From the Office of Clinical Informatics

Quick Reference Guide (QRG)
Message Center: Manage Messages and Letters

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This Quick Reference Guide (QRG) reviews the processes for managing messages and letters using the Message Center.

Common Buttons & Icons

Message Center	**Message Center** button
Communicate	**Communicate** drop-down arrow (in PowerChart toolbar)
Redirect	**Redirect** button
Reschedule	**Reschedule** button
✓ Complete	**Complete** button
Save Addendum	**Save Addendum** button
Save Addendum/Complete	**Save Addendum/Complete** button
Create	**Create** drop-down arrow
Next	**Next** button
OK & Close	**OK & Close** button
OK & Next	**OK & Next** button
Summary View / Inbox View	**Summary View** and **Inbox View** buttons
Reply	**Reply** button

High	**High Priority** button
Notify	**Notify** button
Message Journal	**Message Journal** button (in Messages toolbar)
	Search icon
Delete	**Delete** button
Communicate	**Communicate** button (in Messages toolbar)
Add Results	**Add Results** button
	Favorite icon
/ /	Individual **Accept** / **Reject** / **Modify** order icons
Reject All and Next	**Reject All and Next** button
Accept All and Next	**Accept All and Next** button
	Modify icon

Manage Messages and Letters

NOTE: **Please keep in mind when sending messages within Message Center to be professional, as these messages are trackable and will be documented within patient charts.**

Reply to a Message

➢ **From the Message Center:**

STEP 1: Click **Messages** in Inbox Items.

NOTE: **Bold messages are new, messages in red have been in the inbox for over 24 hours, and high priority messages have a red exclamation point in the Priority column.**

STEP 2: Double-click the message you wish to reply to. The message opens.

NOTE:

- **If you single-click the message, it will display in a preview pane below as read-only without opening.**
- **To access the patient's chart within the message, click Summary View. You can click Inbox View to return to the message.**

STEP 3: Click **Reply**. A new window opens.

NOTE:

- **If you need to make your reply a high priority, you can click High in the toolbar.**
- **To receive a notification when the message is opened, complete the following steps:**

STEP 4: Click Notify.

STEP 5: Select the check box for when you want to be notified.

STEP 6: Click OK.

STEP 7: Update the **To** field, if needed.

- To access your personal address book, complete the following steps:
  - Click the To field Search icon.
  - Click the Show names from drop-down arrow.
  - Click Personal Address Book.
  - Double-click the recipient you wish to add.
  - Click OK.

STEP 5: Enter your reply in the **Message** field.

STEP 6: Click **Send**.

NOTE: **To delete a message from the Message Center, click Delete in the Messages tab toolbar.**

Create a New Message

➢ **From Messages in the Message Center:**

STEP 1: Click **Communicate** in the Messages toolbar.

STEP 2: Enter the patient in the **Patient** field; then click the **Search** icon.

STEP 3: Click the appropriate patient in the top pane.

STEP 4: Click the appropriate encounter to associate the message with in the bottom pane, if needed.

NOTE: **Do not select an encounter if this is an in-between encounter.**

STEP 5: Click **OK**.

STEP 6: Click the **To** field. Your Personal Address List should display below.

STEP 7: Double-click the appropriate recipient.

STEP 8: Click the **Subject** drop-down arrow; then click the appropriate subject. A corresponding template pulls into the Message field.

STEP 9: Document the Message field.

NOTE:

- **The F3 key allows you to move from underscore to underscore in a template.**
- **To make your message a high priority, click High in the toolbar.**
- **To receive a notification when the message is opened, click Notify in the toolbar.**
- **If you want the patient to also receive the message, select the To consumer check box. This generates a message to the patient via the patient portal.**

STEP 10: Click **Send**.

Review All Messages Sent for a Patient

➢ **On the Messages tab toolbar:**

STEP 1: Click **Message Journal**.

STEP 2: Enter identifying information for the patient as appropriate.

STEP 3: Click **Search**.

STEP 4: Select the appropriate encounter.

STEP 5: Click **OK**. All messages sent for the patient display.

NOTE: **The messages you open are actionable; you can reply, reply all, or forward**

Create a Patient Letter

➢ **From the patient's chart in PowerChart:**

STEP 1: Click the **Communicate** drop-down arrow in the PowerChart toolbar.

STEP 2: Click **Patient Letter**. A Create Letter window opens.

NOTE: **You must be within the patient's chart to create a patient letter.**

STEP 3: Enter the body of the letter in the **Patient Message** field.

NOTE: **To insert test results into the letter, click Add Results.**

STEP 4: Click **Preview**. A Preview of the letter displays.

STEP 5: Click **Cancel** to close the preview.

STEP 6: Click the appropriate action in the Action Pane: **Print Now, To Consumer**, or **Do Not Print Now**.

NOTE:

- **If you select Print Now, a Print window displays. Verify the printer settings are correct; then click OK. A copy of the letter is saved to the patient's chart.**
- **Select the To Consumer option to send the letter to the patient via the patient portal.**
- **If you select Do Not Print Now, use Additional Forward Action to forward the letter to a staff member or pool and have them print and mail it to the patient.**

STEP 7: Click **OK**.

Create a Provider Letter

➢ **From the patient's chart in PowerChart:**

STEP 1: Click the **Communicate** drop-down arrow in the PowerChart toolbar.

STEP 2: Click **Provider Letter**. A Create Letter window opens.

NOTE: **You must be within the patient's chart to create a provider letter.**

STEP 3: Click **Recipient**. The Provider Letter Recipients window opens.

STEP 4: Click the **Search for Provider** drop-down arrow; then click the appropriate database.

NOTE: **If you are unable to find a provider in either database, use Add Freetext Recipient and then contact the Help Desk, so the provider can be added.**

STEP 5: Enter the provider in the **Search for Provider** field; then click the **Search** icon. The Address Book window opens.

STEP 6: Double-click the appropriate recipient.

STEP 7: Click **OK**. You return to the Provider Letter Recipients window.

NOTE:

- **You can click the star icon to add a recipient to your list of Favorites.**

- You can forward this letter for staff to print in the Other Actions section at the bottom of the window, if needed.

STEP 8: Click **OK**. You return to the Create Letter window.

STEP 9: Document the body of the letter.

NOTE: To add documents to the letter, complete the following steps:

- Click Browse Documents.
- Click the document you wish to include. A preview populates.
- Select the Attach Full Document check box to include the full document or highlight a section of text; then click Attach Text Selection.
- Click OK.

NOTE: To add results to the letter, complete the following steps:

- Click Add Results.
- Click-and-drag to select multiple cells.
- Click Include Selected.

STEP 10: Click **Preview**. A preview of the letter displays.

STEP 11: Click **Cancel** to close the preview.

STEP 12: Click **OK**.

NOTE: The letter automatically sends to the recipient via their preferred indicated method and a copy is saved to the patient's chart.