



MessageWerx Installation and User Guide

MessageWerx LLC

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MessageWerx Automated Appointment Reminders

Introduction

This document contains information about the MessageWerx Automated Appointment Reminder Services for SOAPware®. The purpose of the service is to take appointment information from a database used by proprietary software such as SOAPware and load it to the MessageWerx Data Center.

Within this document each component of the install will be broken down as well as any setup issues to get the service up and fully functioning.

If you run into any issues that are not addressed in this document please go to our website at <http://www.messagewerx.com> go to our support page and open a support ticket or email customerservice@messagewerx.com We will setup an appointment to diagnose your issue.

Pre-Requisites

1. This software supports SOAPware 2011 and 2012.
2. You need to have administrative rights to install software on the server
3. Microsoft .NET 4.0 Full installation must be installed prior to installing the MessageWerx software.

****You may have to reboot your server after installing this update from Microsoft© so plan accordingly. ****

You can download the software here:

<http://www.microsoft.com/download/en/details.aspx?id=17718>

4. If you have a web filter please allow access to the following sites:

<https://www.messagewerx.com>

<http://www.messagewerx.com>

5. It is recommended that you signup to the MessageWerx service from a machine other than the server. Many customers have Enhanced Security Configuration enabled in Internet Explorer and that may cause issues with the signup process. If you are able to please disable the Enhanced Security Configuration to run the signup process 100% from the server.
6. After signing up for the service you will receive an email with your activation code and links to download the software.

Signing up for MessageWerx service for SOAPware

Open your browser and go to

<https://www.messagewerx.com/register/soapware>

Create a New Account

Use the form below to create a new account.

Please Fill in all fields.

Email

Password (7 Character Minimum and must contain a number)

Confirm password

Location Name

Address

Address 2 (optional)

City / State / Zip

Phone / Fax

Contact Name First / Last

Create Account

Fill out the requested information. Some boxes contain a short description of the information needed and why it is important.

After you click "Create Account" you will be directed to the Customer Subscription Agreement. Please read it carefully and digitally sign your name at the bottom and click "Submit"

CUSTOMER SUBSCRIPTION AGREEMENT

THIS AGREEMENT ("Agreement") is hereby entered into between MessageWrx LLC, a Utah Limited Liability Company and ("Customer") and collectively Company and Customer will be referred to as the "Parties," and individually as a "Party," on the following terms and conditions:

Customer is purchasing Appointment Reminder services to be provided the customer's patients/clients to begin on Aug 12 2011 and to continue for a period of one year, after the initial one year this agreement will convert to a month to month term, unless cancelled in writing 30 days prior to the end of the contract.

SERVICE: Customer desires to purchase appointment reminder services for each doctor, provider or practitioner from MessageWrx at a rate of Ninety-Nine Dollars \$99.00 per month (to include a maximum of 45 appointment reminders per business day per doctor, provider or practitioner). Usage over the maximum number of appointment reminders in the plan selected will result in the customer being billed Fifty Dollars \$50.00 for each additional Fifteen 15 reminders.

PAYMENT TERMS: Subscription fees shall be paid in advance every Thirty 30 days from the initial signup date. Customer may not withhold or "setoff" any amounts due hereunder. Company reserves the right to suspend Service until all past due amounts are paid in full after giving Customer advance written notice and an opportunity to cure as specified in ("Notices") and ("Termination"). Any late payment shall be subject to any costs of collection (including legal fees) and shall bear interest at the rate of one (1) percent per month or fraction thereof until paid.

COMPLAINE: The parties warrants and represents that the Parties at all times that they will maintain and be in compliance with the HIPPA, CAN SPAM ACT, and the Telephone Consumer Protection act ("TCPA") as defined under 47 U.S.C. 227 which strictly prohibits illegal telemarketing. Including but not limited to the transfer of patient information and contact of that patient information. Customer acknowledges that the patient information provided to the Company, the Customer has a pre-existing relationship with that Patient. Customer acknowledges that by providing the patients First Name, Appointment date and time, Phone number or email does not violate the HIPPA Act pursuant to sections **45 CFR 164.501, 164.508(a)(3)**.

TERMINATION: The customer may for any reason terminate this contract within thirty (30) days from the start date of this agreement. After this trial period the subscription is an agreement and cannot be canceled until the period of one year from the start date of this agreement. The Company may, in addition to other relief, suspend or terminate this Agreement if the Customer breaches any material provision hereof and fails within thirty (30) days after receipt of notice of default to correct such default or to commence corrective action reasonably acceptable to the aggrieved Party and proceed with due diligence to completion. If at the time of default by Customer, the Customer is in the one-year initial period of this agreement, then the Customer will be responsible for the remaining months of the initial contract. Either Party shall be in default hereof if it becomes insolvent, makes an assignment for the benefit of its creditors, a receiver is appointed or a petition in Bankruptcy is filed with respect to the Party and is not dismissed within thirty (30) days. . When Customer is in the month-to-month portion of this agreement then Customer may cancel with a 30 day written notice to Company.

DISPUTES, CHOICE OF LAW. The validity of this Agreement, the construction and enforcement of its terms, and the interpretation of the rights and duties of the Parties shall be governed by the laws of the State of Utah and any and all disputes hereunder shall be determined by the federal and state courts located in Salt Lake County, State of Utah.

ENTIRE AGREEMENT: This Agreement is the entire Agreement between the Parties and it supersedes all prior agreement and understandings between the Parties concerning the subject matter herein. It may be modified only by written Agreement signed by duly authorized representatives of each Party.







By typing in your name and clicking submit you agree the the terms and conditions listed above

Submit

For the next step, you will select the number of doctors or practitioners in your SOAPware environment that will use this service. Please change the quantity to the correct amount. If you have a coupon code please enter it at this time.



