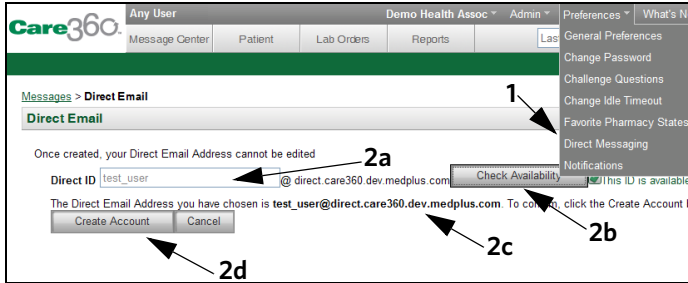


# Care360® Labs & Meds 2012.1

## Direct Messaging

Direct messaging adheres to a set of standards, services, and policies for exchanging patient health information securely over the internet. The *Direct Messaging* service is available (by default) for all Labs & Meds organizations. Healthcare providers wanting to participate in direct messaging using Labs & Meds must establish a unique Direct address for each organization to which they belong.

### Creating a Direct Address



1. In the information bar, click *Preferences > Direct Messaging*.

#### Notes:

- If you create a Direct address, and then your organization disables the *Direct Messaging* service, you will no longer be able to send and receive Direct messages. If your organization enables the *Direct Messaging* service at a later time, your existing address will still be usable.
- Users that are assigned the Phlebotomist or Clinical Lab Staff role cannot send or receive Direct messages.

2. On the *Direct Email* page, do the following:

- Review your Direct address. If you have already created your Direct address, it appears on the *Direct Email* page.

**Note:** Direct addresses cannot be modified.

- Create your Direct address. To create your address for sending and receiving information according to Direct standards, do the following:

**Note:** If you belong to multiple organizations, you must create a different Direct address for each organization.

- a. In the *Direct ID* text box, type the Direct ID you have chosen.

**Note:** The Direct ID can be up to 100 characters in length, and can include alphanumeric characters, periods (.), dashes (-), or underscores (\_).

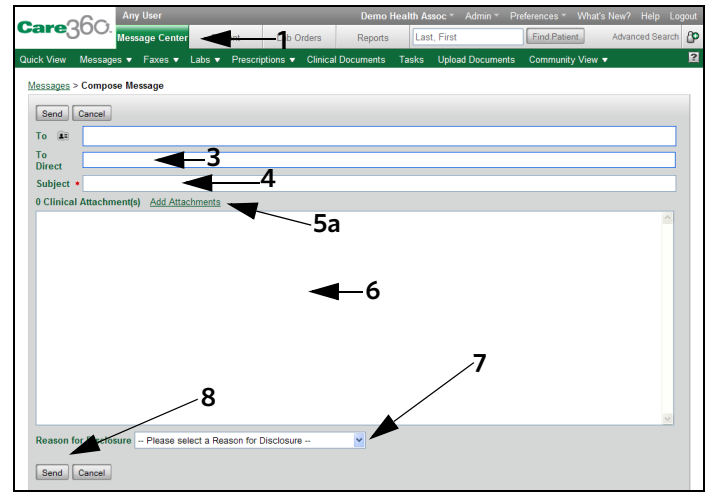
- b. Click *Check Availability*.

**Note:** Your Direct ID must be unique. If the ID you have chosen is already being used, you will receive a message indicating that you must select another ID.

- c. Review the Direct address you have chosen.

**WARNING!** Once you create a Direct address for an organization, you will not be able to modify it or create an additional Direct address for that same organization.

- d. Click *Create Account*.



### To Send a Direct Message

1. Click the *Message Center* tab.
2. In the *Messages* menu, click *Compose Message*.



**Note:** You can also access messaging from a patient chart by clicking the *Message* icon (✉) in the upper-right corner of the page, or the *Compose Message* link in the *Sent Messages/Received Messages* section.

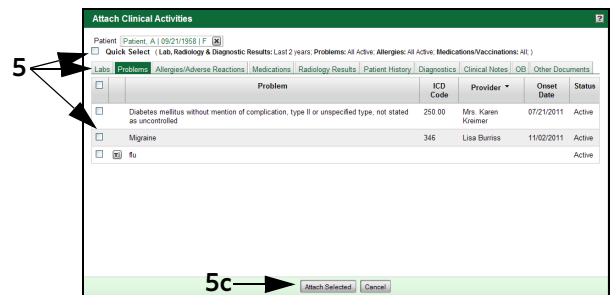
3. To send a message to a Direct user, type the address of the Direct recipient(s) in the *To Direct* box.

#### Notes:

- Only users with a Direct address can send messages to Direct recipients, or receive Direct messages. For more information see "Creating a Direct Address".
- The recipient(s) of a single message can include both Direct and Care360 users.

4. At *Subject*, type a brief subject (up to 180 characters) for the message.

5. To reference patient data or clinical activities, do the following:
  - a. Click *Add Attachments*. Type the search criteria for the patient in the *Patient* box, and then click the patient in the results.



**Note:** You can click *Attach Selected* after selecting the patient to only attach the patient's identification to the message.

- b. Click the *Quick Select* box to automatically attach a portion of the patient's data, or in the available tabs, click the check box next to each data item that you want to include in the message.

