

# Patient Messages Mailbox

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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.

The screenshot shows the 'Mailbox' interface for 'Dev Practice 234'. On the left, there is a 'SELECT MAILBOX' section with a list of providers: Alex Jones, Arhmand Traller, Bob Brown (selected), Dr Green, Dr Joe, Dr John, Dr Sandy, and Dr Test. Below this is a '+ New Mailbox' button. The main area is titled 'CONVERSATIONS' and lists several messages from various patients, including Phillip Glare, Mary Clare (selected), Bae Nilson, Fiona Lambert, Marie Clare, Marie Clars, Patient Test, and Nally Tally. On the right, a conversation with 'Mary Clare' is open, showing a message from 'Bob Brown' with a document attachment 'Document.docx' and a response from 'Dr John'. The interface includes a search bar, navigation tabs, and a top navigation menu.

The screenshot shows the 'Patient Communications' menu in the 'Workbench' section of the application. The menu is open, showing options such as 'Tasks', 'Task Manager', 'Patient Demographics Review', 'Provider Claims', 'SOAP Audit Workbench', 'Group Notes', 'Document and Bill', 'Sign Queue', 'Direct Message Inbox', 'Billing and EHR', 'Prov Room Kiosk', 'Patient Communications' (selected), and 'Mailboxes'. The top navigation bar includes 'Schedule', 'Document and Bill', 'Billing', 'Workbench', 'Search', 'Reports', 'Config', 'Files', 'Versions', 'Apps', 'Help', and 'What's New?'. The user is identified as 'Dr. DEV PHYSICIAN 1 - Smith'.

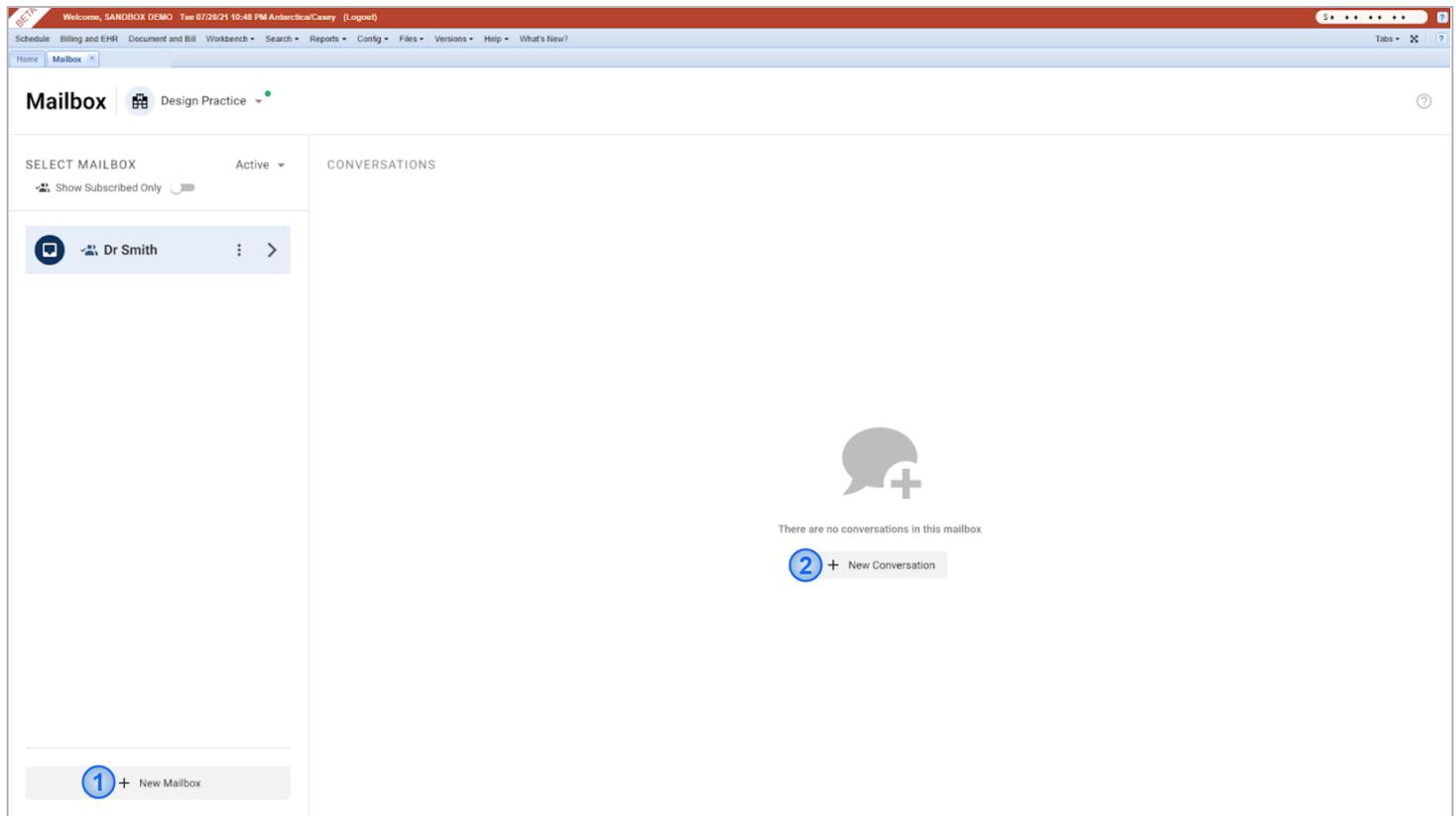
To view the Patient Messages Mailbox:

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



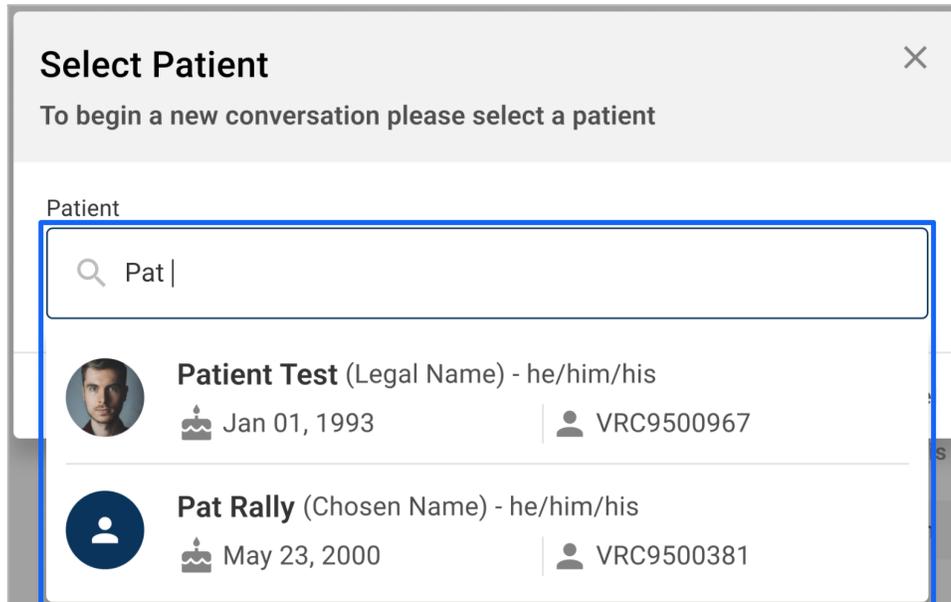
Alternatively, this can also be accessed via the message icon in the dashboard ticker.

