

Referral Messaging enables you to securely communicate in a quick, efficient, context-sensitive manner about referral-specific topics.

Why Use Referral Messaging?

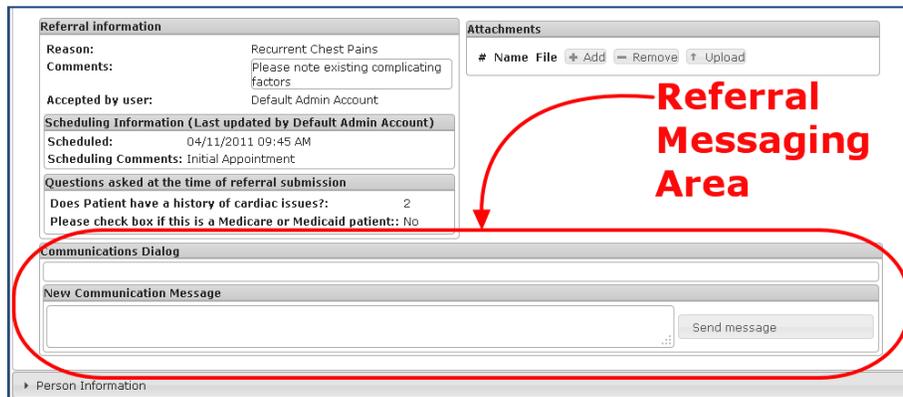
Imagine that either someone in the office took a phone call for you and left a message on your desk; you took the message yourself or found a voicemail waiting for you. Because you are very busy, the messages keep piling up. Sound familiar? By using Referral Messaging, you can save extra steps, hold times on the phone and avoid the potential issues from missed messages and phone tag.

When to Use Referral Messaging

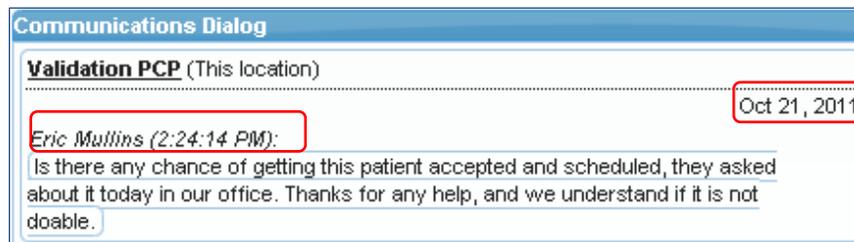
Use Referral Messaging for most communications about an existing referral. The conversation happens right inside the context of the Referrals App, and is linked to the specific patient’s referral. **NOTE:** For urgent issues or those not associated with any specific referral, other tools may be more appropriate.

Creating a Message in a Referral

1. Open a current Referral.
2. Locate the *New Communication Message* section in the lower half of the Referral.



3. Type your message in the *New Communication Message* dialog box.
4. Choose **Send Message**.
5. Your message is logged with your name, time, and date in the *Communication Dialog Box*



and the updated message is sent to the other office alerting them that you sent them a message.

Locating Message Alerts

There are 2 ways to find received messages:

1. Message Bubble Icon

A talk bubble icon appears in the State column of the **Referrals Worklist**, next to the referral that has the new message.

66 'All' Received referrals found				
	State	Patient	Status	
1	★	Smith, John Q	Consult Adde	Primary C
2	★ 🗨️	Atsumi, Kiyoshi	Scheduled	Primary C
3	★	Smith, John Q	Accepted	Primary C

2. New Message Worklist Category

Both Sent and Received Referrals Tabs in the **Referrals Worklist** have a **New Messages** category. Click on this category to view the list of messages.

Sent Referrals Categories					
Not yet accepted (2)	In progress (13)	New messages (11)	Complete (10)	Can	
New messages' Sent referrals found					
State	DOB	Patient	Status	Sent To	To Provider

The number of messages will display in the top left hand corner as well as a list of messages and their corresponding referral.

12 'New messages' Sent referrals found						
	State	Patient	DOB	Status	Sent To	To Provider
1	🗨️ ★	Sawyer, Tom	09/20/2000	Scheduled	YYY UPGRADE TESTING	Tucker, Cameron M MD
2	🗨️ ★	PATIENT, Penny	02/01/1969	Scheduled	YYY Steve Test Clinic	TEST Doctor
3	🗨️ ★	Test, John	03/02/1988	Marked Complete	ZZZ GLHC Training Inb	TRAINING, Specialist DO

Acknowledging a message

Acknowledging a message clears the bubble icon from the **Referrals Worklist** which also reduces the display number. (i.e. If the user Acknowledges the message for line 1 in the example above, the 'New messages' #11 display total will display #10 'New messages').