Checkout - Step 1 of 2

Product: MessageWerx Service		
Recurring Monthly Subscription	Amt: \$99.00 USD	Number of Doctors: <input type="text" value="1"/>
Coupon Code		
<input type="text"/> (if applicable)		
Download Info:		
Name:		
Email:		
We accept     , our billing is handled by:  and credit card processing by: 		
		<input type="button" value="Next"/>

click "Next"

Please review the purchase details and fill out all the required fields below. None of your credit card data is ever stored on MessageWerx servers or systems; rather, it is all contained within Authorize.Net's secure network. Authorize.net is an industry-leading merchant gateway for online transactions and is owned by Visa. Authorize.Net and Chargify are both Level 1 PCI Compliant.



Checkout - Step 2 of 2

Purchase Summary

Today's Total: \$99.00 (then \$99.00 recurring every 1 month)

To complete your order, please enter all fields.

Address

City

State

Zip Code

Credit Card Number

CVV

Exp. Month

Exp. Year

Submit Order

click "Submit Order"

You will then be taken back to MessageWerx website



Congratulations!

A welcome email containing your registration number, software, and instructions has been sent to

Registration Number: **100** *(You will need your registration number during the installation process)*

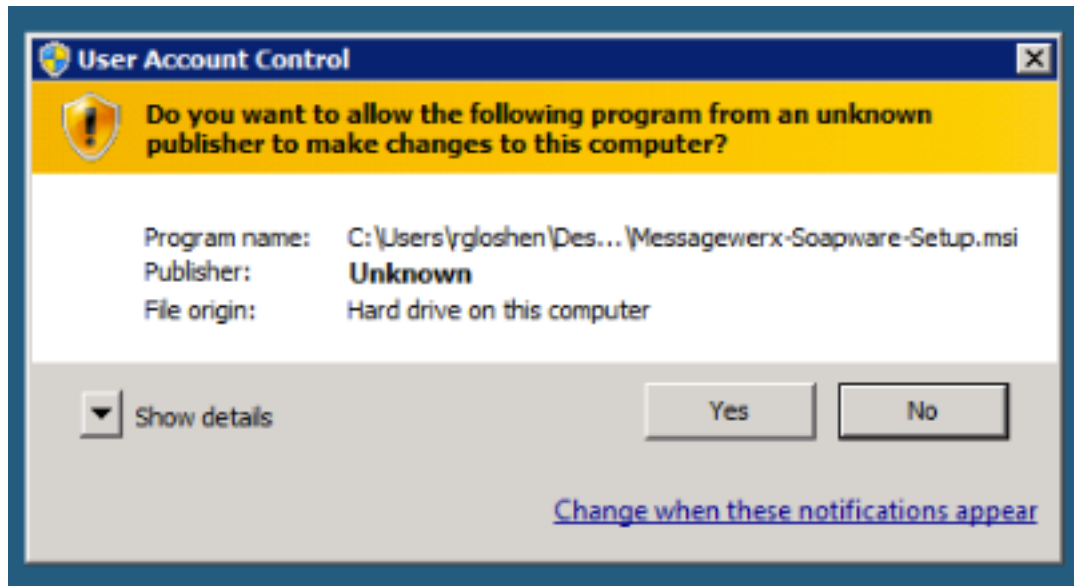
Click [here](#) to download MessageWerx Software.

Click [here](#) for the installation guide.

Please download the MessageWerx software and write down your
Registration Number.

Double click on Messagewerx-Soapware-Setup.MSI to install the software

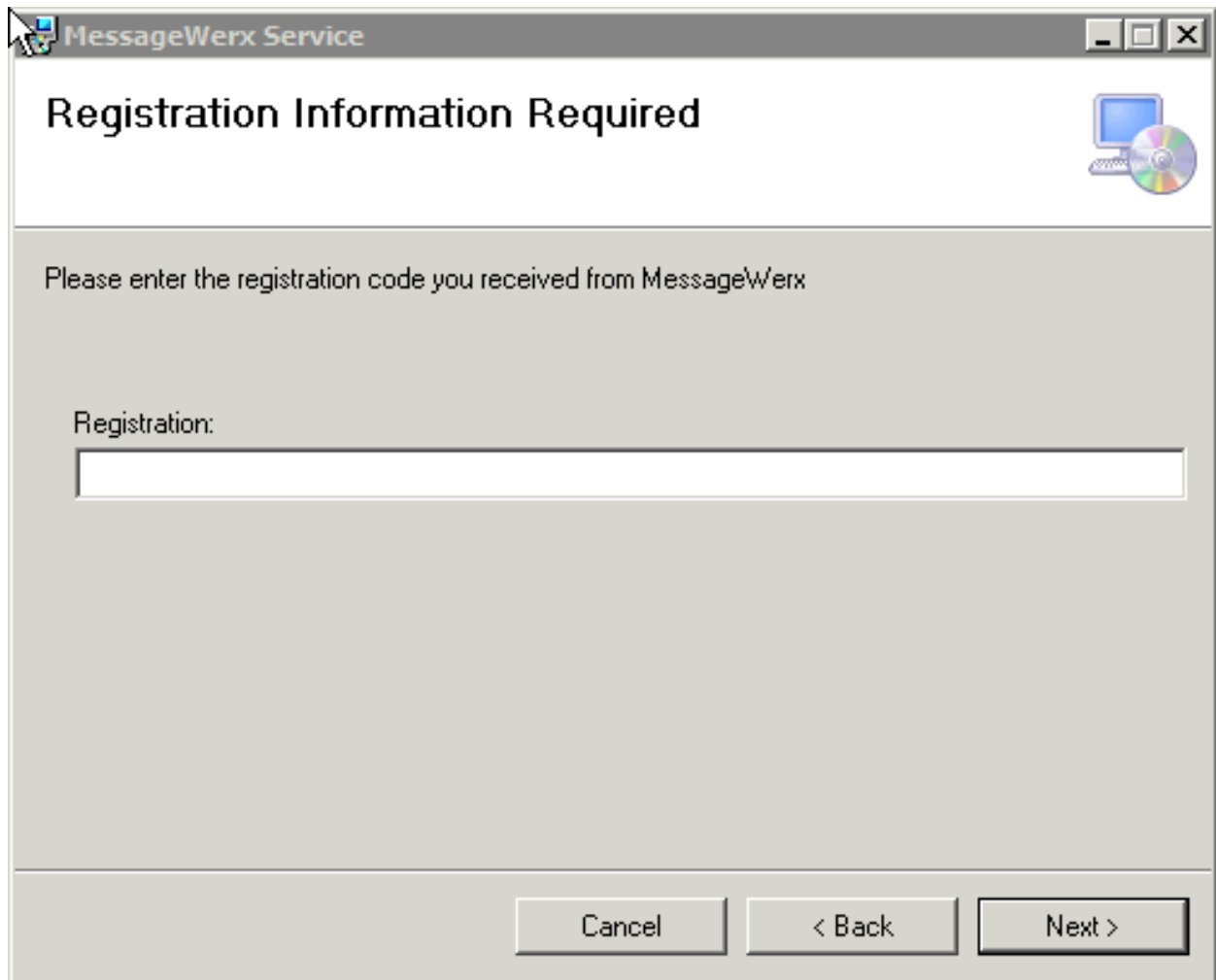
On Windows Server 2008 you may be prompted with this alert. Please click "Yes"