## Mailbox Usage

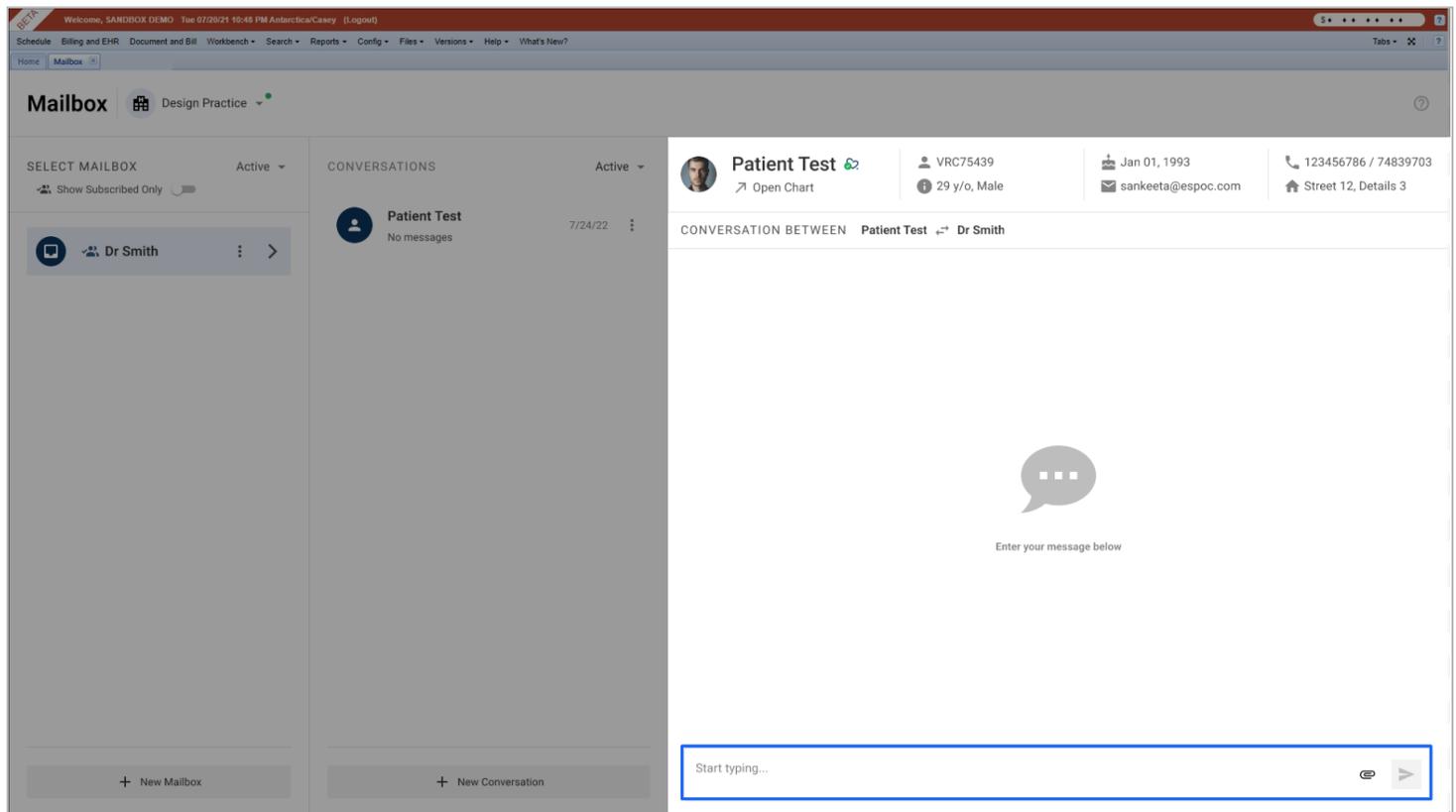


To start a patient conversation within a mailbox:

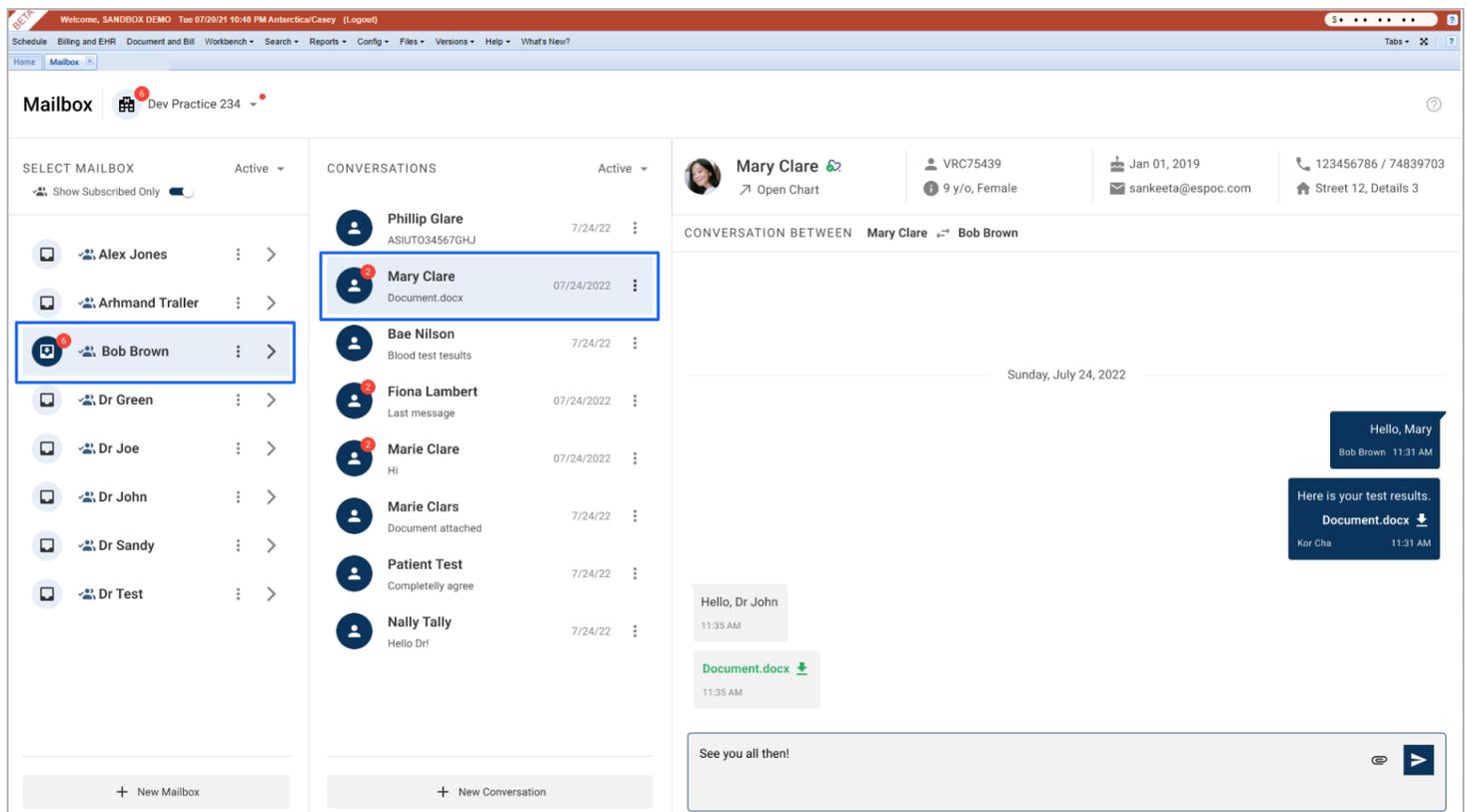
1. Select the **Mailbox**
2. Click on **+ New Conversation**
3. Type in the **Patient's name** on the search box



