



RevolutionEHR

Phone: 877-REVEHR-1

www.revolutionehr.com

customersupport@revolutionehr.com

User Guide – Messaging 6.2.0

March 31, 2014

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1. Messages


RevolutionEHR has a messaging feature that is accessible through the Messaging module within RevolutionEHR and is also accessible through RevolutionPHR. The messaging feature, currently only available through the Polaris experience, allows you and your staff to communicate securely within your practice – even between multiple locations. It also provides secure communication between your practice and your patients through RevolutionPHR.

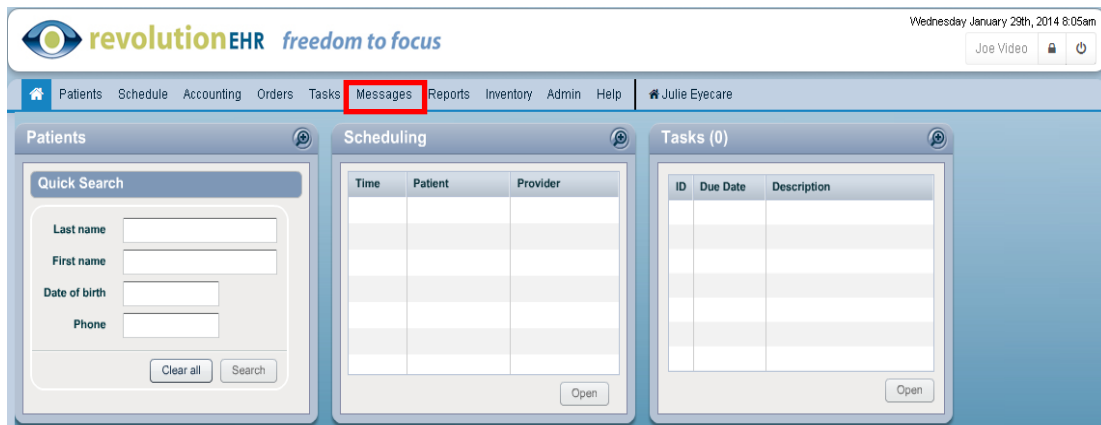
RevDirect is an optional RevolutionEHR integrated web service that provides secure messaging between your practice and external providers. Learn more about RevDirect on RevMarket at <http://market.revolutionehr.com/revdirect/>

1.1 Access

1.1.1 System Menu Bar

RevolutionEHR has the same menu bar available at the top of every screen. This menu bar has a Messages option; click on this option to access the Messages module.

- The number beside 'Messages' indicates how many unread messages a user has in their Inbox. 







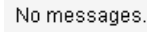
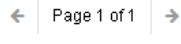
1.1.2 Patient Module

HIPAA compliant messages can be sent directly to the patient through their access to RevolutionPHR. Detailed instructions for sending Messages to the patient from the Patient Module are located in section 1.6.

1.2 Design

1.2.1 Overview

Review the screen and corresponding numbers for an overview of the messages module.

1. Create new message. Enable the icon  to refresh the message list.
2. The screen will always default to the 'Inbox' (notice it is highlighted in blue).
3. To view 'Sent Items' or 'Trash,' click on the appropriate folder. Once enabled, the folder area will be highlighted in blue.
4. Create additional personal folders.
5. Filter the message list; enable 'Unread,' 'Starred,' and/or use the dropdown menu to sort priority options of critical, high, or normal.
6. Bottom Tool Bar.
 - Highlight a message or check multiple messages  and click on the trash icon  to delete the item(s).
 - Use the dropdown menu  to indicate how many messages to view per screen.
 - The current 'no messages' text  will change to display the number of messages within the list.
 - Use the arrow keys  to scroll through multiple pages of messages.



1.2.2 Inbox

		Filter: Unread Starred Priority ▾					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	From ▾	Subject ▾	Date ▲
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alex Solo	Your Contact Lens Prescription Order is Ready!	1/29/2014 11:25 AM
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cathy Totten	Re: appointment slots	1/29/2014 9:43 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Jim Schneider	Please assign task to me	1/29/2014 9:41 AM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cathy Totten	Today's Schedule	1/29/2014 9:31 AM
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	John Oettinger	Release Notes Changes	1/29/2014 9:28 AM

- All unopened messages will be displayed in **bold text**.
- If a message has been created with a priority indicator of either critical or high, a corresponding color-coded exclamation point will be displayed.



