



support@MedExBank.com

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The MedEx Mission

Our mission is to happily deliver the best and most affordable medical communication platform to all users.

Introduction

Medical providers need to communicate securely with their patients across multiple platforms. MedEx grew out of the need for a simple, unified messaging plug-in for OpenEMR, the most successful open source electronic health record system on the planet.

MedEx grew from a simple patient reminder service into a HIPAA compliant, securely encrypted communication platform. Providers can now reach their patients using the modalities their patients prefer, resulting in higher engagements rates (happy patients), lower no-show rates (happy administrators) and reduced staff work loads (happy employees). In addition to the coolness factor of providing modern messaging to patients, you can see that practices with fuller schedules are happier practices all around! We like happy. It is an integral part of our mission (happy MedEx).

MedEx is embedded within OpenEMR. Sign up, create your message and activate it. Everything else happens in the background, every day. Automated SMS text, Voice messaging, e-mail messaging and tele-medicine are only steps away for your practice.

Subscription

MedEx is a subscription based service. A subscription is \$9.95 per provider billed monthly + per message charges. The message rates quoted are North American rates. International rates do vary but for most locations, the published rates apply. Contact support@medexbank.com for country-specific rates.

When a message is processed, the per-message charges are deducted from the practice's credits. Credits are required to process messages. New practices are pre-loaded with \$2.50 credits (250 e-mails or 100 SMS/Voice messages). If a practice's credit balance falls below zero, messaging does not occur. We offer a convenient auto-refill feature.

À LA CARTE PLAN CHARGES

Modality	Send	Receive	Unit of Charge
SMS	\$0.025	\$0.025	160 characters/unit
Voice	\$0.025	\$0.025	per minute
E-mail	\$0.01	\$0.01	per email
TeleHealth	\$0.005	N/A	per minute

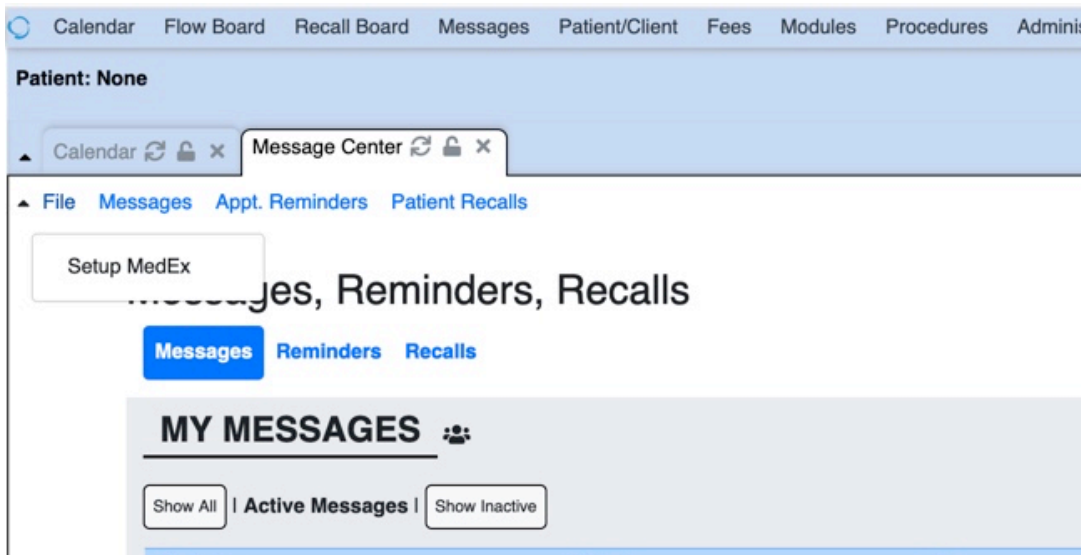
*TeleHeath services are free during the pandemic

A typical practitioner will spend \$25/month on average. The more messaging campaigns you create, the higher the number of messages processed. Our open source cost-sharing model calls for a portion of gross receipts to be donated to the OpenEMR Foundation for on-going development of the core open-source product, OpenEMR. As the messaging volume increases across all OpenEMR::MedEx customers, we lower the per message use charges for everyone. From our inception in 2017, the average monthly per-provider charge has declined from \$99 to today's current average monthly charge of \$25.00.

