Inbox

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User Guide

covisint | a Compuware Company Compuware

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INBOX OVERVIEW

Inbox is a clinical and administrative messaging solution that combines traditional and online document delivery technologies in an easy to use and secure environment. This user guide includes step-by-step procedures designed to enable you to effectively perform Inbox tasks.

You use Inbox to compose, view, and respond to messages about patients. The messages are received from, or sent to, other healthcare providers.

Inbox messages can include attachments, which can be viewed and printed. If your facility's Inbox has been configured to transmit documents to an application such as an EMR (Electronic Medical Record) system, you can forward attachments to the application.

The system provides an audit trail by tracking:

- Messages sent or received by your organization
- User actions

The Inbox also includes the ability to search for audit entries and messages.

The Inbox *Setup* tab allows administrators to:

- Create mailboxes for your organization.
- Create message routing rules.

Depending upon your implementation, Inbox may be configured to work with Contact Manager. For details about using Contact Manager, refer to the support information available at https://portal.covisint.com/web/supporthc/inboxhc.

Information Conventions

It is assumed you are set up on your healthcare organization's portal and understand how to access it.

The following conventions are used in the information.

Convention Description	Example
If you need to press a key on your keyboard, the text on the key will be emphasized.	Press the **Enter** key.
When you need to click a link or a button on the screen, the link or button name will be emphasized.	Click the **Submit** button.
A tip or important note is indicated by the symbol to the right.	

ABOUT MESSAGES

All Inbox users use the *Messages* screen to view and manage messages about patients. Messages can include eForms, Clinical Documents, and attachments in other formats, such as images, text documents, and spreadsheets.

You can also use the *Messages* screen to Link Patient Records. Patient records are "unlinked" when the system cannot determine which existing patient record matches the patient in the message.

> Although the Inbox *Messages* tab does not display messages more than 30 days old, messages are not removed from the system, and they can be retrieved with the Message Search feature. For details, refer to Search Messages.

Options on the screen include:

- Filter messages by type (All Messages, Unread Messages, etc.).
- Filter messages by displaying only messages from a selected date range.
- Filter messages by mailbox.
- Sort messages by clicking on a column heading.
- Re-size columns.

> When you are viewing the Messages screen, click the **Refresh** button periodically to ensure the view displays recently received messages.

The information about a message includes the Patient, Subject, etc., followed by a linked (blue text) entry for each attachment.

- To view the message, click the message information in the row.
- To view an attachment without opening the message, click an attachment link.
- Messages with red text indicate abnormal lab results are included in the message.

> The pencil icon indicates an attachment is digitally signed. You can view digital signatures in the Attachment Viewer.

INBOX SCREENS AND FIELDS

This book includes the following topics, which describe screens that can be accessed by all Inbox users:

- About the Messages Screen
- About the View Message Screen
- About the Attachment Viewer Screen
- About the Compose Message Screen
- About the Provider Directory Search Screen
- About the Patient Search Screen
- About the Search Messages Screen
- About the Search Audit Entries Screen
- About Adding or Editing Patients

About the Messages Screen

For help with procedures you can perform from this screen, go to:

- Search Messages
- View a Message
- Compose Message

This topic includes the following sections:

- Messages Tab Overview
- Message Sorting and Filtering
- Field Descriptions

Messages Tab Overview

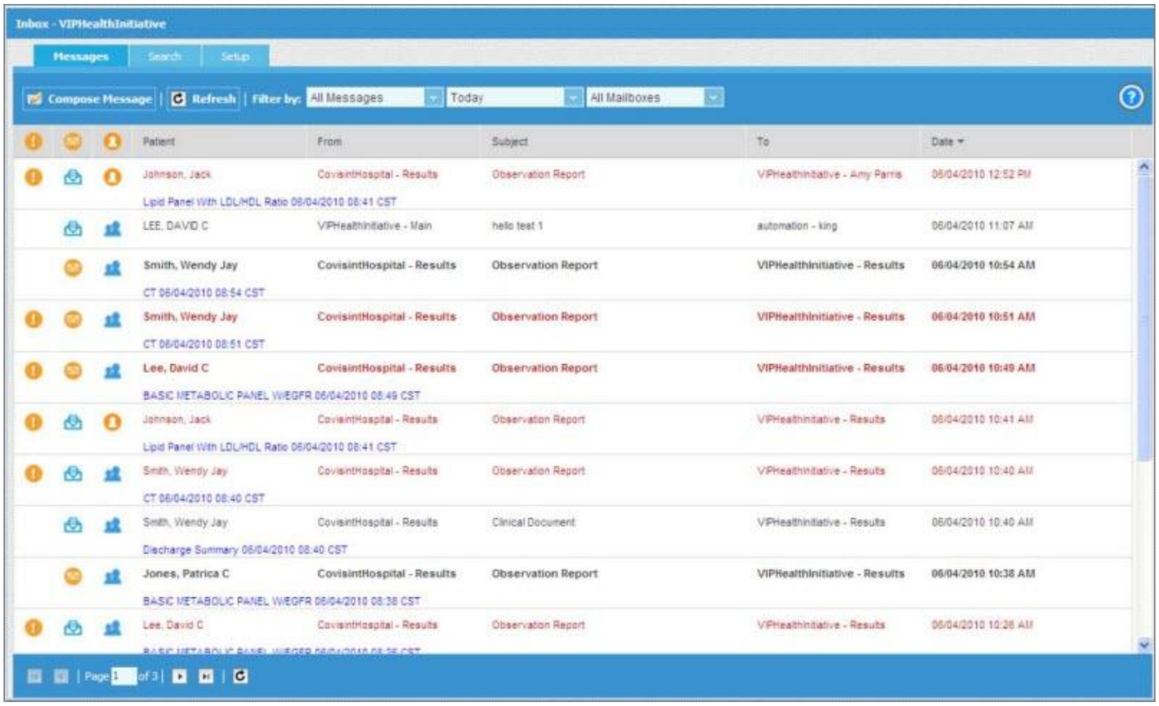
The Messages screen displays when you access Inbox. If you navigate away from the screen, you can return to it by clicking the Messages tab. Use the Inbox *Messages* tab to view and compose patient-related messages. The Messages screen functions as your organization's inbox.

Note: Your view of Inbox may not exactly match the screen shots in this support information. Some Inbox functions are only available to Administrators.