11 'New messages' Sent referrals found						
	State	Patient	DOB	Status	Sent To	To Provider
1	★	PATIENT, Penny	02/01/1969	Scheduled	YYY Steve Test Clinic	TEST Doctor
2	★	Test, John	03/02/1988	Marked Complete	ZZZ GLHC Training Inb	TRAINING, Specialist DO

Therefore, **it is important to acknowledge messages**. Otherwise the bubble icon will remain on the Worklist indefinitely.

Viewing Received Messages

There are two viewing options:

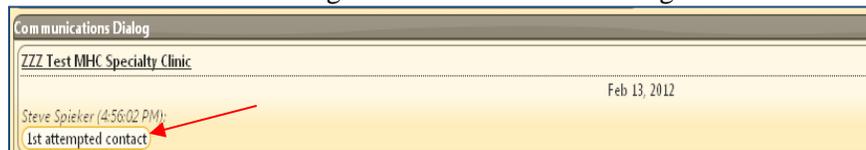
1. Viewing the message by opening the Referral
2. Viewing the Message by opening the Bubble Icon

1. Viewing the message by opening the Referral

Click on the patient name to view the message in the *Communications Dialog* area of the Referrals screen.

66 'All' Received referrals found				
	State★	Patient	Status	
1	★	Smith, John Q	Consult Adde	Primary C
2		Atsumi, Kiyoshi	Scheduled	Primary C

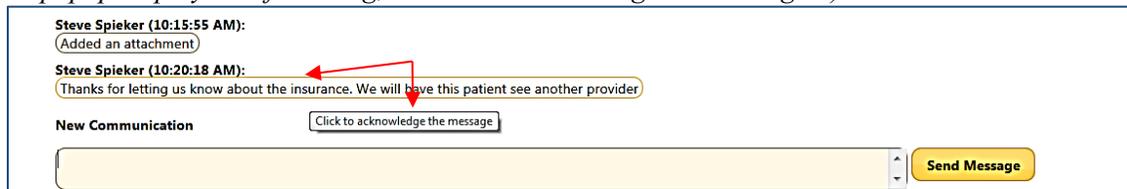
Scroll down to the Communications Message section to view the message.



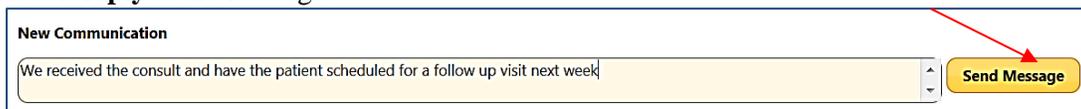
Available Referral Communication Dialog Actions:

- a. You can either **acknowledge** the message by clicking directly on the message itself, which will also remove the message icon from the New Message list.

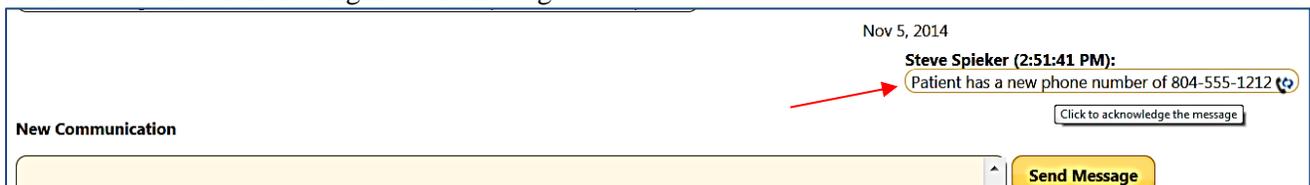
(In the example below, the message that needs to be acknowledged is highlighted in yellow – vs. the message, “Added an attachment”, that is highlighted in black. Plus, by hovering over the message, the popup displays the following, “Click to acknowledge the message”.)



- b. You can **reply** to the message.



Note: Once your message has been sent, you must also **acknowledge your own sent message** to remove the Bubble rather than the original sent message.



2. Viewing the Message by opening the Bubble Icon

To view a message, you also can click right on the talk bubble icon displayed in the **State** section of the Worklist.

