Messaging QRG

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View Outstanding Messages

Main Navigation Panel: Message Badges

The counting behavior on the Alert Bar directly correlates with the counts on the mailbox tabs of the Message Center when Scope = “Me.”

- **Phone:** Number of unread messages sent to the logged-in user. The badge will be red if at least one of the unread messages is urgent or if there are any messages in the Need Action tab.
- **Portal**: Number of unread messages sent from the patient portal to the user.
- **External**: Number of unread direct messages sent to the user.
- **Need Action**: Number of messages that the user has flagged as requiring further action to be taken. The badge is displayed in red.

  Note: The Message Groups above require the following permission: **Messaging_View**
- **Instant**: Number of unread instant messages, indicated in red.

  Note: Requires the following permission: **Instant_Messaging_Allow**

Message Center

1. Navigate to the Message Center:
   - **Main Navigation Panel > Phone, Portal, External or Need Act**
   - **Clinical, Practice Management, or Billing tab > Patient Chart button > Messages**
2. Change the following fields if necessary:
   - **Scope**: Select the radio button for Me, select user from the drop-down, or select the Everyone radio button.
   - **Dates**: Select from the Today, Week, Month, or All radio buttons.
   - **Include EFR**: Select the checkbox to view messages marked with a visibility other than Any Staff Member.
   - **Search**: Enter text in this field, and click the magnifying glass to search for the entered text in qualifying messages.

Note: Search applies for all dates.

3. Click on the appropriate tab to review messages:
    - **Unread Phone:** New messages originating from phone calls or other interoffice messages.
    - **Unread Portal:** New messages originating from the Patient Portal.
    - **Unread External:** New messages originating outside of the practice.
    - **Needs Action:** Messages that have been marked 'Act Req'.
    - **Read:** Messages marked as 'Read' from the Unread Phone tab.
    - **Sent:** All sent messages.

    Note: The text of each tab displays in red when there are unread messages.

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Create a Message

You can create and send patient messages and non-patient messages in OP. Patient messages are patient-specific and are saved as part of the patient's Medical Record. Non-patient messages are not tied to a specific patient, and are typically used for general communications within the practice.

1. Navigate to the Message window using one of the following methods:
    - **Clinical or Practice Management tab > Send Message button**
    - **Main Navigation Panel > Phone, Portal, External or Need Act > New Message button**
    - **Clinical, Practice Management, or Billing tab > Patient Chart button > Messages > New Message button**
2. Confirm the patient information fields are correct or blank depending on the type of message being sent:
    - **Patient Message**: If patient information is not populated, search for and select the patient using the **Patient Search** button .

      Note: If the message is being sent as a result of a conversation with the parent or patient and they are to be reached at a different phone number than what is listed in the patient's Demographics, edit the **Phone:** field. It does not alter the patient's Demographics record.
    - **Non-patient Message**: If a patient's information is displayed, click the **Clear** button to remove the information.
3. Complete the following fields, if applicable:
    - **Spoke with**: Select an option from the drop-down menu.

- **Time of call**: The time and date stamp are populated when the message is opened. To change this information, click the drop-down menu.
- *(Optional)* **Time Spent**: Enter the time spent on the call, in minutes, or click the drop-down menu and select from the number pad.
- **Urgent**: Select the checkbox to mark the message as urgent. The message will display in red in the inbox of the recipient.
- **Visibility**: Default visibility for the message is set to Any staff member. To change the visibility for the message, click the drop-down and select from the list.

4. In the **To:** field, use one of the following methods to select the recipient(s) of the message.
   - Use the drop-down to select the recipient(s), either individual or department. Repeat to add additional recipients.
   - Start typing the recipient name and make your selection. Repeat to add additional recipients.
   - Click the **Recipient Grid** button to select multiple recipients from a list by selecting the checkbox in the **Send** column. Select the checkbox to indicate if there is Action Required (**Act Req**) by each selected recipient.

   Note: In all of the options above, if the message is to be sent to everyone in the practice, select **Everyone** as the recipient.
5. If needed, select recipient actions from the options below.
   - **Action Required** : Select for recipients your message requires action from.
   - **Remove Recipient** : Click to remove a selected recipient.
   - **No One**: Select to document a message without sending to a recipient. The **Send** button is replaced with a **Save** button.
   - **Patient Portal**: Select to send the message to the patient's active portal account.
   - **All Must Read**: Select to require all recipients to read the message. This is typically used when sending a message to a group for users, department, or everyone.
   - **No Response Allowed**: Select to close the message from responses.
6. Complete the fields of the message using the information below.
   - **Subject**: Enter a brief description of the reason for the message.
   - **Message**: Enter the content of the message. Phrase Construction and a shortcut to the patient's prescription record are available.

Note: ClearTriage is also available to practices who have active subscriptions.

7. *(Optional)* Add attachments by clicking the **Attach** button and select document to attach.
8. Click the **Send** button.

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Respond to a Message

Respond to a Message That Does Not Require Action

1. Navigate to the Unread Phone tab of the Message Center: **Main Navigation Panel > Phone**
2. Select the message to respond to. The message will display in the lower section of the window.
3. Click the **Reply** or **Reply All** button. The Message Response window is displayed.
4. If necessary, edit the fields in the top panel of the window.
5. Confirm the recipient(s) listed in the **To:** field for the message response.