Each Inbox message relates to one specific patient. A message can include attachments such as clinical and administrative documents. For each message, you can view the name of patient referenced in the message, sender, subject, recipient, date/time sent/received and list of attachments.

You can control how messages are displayed with Inbox filter and sort controls:

- Filter messages by type, date range, or mailboxes within your practice or facility.
- Sort messages by clicking the column heading by which you want to sort messages.



Messages are summarized in the Messages tab, and marked with icons and formatting that helps you determine which messages you need to view or act on.

Convention	Description
(urgent)	Messages marked with this icon are urgent - they include information such as out of range clinical results that require action.
(unread)	Messages you have not read are flagged with the icon.
(read)	Messages you have read are flagged with the icon.
(unlinked)	Messages associated with unlinked patients (patients for whom there is no record on your system) are flagged with the icon
Red font	Messages that include abnormal results are marked with red text, in addition to the urgent icon. Note: A message that includes abnormal results will be marked with red text only if sent via a feed (not manually).
Bold font	Unread messages are marked with a bold font, in addition to the unread icon.
standard weight font	Read messages are marked with a normal font, in addition to the read icon.

Message Sorting and Filtering

You can sort messages by clicking the column heading by which you want to sort. Repeatedly clicking a column heading toggles the sort between ascending and descending order.

You can filter messages by type, date range, and mailbox. You can use multiple filtering options to progressively narrow the list of displayed results.

The message type filter allows you to limit the display to only those messages that have a specific status. You select one display option from the following:

- All Messages (default value)
- Sent Messages
- Received Messages
- Unread Messages
- Read Messages

You can filter messages by limiting the date range. Note that the default is Today, so you will need to change the filter if you want to see messages from previous days. You can select one of the following date range filters:

- Today (default value)
- Last 7 days
- Last 14 days
- Last 30 days

> To view messages more than 30 days old, refer to Search Messages.

You can filter messages to limit the view to only messages that were sent to or from a specific mail box. To use this filter, select the mailbox whose messages you want to view.

Field Descriptions

The following table describes the Fields and Menu Options on the Messages screen.

FIELD NAME	DESCRIPTION
Patient	The name of the patient for whom the message is related.
From	The name of the person or mailbox that sent the message.
Subject	The subject the message author entered for the message.
To	The name of the person or mailbox to which the message was sent.
Date	The date on which the message was received or sent.
page controls	Use the page controls as required to navigate through messages that are displayed over multiple pages. Hover your cursor over an icon to view its function. 

Menu Bar options	
	Click to Compose a Message.

Refresh	Click to refresh the display to ensure you are viewing all the available messages.
Filter by:	Select one or more of the filter options: All Messages / Last 30 Days / All Mailboxes
(help)	Click (help) on the menu bar to display this screen-level help page.

About the View Message Screen

For help with tasks you can perform from this screen, go to:

- View and Save Attachments
- Reply to a Message
- Forward a Message
- Resend a Message

This topic includes the following sections:

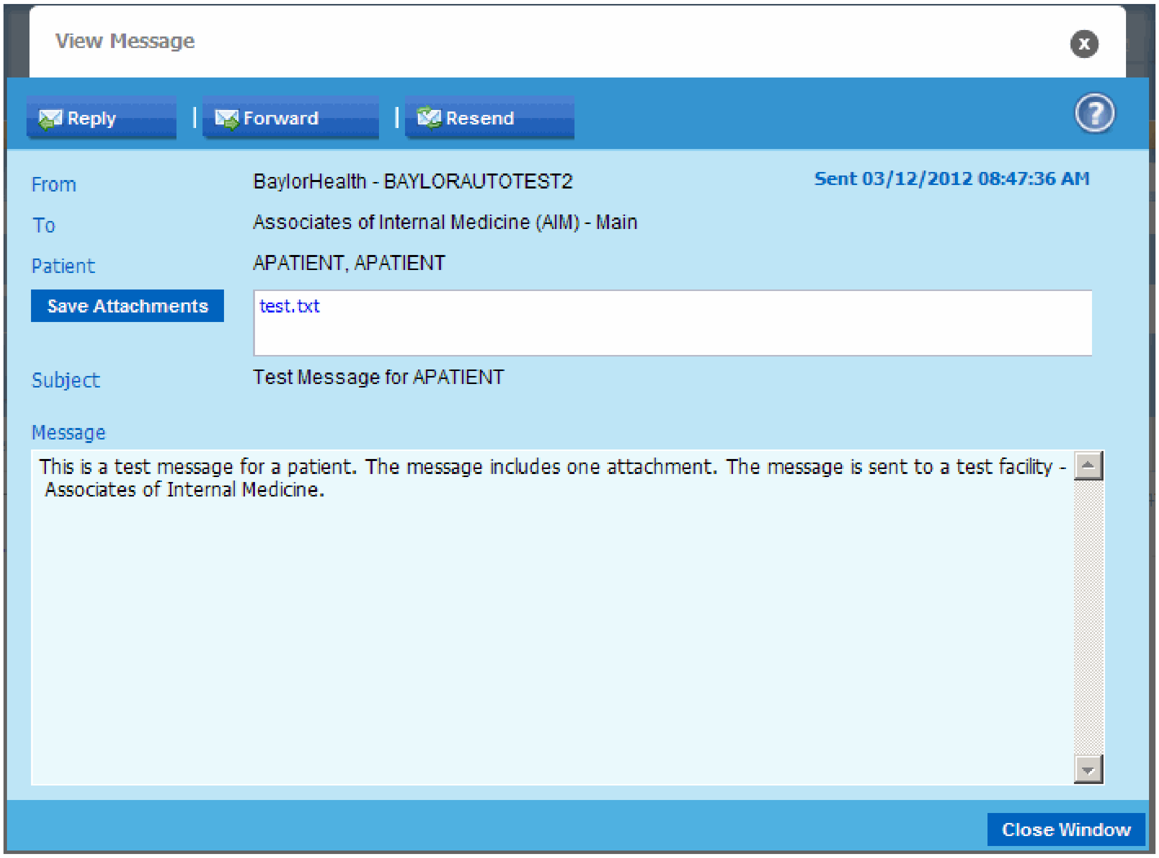
- View Messages Screen Overview
- Field Descriptions

View Message Screen Overview

When you ***click a message in the Messages screen*** **Messages screen**

, it displays in a new window in the View Message screen. The new window overlays the Messages screen. Close the View Message screen to return to the Messages screen.

