

## Implementation Process and Setup

- **User access**
  - Account creation for users (schedulers, MAs, RNs, other clinical and administrative support staff) who will need access to communicate with patients, if not already set up in pMD as part of the charge capture implementation
    - This can be done in bulk via a spreadsheet import (requiring name, email, role type, and phone number), or manually one at a time using the pMD user interface
  - All users who will be communicating with patients via pMD to update unread message reminders (SMS/phone call/email) settings to XX minutes
    - pMD can also set a default reminder for all users in a practice
- **Patient access**
  - Set up Patient Chat Routers:
    - Designate patient request types (e.g. questions about my appointment, questions about my symptoms, virtual visits) that will be available for patients to select in the app
    - Designate recipient(s) for each active chat router
    - Set up auto-replies per request type that patients will receive immediately upon contacting the practice via the app
  - (optional) review and customize the patient disclaimer
    - Default disclaimer is: *pMD Secure Messaging is not intended for urgent or life-threatening issues. For emergencies, please call 911 or go to the ER.*
- **Patient enrollment**
  - (optional) Bulk patient import requires the patients' names, dates of birth, and cell phone numbers, which pMD can enroll en masse
  - End users can also enroll patients individually using the pMD user interface.
    - A cell phone # import for all patients would also be helpful since that would make it easier for your users to enroll patients ad-hoc as needed
  - Finalize patient enrollment workflow
    - Designate who will be responsible for patient enrollment going forward and at what point in the patient's care enrollment will occur (e.g. at bedside, at appointment check in)
  - If applicable, work with IT to update the ADT interface to send/process patient cell phone numbers going forward (phase 2)
- **Training and support**
  - pMD account managers can provide super-user training for supervisors and/or the users who will be taking point on patient communication
  - pMD can provide a reference PDF for both provider and staff workflows with very simple instructions
  - Our support team is available 24/7/365 by phone, and can also be reached by in-app chat for questions that are not urgent