Your credit card statements will show two types of charges. The first is the base monthly subscription charge. This charge occurs on the same day every month. The second is the auto-refill Credit charge. When your credit balance dips below a predetermined amount, a charge is placed to replenish your credits. You determine when to auto-refill and how much to add on the MedEx website. The higher the refill amount, the less frequently you will need to auto-refill.

MedEx Registration Process

1. Enable the MedEx Communication Service via Administration->Globals->Connectors in OpenEMR.
2. Reload the Messages tab of OpenEMR. A new sub-menu will appear in the Messages tab. Navigate to File->Setup MedEx to register.



REGISTER: MEDEX BANK

E-mail	<input type="text" value="your email address"/>
Password	<input type="password" value=""/>
Repeat	<input type="text" value="Repeat password"/>

I have read and my practice agrees to the [MedEx Terms and Conditions](#)

I have read and accept the [MedEx Business Associate Agreement](#)

3. Register using a unique and valid email. This email does not have to be the email address your practice uses to communicate with the public. Your password must be complex: one uppercase letter, one lower case, one number and one special character.

MedEx Preferences

1. **General:** Decide on your practice's policy regarding HIPAA policy documentation. Hover your mouse over the General options for help determining which policy suits your needs the best.
2. **Enable Facility:** Choose which facilities you wish to send messages for. Most practices with more than one location will choose all locations, but surgeons may wish to only include office-based facilities for example. There are no limits on the number of facilities you can list.
3. **Included Providers:** Choose which Providers to send messages for. Each provider selected will increase the base MedEx subscription price by one unit.
4. If you plan to locally print Recall Labels or Postcards for Recalls, complete these sections.
5. **Sync Frequency (Polling):** Your server needs to talk to MedEx, to deliver any new message requests and retrieve patient responses. This setting determines how often your server polls MedEx. If your server's callback url is accessible (see My Practice below), MedEx will also push new responses into your system in real-time. **Recommended setting: 29 minutes.**

Polling syncs only occur when there is at least one person actively logged in/using OpenEMR. To ensure messages flow every day, we also recommend adding a background cronjob to sync MedEx.

If your server is running linux, add this cronjob:

```
0 0,4,8,12,16,20 * * * /usr/bin/env php /var/www/openemr/library/ajax/execute_background_services.php
```

Adjust the file locations to match your server.

The default location for OpenEMR on linux is `'/var/www/openemr'`.

Setup & the MedEx Website:

1. Login to MedExBank.com using the same e-mail/password credentials you used when signing up through your OpenEMR server.

Account Login

NEW PRACTICE

Practice Registration

Registration is performed through your EMR.
If you are using openEMR >=5.0.1:

1. Check the Global: "Enable MedEx Communication Service"
2. Refresh the "Messages" tab.
3. Select: File -> Setup MedEx and register!

API CUSTOMERS

My Practice is registered

E-Mail Address

Password

[Forgotten Password](#)

LOGIN

2. In the **My Practice** section, complete the data for each section:

- Admin contact
- Outgoing Messages
- E-mail Alerts
- TeleHealth

Practice Information

My Practice

My Facilities

My Providers

Messaging

Appt. Reminders

Patient Recalls

Go Green

Clinical Reminders

Announcements

Dial Zero

Services

TeleMedEx

SMS Bot

Account

Logout

PRACTICE INFORMATION

Settings Outgoing Messages E-mail Alerts TeleHealth

ADMINISTRATOR ACCOUNT

* First Name

* Last Name

* Login E-Mail

PRACTICE INFORMATION

* Telephone

Fax

Callback URL

* Time Zone

SAVE


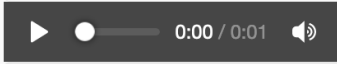
Be sure to select your correct **Time Zone**: messages are delivered according to local time here.