- Enable the star (it will change to yellow) to indicate a message needs follow-up.

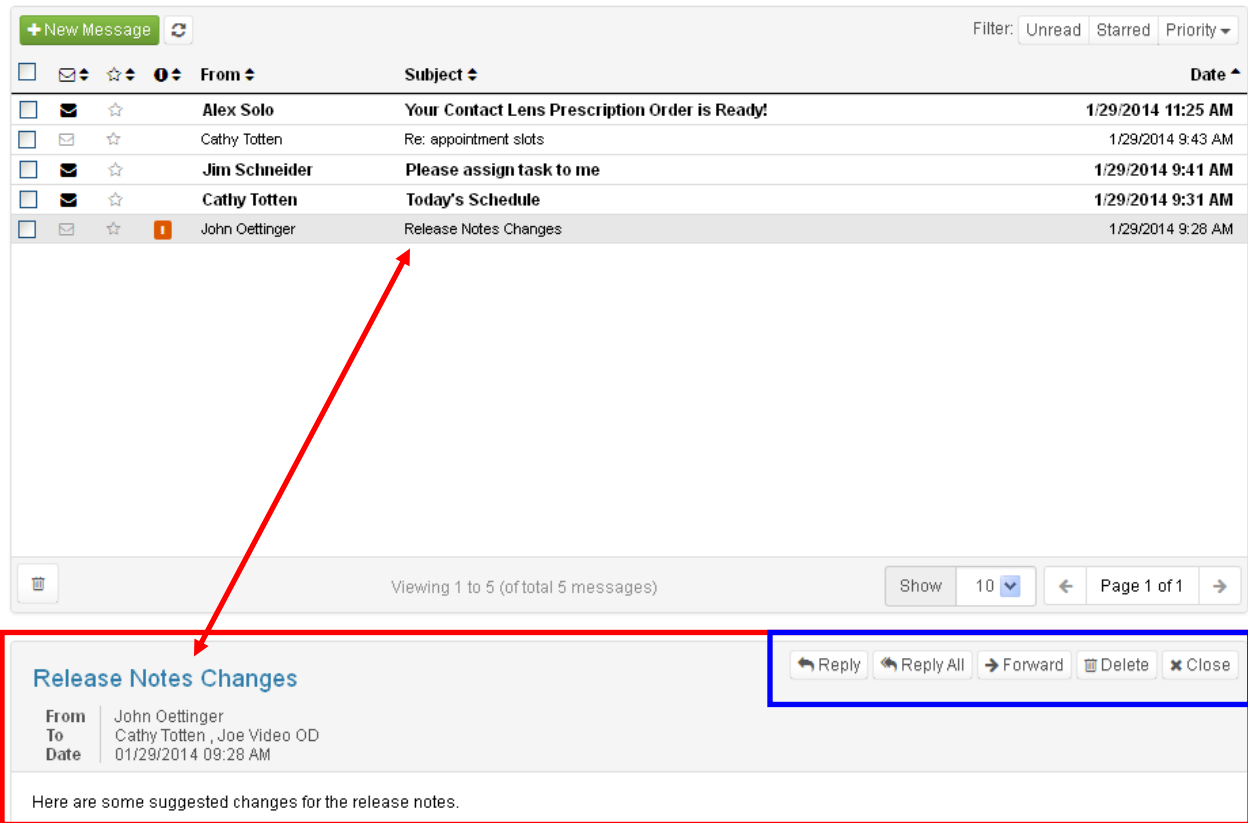


- Click on any of the column header arrows to sort the list of messages.

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	From ▾	Subject ▾	Date ▾
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- Click on a message to open.

- The opened message will be viewable in the bottom area of the screen.
- Function buttons are in the upper right-hand corner of the opened message.



Release Notes Changes

From: John Oettinger
To: Cathy Totten, Joe Video OD
Date: 01/29/2014 09:28 AM

Here are some suggested changes for the release notes.