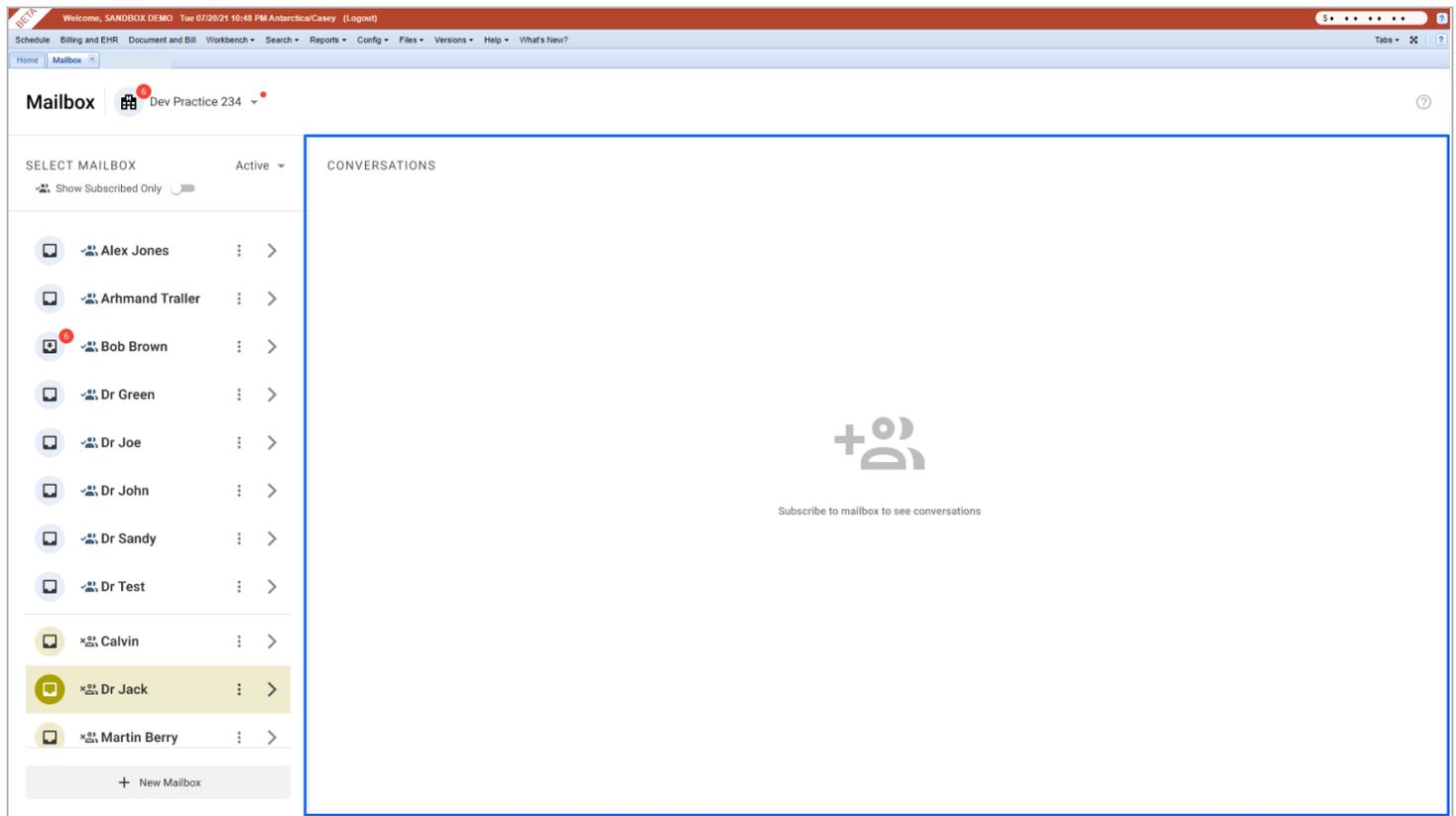
4. **Select the Patient** from the list
  - a. The search box will display relevant accounts that show the **Patient's Full name, Preferred pronoun, Date of Birth, and Account number** to ensure that the correct Patient is selected.



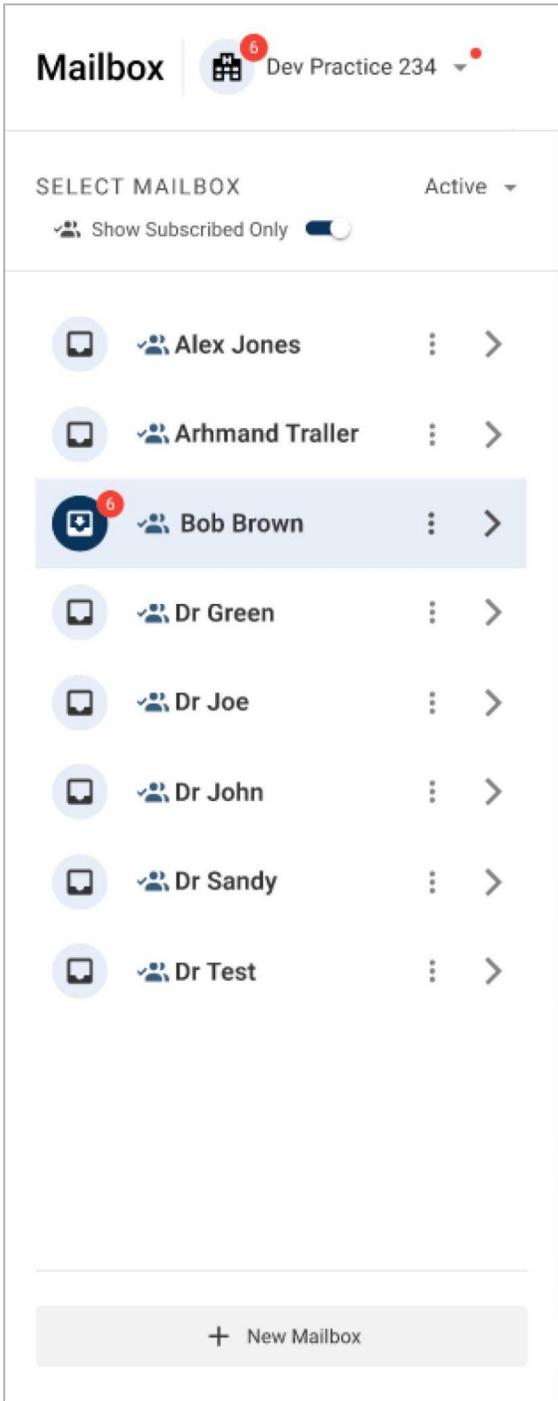
Once selected, the user can send a message to the patient by typing in the **empty textbox** at the bottom of the page. Messages can either be via text format, or users can also send attachments when needed.



