

# Sending Direct Messages

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Direct messaging is an easy way to securely send patient information/documentation electronically. Direct messages can only be exchanged with other direct services. Therefore, both the sender and recipient need to have direct messaging set up to utilize the service. Direct messages cannot be sent to a regular email address.

[Here](#) is our article setting up direct messaging.

In this article, we will look at sending direct messages from the [message center](#) and from the [patient chart](#).

## Sending Direct Messages

1. First you'll need to obtain your contact's direct messaging address and add it to your contact information. Click on the (



) icon to navigate to the message center and click **Contacts**.

The screenshot shows a software interface with a top navigation bar containing 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', 'Help', and a search bar. On the right side of the navigation bar, there are notification icons for messages (12) and a plus sign (33). A blue arrow points to the message icon. Below the navigation bar is a sidebar menu with categories like 'ALL MESSAGES', 'Incoming Messages', 'Starred', 'All Messages', 'FAX', 'Incoming Fax', 'Outgoing Fax', 'LAB RESULTS', 'ERX', 'eRx Requests', 'REFERRALS', 'Outbound Referrals', and 'Contacts'. A blue arrow points to the 'Contacts' item. The main content area is titled 'Incoming Messages' and features a table of messages. The table has columns for 'From', 'Title', 'Associated patient', 'Assigned to', 'Assigned by', 'Workflow', 'Created', and 'Updated'. The messages include a PDF, two incoming faxes, and two online appointments.

	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	drchrono	Generated PDF: patient_statements_12_07_20.pdf					Dec. 7, 2020, 11:07 a.m.	Dec. 7, 2020, 11:07 a.m.
<input type="checkbox"/>	Sample Doctor, MD (301)	Incoming Fax					Dec. 1, 2020, 3:55 p.m.	Dec. 1, 2020, 3:55 p.m.
<input type="checkbox"/>	Sample Doctor, MD (301)	Incoming Fax					Dec. 1, 2020, 3:23 p.m.	Dec. 1, 2020, 3:23 p.m.
<input type="checkbox"/>	Homer J. Simpson	Online Appointment	Homer J. Simpson				Nov. 4, 2020, 12:59 p.m.	Nov. 4, 2020, 12:59 p.m.
<input type="checkbox"/>	Homer J. Simpson	Online Appointment	Homer J. Simpson				Nov. 4, 2020, 12:57 p.m.	Nov. 4, 2020, 12:57 p.m.

2. You can click the (



) icon next to an existing contact or (



) to create a new contact.

### Referral Contacts

[Export \(CSV\)](#)

Name ^	Direct Email Address	Phone #	Fax #	Address	Specialty	NPI	Provider #	Out	+ New
Test Contact			+1 301-555-5555						
Dr Dan			+1 410-555-5555						
Sample Doctor, MD			+1 301-850-2018			1234567891			
Julius Hibbert			+1 301-555-5555		Acupuncture				
First Last			+1 240-555-5555						
Sample sam			+1 650-555-5555						

3. Fill out the information add the recipients' direct address in the **Direct Email Address** field and click **New Contact**.

## New Contact

X

First Name	<input type="text" value="First Name"/>
Middle Name	<input type="text" value="Middle Name"/>
Last Name	<input type="text" value="Last Name"/>
Salutation	<input type="text" value="-----"/> ▼
Suffix	<input type="text" value="e.g. I, II, III, IV, Jr, Sr"/>
Organization	<input type="text" value="Organization"/>
Direct Email Address	<input type="text" value="For Direct Message"/> ←
Phone #	<input type="text" value="XXX-XXX-XXXX"/>
Fax #	<input type="text" value="XXX-XXX-XXXX"/>
Street Address	<input type="text"/>
Zip Code	<input type="text"/>

4. Once you have the direct message address in your contacts, sending a direct message is just like sending a [referral](#). There are two main things to remember:

a. If you're sending direct messages to meet Meaningful Use stats, select the **Clinical Summary** option.