Click "Next"

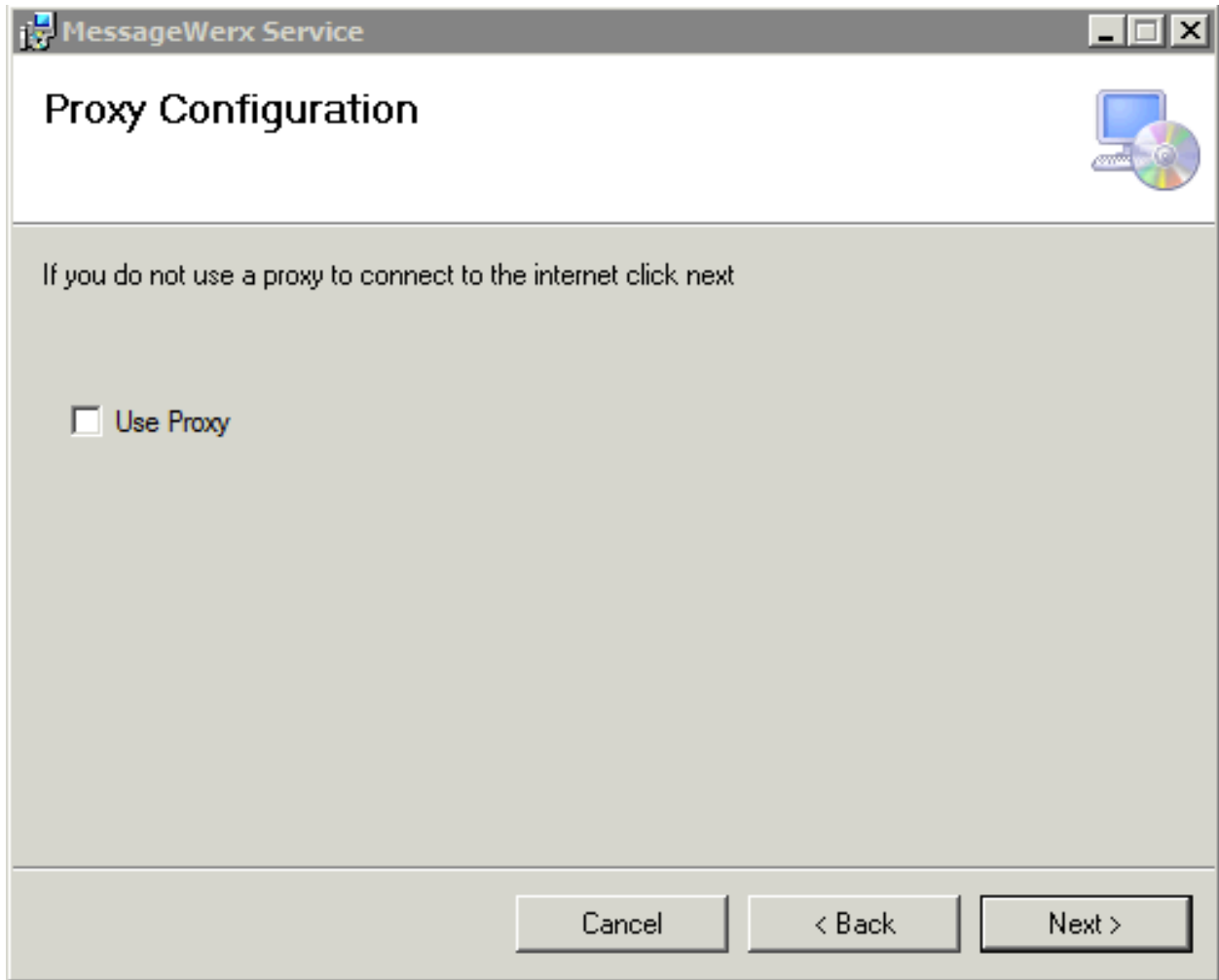


Enter the Registration Number from the MessageWerx Website or from your email and click "Next"