1.3 Create/Send Message

In order for messages to be sent to your customer, an email address must be configured for your practice. To ensure you have email information setup for your practice, access Administration → General → Locations → Select/Open your practice → Location Details slider.

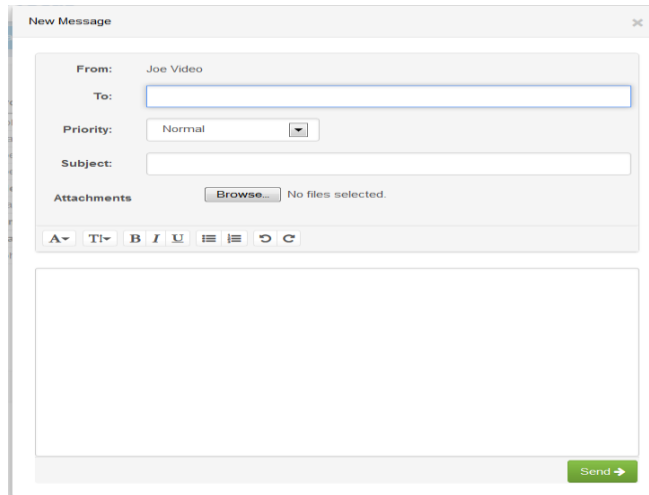
Click on **+ New Message** to open a window for a new message.

- 'From' is automatically completed by the system with the name of the sender.
- The 'To' field is covered in detail in section '1.3.1 Recipient Options.'
- The priority will default to 'normal.' Use the dropdown menu to change the priority to critical or high.
- Enter a subject.
- Add an attachment, as appropriate.

- The message default text style is 'Arial' and default size is 'small.' Use the tool bar to change the text defaults and to add bullets or numbers to the message.

- The 'circle arrow' buttons work as "undo" and "redo." 

- Click on send and a copy of the message will be available in the 'Sent' folder. As the message is sent, the screen will return to the area of Messages the system was on before the user enabled the 'New Message' button.
- Click on the 'X' to exit the screen and return to the screen the system was on before accessing the 'New Message' window.



1.3.1 Recipient Options

- Insert the cursor within the 'To' field to activate a dropdown list of recipients. All members of your practice, across all locations, will be on the list.
- When typing in the 'To' field, the list of names sorts according to the letters typed. The typed letters are underlined within the name choices provided.
- If a name is chosen in error, enable the 'X' beside the person's name to delete the recipient from the 'To' field.
- The message can be sent to multiple recipients.

1.3.2 Sent Folder


All sent messages will have a copy saved within the 'Sent' folder automatically.