Also ensure your server has your local time zone set correctly (<https://linuxize.com/post/how-to-set-or-change-timezone-in-linux/>).

3. The **My Facilities** section on MedEx lists the facilities you selected when completing your **MedEx Preferences** in OpenEMR. If there is a discrepancy, you will need to update your facility information in OpenEMR, not on MedEx. When your patients receive a voice message from your practice, it will display your main phone number as the caller-id. The only facility feature that can be changed on MedEx is the facility caller-id. If you wish to have a caller-id displayed for a specific office other than your main office phone number, you should Edit the facility here.

4. **My Providers** lists the providers you selected when completing your **MedEx Preferences** in OpenEMR. In this section, you will need to indicate how the provider's name should appear in text messages and e-mails, as well as how it will sound in a voice message.

If you are using a tele-health provider, indicate the provider's room name. MedEx will display the link to the provider's waiting room in outgoing messages (*****TM_url***** in message templates).

Name:	Billy Smith	 <p>PROVIDER IMAGE</p> <p>Browse... No file selected.</p> <p>Add Image</p>
Display in E-mail/SMS:	<input type="text" value="Doctor Smith"/>	
"Sounds like" Phonetics:	<input type="text" value="Doctor Smith"/>	
		
Tele-Health Room Name:	<input type="text" value="DrSmith"/>	
Patient/Waiting Room URL:	<input type="text" value="https://dsdbox.com/DrSmith"/>	
Unique e-mail:	<input type="text" value="john@medexbank.com"/>	
Mobile Phone:	<input type="text"/>	

If your practice is using our tele-health service, **TeleMedEx**, each provider can access their own TeleMedEx DashBoard using their "Unique e-mail". This dashboard is limited to TeleMedEx and the SMS Bot. MedEx pulls this email address from your OpenEMR Address Book.

Before a provider can log in to their TeleMedEx DashBoard, they will need to create a secure password on medexbank.com: follow the link to **Create/Reset Password** on the login page.

<https://medexbank.com/cart/upload/index.php?route=account/forgotten>

Clinical Alerts (BETA):

As OpenEMR improves its Clinical Decision Rules Engine, we will offer all practices the ability to send a message to the provider using the phone number provided in the “Mobile Phone” field. This value must be entered in the OpenEMR Address Book for each user in the **Mobile** field.

For example, a Rule is created to recognize an elevated HbA1c over 10. Next, create a **Clinical Alert** in OpenEMR’s Clinical Decision Rules Alert Manager. When an A1c is over 10, this Alert is triggered.

At present, there are three types of Clinical Alerts in OpenEMR:

1. **Active Alert** - a pop-up alert occurs when accessing the patient record in OpenEMR.
2. **Passive Alert** - display a message in the Clinical Alerts widget located in the patient’s Medical Record Dashboard.
3. **Patient Reminder** - this Alert will be available in MedEx, where you can create custom messages using e-mail, SMS or Voice directed to the patient, the provider or another API.

As of publication time, the OpenEMR CDR Engine **does not work** in the latest release. MedEx has performed custom deployments for individual subscribers to achieve their messaging needs, but this work has not been accepted into the OpenEMR codebase. Drop us a note to see if we can help you achieve what you desire.


The Base Communication Package




To create messages, you will need an active subscription. Activate your subscription by clicking the Base Subscription button. It is highly recommended that you enable the Credits::Auto-refill feature to ensure messages are automatically sent out in the future. Processing of payments are handled through our third party processor PayPal (Braintree). You can cancel your subscription at any time by deleting your subscription. We will be sad to see you go but we will happily refund any used credits! If you have any issues please contact [support](#) for prompt assistance.



Navigating the Base Package

MedEx auto-creates examples of each type of Reminder and Recall which suit most users needs without modification. You are welcome to customize these messages and their timings to match your workflows.