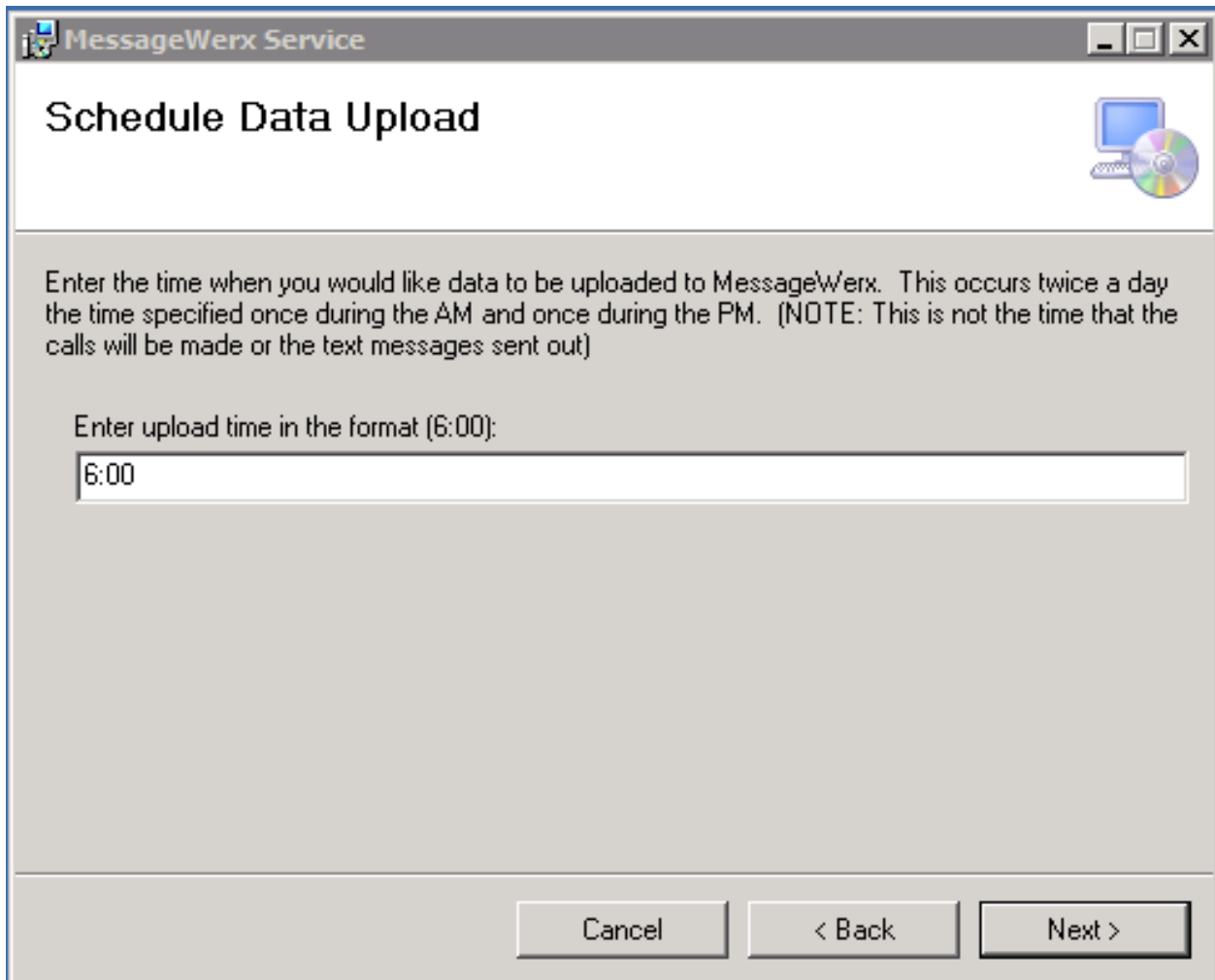


The image shows a screenshot of a Windows-style dialog box titled "MessageWerx Service". The window has a title bar with standard minimize, maximize, and close buttons. The main content area is titled "Registration Information Required" and contains the instruction: "Please enter the registration code you received from MessageWerx". Below this text is a label "Registration:" followed by a single-line text input field. At the bottom of the window, there are three buttons: "Cancel", "< Back", and "Next >". A small icon of a computer monitor and a CD-ROM is located in the top right corner of the window's content area.

If you do use a Proxy then check the box. The installer will utilize the current settings in Internet Explorer. If you do not use a proxy, please click "Next" without checking the "Use Proxy" box.



Enter the time when you would like to have the data uploaded to MessageWerx each day.