When a message is displayed in the View Message screen, you can view and save attached documents and reply to, forward, or resent the message.



Field Descriptions

The following table describes the Fields and Menu Options on the View Message screen.

FIELD NAME	DESCRIPTION
message date	The message date displays in the upper right corner of the screen. The “Sent date/time” or “Received date/time” is displayed in the viewing user's time zone.
From	Displays the name of the facility or practice that sent the message.
To	Displays the message recipients.
Patient	Displays the name of the patient referenced in the message.
Save Attachments	Displays the list of documents and eForms attached to the message. You can click Save Attachments to store the attachments, or click individual attachments to view or save them. Signed documents are marked with one of the following: • The pencil icon. • The (Signed) indicator.
Subject	Displays the subject of the message.

Message	Displays the message.

Menu Bar options	
Reply	Click **Reply** on the menu bar to open the *Compose Message* screen to send a reply to the message. Note: This option does not display for messages sent by your facility.
Forward	Click **Forward** on the menu bar to open the *Compose Message* screen to forward the message to another facility or practice.
Resend	Click **Resend** on the menu bar to open the *Compose Message* screen tor resend the message. Note: This option displays only if the message was originally sent by a user at your facility.
(help)	Click (help) on the menu bar to display screen-level help.
Close Window	Click Close Window to return to the Messages screen.

About the Attachment Viewer Screen

For help with procedures you can perform from this screen, go to:

- View and Print eForms and Clinical Documents
- View Electronic Signatures
- Send a Document to Another Application

This topic includes the following sections:

- Attachment Viewer Screen Overview
- Field Descriptions

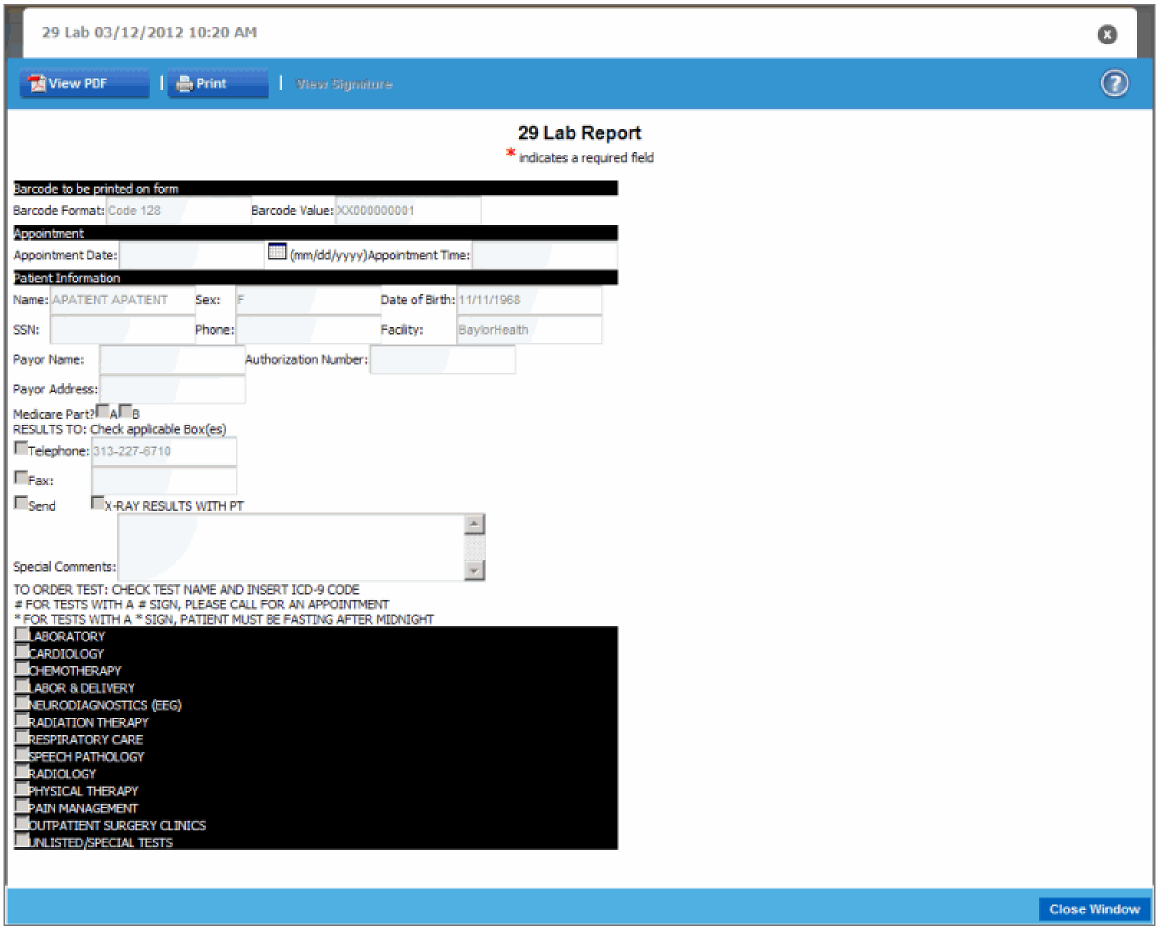
Attachment Viewer Screen Overview

The Inbox *Attachment Viewer* screen displays eForms and Clinical Documents attached to a *received* patient message. To access the *Attachment Viewer* screen, click an eForm or Clinical Document attached to a patient message. The attachment displays in the Attachment Viewer.

Options on the screen are implementation-specific, and may include the abilities to:

- View an attachment as a PDF.
- Print an attachment.
- View the signature of an electronically-signed document.
- Send a document to another application, such as an EMR.

Attachments in other formats, such as PDF or JPG, are downloaded or opened with software on your PC. For details, refer to View and Save Attachments.



Field Descriptions

The following describes the Menu Options on the Attachment Viewer screen.

Some options may not display, depending on your system configuration.

Menu Bar options	
View PDF	Click **View PDF** to generate and preview a PDF of the form prior to printing.
Print	Click **Print** to print the document.
View Signature	Click **View Signature** (if available) to view the signature details of an electronically signed document.
Send To Application	Click **Send To Application** (if available) to copy the document to a configured application, such as an EMR system.
(Help)	Click (Help) on the menu bar to display screen-level help.
Close	Click **Close Window** to dismiss the attachment viewer screen.