Appointment Reminder Campaigns

The default Reminder Campaign process starts with an **e-mail 14 days** before a scheduled appointment. Patients can confirm by clicking a link in the e-mail they receive. If they do, your Calendar, Flow Board and SMS Bot will show that the patient has confirmed  by e-mail.

Two days prior to this appointment, an automated **voice reminder (AVM)** will be sent. You'll be able to choose the dialect and language desired. The patient can confirm  or request a callback . If an answering machine picks up, the message is left on the machine .

If the patient does not respond to the AVM, **one day** before the appointment, an **SMS** text message will be sent to their mobile device. The patient can confirm  or request a  call back. Your practice can create messages to match any workflow you desire.

REMINDER CAMPAIGN: EVENTS

MODALITY	MESSAGE NAME	DELIVERY SCHEDULE	INSTRUCTIONS	LIVE	ACTIONS
	Default Reminder EMAIL	15 days before	Send if unconfirmed	<input checked="" type="checkbox"/>	  
	Default AVM Reminder	2 days before	Send if unconfirmed	<input checked="" type="checkbox"/>	  
	Default SMS Reminder	1 days before	Send if unconfirmed	<input checked="" type="checkbox"/>	  

CREATE → →

To send an email you need the patient's email address. The same is true for SMS - the patient needs an SMS-capable phone. MedEx assumes any phone number listed as a "Mobile/Cell Phone" in your OpenEMR's Patient Demographics section is SMS capable. **Each message we send includes an opt-out option.** If a patient chooses to opt out of one particular type of communication modality, MedEx will update their preference in your OpenEMR database, and will no longer send those messages to that patient. Your office staff should ask each patient which type of messaging they allow, and document this in the demographics section.

Recall Campaigns

OpenEMR 5.0.1 and beyond, include a Recall Board. The Recall Board is an electronic method of storing lists of patients who need to schedule appointments. MedEx contributed this code to the OpenEMR codebase for all OpenEMR users. With an active MedEx subscription, your practice can create a series of messaging campaigns specifically for patients listed on the Recall Board.

RECALL CAMPAIGN: EVENTS

MODALITY	MESSAGE NAME	DELIVERY SCHEDULE	INSTRUCTIONS	PATIENT LANGUAGE	LIVE	ACTIONS
	Default Recall E-mail	30 days before	Send if not booked	All languages	<input type="checkbox"/> Off	
	Default SMS Recall	14 days before	Send if not booked	All languages	<input type="checkbox"/> Off	

CREATE
New SMS Event
→
#
days before (5-8PM)
→
ONLY SEND IF APPT. NOT BOOKED <= 3 MONTHS

Default examples for Recall Campaign Events:

The default Recall workflow is to send one **e-mail** message **30 days** before the desired Recall Date. A second message is sent via **SMS 2 weeks** before the Recall Date reminding the patient to call and setup their appointment. If no response is received after these events complete, the row on the Recall Board is highlighted red and its status is changed to “Manual Processing Needed”. Your office can personally call, send postcards or delete the recall, according to your in-house workflows.

Once an appointment is booked in the calendar (within 3 months of the recall date), the recall is auto-deleted from the Recall Board.

RECALL BOARD

Persons needing a recall, no appt scheduled yet.

All Facilities

All Providers

From:
To:

MedEx Status
On-line

+ New Recall
▼ Filter







All	Events Scheduled	In-process	Manual Processing Required	Recently Completed			
Name	Recall	Contacts	Postcards	Labels	Office: Phone	Notes	Progress
<div style="background-color: black; color: white; padding: 2px;">██████████</div> <small>PID: 1296 Last Visit: 09/12/2018 DOB: 10/12/1951 (69)</small>	09/11/2020 RTC 2 years Oculoplastics, LLC	H: 413-██████████ 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	Postcard: 02/20/2019 @ 4:24PM ✕

Go Green Events

Can any of your office tasks be improved with automation? Go Green Events can be deployed to achieve this. You can create messages to precisely reach patients by Visit Types (New, Annual, Mammo, etc), Appointment Status, Provider and/or Facility.