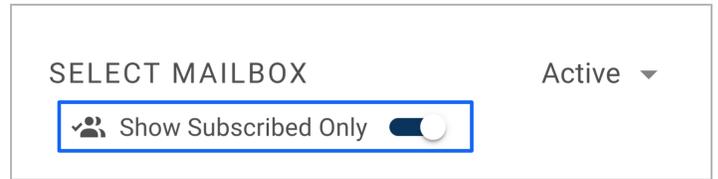
When several mailboxes are set up, a **blue shading** will indicate the currently selected conversation.



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.



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

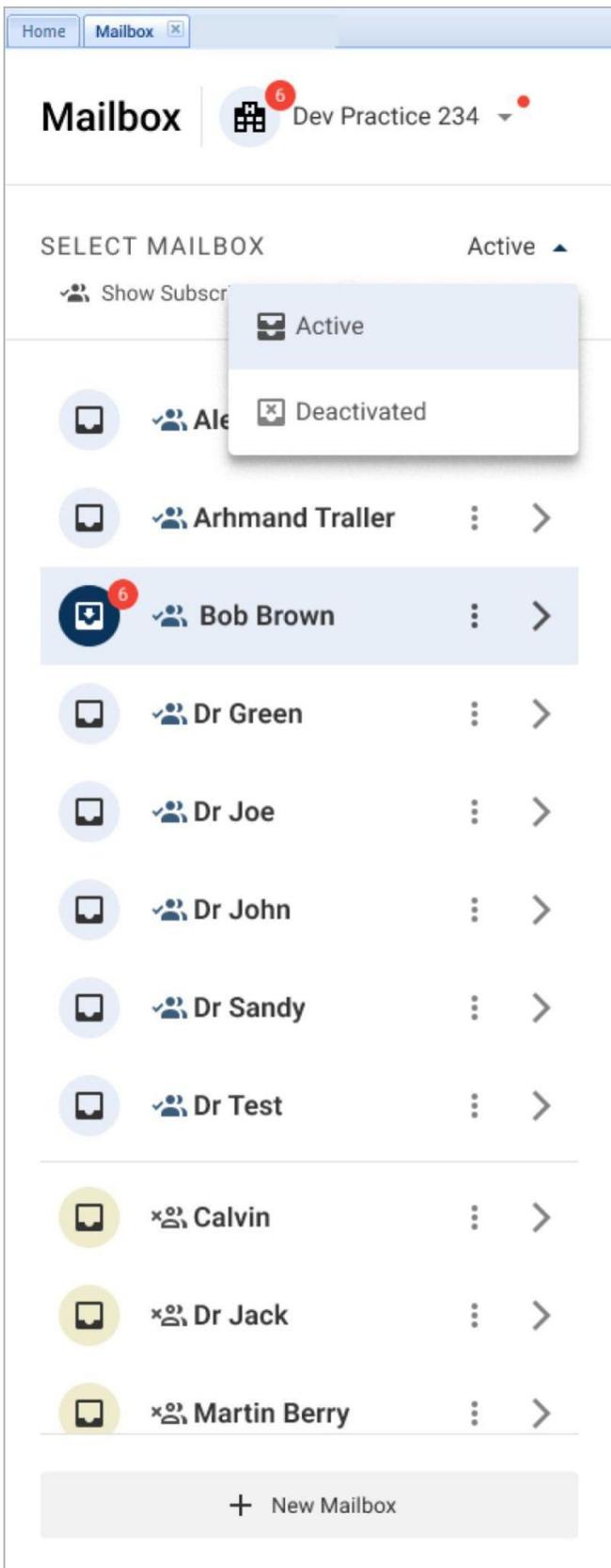


This allows for less mailbox clutter and provides the option to view unsubscribed mailboxes only when necessary.

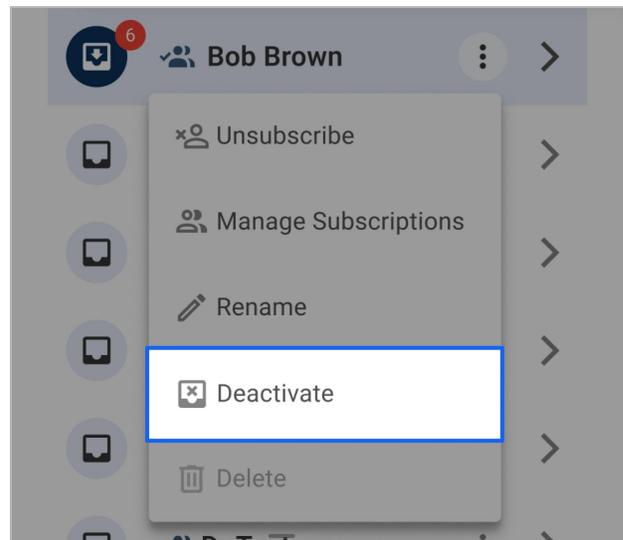
**Note: In the Patient's Chart summary, users will be able to view and send patient messages even if they are not subscribed to the mailbox.**

## 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.



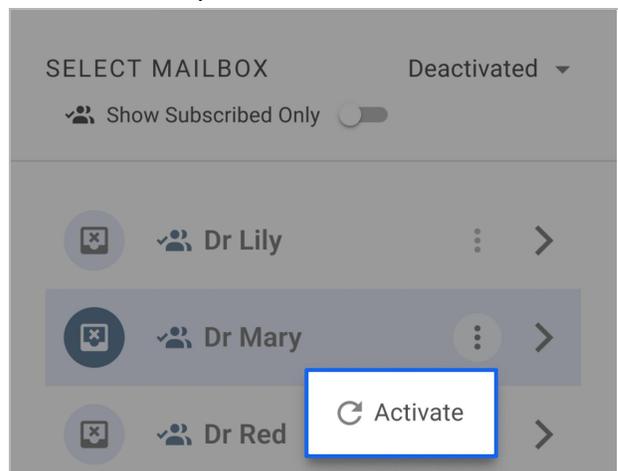
1. Only Mailbox Admins can Deactivate a mailbox by clicking on the **Deactivate** option from the three-dot menu.

