manson's Mailbox<Dr Judy's Mailbox<Dr Tompson's Mailbox<Dr Tompson's MailboxDr Red's MailboxDr Tale's Mailbox<Dr Tale's Mailbox<Dr Brown's Mailbox		Dr John's Mailbox		
Dr Manson's MailboxDr Judy's MailboxDr Tompson's MailboxDr Red's MailboxDr Tale's MailboxDr Tale's MailboxDr Brown's Mailbox		Dr Green's Mailbox		
Image: Dr Judy's MailboxImage: Image: Im		Dr Manson's Mailbox		
Dr Tompson's MailboxImage: Compare the second s		Dr Judy's Mailbox		
Dr Red's Mailbox Image: Comparison of the second of th		Dr Tompson's Mailbox		
Dr Tale's Mailbox Dr Brown's Mailbox		Dr Red's Mailbox		
Dr Brown's Mailbox		Dr Tale's Mailbox		
		Dr Brown's Mailbox		
Dr Stone's Mailbox		Dr Stone's Mailbox		
Cancel Save			Cancel	Save

Clicking on a specific practice brings down a list of all mailboxes within the selected practice.

From here, Mailbox Admins can manually toggle specific mailboxes that the current user can be subscribed to when the toggle for the mailbox is turned on.

This configuration allows for Mailbox Admins to easily set up user subscriptions to multiple mailboxes at once for new and existing users in the practice.

Creating Mailboxes

Initially, there are no default mailboxes set up. The Mailbox Admin will be responsible for initially setting up new mailboxes for the practice to use.

Viricome, SAKDBOX DEMO Tue 5726/21 45:48 PM AntarcticatCasey (Logout)	S+ ++ ++ ++ B
Scheduler_Stilling and EHR Decument and Bill Wold-Minch - Search + Reports + Config + Files + Versionis - Help + What's New?	Tabs + X ?
Atomic 2 Mathew 19	
Mailbox A Design Practice -	0
No mailboxes have been created for this practice. Please create a mailbox.	
+ New Mailbox	

To create a new mailbox, click on the **+ New Mailbox** icon.

Create New Mailbox		×
Mailbox Name Dr Smith		
	Cancel	reate

Enter the desired name for the mailbox, this can either be for specific clinicians or workflow specific names that the practice uses.



Once the mailbox has been created, there are several options available in the menu:

- 1. **Subscribe/Unsubscribe** allows the user to subscribe or unsubscribe to the selected mailbox.
- 2. **Manage Subscribers** allows Mailbox Admins to manage the subscribers of the selected mailbox.

Manage Subscribers Mailbox: Bob Brown		×
Q Search a User		
Bob Brown		
User Test		
Alex Jones		
Assistant		
John Doe		
3 Users Selected Show Selected Only	Cancel	Save

- 3. **Rename** allows Mailbox Admins to rename the selected mailbox.
- 4. **Deactivate** allows Mailbox Admins to deactivate the selected mailbox.
- Delete allows Mailbox Admins to delete the selected mailbox.
 Note: Mailboxes can only be deleted if there are no active or archived conversations.

Mailbox Access	×
へ ☐ Dev Practice	6 Selected
🔲 Dr John's Mailbox	
Dr Green's Mailbox	
Dr Manson's Mailbox	
Dr Judy's Mailbox	
Dr Tompson's Mailbox	
Dr Red's Mailbox	
🔲 Dr Tale's Mailbox	
Dr Brown's Mailbox	
Dr Stone's Mailbox	
	Cancel Save

Clicking on the dropdown allows you to toggle access of users to the selected mailbox.

Note: At least one clinician must be configured to have mailboxes to count as patient messaging for Meaningful Use purposes.

Welcome, Dr. D	DEV PHYSICIAN 1	l - Smith Mon 01/30/2	23 08:54 AM E	ST (I	(Logout)						\$ •	• 115 • 521 •	••	• •		8?
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Home Schedule 🗷					My Profile/Change Passwo	ord										
- Acct # / Barcode -	Patient Month	Week Day (Office) Main Office		3rd Party Services	Þ	y >	Today's Practitic	oner 🕶	Log	▼ 0-1-0-0	1-1	?			
- Last/Nick Name -	ALEX JONES (D	P)			Payer	•	HE	ALTH (DP)		D	R. JOHN (DP)					
- First/Nick Name -	7:00a			2	Practice			Attachments			7:00a					1
- Date of Birth -	7:15a			1	System	₽		Billing	•		7:15a					1
- Phone 1 -	7:30a						1	Contacts	•		7:30a					
- Phone 2 -	7:45a							Careplans			7:45a					
- Email -	8:00a							Desumentation			8:00a					
- Assigned Phys -	8:15a							Documentation			8:15a					
Clear Create More	8:30a							EHR Connections			8:30a					
	8:45a							Front Desk			8:45a					
😫 Popup On 🕟	9:00a							Logins			9:00a	Out of Off	ice			
Date 🔻 Patient	9:15a							Patient Portal			9:15a					
	9:30a							PHI			9:30a					
	9:45a							-			9:45a					
	10:00a						11	Reports			10:00a					
	10:15a						1 (3	Settings			10:15a					
	10:30a						10:3	30a			10:30a					
	10.455						10.2	155			10.455					

To enable this feature:

- 1. Go to **Config**
- 2. Hover over **Practice**
- 3. Then click Settings

Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 01/30/23 08:56 AM EST (Logout)				\$ ◆ 11	15 + 521 +	• • • •	8?
Schedule Document and Bill Billing • Workbench • Search • Reports • Config • Files •	Versions - Apps	Help 🗸 What	it's New?			Tabs 🗸	X ?
Home Settings 🗷							
PROV PRACTITIONER SVCFAC PINMAP LOG CP CPTS SETTINGS INVOICE	POS PATCALI	. NDC C	Contract Proc	РумтТуре	CONSENTS	Signa	TURE TYPE
0							?
Basic Advanced User Defaults							
Print Csv Showing 223 of 223 • 😰 Save							
Type 🔺	Value	Default	Description				
billing_sheet.auto_populate_service_facility	F	F	If T, when creating a	patient on the E	Billing Sheet, t	he service f	acility 🔺
billing_sheet.enable_hover_message	F	F	If T, a popup of the fu	II date for the ro	ow your mous	e cursor is	noveri
billing_sheet.require_dob_new_or_activate_patient	F	F	if set to T, requires Da	ate of Birth whe	en creating/ac	tivating a pa	tient i
care_to_me.provider_availability.enable	Т	F	If set to T, enable pro	vider availabilit	y feature in C	are To Me p	ortal

From within the settings page:

- 1. Click Settings
- 2. Click Advanced

Inside the advanced settings:

- 1. Type *patient_portal.use_mailbox_messaging* on the respective field and hit enter
- 2. Set the value to **T**
- 3. Type *ui.pat_messages_mailbox.enable* on the respective field and hit enter
- 4. Set the value to **T**
- 5. Click on Save

Note*: This is a Coach enabled setting.