

Sending Direct Messages


Last modified on 10/30/2024 4:05 pm EDT

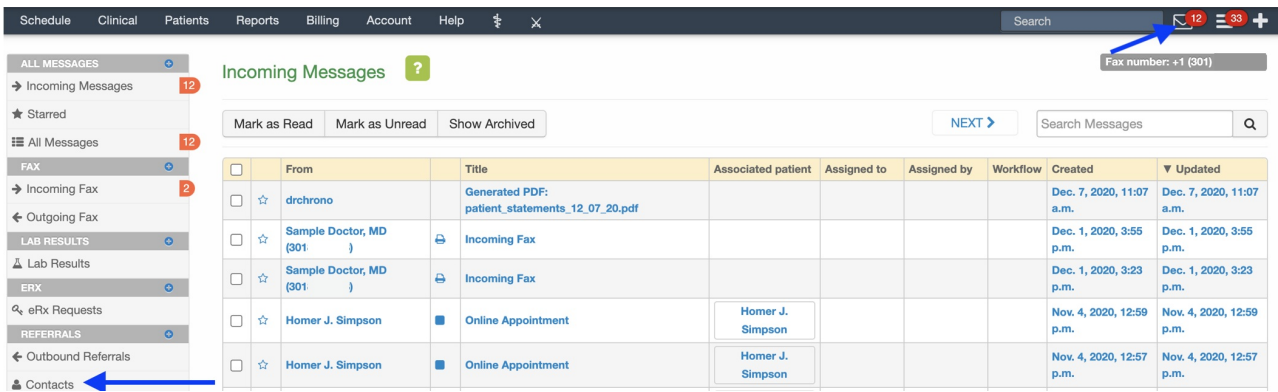
Direct messaging is an easy way to securely send patient information/documentation electronically. Direct messages can only be exchanged with other direct services. Therefore, both the sender and recipient need to have direct messaging set up to utilize the service. Direct messages cannot be sent to 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 the 'Incoming Messages' section of a software interface. The top navigation bar includes 'Schedule', 'Clinical', 'Patients', 'Reports', 'Billing', 'Account', 'Help', and a search bar. A notification icon in the top right shows '12' messages and '33' items. The left sidebar lists various message categories: 'ALL MESSAGES', 'Incoming Messages (12)', 'Starred', 'All Messages (12)', 'FAX', 'Incoming Fax (2)', 'Outgoing Fax', 'LAB RESULTS', 'Lab Results', 'ERX', 'eRx Requests', 'REFERRALS', 'Outbound Referrals', and 'Contacts'. The main area displays a table of messages with columns for 'From', 'Title', 'Associated patient', 'Assigned to', 'Assigned by', 'Workflow', 'Created', and 'Updated'. A blue arrow points to the 'Contacts' option in the sidebar.

	From	Title	Associated patient	Assigned to	Assigned by	Workflow	Created	Updated
<input type="checkbox"/>	dirchono	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 \(CSV\)](#)

Search Contacts



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 ⓘ

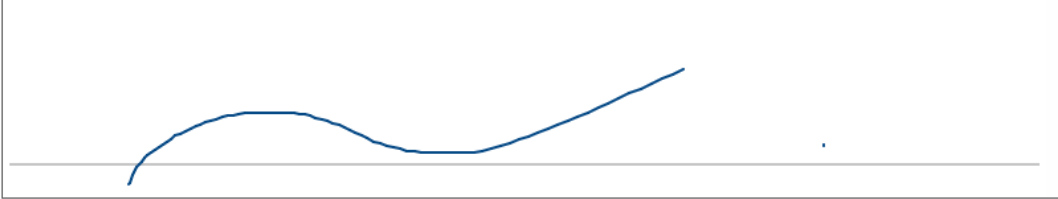
<input checked="" type="checkbox"/>	Data To Include in Clinical Summary
<input checked="" type="checkbox"/>	Patient name: Jenny (Jen) Harris
<input checked="" type="checkbox"/>	Sex: Female
<input checked="" type="checkbox"/>	Birthdate: Feb. 11, 1980
<input checked="" type="checkbox"/>	Race: white
<input 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 1

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 1

Preview Fax → Direct Message

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

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**.

+ Add new patient

Demographics

Appointments

Clinical Dashboard

Documents

Eligibility

Tasks 0

Problem List 7

Medication List 5

Send eRx

Allergy List 4

Drug Interactions 6

Jenny (Jen) Harris (Female | 40 years old | Feb. 11, 1980) HAJE000001

Phone: (650) 215-6343 Email: ✉

Address: 1001 N Rengstorff Ave
Mountain View, CA 94040

Date Added: Nov. 3, 2020
Last Scheduled Appt: Thu Dec 17, 2020
Next Scheduled Appt:

CDS: [Adult Immunization Schedule Age: 27-49](#)

onpatient access enabled New Referral Fax Demographics Print Demographics Vitals + Schedule New Appointment

Referral Note **Clinical Summary**

- Download PDF (will appear in Message Center)
- Download C-CDA XML
- Display C-CDA XML
- Customize Clinical Summary (XML or PDF)
- Send to Onpatient
- Send Direct Message**

Last generated at Dec. 8, 2020, 11:56 a.m.


Summary Of Care Provided

Appointment	Summary of Care	Summary of Care requested and not available
No New Patient, Transition of Care or Referral appointment has been recorded for this patient.		

Ongoing Problems

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

- [+ Add new patient](#)
- Demographics
- Appointments
- Clinical Dashboard
- Documents
- Eligibility
- Tasks 0
- Problem List 7
- Medication List 5



Jenny (Jen) Harris (Female | 40 years old | Feb. 11, 1980) [✎](#)

HAJE000001

Phone: (650) 215-6343 **Email:** Missing **Date Added:** Nov. 3, 2020

Address: 1001 N Rengstorff Ave **Last Scheduled Appt:** Thu Dec 17, 2020

Mountain View, CA 94040 **Next Scheduled Appt:**

CDS: [Adult Immunization Schedule Age: 27-49](#)

onpatient access enabled
New Referral
Fax Demographics
Print Demographics

Vitals
+ Schedule New Appointment


Direct Messaging

Recipient Email

[Send](#)

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

- [+ Add new patient](#)
- Demographics
- Appointments
- Clinical Dashboard
- Documents
- Eligibility
- Tasks 0
- Problem List 7
- Medication List 5
- Send eRx
- Allergy List 4
- Drug Interactions 6



Jenny (Jen) Harris (Female | 40 years old | Feb. 11, 1980) [✎](#)

HAJE000001

Phone: (650) 215-6343 **Email:** Missing **Date Added:** Nov. 3, 2020

Address: 1001 N Rengstorff Ave **Last Scheduled Appt:** Thu Dec 17, 2020

Mountain View, CA 94040 **Next Scheduled Appt:**

CDS: [Adult Immunization Schedule Age: 27-49](#)

onpatient access enabled
New Referral
Fax Demographics
Print Demographics

Vitals
+ Schedule New Appointment

Direct Messaging

Recipient Email

[Send](#)

Your clinical summary was successfully sent.
You can download sent XML file [here](#).