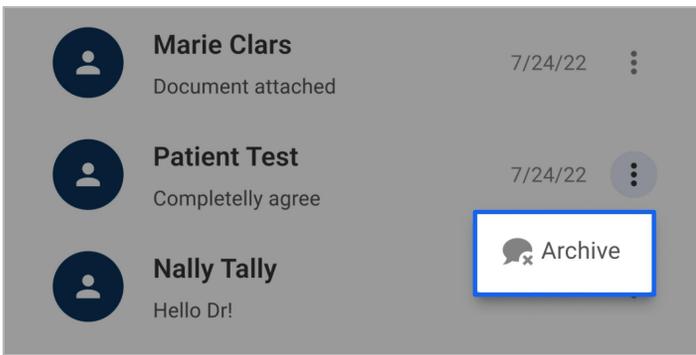


When a mailbox is deactivated:

- 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.

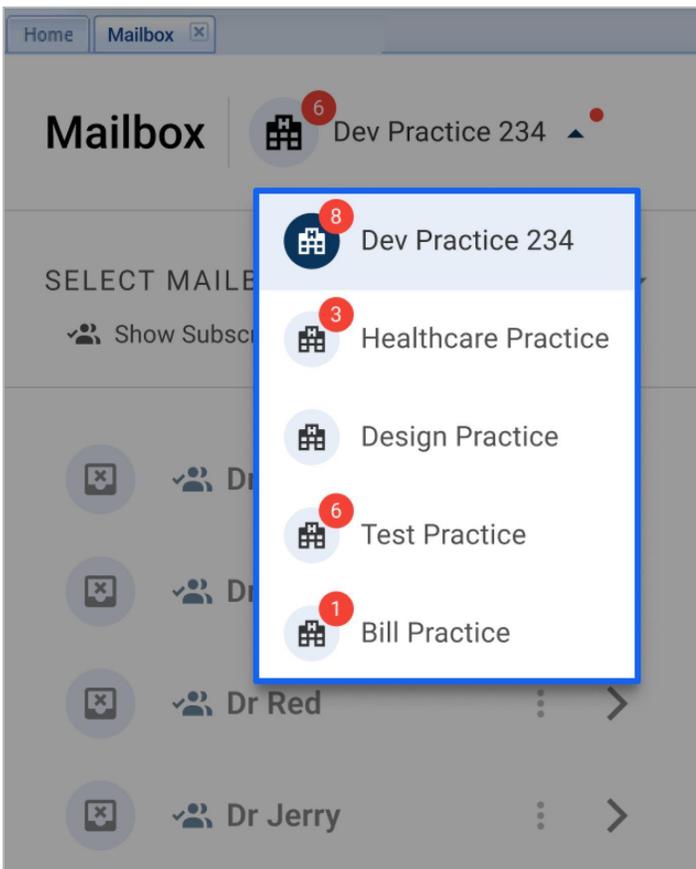




All subscribers have the option to **Archive** a conversation.

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.

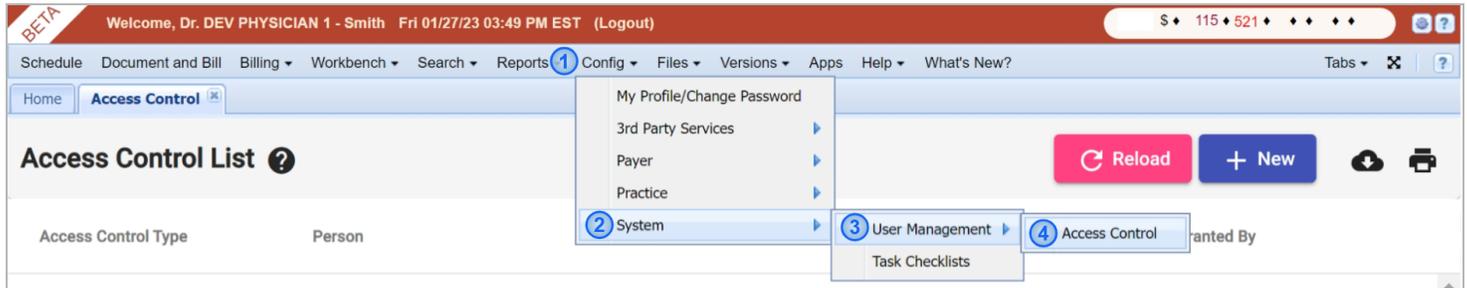


If the user has access to multiple practices, they can easily switch mailbox views by clicking on the current practice. A dropdown will display all the available practices to easily switch between practice mailboxes.

## 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.

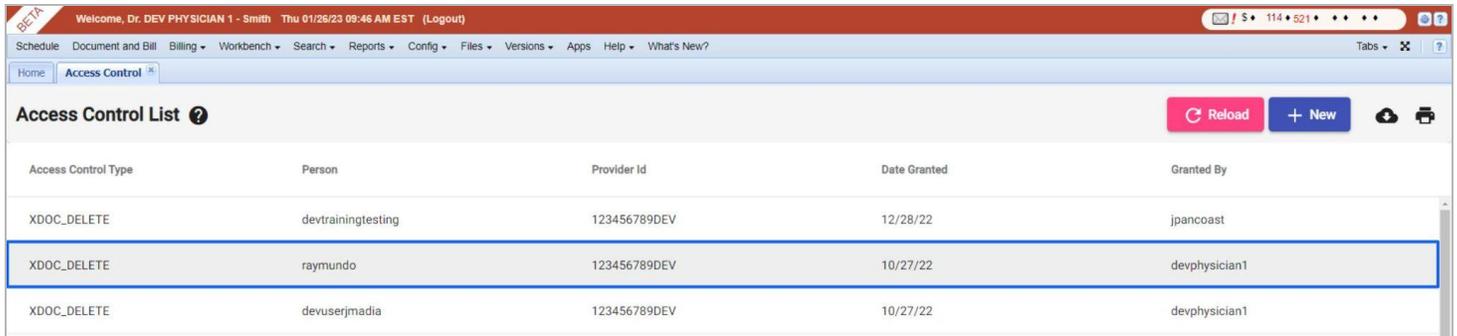
Practice Owners or Administrators are able to give account permissions to users.



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.

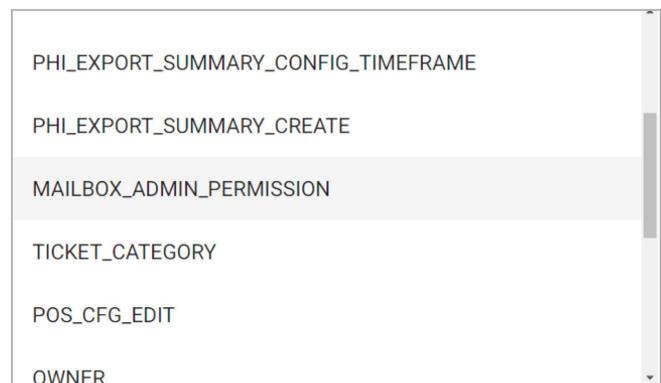


Select the user that you wish to grant access as Mailbox Admin.