As an example, with every scheduled new patient appointment, MedEx can deliver a “Welcome to the Practice” e-mail, complete with attached PDF intake forms or a link to your Patient Portal. Other examples include a message containing the URL link for a tele-health visit, sent 15 minutes prior to the appointment, NoShow messages and post-visit surveys. You are limited only by your own creativity.

GOGREEN CURRENT EVENTS

MODALITY	MESSAGE NAME	DELIVERY SCHEDULE	INSTRUCTIONS	LIVE	ACTIONS
	NO SHOW Note	1 days after	Send to all targeted calendar events	<input type="checkbox"/> Off	 
	<u>Target Visit Types:</u> <ul style="list-style-type: none"> Established Patient Health and Behavioral Assessment New Patient No Show Office Visit Ophthalmological Services Preventive Care Services 	<u>Target Appt Status</u> <ul style="list-style-type: none"> ? No show 	<u>Target Providers:</u> <ul style="list-style-type: none"> Moss DelMundo 	<u>Target Facilities:</u> <ul style="list-style-type: none"> Heart Strings, LLC 	
	Post Visit Questionnaire	2 days after	Max once per year per target patient	<input type="checkbox"/> Off	 
	<u>Target Visit Types:</u> <ul style="list-style-type: none"> Established Patient Health and Behavioral Assessment New Patient Office Visit Preventive Care Services 	<u>Target Appt Status</u> <ul style="list-style-type: none"> > Checked out \$ Coding done 	<u>Target Providers:</u>		

New "Go Green" Event






Announcements/Group Messaging

If you ever need to reach a group of patients quickly, and the staff is not able to perform this task in a timely manner, you may wish to create an announcement.

Like GoGreen and Recall messaging, Announcements can be targeted by facility, provider, appointment type and/or appointment status. Unlike Reminders and Recalls, an Announcement is not personalized but are Group Messages. Everyone receives the same message. “We are closed tomorrow for the storm. Please call to reschedule.” “Dr. Smith has a family emergency and will be out of the office tomorrow. We apologize and will reach out to reschedule you tomorrow morning.”

On the MedEx Bank website, you will find the steps to create an Announcement are intuitive. with options to send announcements as an email, SMS text and/or a personally recorded message.

ANNOUNCEMENTS

NAME	MODALITY	APPOINTMENTS	INSTRUCTIONS	LIVE	ACTIONS
Snow Closure	 	<p>Date Range: 2018-06-02</p> <p>Provider: Moss DelMundo</p> <p>Facility: Heart Strings, LLC</p>	Toggle "LIVE" to run		 

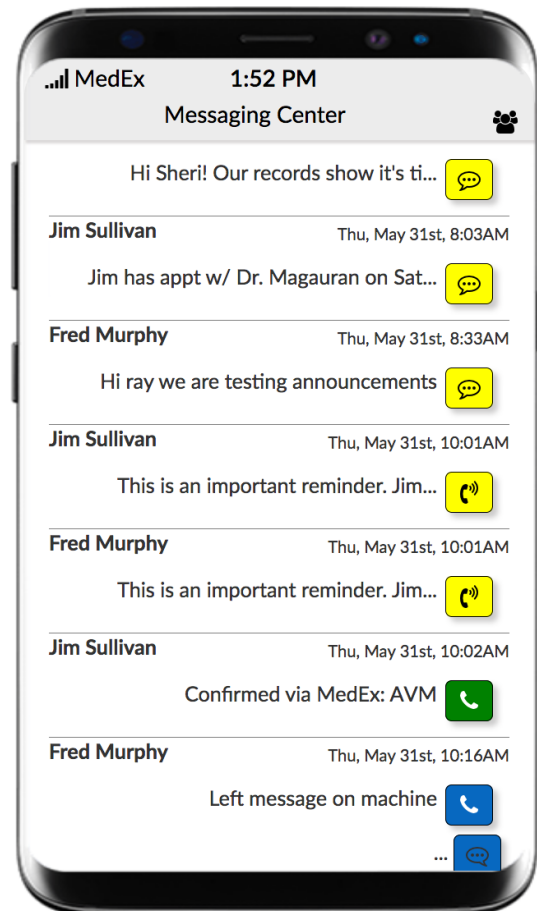
[NEW ANNOUNCEMENT](#)

The SMS Bot

Your MedEx subscription adds an SMS interface directly into OpenEMR. Your staff can text patients from any computer if they are logged into your OpenEMR server.