Window

About the Compose Message Screen

For help with tasks you can perform from the Compose Message screen, go to:

- Compose a Message
- Reply to a Message
- Forward a Message
- Resend a Message

This topic includes the following subsections:

- Compose Message Screen Overview
- Field Descriptions

Compose Message Screen Overview

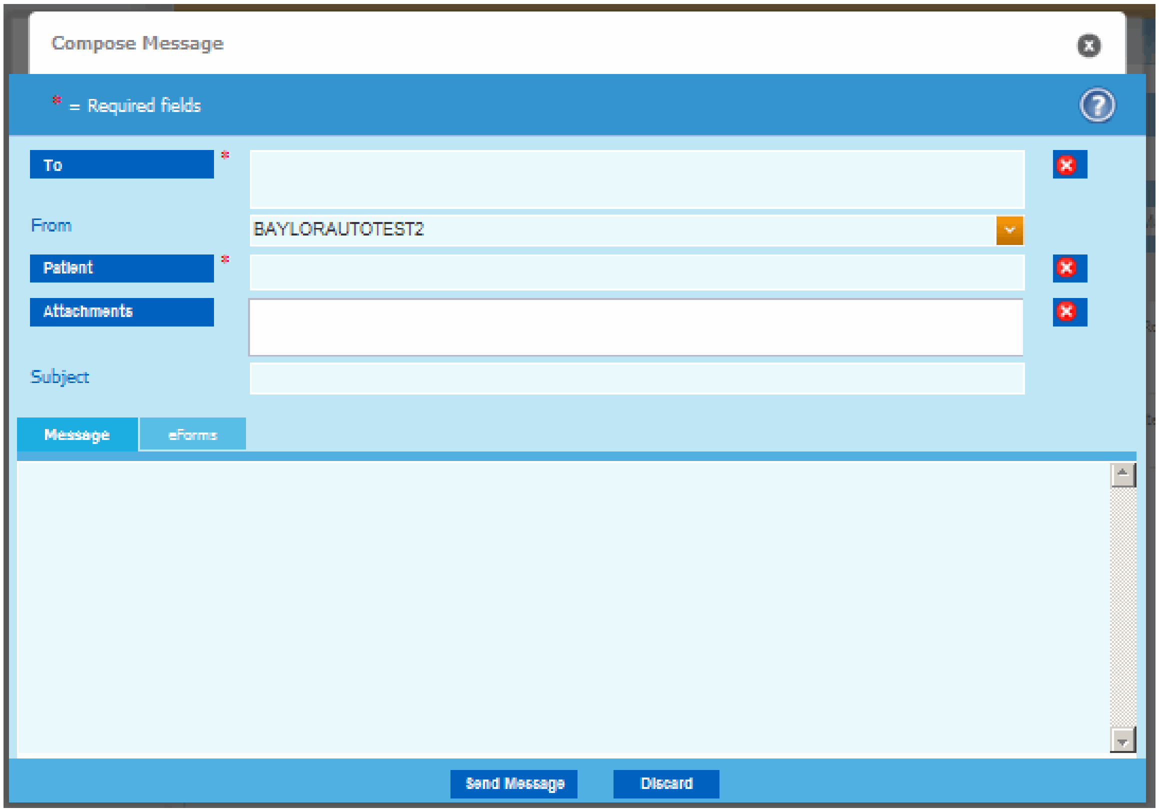
The Compose Message screen displays when you:

- Click the Compose Message button on the Messages screen.
- Click Reply, Forward, or Resend on the View Message screen.

When you access the Compose Message screen from the *View Message* screen:

- Fields are pre-populated with information from the original message.
- You cannot change the patient associated with the message.

The *Compose Message* screen is used to create and send patient-related messages to other facilities or practices. A message can be sent to multiple recipients (i.e., facilities or practices) along with one or more attached documents.



Field Descriptions

The following describes the Fields and Menu Options on the Compose Message screen. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION
To *	Displays the recipients for the message. Click the To button to search for and select recipients. To remove all recipients from this field, click the clear field button.
From	Displays the message sender's mailbox. Click the drop-down arrow to change the mail box.
Patient *	Displays the patient associated with the message. Click the Patient button to search for and select a patient. To remove the selected patient from this field, click the clear field button. When replying, resending, or forwarding a message, the Patient field in not editable.
Attachments	Displays the list of documents and eForms attached to the message. Click Attachments to attach documents stored on your computer, or patient documents. You must first select a patient to use the attachment feature. To remove all the attachments, click the clear field button.

	To remove a selected attachment, double-click its name in the list. The attachment is removed from the message.
Subject	Enter the subject of the message.
Message	Displays the message. Enter a message, if needed. Text can be typed, or pasted from another application.
eForms	Displays the list of eForms available to attach to the message. For details, refer to Complete and Attach an eForm.

Menu Bar options	
(help)	Click (help) on the menu bar to display screen-level help.
Send Message	Click to send the message.
Discard	Click to cancel your changes and exit the Compose Message screen.

About the Provider Directory Search Screen

For help with the procedure you can perform from this screen, go to Search for Providers.

This topic includes the following sections:

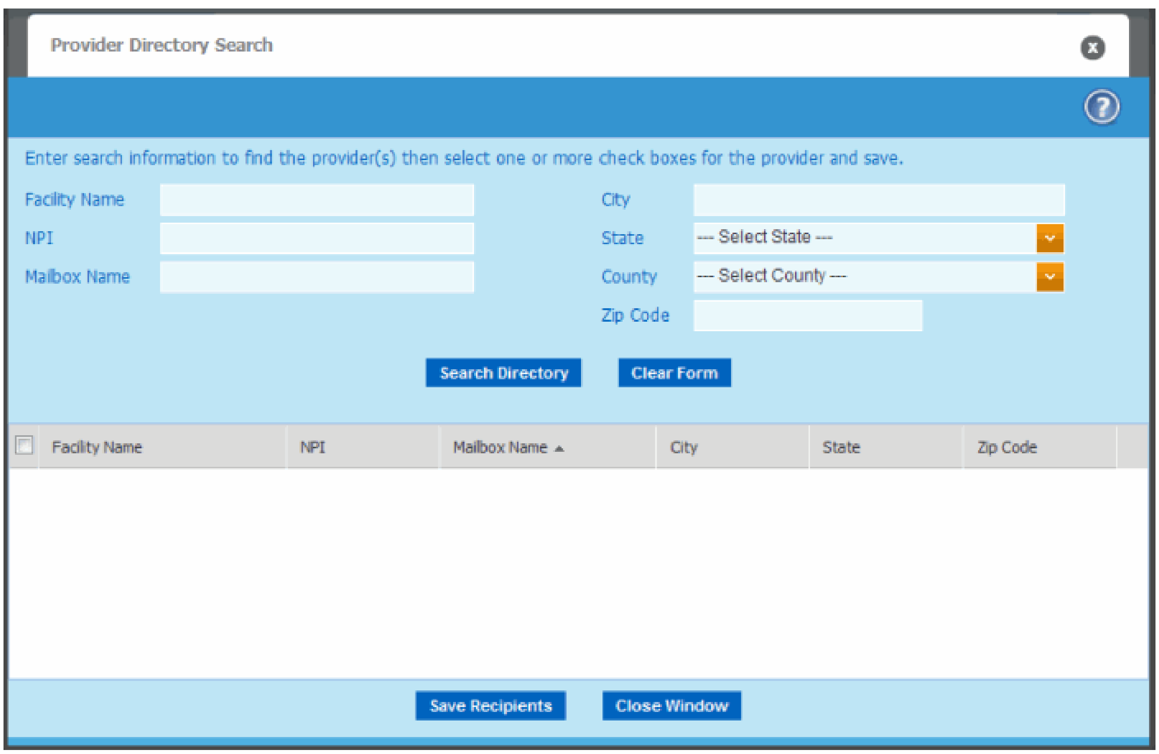
- Provider Directory Search Screen Overview
- Field Descriptions

Provider Directory Search Screen Overview

Use the Inbox Provider Directory Search screen to search for message recipients or senders.

You access Provider Directory Search when:

- You click the **To** button on the Compose Message screen.
- You click the **To** or the **From** button on the Search Messages screen.



Field Descriptions

The following describes the Fields and Menu Options on the Provider Directory Search screen.

FIELD NAME	DESCRIPTION
Facility	To search for a mailbox by facility, enter all or part of the provider name (e.g.,

Name	'mer' to search for Mercy Hospital).
NPI	To search for a mailbox by NPI (National Provider ID), enter the complete NPI. Note: NPI is an exact match field and starts with “1,2, 3, or 4."
Mailbox Name	To search for a mailbox by its name, enter all or part of the mailbox name.
City	To search for a mailbox by city, enter all or part of the name of the city in which a provider is located.
State	To search for a mailbox by state, click the arrow and select a state from the drop-down list in which a provider is located. Hint: To narrow the options, type the first letters of the state in the text box.
County	To search for a mailbox by county, click the arrow and select a county in which a provider is located. Hint: To narrow the options, type the first letters of the county in the text box. Note: You must first select the state.
Zip Code	To search for a mailbox within a zip code, enter all or part of the zip code in which a provider is located. Note: We recommend using a complete zip code to limit the number of search results.
Results	Displays the Provider Directory Search results. To sort the information in a column, click the column header. Note: • A maximum of 200 results are returned per search. • The widths of all of the columns are adjustable.

Menu Bar options	
(help)	Click (help) on the menu bar to display screen-level help.

About the Patient Search Screen

For procedures you can perform from the screen, go to:

- Search for a Patient
- (Optional) Add or Edit a Patient

Your Inbox implementation may not include the ability to add or edit patients.

This topic includes the following sections:

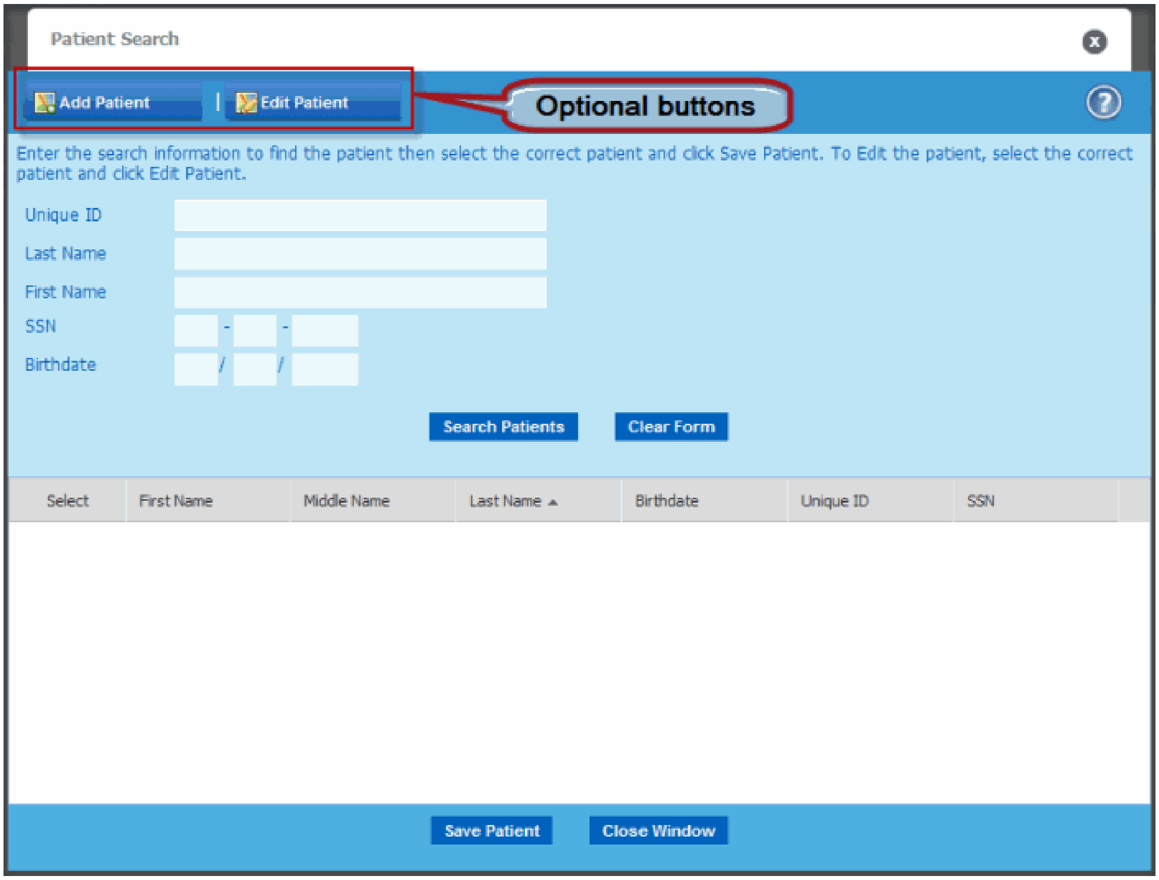
- Patient Search Screen Overview
- Field Descriptions

Patient Search Screen Overview

You access the Inbox Patient Search screen as you perform various tasks that require patient selection.