Click on the dropdown below the username.

The screenshot shows a form for selecting a user. The 'Person' field is set to 'sandboxdemo'. Below it, there is a dropdown menu labeled 'Access Control Types \*'. At the bottom, there are three buttons: 'Save', 'Revoke Access', and 'Close'.

Scroll down to find **MAILBOX\_ADMIN\_PERMISSION** and select it.



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

## Mailbox Admin Management

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

The screenshot shows the application's home page for Dr. DEV PHYSICIAN 1 - Smith. The 'Config' menu is open, and the path 'Config > Practice > Logins' is highlighted with numbered callouts 1, 2, and 3. The 'Messages and Alerts' section contains several notifications regarding tasks, claims, and outstanding workbench items. The 'Quick Links' section lists various application features like Schedule, Document and Bill, and Patient Comms. The 'Tracking' table shows the status of tasks:

	Mine	Owed	Team
Open	4	116	5
Pending	0	1	1
Closed	0	0	0

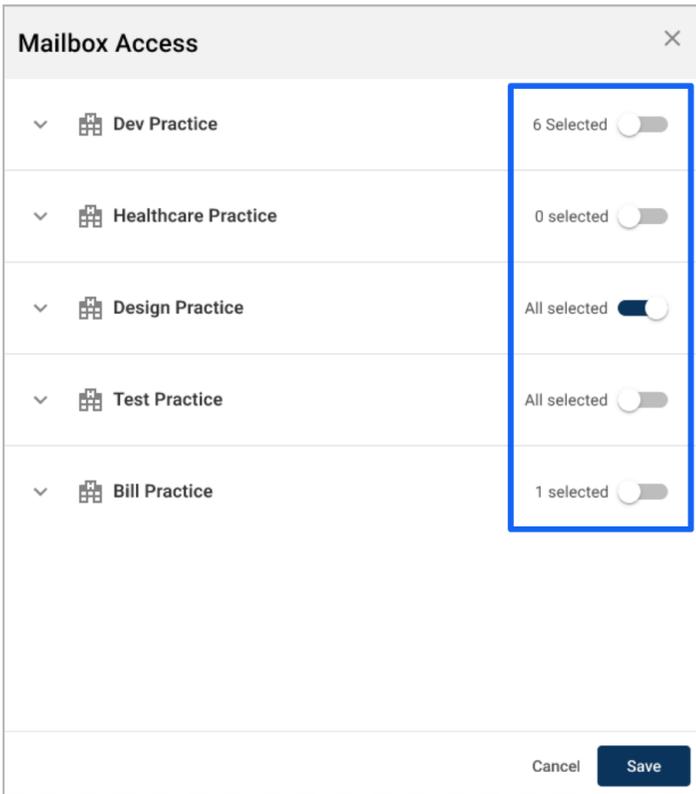
To do so:

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

The screenshot shows the 'Logins' configuration page for user 'drann - Active'. The 'Mailbox Access' section is highlighted with a blue box, and the 'Configure' link is visible. The 'User Settings' table below shows various configuration options:

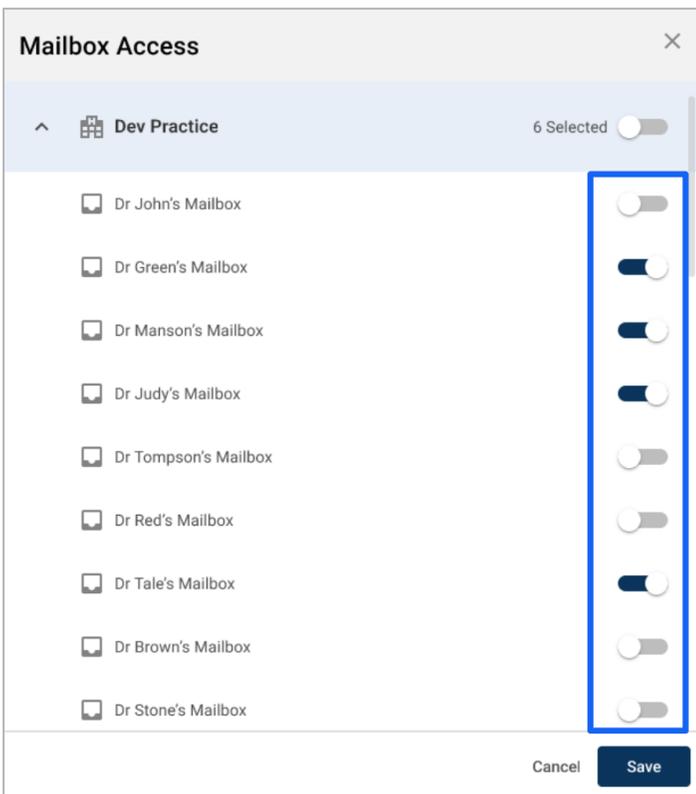
Type	Value	Default	Description
feature_toggle.fix_xdoc_pdf3	T	T	
integration.bcws.clerk_key			
integration.cash_practice.clerk_key			
integration.medappz.person_key			
integration.merchant_service.clerk_key			
login.two_factor_auth_key_verified	F	F	
login.two_factor_auth_shared_key			
login.two_factor_email_auth_enabled	F	F	options: T and F. If it is T and normal 2f...
messages.provider_app.push_notification_enabled	F	F	Allow push notifications on Provider m...
monitor.patient_referral.can_close_ticket	F	F	Setting to (T)true allows this user to clo...
oauth.expiration_time_seconds	1800	1800	Amount of time in seconds before 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**.