MessageWerx Service

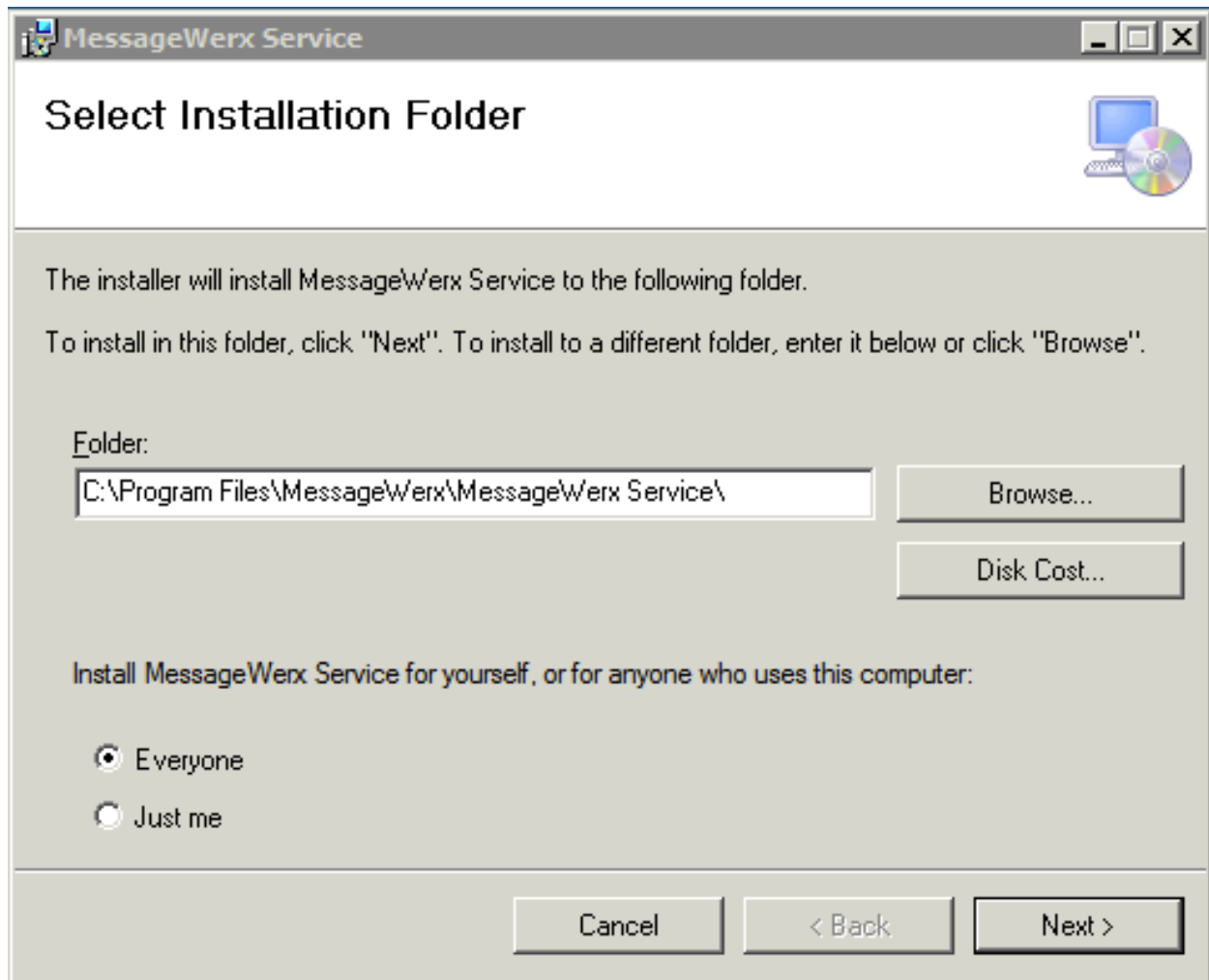
Schedule Data Upload

Enter the time when you would like data to be uploaded to MessageWerx. This occurs twice a day the time specified once during the AM and once during the PM. (NOTE: This is not the time that the calls will be made or the text messages sent out)

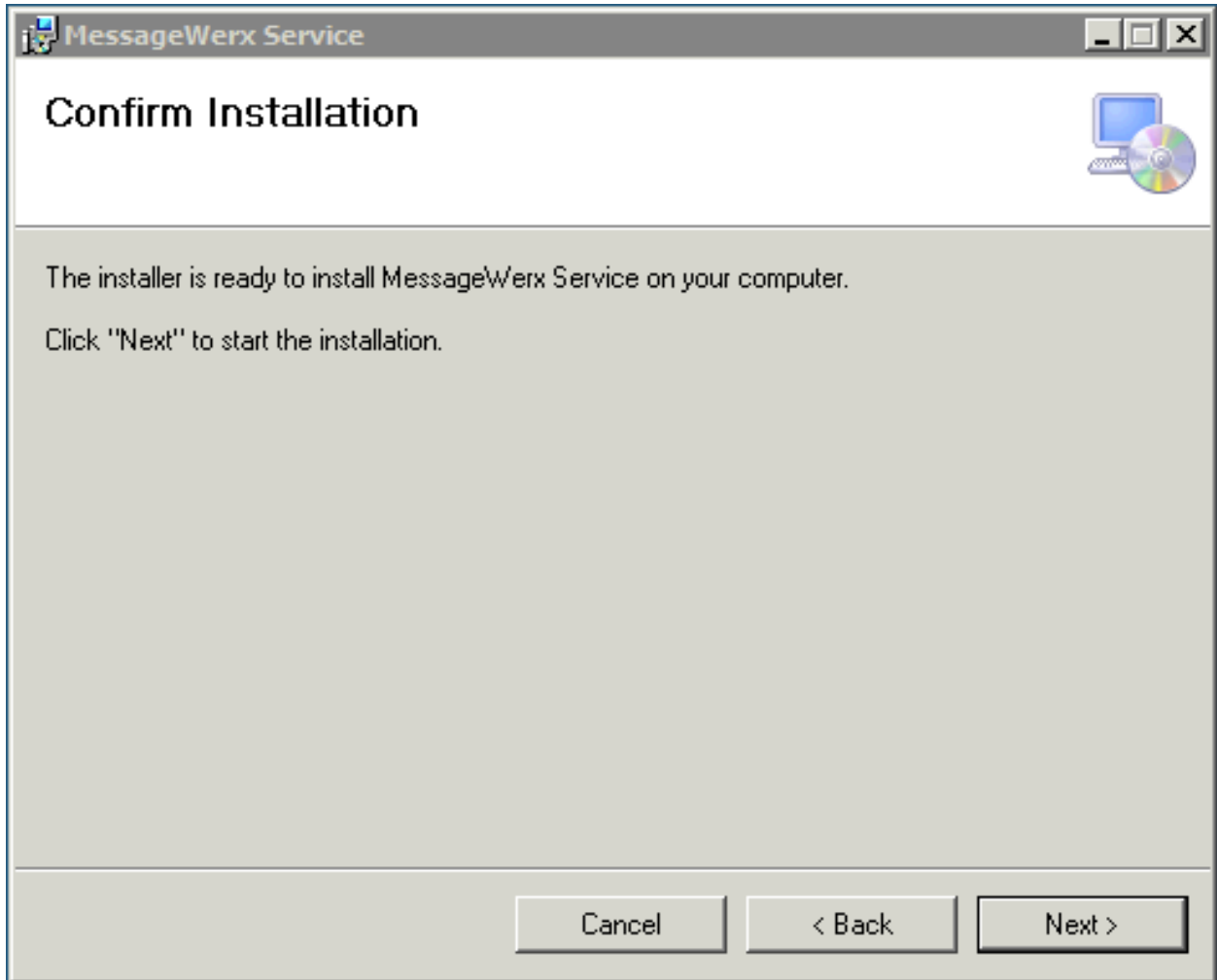
Enter upload time in the format (6:00):

Cancel < Back Next >

Select the folder where you want to install the MessageWerx Software. On the bottom option please leave it at "Everyone" unless you have specific security concerns (not common). Click "Next"



Click "Next"



If your PostgreSQL database is installed on the same server that you are running the MessageWerx software installation on you will type in **localhost** in the Server Name box. If not, please enter in the IP Address or fully qualified domain name of your Database Server.

The default port for PostgreSQL is **5432**. Do not change this unless you know it is set to something unique.