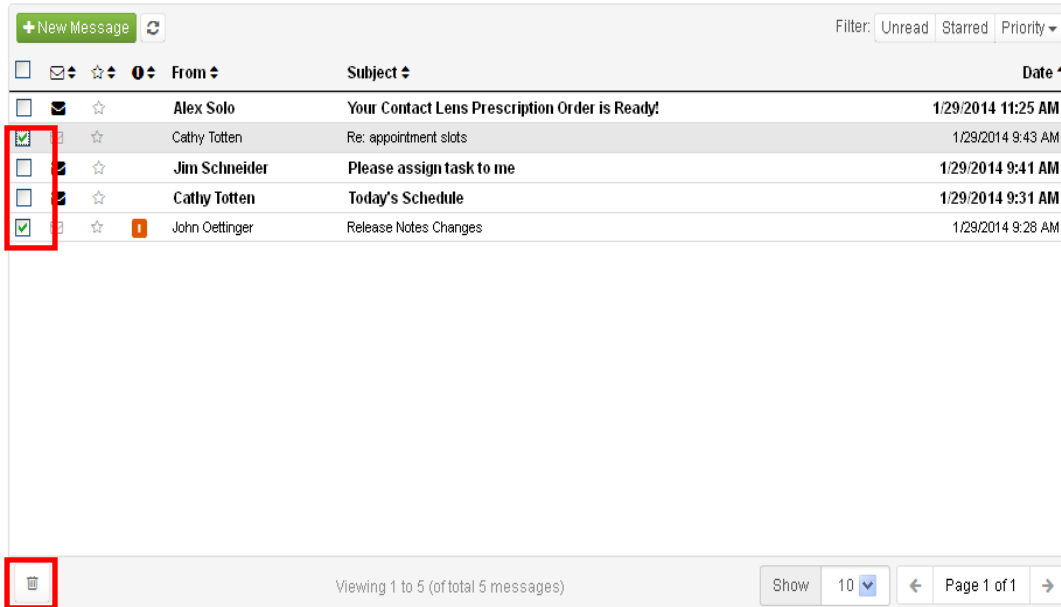


System functions within the 'Sent' folder are similar to what has already been reviewed for the 'Inbox.'

1.4 Delete Message

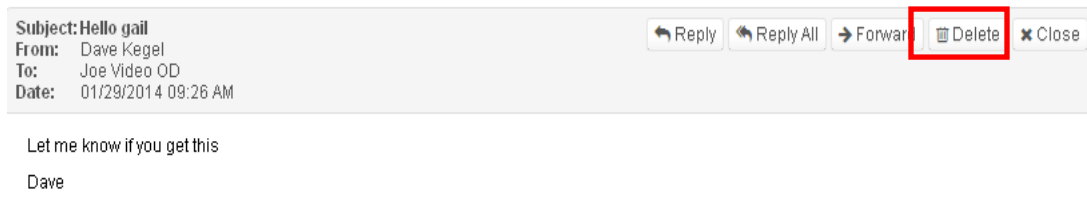
- To delete a message from the list of messages, enable the checkbox(s) beside the message(s) and enable the trash icon at the bottom of the messages

screen. Or, drag and drop the message to the trash  folder in the left hand column of the screen.



<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	From	Subject	Date
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alex Solo	Your Contact Lens Prescription Order is Ready!	1/29/2014 11:25 AM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Cathy Totten	Re: appointment slots	1/29/2014 9:43 AM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Jim Schneider	Please assign task to me	1/29/2014 9:41 AM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Cathy Totten	Today's Schedule	1/29/2014 9:31 AM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	John Oettinger	Release Notes Changes	1/29/2014 9:28 AM


- To delete a message that is currently open, use the delete function button in the upper right hand corner of the opened message.



Subject: Hello gail
From: Dave Kegel
To: Joe Video OD
Date: 01/29/2014 09:26 AM

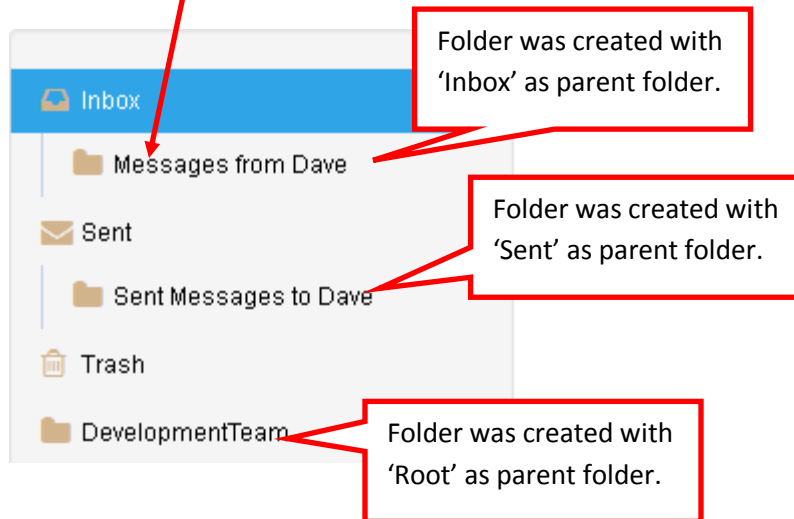
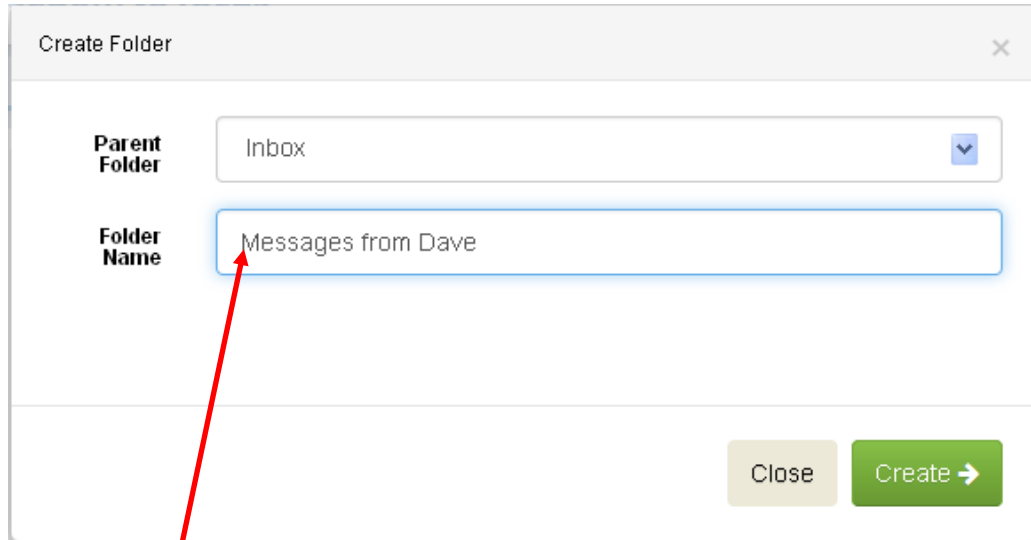
Let me know if you get this
Dave

