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**.

2. You can click the (

)icon next to an existing contact or (

) to create a new contact.

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	First Name
Middle Name	Middle Name
Last Name	Last Name
Salutation	---------
Suffix	e.g. I, II, II, IV, Jr, Sr
Organization	Organization
Direct Email Address	For Direct Message
Phone #	XXX-XXX-XXXX
Fax #	XXX-XXX-XXXX
Street Address	
Zip Code	

New Contact

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 ⓘ

☑	**Data To Include in Clinical Summary**
☑	Patient name: Jenny (Jen) Harris
☑	Sex: Female
☑	Birthdate: Feb. 11, 1980
☑	Race: white
☑	Ethnicity: not_hispanic
☑	Preferred language: eng
☑	Smoking status: None known
☑	Problems: View ▾
☑	Medications: 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 ⓘ
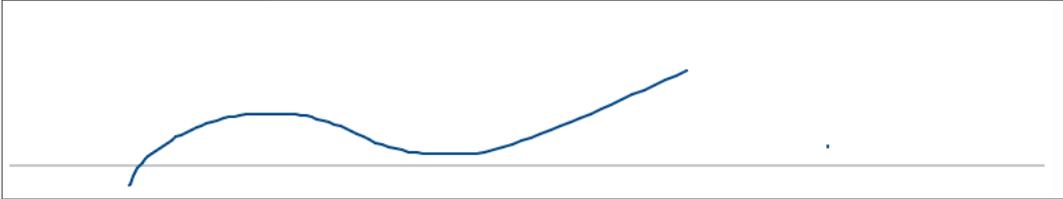
[Preview]   Fax ▾ ➤ Direct Message

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**.

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

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