### Clinical Summary

Include Clinical Summary ⓘ

Electronic transmission enabled ⓘ

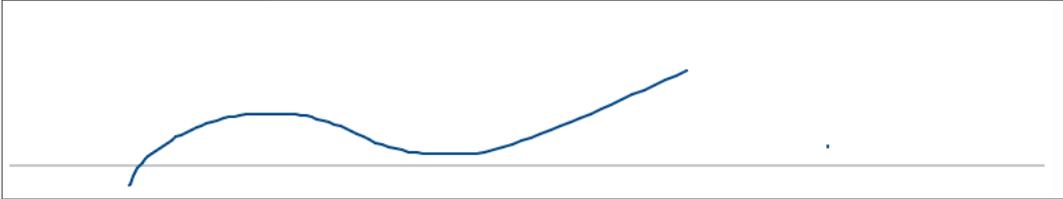
<input checked="" type="checkbox"/>	Data To Include in Clinical Summary
<input checked="" type="checkbox"/>	Patient name: Jenny (Jen) Harris
<input checked="" type="checkbox"/>	Sex: Female
<input checked="" type="checkbox"/>	Birthdate: Feb. 11, 1980
<input checked="" type="checkbox"/>	Race: white
<input checked="" type="checkbox"/>	Ethnicity: not_hispanic
<input checked="" type="checkbox"/>	Preferred language: eng
<input checked="" type="checkbox"/>	Smoking status: None known
<input checked="" type="checkbox"/>	Problems: <input type="button" value="View"/> ▼
<input checked="" type="checkbox"/>	Medications: <input type="button" value="View"/> ▼

b. At the bottom of the referral you will have the option to send via fax or direct message, just clicking on the **direct message** button will send the referral as a direct message and you're done!

## Documents ?

Description	Date	Tags
Testing	Dec. 1, 2020	
C-CDA Import	Dec. 1, 2020	c-cda, imported,
SOAP Subjective	Nov. 13, 2020	free draw
Consent for Injection	Nov. 13, 2020	free draw
Free Hand Drawing	May 3, 2017	free draw

**Sign your referral (Optional)** ✕



Save Signature ?

5. You can view your incoming and outbound direct messages in the message center.

- FAX +
- Incoming Fax 2
- ← Outgoing Fax
- LAB RESULTS +
- 🧪 Lab Results
- ERX +
- 🔍 eRx Requests
- REFERRALS +
- ← Outbound Referrals
- 👤 Contacts
- ONPATIENT +
- Online Appointments 5
- Patient Message
- Sent Message
- TASKS NEW TASK +
- ☰ My Tasks
- DIRECT MESSAGES** +
- ☰ Incoming Direct Messages 1
- ☰ Outbound Direct Messages

## Sending a Clinical Summary with Direct Messaging

You can send a patient's clinical summary via direct message from the patient's chart.

1. Navigate to the patient's chart. Select **Clinical Dashboard** from the menu on the left. Go to the **Clinical Summary** menu and select **Send Direct Message**.

The screenshot shows the patient chart for Jenny (Jen) Harris. On the left is a navigation menu with 'Clinical Dashboard' selected. The main content area shows patient information: Jenny (Jen) Harris (Female | 40 years old | Feb. 11, 1980). Below this are buttons for 'onpatient access enabled', 'New Referral', 'Fax Demographics', and 'Print Demographics'. A 'Clinical Summary' dropdown menu is open, showing options like 'Download PDF', 'Download C-CDA XML', and 'Send Direct Message', which is highlighted. A table below shows 'Summary Of Care Provided' with columns for 'Appointment', 'Summary of Care', and 'Summary of Care requested and not available'. The table content indicates 'No New Patient, Transition of Care or Referral appointment has been recorded for this patient.'

2. Enter the direct address of the recipient and click **Send**.

The screenshot shows the 'Direct Messaging' section of the patient chart. The patient information is the same as in the previous screenshot. Below the patient info are buttons for 'onpatient access enabled', 'New Referral', 'Fax Demographics', and 'Print Demographics'. The 'Direct Messaging' section has a 'Recipient Email' input field and a 'Send' button.

3. You will see a message confirming that your clinical summary was sent.

The screenshot shows the 'Direct Messaging' section with the 'Recipient Email' field now containing '@drchrono1.drc'. Below the 'Send' button, a green confirmation message is displayed: 'Your clinical summary was successfully sent. You can download sent XML file [here](#).'