1.5 Create Personal Folder


- To create a personal folder, click on 'Create Folder.' 
- Use the dropdown menu to choose a parent folder. If 'Root' is chosen as the parent folder, the personal folder will be added to the bottom of the folder list.

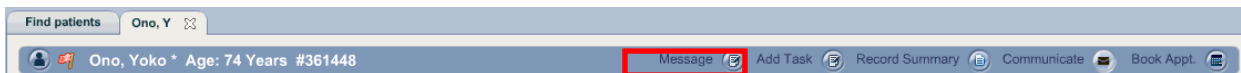
If any other folder is chosen as the parent folder, the new personal folder will be added below the chosen folder as a sub-folder of the parent folder.

- Name the folder and click create.
- **Folders cannot be updated or deleted.**




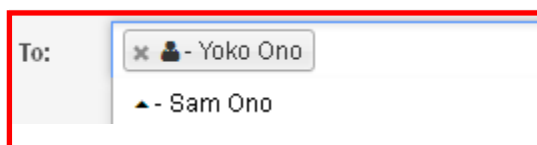
1.6 Send Message from Patient Module

Once a patient file has been accessed, every screen has the same header bar. This header bar has a Message option. Click on 'Message'  to open a 'create message' window.



Instructions to Create/Send a message have been reviewed in section 1.3; however, **there are some significant differences when accessing a message from the patient module.**

- As the Message button is enabled from within the patient module – **the current patient will automatically populate as the recipient of the message.** The 'head and shoulders' icon  beside their name is a visual indicator the recipient is the accessed patient.
- Click beside the patient name in the 'To' field to activate a dropdown menu of recipients that includes all employees of your practice (across all locations) **and the list will include authorized patient representative(s).** The triangle icon is a visual indicator this person is an authorized patient representative. (Note: The authorized patient representative(s) is setup within the Demographics module → Login Information slider.)




- A copy of the sent message will be available in the 'Sent' folder within the 'Messages' module.
- Once the message has been sent, or when using 'X' to exit the create message window, the system will return to the area within the Patient Module the system was on before 'Message' was enabled.
- The message will be available for the patient within RevolutionPHR. See section 2.
- The patient will receive a HIPAA compliant notification that will indicate they have a message to view within RevolutionPHR. This notification will be sent to the email address that is in their Demographics component.

➤ **Sample message:**

DO NOT REPLY TO THIS E-MAIL / INFORMATION ONLY / RESPONSES ARE NOT MONITORED

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=====  =====

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Raymore Vision Center has sent you an important message in the "Personal Health Record for your eyes" account of Yoko Ono.