The default user is **postgres**. The password was configured during your initial installation of SOAPware. If you do not know your password please go to <http://www.messagewerx.com/support> and open a support ticket. We can help you reset your password.

Click "Submit"

SoapWare Settings

Please Enter in your Soapware Database Connection Information

Server Name

Port

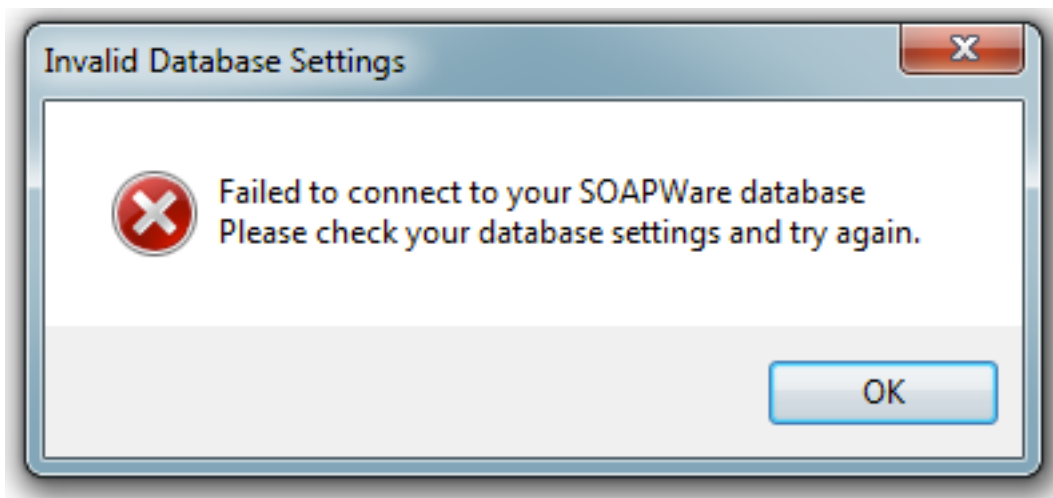
User

Password

Cancel Submit

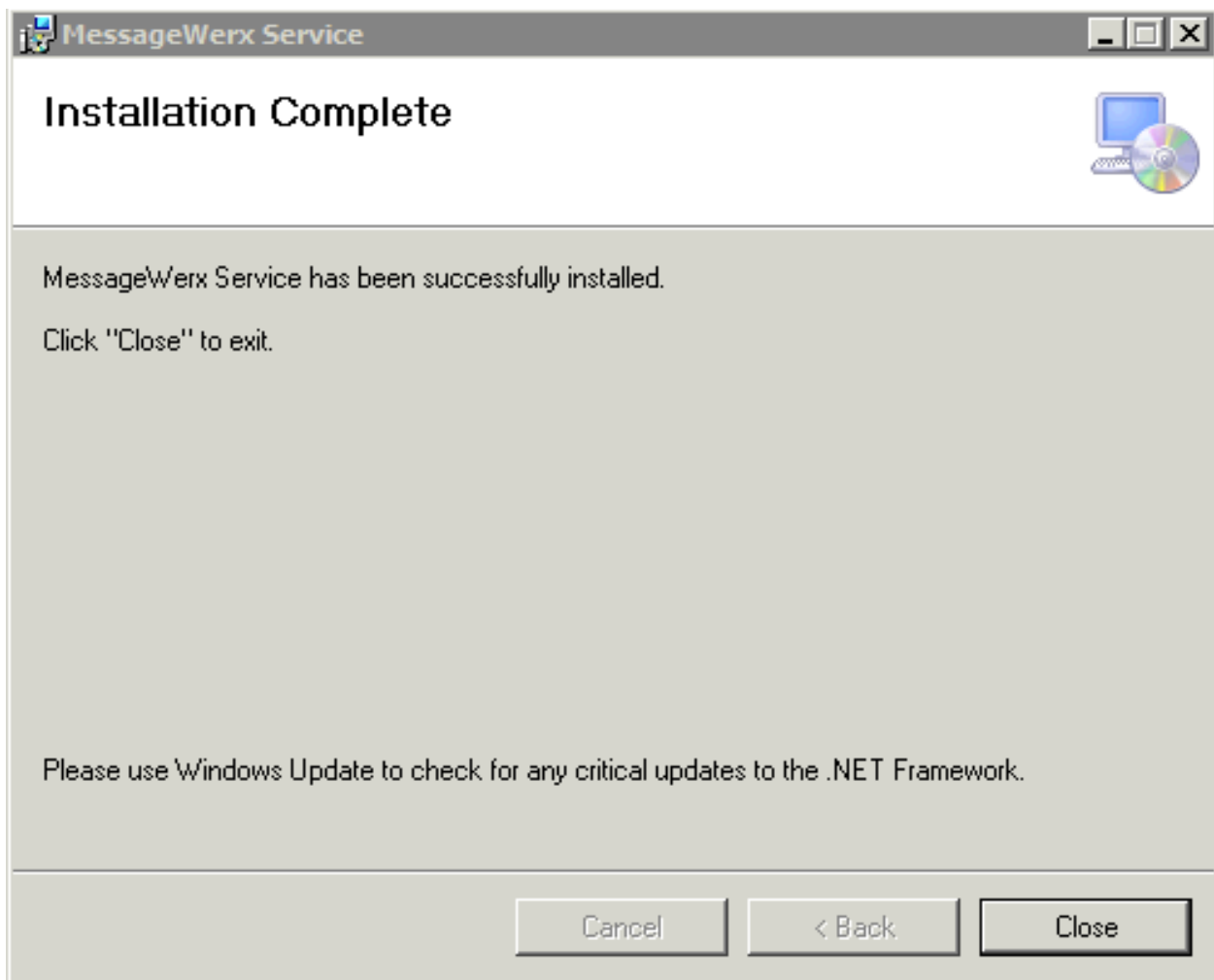
Cancel < Back Next >

The installation will then try and connect to the PostgreSQL Database with the credentials you provided. If they are not correct you will receive an error message like the one below. Click "Ok" and try again. You cannot finish the installation without the correct username and password for your PostgreSQL Database.



