

These exchanges will utilize the Direct protocol so it is critical that the provider equip their practice with this capability through RevDirect. Once Direct has been enabled for the practice by RevolutionEHR and confirmed via email, the practice can then establish their internal addresses.

Direct Setup

The first address to establish is for the location by navigating to **Administration > General > your location > External System IDs slider > Edit**. Check the “Enabled” box and enter a “Location Direct Address” of choice.

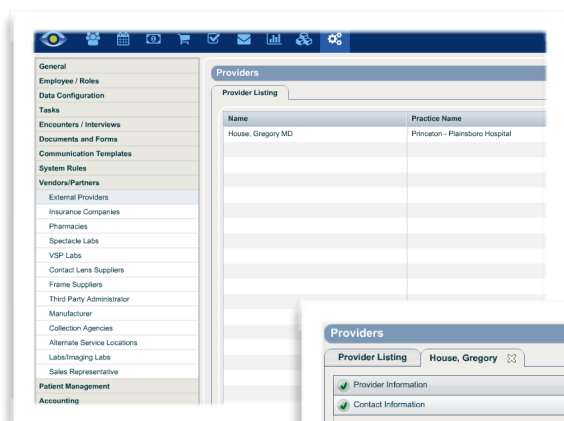
A screenshot of the 'RevDIRECT Messaging' form. It has a blue header bar with the text 'RevDIRECT Messaging'. Below the header, there is a section with a label 'Enabled' followed by a red asterisk and a checked checkbox. Below this, there is a label 'Location Direct Address' followed by a red asterisk, a text input field containing 'RaymoreVision', and a text input field containing '@direct.revolutionehr.com'. To the right of these fields is a 'Validate' button.

Clicking “Validate” then allows the address to be checked to verify availability.



Once the address has been verified as unique, clicking “update” will establish the practice’s “Location Direct Address” and allow individual staff members’ addresses to be created by accessing each employee through **Administration > Employee/Roles > Employees > select employee > External System IDs slider > Edit**. The process to establish individual addresses for staff members is identical to that for the practice as described above.

Once an address has been established for the practice or staff member it cannot be changed.



The final step in configuring the practice to utilize Direct for communication and data transfer is to obtain the addresses of external providers. Once known, these are entered by navigating to **Administration > Vendors/Partners > External Providers > select provider or add new > Contact Information slider** and entering the address in the DIRECT Address field.

Once internal and external providers have Direct addresses entered in their respective RevolutionEHR profiles, the secure electronic exchange of data is possible.

Exchange Process

There are two methods for exchanging electronic patient data with another provider.

In situations where a Summary/Transition of Care document is being sent as part of a referral, the entire process can take place within the **Show More > Referrals** screen. Upon clicking “Add” to enter a new referral, the internal provider’s name will automatically populate the “Referred By” entry. When the referral is being made to an external provider with Direct capability, the “Send Transition of Care” box will be available to the internal provider.

Clicking “Send Transition of Care” will open a new outbound message addressed to the external provider. A personal message and/or additional documentation (i.e., OCT results, consultation letter, etc.) can be added as an attachment if desired. Upon clicking “Send”, an electronic Summary/Transition of Care document is automatically generated and attached to the outbound message.

In situations where a referral is not taking place, an electronic Summary/Transition of Care document can be generated through the “Record Summary” button in the patient header bar by saving the file in XML format.



The messaging module can then be used to send this file as an attachment to an external provider with Direct capability. External providers with Direct addresses logged in their RevolutionEHR profile are visible at the top of the “To” list with an arrow icon.