66 'All' Received referrals found				
	State★	Patient	Status	
1	★	Smith, John Q	Consult Adde	Primary C
2	★	Atsumi, Kiyoshi	Scheduled	Primary C
3	★	Smith, John Q	Accepted	Primary C

The following screen will appear when you click on the message bubble:

Communication Entries [X]

Patient: CNRTEST, BETTY **Status:** Accepted
Referred By: yyy New Code PCP **Referred To:** YYY New Code Specialty

yyy New Code PCP (This location) **YYY New Code Specialty**

Feb 12, 2013

Steve Spieker (7:48:31 AM):
 (Patient is aware that she sill need to pay for initial evaluation at the time of the appointment.)

Steve Spieker (8:22:52 AM):
 1st attempted contact

[Text Input Field]

Send Close Acknowledge received communication

Message Bubble Display format

Messages are sectioned in a number of ways in order to provide a clear flow of the conversation for ease of use.

1. By Office. Sending and Receiving office messages are divided into 2 columns which allow the reader to quickly view what they have sent from their office “(This location)” and what was received from the other office.

Communication Entries [X]

Patient: Jetson, Elroy **Status:** Consult Added
Referred By: ZZZ Test MHC Primary Practice **Referred To:** ZZZ Test MHC Specialty Clinic

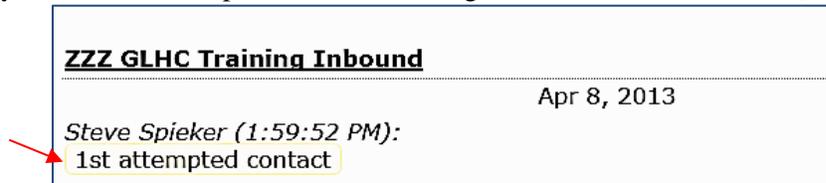
ZZZ Test MHC Specialty Clinic **ZZZ Test MHC Primary Practice** (This location)

Dec 28, 2011

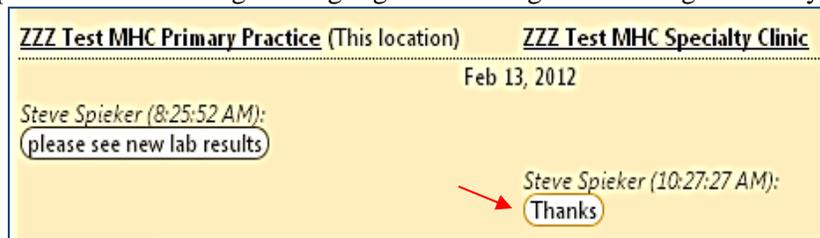
2. By Date. As messages are sent/received, they are broken out by date to assist with the messages timeline.



- Highlighted.** The newest message is highlighted by a circle outlined in color. (Shown in yellow in the example below when using Dark Blue and Red themes)



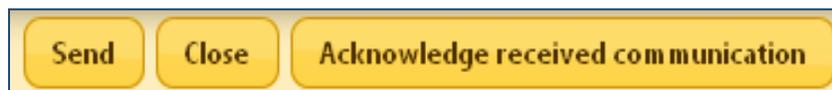
(In the example below the messages is highlighted in orange when using the Sunny theme).



- Top to bottom.** The latest message is also located at the bottom of the screen. (Read from top to bottom).

Available Message Bubble Actions

When you open a message through the Message Bubble, you will see three available options:



1. Send

To respond to the received communication, type in your message in the “New Communication Message” box and choose **Send**. The sent message will immediately display in the *Communication Entries* section, verifying that the message was sent.

2. Close

If you need to complete an action or want to come back to the message, click on **Close**. The message, and bubble icon, will remain in the queue as a reminder until you acknowledge the message (see below).

3. Acknowledging message

Acknowledging a message clears the bubble icon from the *Referrals Worklist*.

Key Points to Remember:

- After a user acknowledges a message, no subsequent users will see the bubble icon on the Referrals Worklist alerting them.

2. It is **important to acknowledge a message** if no further action is needed regarding the message. Otherwise the bubble icon will remain on the Worklist indefinitely and you will not be alerted to any other new messages sent on that referral.
3. Timely acknowledgement of messages as a Best Practice will enhance the benefit of Referrals Messaging for both practices.