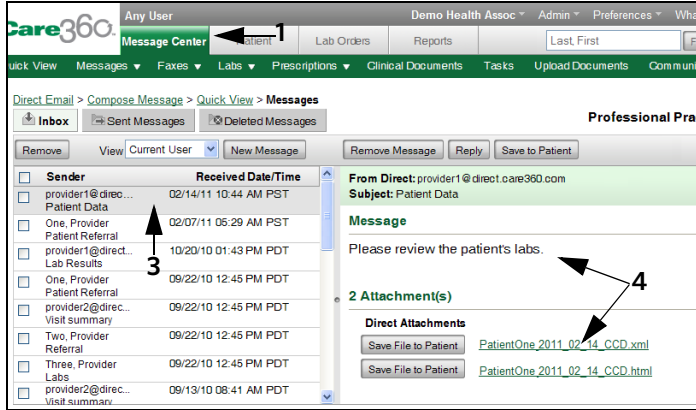
**Note:** The attachments available for a message vary depending on which premium services your organization has enabled.

- c. To attach the selected data to the message, click *Attach Selected*. The *Clinical Attachment(s)* area displays the number of clinical activities you selected.

6. Type the message content (up to 4000 characters).

- At Reason for Disclosure, select the item that most closely matches the purpose of the message.
- To send the message, click *Send*.

## Viewing a Received Message

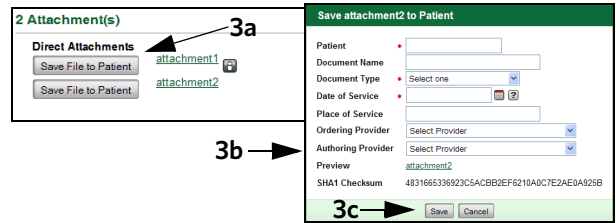


### Notes:

- Saving a Direct message to a patient's chart does not automatically save the attachments, and saving an attachment does not automatically save the message.
  - A Direct message or attachment can be saved to multiple patients' charts, but only once to each chart. You can save Direct messages from within your organization to a patient chart.
- To save an attachment included in the Direct message to a patient's chart, do the following:
    - In the *Attachment(s)* area of the message, click *Save File to Patient* next to the attachment you want to save.

**Note:** Depending on which premium services your organization has enabled, the attachments which can be saved to a patient's chart will vary.

- In the *Attachment(s)* area of the message, click *Save File to Patient* next to the attachment you want to save.



- In the *Save to Patient* dialog box, type or select the following attributes for the file:
  - In the *Patient* box, type the last name of the patient and then click the patient's name from the results list.
  - In the *Document Name* box, type a descriptive name for the attachment. For example, 1/08 Lipid Panel Test.

**Note:** If you add a descriptive name for the attachment, it appears in parenthesis next to the file name in the *Document Name* column of the *Patient Uploaded Documents* list, otherwise the file name appears.

- In the *Document Type* list, click the category under which the attachment should be filed.

### Notes:

- The document type determines where the document is filed. For example, if a document type of *Lab Results* is assigned, it will be available with all other lab results, such as in the *New Lab Results*, *All Lab Results*, and *Recent Requisitions* list.
  - Documents identified as *Other Documents*, any category under *Other Documents*, or *Antepartum Package* will be available from the patient *Summary* page in the *Other Documents* section.
  - In the *Date* box, type a date in *mm/dd/yyyy* format, or click the calendar icon (📅) to select a date.
  - In the *Place of Service* box, type the place in which the service described by the document was performed.
  - In the *Ordering Provider* list, click the name of the healthcare provider who ordered the lab test or click *Other*, and then type the provider's name in the box.
  - In the *Authoring Provider* list, click the name of the healthcare provider who added the note about the patient visit (or encounter) by clicking the name of a provider in the list, or clicking *Other*, and then typing the provider's name in the box.
- Click *Save*.

## To View a Received Message

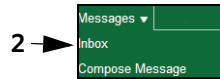
- Click the *Message Center* tab.
- In the *Messages* menu, click *Inbox*.

### Notes:

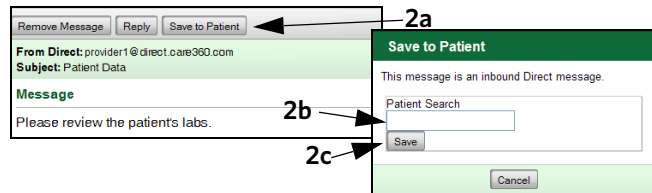
- The *Direct Messaging* service is available (by default) for all organizations. If your organization disables the *Direct Messaging* service, you will be unable to send or receive Direct messages; however, you will still be able to view Direct messages you received while Direct messaging was available.
- You can also access new messages from the *Quick View* page.

The *Inbox* appears, displaying a list of the messages you have received sent to you; messages that you have not yet viewed appear in bold.

- In the left column, click the Direct message you want to view from the list of messages.  
The content of the Direct message appears in the right column of the messages *Inbox*.
- Review the content of the *Message* body as well as any attached patient data, as applicable. To view attached patient data in detail, click the corresponding link in the list of *Attachment(s)*.



## Saving a Direct Message



## To Save a Direct Message or Attachment to a Patient Chart

- View a received message.
- To save the Direct message to a patient's chart, do the following:
  - Click *Save to Patient*.
  - In the *Save to Patient* dialog, type a patient's name in the *Patient Search* box, and then click the name of the appropriate patient.
  - Click *Save*.

For help, contact the Help Desk at 1-800-697-9302.