

May 13 - JComm Automated Communications

This webinar provides an overview of recent system updates and offers a guide on utilizing JCOM for automated communications and intake forms.

Charting Improvements: An autosave feature has been introduced to charts, triggering automatically after two minutes to ensure data is preserved if a practitioner steps away.

System Settings: An "all-for-one" setting allows organizations to toggle between a simplified "Save" button (autosave) and the traditional "Complete and Close" button.

Feature Title: Juvonno Core Updates & JCOM Service-Specific Automation

Problem Solved

- **Charting Navigation Confusion:** The previous layout caused friction for providers who were unaware of interface modifications or accidentally left charts in an incomplete, "in-progress" state.
- **Repetitive Manual Document Distribution:** Administrative teams faced manual overhead and tracking issues when sending critical forms (e.g., liability waivers, outcome measures, or clinical surveys) to patients prior to or after distinct types of service appointments.
- **Dashboard Filter Reset Fatigue:** In the Invoice Search UI, advanced search panels and custom date filters reset between sessions, requiring users to repeatedly re-enter parameters during dense workflow periods.

Core Functionality

- **Configurable Chart Saving Workflows:** System administrators can toggle the top-right button within patient charts between a standard `Complete and Close` function or an `Autosave` trigger. By default, the system runs a 2-minute auto-save loop. Providers can also mass-update or mass-lock charts directly from their progress tabs.
- **Service & Invoice-Triggered Automation (JCOM):** Enables automatic delivery of target intake packets, surveys, or outcome measures via text or email based on specific appointment bookings or finalized line-item invoices.

- **Enhanced Invoice Search View:** Incorporates persistent dashboard visual components, dynamic aggregate calculation rows ("Grand Totals"), multi-select batch controls, and a pinning configuration for advanced search options.

Technical Implementation / Config

1. Chart Menu Save Preference & Individual Views

To adjust the primary interaction button on the charting interface, browse to the Global System Settings:

- **Path:** System Settings -> Patient section -> Charts.
- **Field:** Chart Menu Save Preference.
- **Options:** Select either Autosave or Complete and Close.

For individual layout scaling configurations, adjust individual profiles directly:

- **Path:** User Profile -> Preferences -> Default Chart View.
- **Options:** Set to open natively in a New Window, Expanded Screen (hides schedule overlay), or default lower-right panel pop-up.

2. Advanced Search Panel Persistence

To enforce an open-by-default status for accounting filters across the organization, update global accounting variables:

- **Path:** System Settings -> Accounting.
- **Field:** Invoice Search Custom Search.
- **Options:** Set to Always Open or Always Closed.

3. JCOM Campaign Trigger Configuration

Automated campaigns should leverage specific operational parameters rather than filtering out massive user lists via the primary Audience tier.

- **Audience Setup:** Keep baseline Audience parameters set to All.
- **Pre-Appointment Configuration:** Set the trigger type to Scheduled Item and input the targeted service item string or item ID number (Click **Go** to commit changes).
- **Post-Appointment Configuration:** Set the trigger type to Invoice Item or Category to prevent automated delivery if an un-cancelled appointment is abandoned on the scheduling calendar.
- **Delivery Frequency Check:** Ensure the One Send Per Patient restriction flag is **unchecked** if patients must complete the document prior to every recurring appointment instance.

Caveats & Limitations

Token Expiration Windows: Hyperlink security tokens injected via JCOM automation expire exactly 72 hours after transmission. If a recipient accesses an invitation after 72 hours, the interface rejects the request with a Token is Expired error code.

Form Attachment Restrictions: Automated JCOM campaigns support exactly one intake mapping tag per campaign. If an evaluation process demands an identity document, a custom policy agreement, and a health questionnaire, they must be combined into a single, multi-page document structure.

SMS Text Character Compounding & Emojis: The interface retains legacy calculation counters that estimate message counts based on historical 160-character cellular SMS split boundaries. While internal verification proves single payloads up to 500 characters route without physical segmentation, external emoji characters copied from alternative clipboards risk displaying on target end-user equipment as empty glyph blocks (white box renders). SMS text message segments explicitly drop structural formatting syntax (bolding, italics, or carriage returns) and condense automatically into a single un-broken block text paragraph.

No Retrospective Campaign Processing: The Start Date parameters indicate the operational launch date for automated background jobs. Setting a past date will not scan prior historical records to capture past client encounters.

Portal Patient Forms Restriction: Intake forms exposed directly on the public Client Portal operate as a global configuration ("all for one").

Missing Technical Detail:

The speaker referenced upcoming automated logic improvements designed to fix a bug where custom date range boundaries unexpectedly stick to previous selection ranges (e.g., sticking permanently to May 8th), along with an upcoming upgrade to allow users to directly input custom text date characters instead of navigating manually through graphical calendar scroll pickers, but did not explain specific implementation steps.

Best Practices

Invoice Enforcement Workflow: When using post-treatment tracking sequences or survey modules tied to an Invoice Item, clinical operations must require all front-office staff to invoice and clear every appointment line item before local business hours conclude to keep execution windows accurate.

JCOM Execution Timing Windows: Automated pre-appointment messages configure in integer Days, not precise hours. If a daily background evaluation daemon triggers at 8:00 AM, patients with early 8:00 AM appointments will receive their documents too late. Best practice dictates scheduling automated waivers to deploy a minimum of 1-2 days prior to the appointment date.

Discipline Intake Consolidated Architecture: For healthcare practices utilizing multi-disciplinary professionals (e.g., Chiropractic and Massage Therapy), avoid maintaining separate portals or overloading a client's profile with redundant documents. Best practice dictates constructing a unified primary health questionnaire utilizing conditional logic toggles, while separating out discipline-specific liability content into independent legal consent sub-forms.

Keywords: JCOM, Charting Preferences, Invoice Search, Intake Automation, System Settings

Source: https://drive.google.com/file/d/11mt_c3d1Y2uirgNy79v7zQ_fBG4HSe3X

Revision #4

Created 2026-06-26 21:00:16 UTC by Admin

Updated 2026-07-13 15:34:15 UTC by Admin