You can access the Patient Search screen in multiple ways:

- Click the **Patient** button on the Compose Message screen.
- Click the **Patient** button on the Search Messages screen.
- Select the Inbox **Search** tab **> Patients** tab.
- Search Audit Entries using "patient" as a search criterion.



Field Descriptions

The following describes the Fields and Menu Options on the Patient Search screen.

FIELD NAME	DESCRIPTION
Unique ID	To search by Unique ID, enter the Unique ID for the patient.
Last Name	To search by patient's last name, enter all or part of the last name.
First Name	To search by patient's first name, enter all or part of the first name.
SSN	To search by social security number, enter the complete SSN.
Birthdate	To search by patient date of birth, enter date of birth in MM/DD/YYYY format (e.g., 08/07/2000).
Search Patients	Click Search Patients to perform the search.
Clear Form	Click Clear Form to clear your search criteria and start over.
Results	The lower part of the screen displays Patient Search results. To sort the information in a column, click the column header.

- A maximum of 200 results is returned per search.
- The widths of all of the columns are adjustable.

Menu Bar options	
Add Patient	Optional. If available, click Add Patient to create a new patient. For details, refer to Add or Edit a Patient.
Edit Patient	Optional. If available, click Edit Patient to modify patient information. For details, refer to Add or Edit a Patient.
(help)	Click (help) on the menu bar to display screen-level help.
Save Patient	Saves the selected patient to the screen from which you accessed the Patient Search screen.
Close Window	Dismisses the Patient Search window so you can return to the screen from which you accessed the Patient Search screen.

About the Search Messages Screen

For help with tasks you can perform from the Search Messages screen, go to Search Messages.

This topic includes the following sections:

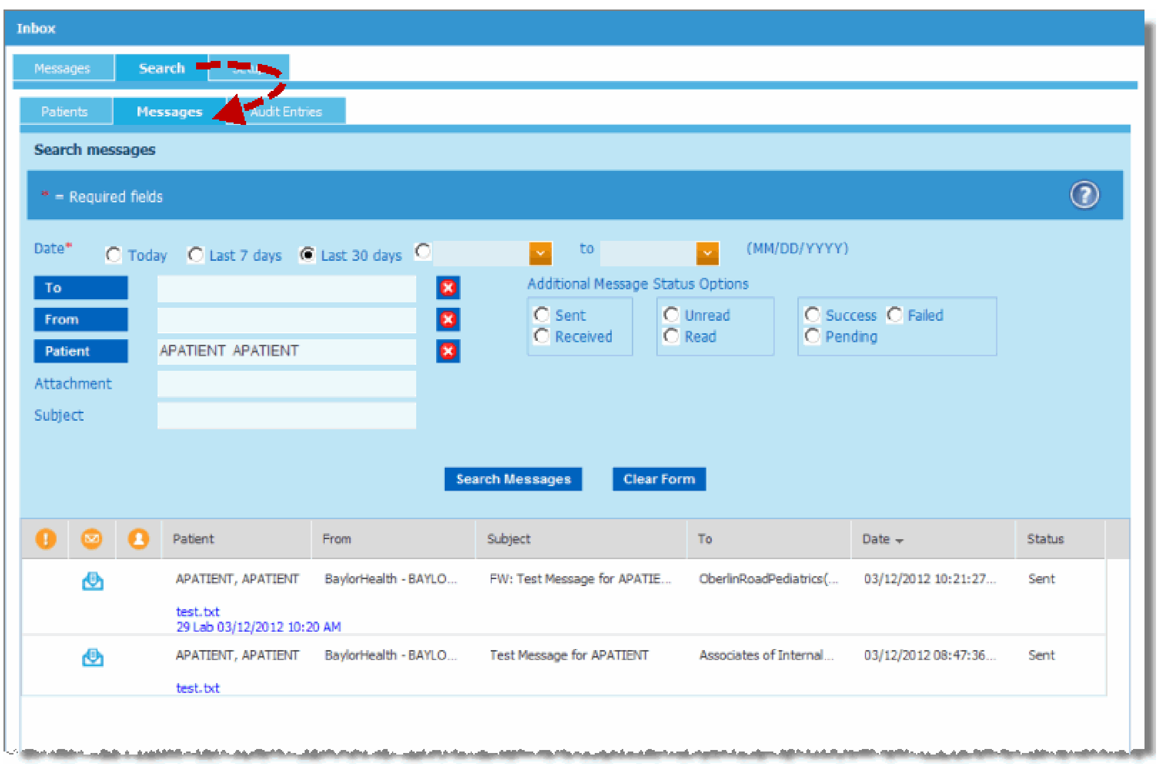
- Search Messages Screen Overview
- Field Descriptions

Search Messages Screen Overview

The Inbox *Search Messages* screen is used to search sent and received messages in the Inbox.

Although the Inbox *Messages* tab does not display messages more than 30 days old, messages are not removed from the system, and they can be retrieved with the Message Search feature.

Access the Message Search screen from the Inbox screen by selecting the **Search** tab **> Messages** tab.



Messages are summarized in the Messages tab, and marked with icons and formatting that helps you determine which messages you need to view or act on.

Convention	Description

(urgent)	Messages marked with this icon are urgent - they include information such as out of range clinical results that require action.
(unread)	Messages you have not read are flagged with the icon.
(read)	Messages you have read are flagged with the icon.
(unlinked)	Messages associated with unlinked patients (patients for whom there is no record on your system) are flagged with the icon
Red font	Messages that include abnormal results are marked with red text, in addition to the urgent icon. Note: A message that includes abnormal results will be marked with red text only if sent via a feed (not manually).
Bold font	Unread messages are marked with a bold font, in addition to the unread icon.
standard weight font	Read messages are marked with a normal font, in addition to the read icon.