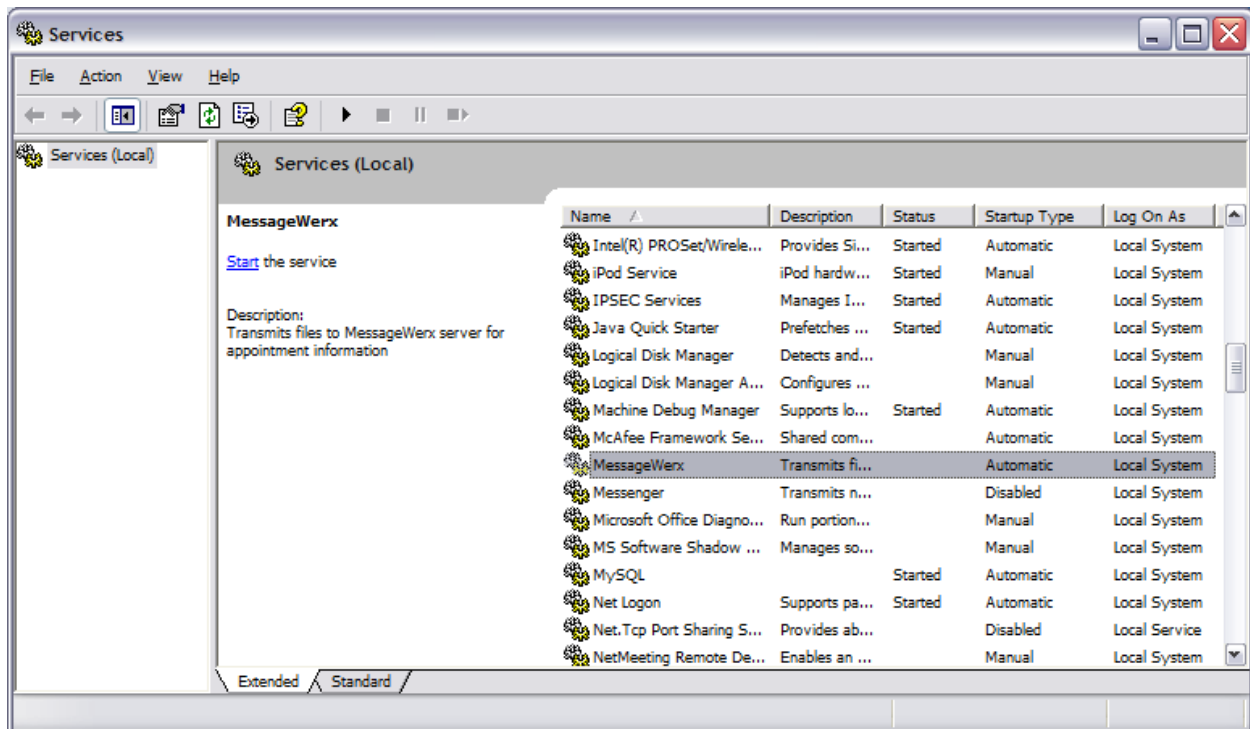
If you do not know your PostgreSQL database password please go to <http://www.messagewerx.com/support> and open a support ticket. We can help you reset your password.

When it has successfully completed the installation click "Close"



Starting the Service

After completing the installation as detailed above, go to the start -> administrator tools -> services. Locate the MessageWerx service as shown below. Right click on the service and click on "start". Wait for the service to start and then close the services window.



About the Service

The MessageWerx service runs at a preconfigured time twice a day and extracts appointment information from the SOAPware PostgreSQL database. This service sleeps until the desired run time. The service then packages up the data, encrypts it

and securely uploads it to MessageWerx servers via HTTPS. We keep a running log of two months of prior appointment reminder data for reporting purposes.

Our software extracts the following data from the SOAPware PostgreSQL Database:

Doctor Name
Patient First Name
Appointment Date and Time
Email Address
Home Phone and Cell Phone

No sensitive patient data is ever transmitted to MessageWerx.

Next, open your browser and go to:

<https://www.messagewerx.com/logon>

Login with the username and password you created



Log On

Please enter your e-mail address and password.

Account Information

E-mail address

Password

Remember me?

[Forgot Your Password](#)

You will now see a screen with all the providers that are setup in your SOAPware system.



Providers

Id	First Name	Last Name	Active	
10005	Rena	Thornton	Active	Edit Details
10006	Kaye	Yocham	Inactive	Edit Details
10007	Rita	Pense	Active	Edit Details
10008	Krista	Laningham	Active	Edit Details
10009	Jennifer	Berg	Active	Edit Details

Click "Edit" to view options for a specific doctor or practitioner. You will see all available options for MessageWerx Appointment Reminders. Some of the boxes contain a gray help box with a description of the information needed in that box.

Location Name:

The exact text entered into this field will be played to your clients on the voice reminders. This is a reminder from " ". If you have only one location please put your company name here.

Preferred Method of Contact:

This is the default setting for your reminders. It can be overridden in SOAPware and will be explained in detail on page 27.

Pin Code:

This is used to record a custom voice greeting. To record a custom voice greeting you will need your Provider ID number and the 4 digit pin code you previously set on this page.

Edit Provider Information

Provider

Active:

First Name:

Last Name:

Location Name:

Time Zone:

Participate in Daylight Savings Time:
 Yes No

Number of days in advance to remind:
 1 Day 2 Days

Earliest time to start calling:

Preferred method of contact:
 Phone Call Text Message

Default Caller ID to use:

Pin Code:

The MessageWerx system will not allow you to exceed the number of users defined in the agreement. If the number is exceeded, you will receive a notification on how to add more users to your account.

If you need to adjust the number of users, please visit:

<http://www.messagewerx.com/support/>. At this point, you can open a support ticket for your requested adjustment.

You may add an unlimited amount of providers at the \$99/month rate.

Adding or removing providers in your SOAPware EMR environment will automatically be reflected with 12 hours on MessageWerx servers.