Use the following link <https://www.revolutionphr.com> to access the account. If you do not remember your Username and/or Password, please contact Raymore Vision Center for this information.

Sincerely,
Raymore Vision Center



Your practice name.

RevolutionPHR, the Personal Health Record for your eyes

This message is intended exclusively for the individuals and entities to which it is addressed. This communication, including any attachments, may contain information that is proprietary, privileged, confidential, including information that is protected under the HIPAA privacy rules, or otherwise legally exempt from disclosure. If you are not the named addressee, you are not authorized to read, print, retain, copy or disseminate this message or any part of it. If you have received this message in error, please notify the sender immediately by email and delete/destroy all printed copies of this message. This message is protected by applicable legal privileges and is confidential.

2. Messages - PHR

2.1 Access

Once a patient has logged into RevolutionPHR, if the patient has a new message they will see a new message indicator below their name in the upper right hand corner of the screen.

View without a message.

Welcome, Yoko Ono
[logout >](#)
 RevEHR
 Heather Symdon, OD
[send message](#)

View with a message.

Welcome, Yoko Ono
[logout >](#)
 RevEHR
 Heather Symdon, OD
[1 new message\(s\)](#)



'Send message' is a hyperlink and will open a window for a new message. 'New message(s)' is a hyperlink to the messages screen.

The Messages section of RevolutionPHR can be accessed from the Overview screen. The patient will see the number of new/unread messages and have access to view and send messages.

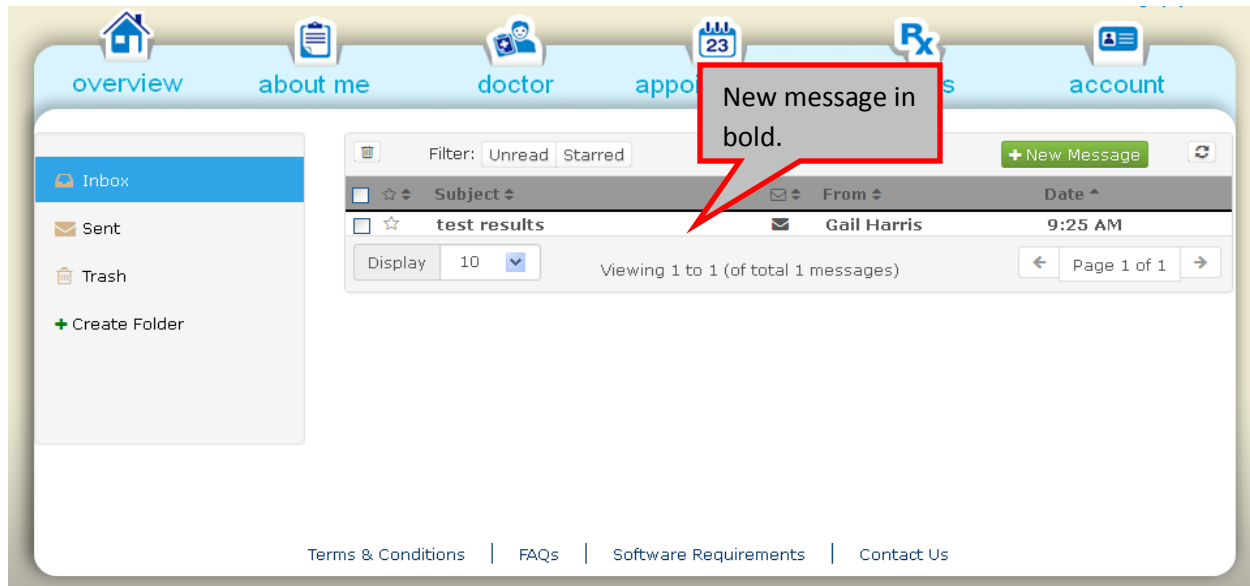
The screenshot shows the patient's Overview screen. The top navigation bar includes icons and labels for: overview (highlighted with a red box), about me, doctor, appointments, orders, and account. The main content area is divided into several sections:

- Next Appointment:** No upcoming appointments. Includes a [book new visit](#) button.
- Account Summary:** Total Due: \$1,707.40; Total Credit: \$14.00.
- Order Status:** Date: 12/16/2013; For: Eyeglass; Status: Order Placed with Supplier.
- Messages:** 0 new. Includes [view messages](#) and [send message](#) buttons. This section is highlighted with a red box.
- Authorized Patients:** Other patients you are allowed to access: Sam Ono. Includes a [view](#) button.