Field Descriptions

The following describes the Fields and Menu Options on the Message Search screen. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION
Date *	You must make a date selection: • Today (default selection) • Last 7 days • Last 30 days • Within a selected date range. To select a date range: a. You must enter a start date in MM/DD/YYYY format in the first date field, or click the calendar icon and select a date. b. (Optional) You can enter an end date in MM/DD/YYYY format in the second date field, or click the calendar icon and select a date. If you do not select an end date, the search will return messages sent or received after the start date.
To	To search for a message by recipient, click the **To** button to open the Provider Directory screen and select a provider.
From	To search for a message by sender, click the **From** button to open the Provider Directory screen and select a provider
Patient	To search for a message by patient name, click the **Patient** button to open the Patient Search screen and select a patient.
clear field	To clear a selection from the *To*, *From*, or *Patient* field, click its associated **Clear Field** button.

Attachment	To search for a message by document name, enter part or all of the document name. **Important**: If the search string you enter is partial, it must be an exact match starting from the beginning with the term for which you are searching. For example, if you want to find messages that include attachments titled "LA Medicaid Results," you must enter a search string such as "LA," "LA Med," etc. You cannot successfully search for the attachments with search terms such as "Medicaid" or "Medicaid Results."
Subject	To search for a message by subject, enter part or all of the subject content. **Important**: If the search string you enter is partial, it must be an exact match starting from the beginning with the term for which you are searching. For example, if you want to find messages that include "LA Medicaid Results" in the Subject field, you must enter a search string such as "LA," "LA Med," etc. You cannot successfully search for the attachments with search terms such as "Medicaid" or "Medicaid Results."
Additional Message Status Options	To search for a message by status, select the desired status in the *Additional Message Status Options* section. Note: "Success" "Pending" and "Failed" are only applicable to messages to fax-only contacts.
search results	Search results display in the lower section of the *Search messages* screen. • To sort the results by a column, click the column header. The default sort is in descending order, by *Date*. • A maximum of 200 results is returned per search. • The widths of all of the columns are adjustable.

Menu Bar options	
(help)	Click (help) on the menu bar to display screen-level help.

About the Search Audit Entries Screen

For help with the procedure you can perform from this screen, go to Search Audit Entries.

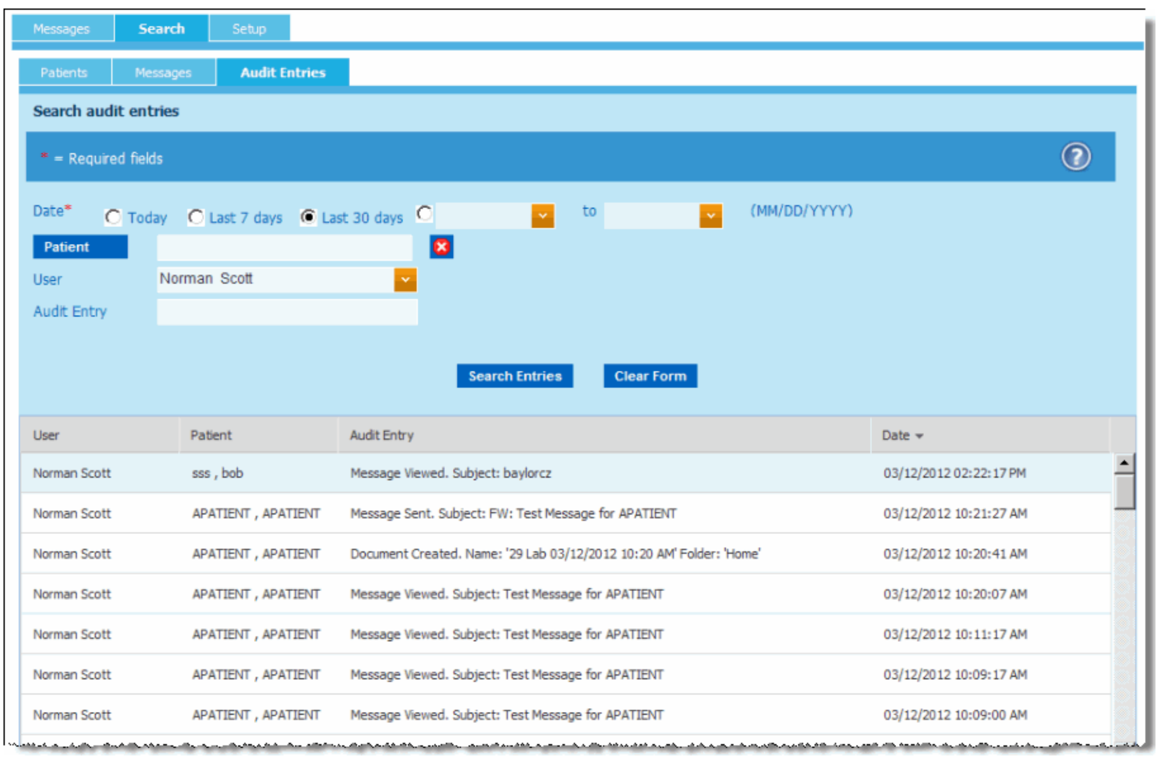
This topic includes the following sections:

- Search Audit Entries Screen overview
- Field Descriptions

Search Audit Entries Screen overview

Audit Entries are system-generated messages that are created as users work with Inbox and to record system-initiated events. Examples of events that generate Audit Entries include sending a message, reading a message, and editing a patient.

Use the Inbox *Audit Entries Search* screen to find and view audit entries.