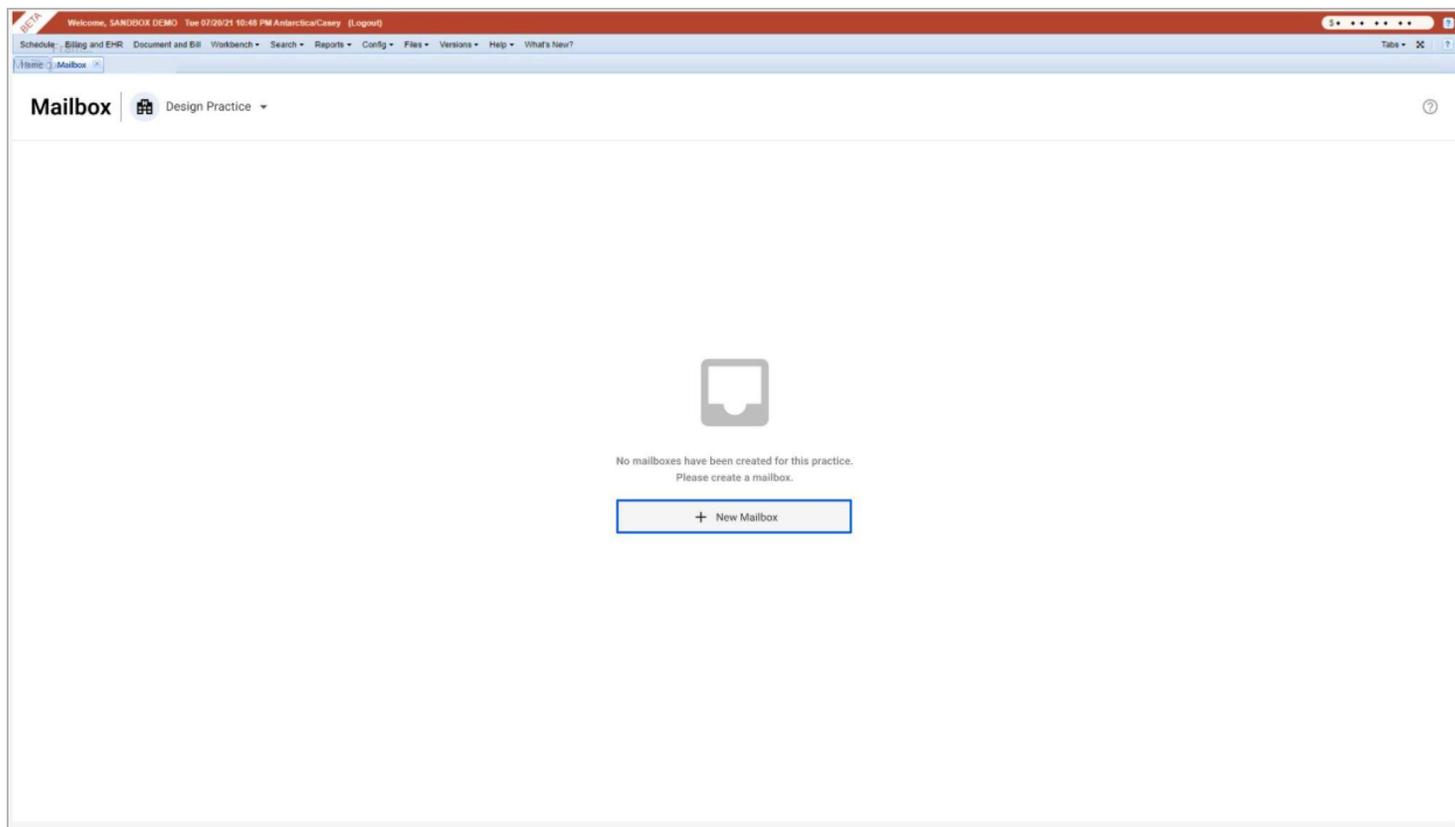
Clicking on a specific practice brings down a list of all mailboxes within the selected practice.

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.

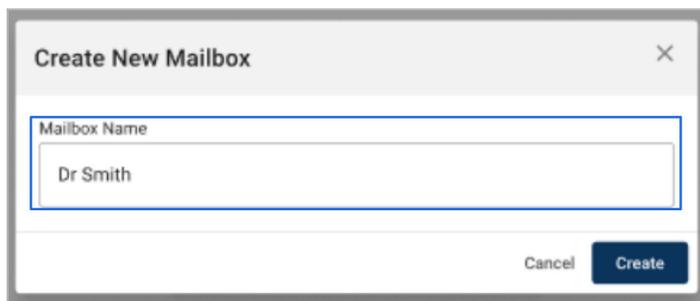
This configuration allows for Mailbox Admins to easily set up user subscriptions to multiple mailboxes at once for new and existing users in the practice.

## Creating Mailboxes

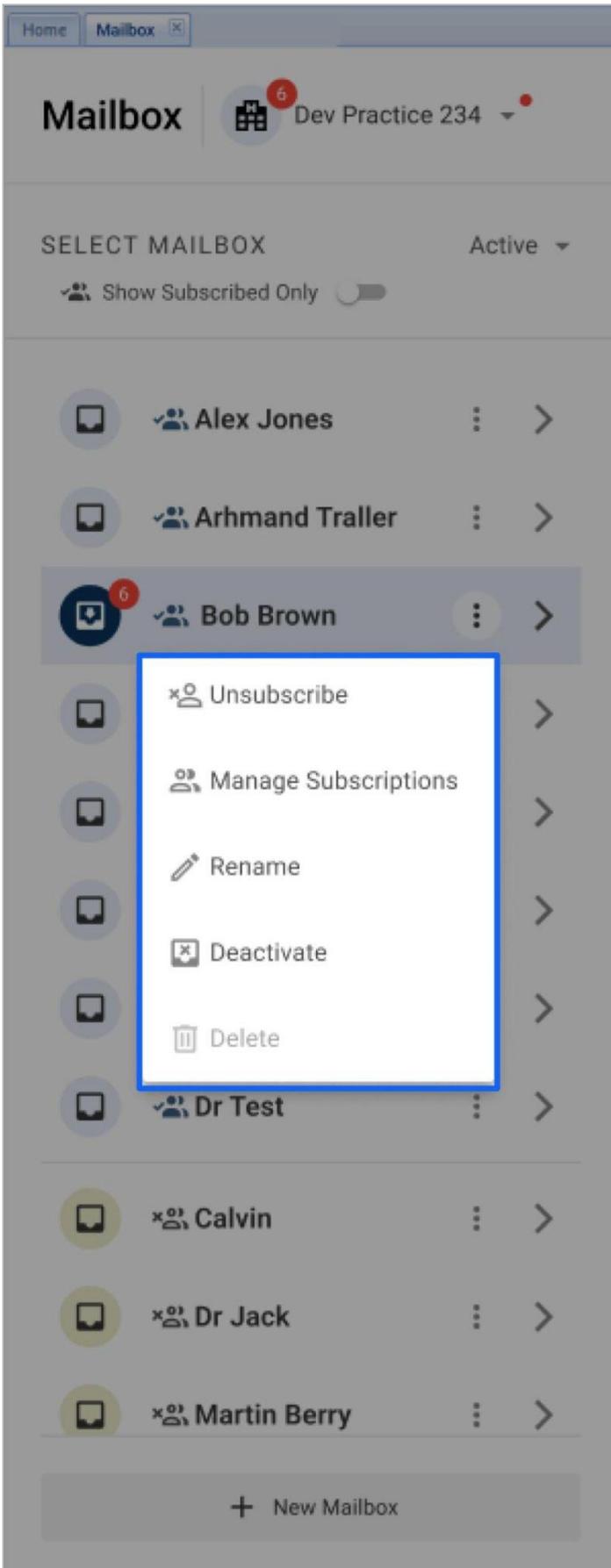
Initially, there are no default mailboxes set up. The Mailbox Admin will be responsible for initially setting up new mailboxes for the practice to use.



