Messaging

To start a message, click **Communicate** on the tool bar.

Messaging – Create New Message

1. If within the correct patient's chart, Click the **Communicate** icon .
2. If outside the patient's chart enter the patient's last name in the **Patient** field and **Click** the binoculars.
3. Select the patient and click **OK.**
4. Enter any message recipient(s) in the **TO** and **CC** boxes. To include yourself as a recipient click **Include Me.**
5. The **SAVE TO CHART** field will default.
6. Select a Template in the Subject dropdown if desired, or free text a message **Subject**.
7. Messages will default to **Save as**: Phone messages. Select a different folder to save to if needed.
8. Free text or use auto text to populate the message.
9. Select any additional messaging/reminder options.
10. Click **Send.**

Messaging – Replying or Forwarding

1. Open a message and click **Reply** to sender or **Reply All** to include all message recipients.
2. Compose the response or insert auto text.
3. Set a reminder or due date as necessary.
4. Select any additional messaging options and **Send**.
5. To Forward a message, click the **Forward** icon and proceed with steps 2-4 above.

Proxy – Granting

1. Click the **Proxy** tab in the **Inbox Summary**.
2. Click **Manage** button.
3. Click **Given** button at bottom of screen, then **Add.**
4. Select any recipient from the **User** Search.
5. Select **Begin** and **End** dates.
6. Select **Available Items** to Grant.
7. Click **Accept & New.**
8. The users displayed in the **Proxies Given by Me** pane are authorizations you have granted others.

Proxy – Viewing Another User's Inbox

1. In order to view another user's Inbox, you must have proxy rights to do so
2. Click the **Proxy** tab in the **Inbox Summary.**
3. From the **Proxy** list, select the Inbox you would like to access
4. Work in the proxy's Inbox as if it were your own
5. To review an item and leave for the original owner, **close** the item. Do not sign, refuse or forward.

Opt in to Pools

1. Click the **Pools** tab in the **Inbox Summary**.
2. Click **Manage** button.
3. Scroll through the list of available pools and highlight those to opt in to <Ctrl + Click>
4. Click the **Opt In** button between the Available and Member Pools panes to opt in to the pool.
5. The pools are available in the Pools drop down of your inbox.