Messages are delivered across the phone network in real-time and are not encrypted. Please instruct your staff not to include protected health information when communicating via the SMS Bot unless you have specifically obtained your patient's consent (consider revising your HIPAA Privacy Policy). Exchanging appointment information is consider acceptable and does not fall under HIPAA regulations.

Remember to keep it HIPAA compliant!



TeleMedEx

Medex includes a teleHealth service called TeleMedex. During the Covid-19 pandemic, TeleMedEx is free to use with an active MedEx subscription in place.

On the **My Practice::TeleHealth** page, indicate that your teleHealth provider of choice is MedEx by entering **<https://dsdbox.com/>** . This is the first part of the url for your waiting room. On the **My Providers** page, enter the desired room name for each provider. When MedEx sends a message to invite the patient to the remote visit, MedEx will append your chosen **room name** to this url.

<https://dsdbox.com/DrSmith>

If you use an outside telehealth provider, enter their patient facing url in this box. MedEx will build the url for this service provider using this base telehealth url + the room name entered on the My Providers tab to create the waiting room link for that service. Using doxy.me as an example, the patient url might be:

<https://doxy.me/DrSmith>

TeleMedEx Dashboard

The TeleMedEx Dashboard is used to control the flow of virtual visits:

The dashboard interface includes a header with the provider name "Donna Lee". Below this is a navigation bar with tabs for "Invite", "Waiting Room", "In Session", and "History". The "Invite" tab is active. A section titled "Share Your On-line Waiting Room:" provides a URL: <https://dsdbox.com/DonnaLeed>. Below this is a "SEND AN INSTANT INVITE:" section with the instruction "Use Chrome Browser if possible!". It contains two rows of input fields: "Email address" and "SMS capable phone", each with "E-mail" or "SMS" buttons and "Preview" buttons. An "ADDRESS BOOK:" section features a search bar and fields for "First name", "Last name", "Email address", "Mobile Phone", and "Unique ID", with an "Add New Contact" button. To the right, a mobile phone screen displays the "SMS Bot" interface with a list of messages and status indicators like "Delivered..." and "In progress...".