   Note: Remove recipients by clicking the **Remove Recipient** button.
6. In the **Response:** field, enter the response to the message.
7. Confirm the **Mark message read** checkbox is selected.

   Note: This moves the original message from your Unread Phone tab to the Read tab in the Message Center. If the message was sent to other recipients, selecting this option will leave the message in the Unread Phone tab of the other recipients.
8. Click the **Send** button.

Respond to a Message Marked as Action Required

Messages that require action are displayed in **bold** in the Message Center.

1. Complete steps 1-7 in the section above.
2. Select from one of the options to determine how the message will be handled:
   - **Further action required by me**: This moves the message to the Need Action tab of your Message Center for you to complete or follow-up on at a later time. If the message was sent to other recipients, selecting this option will leave the message in the Unread Phone tab of the other recipients.
   - **Completed: remove from my inbox**: In combination with the Mark message read checkbox, this option moves the message to your Read tab. If the message was sent to other recipients, selecting this option will leave the message in the Unread Phone tab of the other recipients.

- **Completed: remove from all inboxes**: This option is only displayed when the message was sent to multiple recipients. In combination with the Mark message read checkbox, this option moves the message to your Read tab and also removes the message from the Unread Phone tab of the other recipients.

3. Click the **Send** button.

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Forward a Message

Forward a Message That Does Not Require Action

1. Within the Message Center, highlight the message you want to forward.
2. Click the **Forward** button.
3. Confirm or change the recipient(s) listed in the **To:** field.

   Note: Remove recipients by clicking the **Remove Recipient** button.
4. In the **Response:** field, enter text as necessary.
5. Confirm the **Mark message read** checkbox is selected.

   Note: This moves the original message from your Unread Phone tab to the Read tab in the Message Center. If the message was sent to other recipients, selecting this option will leave the message in the Unread Phone tab of the other recipients.
6. Click the **Send** button.

Forward a Message That Requires Action

1. Within the Message Center, highlight the message you want to forward.
2. Click the **Forward** button.
3. Confirm or change the recipient(s) listed in the **To:** field.
4. Select the **Action Required** button for the recipient(s) that need to take action.
5. In the **Message:** field, enter text as necessary.
6. Below the Message: field, confirm **Mark message read** is selected.
7. Confirm Completion to remove from the inbox(es) of the previous recipient(s).
   a. If only sent to you: **Completed: Remove from my inbox** is selected.
   b. If the message was sent to more than one person/group: **Completed: Remove from all inboxes** is selected.
8. Click the **Send** button.

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Comment on a Message

Commenting on a message saves a response to a message without sending the response to a recipient.

1. Within the Message Center, highlight the message you want to comment on.
2. Click the **Comment** button.
3. Enter the comment in the **Message:** field.
4. Confirm the **Mark message read** checkbox is selected.
5. If the Message was marked by the sender as Action Required, select from the following options to determine how the Message will be handled:
   - **Further action required by me**: This moves the message to the Need Action tab of your Message Center for you to complete or follow-up on at a later time. If the message was sent to other recipients, selecting this option will leave the message in the Unread Phone tab of the other recipients.
   - **Completed: remove from my inbox**: In combination with the Mark message read checkbox, this option moves the message to your Read tab. If the message was sent to other recipients, selecting this option will leave the message in the Unread Phone tab of the other recipients.
   - **Completed: remove from all inboxes**: This option is only displayed when the message was sent to multiple recipients. In combination with the mark message read checkbox, this option moves the message to your Read tab and also removes the message from the Unread Phone tab of the other recipients.
6. Click the **Save** button.

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Invalidate a Message

Messages in OP cannot be deleted but they can be invalidated by the staff member who sent them. Invalidated messages are not outwardly visible in the Patient Chart but they are retained in the patient's Medical Record.

1. Within the Message Center, navigate to the **Sent** tab.
2. Select the message to invalidate.
3. Click the **Invalidate** button.
4. Click **OK** to invalidate the message. This action cannot be reversed.

   Note: When viewing a patient's medical records (**Clinical tab > Medical Records button**), select the **Include invalidated** checkbox in order to see any invalidated messages associated with the patient record.

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Instant Messages

Instant Messaging allows you to send a quick message to someone else in the office. Instant Messages are not linked to a patient's record and should not be used for medical documentation. Instant Messages are not saved or tracked in the audit trail.

Send an Instant Message

1. Navigate to the Read IM window: **Main Navigation Panel > Instant**
2. Click the **New IM** button. The Send IM window is displayed.
3. Click the **To:** drop-down and select from the list.
4. Enter your message.
5. Click the **Send** button.

Reply to an Instant Message

1. Navigate to the Read IM window: **Main Navigation Panel > Instant**
   Note: The badge will display the number of unread messages in red.
2. The first column will display who the message is from. The second column displays the message. Hover over the text to see the entire message. The third column displays the date/time the message was sent.
3. Highlight the message you wish to respond to and click **Reply**.
4. Enter your message.
5. Click the **Send** button.

Acknowledge an Instant Message

1. Within the Read IM window, select a message.
2. Click the **Ack** button to acknowledge the message.

Delete an Instant Message

1. Within the Read IM window, select the message you want to delete.
2. Click the **Delete** button.

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