Create a Message

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Version 21.0

About

Below, you'll learn how to create and send a patient Message and a non-patient Message in OP. Patient Messages are patient-specific and are saved as part of the patient's Medical Record. Non-patient Messages, however, are not tied to a specific patient and are typically used for general communications within the practice. All Message creation is started using one of the following methods:

- Click the **Send Message** button in the Clinical or Practice Management tab.
- Click **Phone** in the Messages section of the Main Navigation Panel to open the Message Center. Then, click the **New Message** button.
- Click **Messages** in the Patient Chart. Then, click the **New Message** button.

Create a Message

1. Navigate to the Message using one of the methods above.
2. Confirm the patient information fields are correct or are blank depending on the type of Message being sent.

- **Patient Message**: If the patient's information is not already populated, search for and select the patient using the **patient search** field  . Once the patient is selected, their information is populated.

Tip: The only patient information that can be edited is the **Phone** and **Ext.** fields. This should be updated 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. Editing the Phone field 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 optionfrom 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.
- **Time Spent**: Enter the amount of time spent on the call, in minutes, or click the drop-down menuand select from the number pad.
- **Urgent**: Select the checkbox to mark the message as urgent.
- **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 in the To: field** to select the recipient(s), either individual or department. Repeat this method to build your recipient list from left to right in the To: field.
   - Start typing the recipient name in the To: field, and make your selection. Repeat this method to build your recipient list from left to right in the To: field.
   - Click the **Recipient Grid** button to choose multiple recipients from a list by selecting the checkbox in the Send column. While here, you can also select the checkbox to indicate if there is Action Required (**Act Req**) by each selected recipient.
   - In all of the options above, if the message is to be sent to everyone in the practice, selec**Everyone** as the recipient.

5. If your message requires action from the recipient(s), select the**Action Required** button for each recipient. If a selected recipient needs to be removed, click the **Remove Recipient** button .
6. If needed, select additional recipient actions.

   - **No one**: This option is used to document a message but the message is not sent to a recipient. When this option is selected, the Send button is replaced with a Save button.
   - **Patient Portal**: This option sends the message to the patient's active portal account.
   - **All Must Read**: This option requires that all recipients read the message. This is typically used when sending a message to a group of users, department or everyone.
   - **No Response Allowed**: This option closes the message from further responses.

7. 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 that have active subscriptions.

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

Version 20.18

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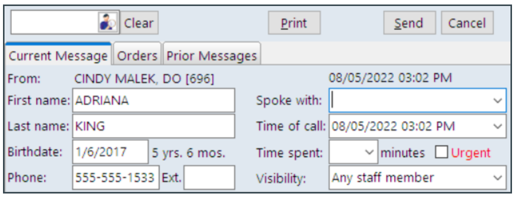

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