TeleMedEx: Invite Tab

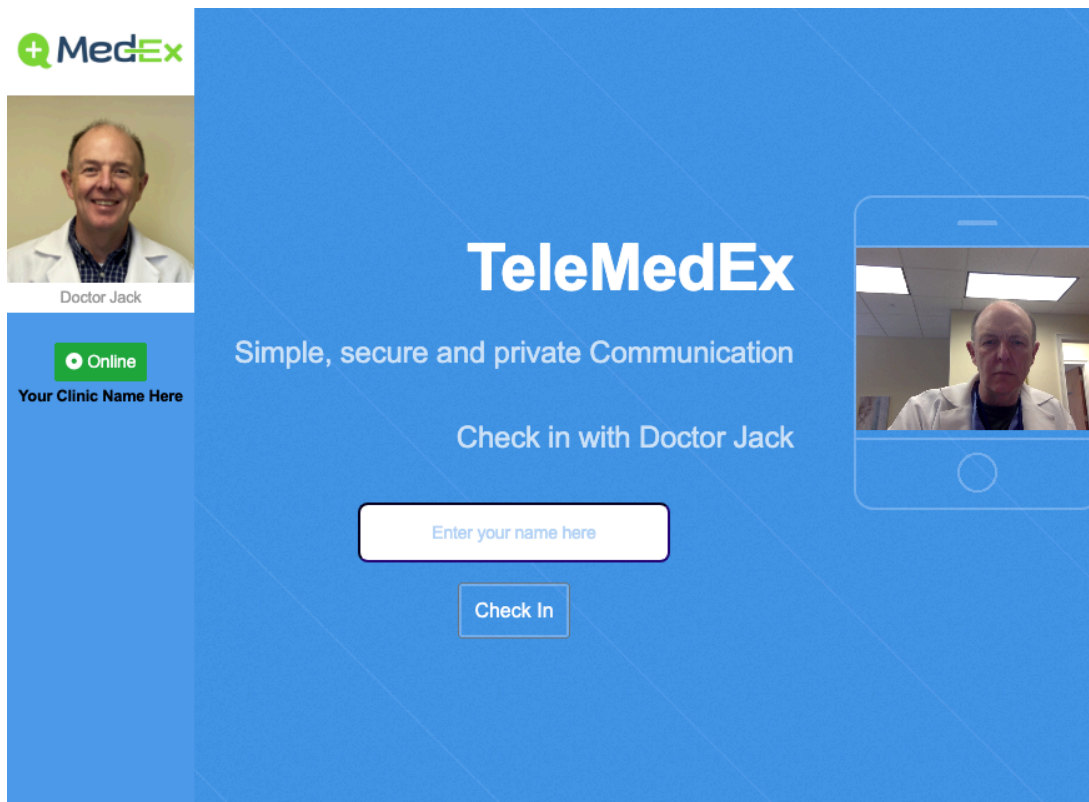
All users of MedEx will have access to the Invite tab. Here manual invitations can be sent via e-mail or SMS in real time. Invitations and patient responses are displayed in the adjacent SMS Bot.

TeleMedEx: Waiting Room

When patients are scheduled for a TeleHealth Visit, they receive the url for your provider’s waiting room. In our example, Dr. Smith’s waiting room is located at:

<https://dsdbox.com/DrSmith>

The Patient waiting room will display the provider’s status - Online, off-line or in-session. The patient enters their name and clicks the “Check In” button.



A notice is sent to the provider’s TeleMedEx Dashboard::Waiting Room on MedEx, displaying the patient’s name and a button “Open Room”.

Provider: Doctor Jack

[Invite](#)
[Waiting Room 1 ⚡](#)
[In Session](#)
[History](#)

PATIENT NAME	DATE	CHECK-IN TIME	ACTION
Phil Bedford	03/11/2021	8:40 AM	Open Room

By clicking “Open Room”, the provider is directed to the secure HIPAA-compliant telemedicine session. The patient is also directed to this same area. Telemedicine connections rely on a web technology called webRTC. Not all browsers are HIPAA-compliant when it comes to webRTC. MedEx limits browser connections to Chrome, Chromium and Vivaldi. You may be able to make a connection using a different browser, but features, security and connectivity may be affected. Patients connecting to the Waiting Room on a smart device, may be instructed to download the Jitsi Meet App the first time they use the service. This app is HIPAA-compliant.

Depending on the device, some users may need to add the MedEx secure server url in settings:

<https://jisti.dsdbox.com/>

TeleMedEx: In Session

Once the tele-health connection is established, a timer is started and the Dashboard displays the session information on the **In Session** tab.

Provider: Doctor Jack

Invite Waiting Room **In Session** (1) ⚡ History

PATIENT NAME	DATE	START	ACTION
Phil Bedford	03/11/2021	9:21 AM	End Join

If there is a connectivity problem during the session, the provider can return to the Dashboard and rejoin the session via the "Join" button. When the video session completes, the provider is redirected to the TeleMedEx Dashboard and the session is marked as ended. The duration of the appointment and patient name is added to the History tab for documentation purposes. The provider can delete the historical data if desired. For many behavioral health practices, this is the desired work-flow. Documentation of the visit is made in OpenEMR.

MedEx has developed a TeleMedicine Form that is tightly integrated into OpenEMR. It includes many of the Dashboard features so providers do not need to log into OpenEMR. Please contact support@medexbank.com if you would like to add these to your OpenEMR server.