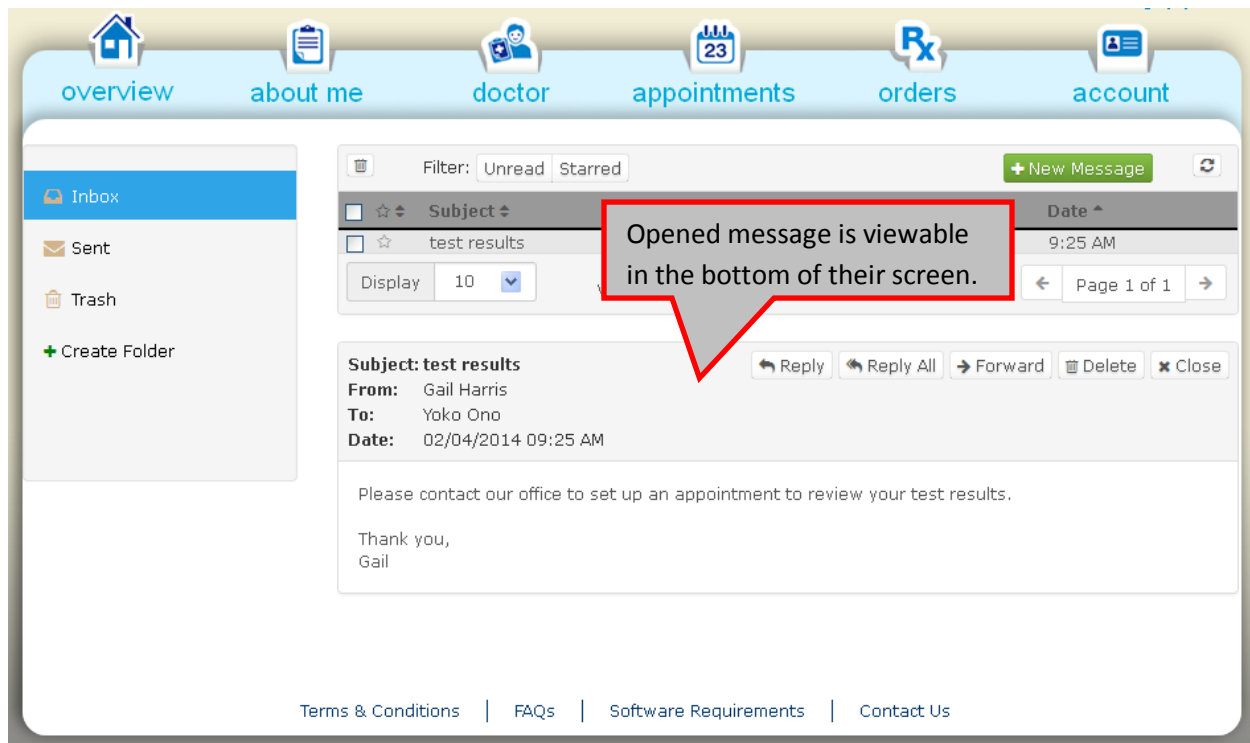
2.2 Design

Features and functions of the patient's messages area are very similar to the design of Messages within the practice's Messages module.

Screen view of one unread message.



Screen view of one opened message.



2.3 Create/Send Message

The patient can send a message to providers (across all locations). As they access the 'To' field, the dropdown menu of options will provide them with a list of all providers.

✕

From: Yoko Ono

To:

Priority:

Subject:

- Barry, Lisa OD
- Beecher, Julie OD
- Bevier, Katie
- Carlson, Steve
- Carlsson, Sven-Christian OD
- Carlton, Steve
- Cleveland, Rod OD
- David, Melissa OD
- Elfers, David

A T

Send →