You may also go to "My Account" in the top right hand corner to update company information and the point of contact for the account.

Manage Account

Edit Your Account Information

[Change Password](#)

Location Name

Address

Address 2 (optional)

City / State / Zip

Phone / Fax

Contact Name First / Last

Lastly, please login to SOAPware and open the scheduler.

When making an appointment with the customer, please ensure that either the Home Phone Number or Cell Phone Number fields have a valid number. Due to privacy concerns the Work Phone will never be utilized for Appointment Reminders.

To select what type of reminder you want for your client please do one of the following:

VOICE REMINDER

If only the Home phone number field has a phone number then the customer will receive a voice reminder

The screenshot shows the SOAPware 2011 interface for patient management. The title bar indicates the patient is John Smith, the user is Jennifer Berg, and the provider is Jennifer Berg. The main window is titled 'Demographics' and contains several sections for data entry:

- Demographics Section:** Includes dropdown menus for Race, Ethnicity, and Language, each with a warning icon. There are 'Load' and 'Clear' buttons to the right.
- Address Section:** Includes a 'Street' text field, and 'City', 'State', and 'Zip' fields. The 'Zip' field has a warning icon.
- Contact Information Section:** Includes 'Home Phone' (with the value '(801) 456-8600'), 'Work Phone', and 'Cell Phone' fields.
- Other Fields:** Includes an 'Email' text field, 'Primary Contact' and 'Secondary Contact' dropdown menus, and checkboxes for 'Exclude From Data Explorer' and 'Enroll for Online Access'.
- Right Panel (Billing Information):** Includes dropdown menus for 'Primary Provider' (Jennifer Berg), 'Referring Provider', 'PCP', 'Preferred Pharmacy', 'Guarantor', 'Financial Class', and 'Student Status'.

At the bottom of the window, there is a 'General' tab selected. The status bar at the very bottom shows 'Smith, John' and a search box for documentation.

TEXT MESSAGE REMINDER

If only the Cell phone number field has a phone number then the customer will receive a text message reminder. Note -- in a future version, you will be able to specify voice message or text message by either home or cell phone fields.

The screenshot shows the SOAPware 2011 interface for patient John Smith. The 'Demographics' tab is active, displaying various fields for patient information. The 'Cell Phone' field is populated with '(801) 456-8600'. The 'Primary Provider' is listed as Jennifer Berg. The 'General' tab is selected at the bottom of the form.

Field	Value
Race	[Warning Icon]
Ethnicity	[Warning Icon]
Language	[Warning Icon]
Street	[Empty]
City	[Empty]
State	[Empty]
Zip	[Warning Icon]
Home Phone	[Empty]
Work Phone	[Empty]
Cell Phone	(801) 456-8600
Email	[Empty]
Primary Contact	[Empty]
Secondary Contact	[Empty]
Primary Provider	Jennifer Berg
Referring Provider	[Empty]
PCP	[Empty]
Preferred Pharmacy	[Empty]
Guarantor	[Empty]
Financial Class	[Empty]
Student Status	[Empty]

******If both fields have valid phone numbers then the "Preferred Method of Contact" you selected on page 22 will be used******

The screenshot shows the SOAPware 2011 interface for patient Smith, John. The 'Demographics' tab is active, displaying a form with the following sections:

- Demographics:** Race, Ethnicity, and Language dropdown menus, each with a warning icon.
- Address:** Street, City, State, and Zip text input fields.
- Contact Information:** Home Phone (801) 456-8610, Work Phone, and Cell Phone (801) 456-8600 text input fields. An Email field is also present.
- Primary/Secondary Contact:** Two dropdown menus for selecting contact types.
- Options:** Checkboxes for 'Exclude From Data Explorer' and 'Enroll for Online Access'.
- Right Panel:** A vertical sidebar containing dropdown menus for Primary Provider (Jennifer Berg), Referring Provider, PCP, Preferred Pharmacy, Guarantor, Financial Class, and Student Status. 'Load' and 'Clear' buttons are at the top.

At the bottom of the window, there is a search bar for documentation and a taskbar with various application icons. The patient's name 'Smith, John' is displayed in the bottom right corner.

Setting a Custom Greeting for Voice Reminders

To change your greeting will need to know your account number and 4 digit pin number. You can find both of these items in your account at:

<https://www.messagewerx.com/logon>

To change your greeting call 801-456-8610 and follow the prompts:

1. Start communicating effectively with MessageWerx. To personalize your message please enter your 5 digit account number followed by the pound key
2. Thank you, now please enter your 4 digit access pin followed by the pound key
3. If you entered an invalid account number or pin number it will ask you to try again, if not your will go to the next step.
4. To listen to your current recording press 1. To record a new message press 2
5. Let's begin your recording process. You will be prompted to record your message in three parts. The first part is your greeting. For example "This a friendly reminder from Dr. Ryan's office. We are calling to remind" after this section the system will automatically say the patients name. The system will begin recording your personalized message after the beep, press pound when you are finished recording:
6. To save this recording press 1, to listen to your recording press 2, to re-record press 3.

7. Now you are ready to record the 2nd portion of your personalized message. For example " you have an appointment scheduled for" After this section the system will automatically say the patients appointment date and time. The system will begin recording your personalized message after the beep, press pound when you are finished recording:

8. To save this recording press 1, to listen to your recording press 2, to re-record press 3.

9. Great now you are ready to record the 3rd portion of your personalized message. For example " Press 1 to confirm this appointment, Press 2 to cancel this appointment. If you have questions or unable to keep this appointment, press 3 to be connected to the receptionist or call 801-456-8600 at your earliest convenience." The system will begin recording your personalized message after the beep, press pound when you are finished recording:

10. To save this recording press 1, to listen to your recording press 2, to re-record press 3.

11. To listen to your current message press 1. To record a new message press 2 or if you are satisfied with your message you may hang-up now.

When you change your greeting it will be active immediately.

If you have questions please go to <http://www.messagewerx.com> click on the support link. Here you will find frequently asked questions or you can open a support ticket. You may also send your questions to customerservice@messagewerx.com