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

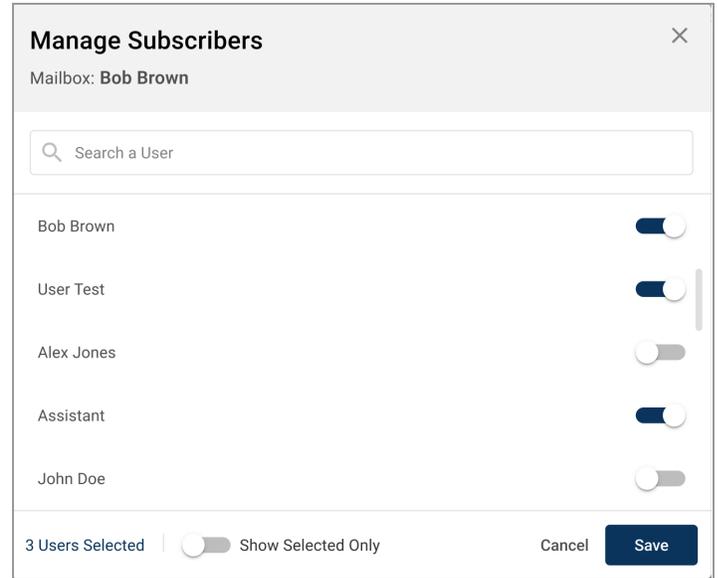
A screenshot of a "Create New Mailbox" dialog box. The dialog has a title bar with "Create New Mailbox" and a close button (X). Inside the dialog, there is a text input field labeled "Mailbox Name" containing the text "Dr Smith". At the bottom right of the dialog, there are two buttons: "Cancel" and "Create".

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.



3. **Rename** - allows Mailbox Admins to rename the selected mailbox.
4. **Deactivate** - allows Mailbox Admins to deactivate the selected mailbox.
5. **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** ✕

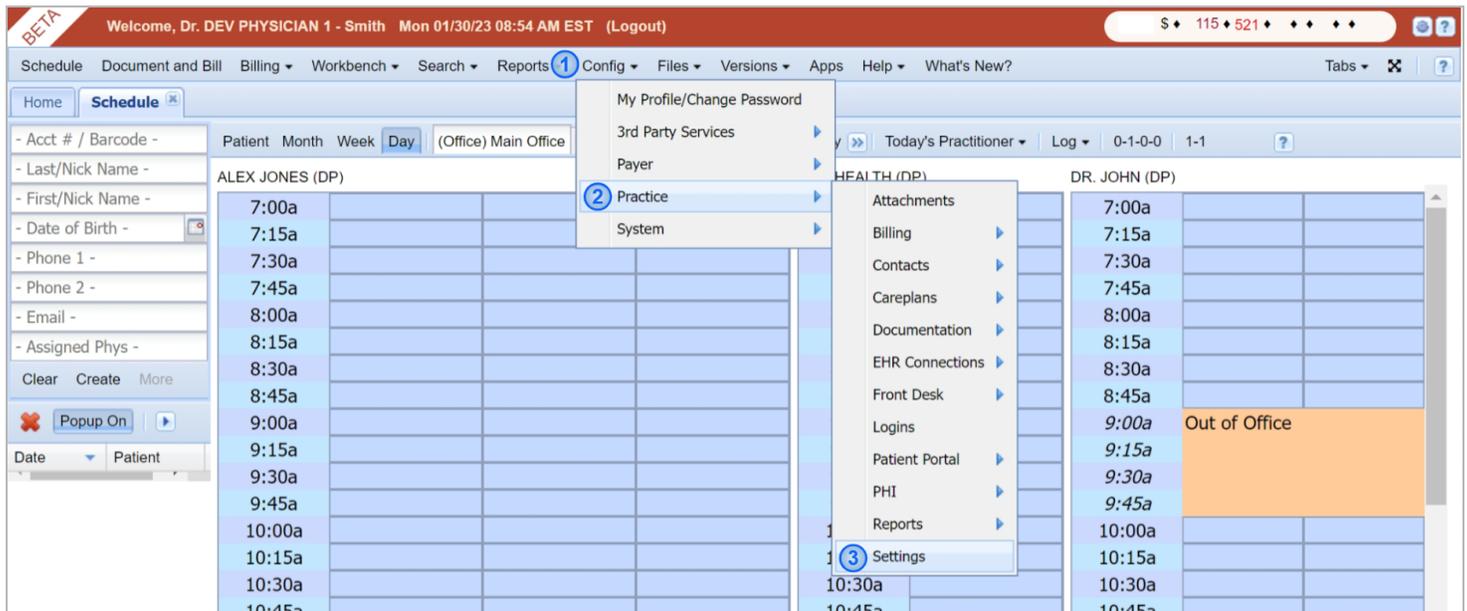
^ **Dev Practice** 6 Selected

- 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**

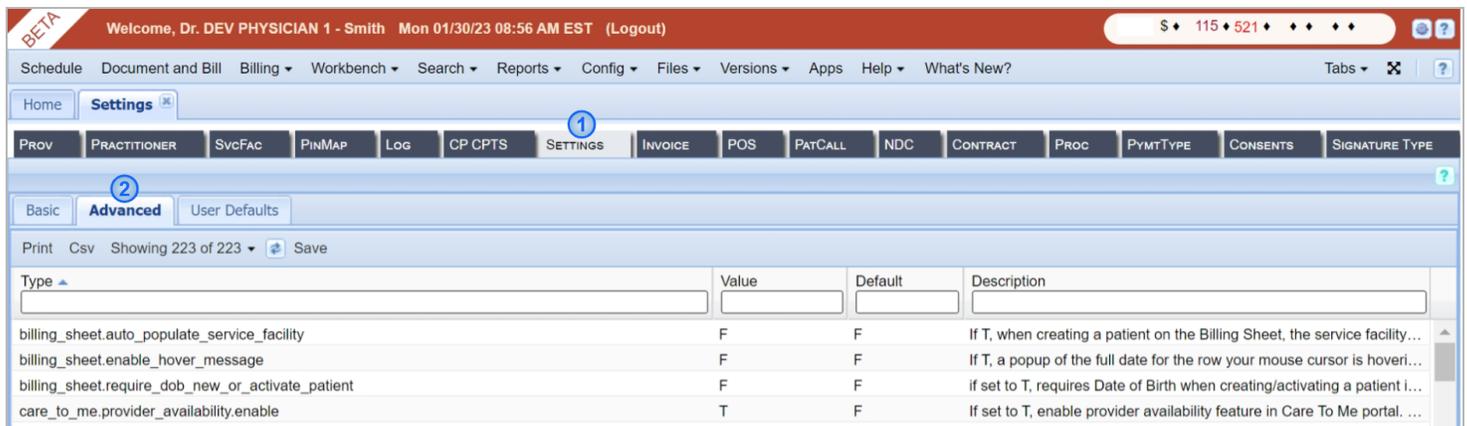
Clicking on the dropdown allows you to toggle access of users to the selected mailbox.

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



To enable this feature:

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



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.