Field Descriptions

The following describes the Fields and Menu Options on the Audit Entries Search screen. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION

Date *	To search for audit entries by date, select a date filter or specify a date range. To specify a date range: a. Enter the beginning date in the first field, or click the calendar to pick a date. b. Enter the ending date in the second field, or click the calendar to pick a date. A start date is required to perform an audit entry search. We recommend you use an ending date and limit the search period to 31 days or less to make reviewing the search results more manageable. Dates must be entered in the MM/DD/YYYY format (e.g., 10/19/2011). If a date is improperly formatted or out of range, the exclamation point icon displays. Hold your cursor over the icon to view an explanation of the problem.
Patient	To search for audit entries by patient name, use the search feature. Click the Search button to open the Patient Search screen. To clear the Patient field, click its clear field button.
User	To search for audit entries associated with a user at your facility, click the arrow and select the user from the drop-down list.
Audit Entry	Search terms in this field must **exactly match** the desired entry, starting at its beginning. For example, to search for entries about messages received, the search term must begin with "mess," "messa," "message," etc. You cannot successfully search on "received" because the entries do not begin with the word "received."
search results	Displays the audit entries search results. To sort the information by column, click the column header • A maximum of 200 results are returned per search. • Column widths are adjustable.

Menu Bar options	
(help)	Click (help) on the menu bar to display screen-level help.

About Adding or Editing Patients

For help with procedures you can perform from this screen, go to:

- Add a Patient
- Edit a Patient

Important: The ability to add or edit a patient from the Inbox is *optional*, and may not apply to your Inbox configuration.

This topic includes the following sections:

- Add/Edit Screens Overview
- Field Descriptions

Add/Edit Screens Overview

Patient information can be added to your system in a number of automated ways, depending on your system configuration.

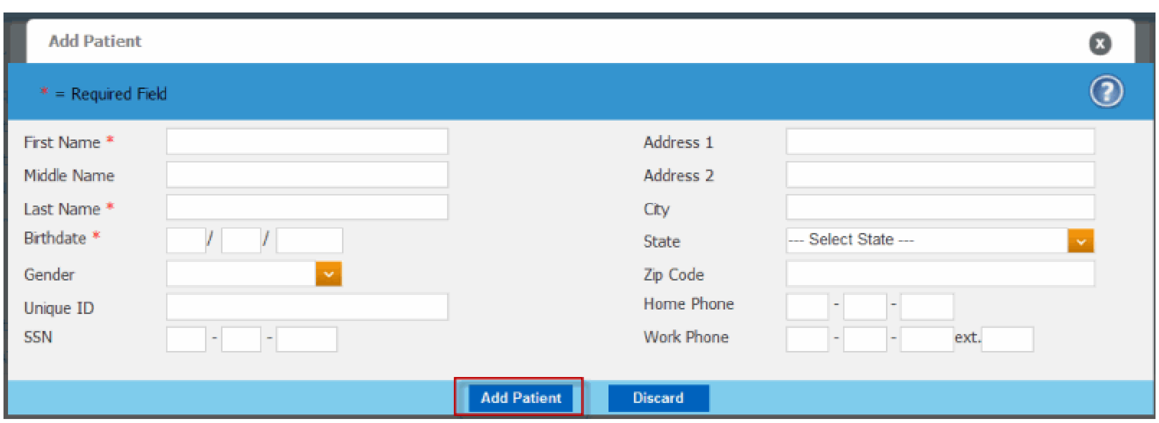
If supported by your configuration, you can use the Inbox optional Add Patient and Edit Patient screens to manually:

- Add patients to the Inbox.
- Modify information in existing patient records.

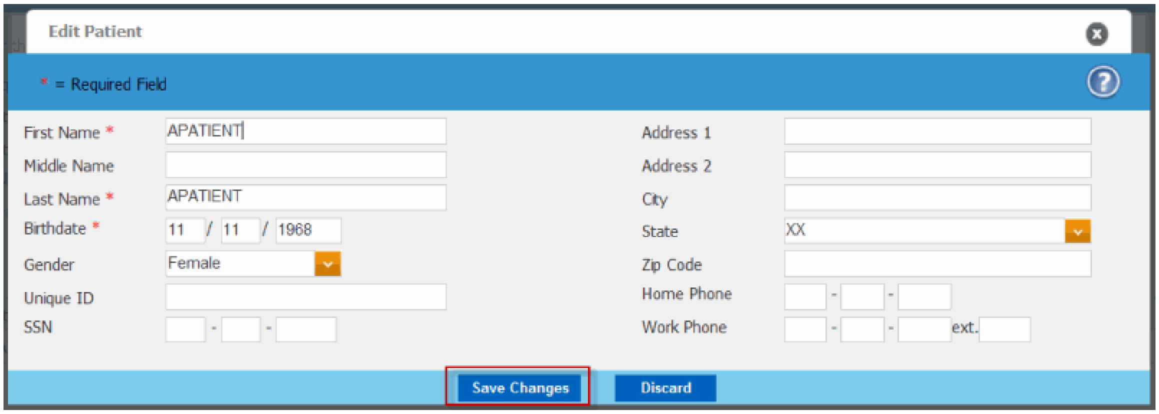
The Add Patient and Edit Patient screens include the same patient information fields. There is a slight difference in the controls available on the two screens:

- The Add Patient screen includes an **Add Patient** button that is used to save the new patient information.
- The Edit Patient screen includes a **Save Changes** button used to save your modifications to existing patient information.

Add Patient Screen



Edit Patient Screen



Field Descriptions

The following describes the Fields and Menu Options on the Add / Edit Patient screen. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION
First Name *	Enter or edit the patient's first name.
Middle Name	Enter or edit the patient's middle name.
Last Name *	Enter or edit the patient's last name.
Birthdate *	Enter or edit the patient's birth date in MM/DD/YYYY format.
Gender	Select a gender from the drop-down list.
Unique ID	Enter or edit the patient's unique identification number.
SSN	Enter or edit the patient's Social Security Number.
Address 1	Enter or edit the patient's street address.
Address 2	Enter or edit the patient's additional address information, such as an apartment number.
City	Enter or edit the patient's City.
State	Select the patient's State from the drop down list. Hint: Start typing the State to jump through the list.
Zip Code	Enter or edit the patient's Zip code.
Home Phone	Enter or edit the patient's home telephone number.
Work Phone	Enter or edit the patient's work telephone number.
Add Patient	Displays only on the *Add Patient* screen. Click Add Patient to save the new patient information.

Save Changes	Displays only on the *Edit Patient* screen. Click Save Changes to save the modified patient information.
Discard	Click to exit the screen without saving patient information.

Menu Bar options	
(help)	Click (help) on the menu bar to display screen-level help.

INBOX PROCEDURES FOR ALL USERS

This book includes the following procedures, which support tasks that can be performed by all Inbox users:

- Search Messages
- View a Message
- View and Save Attachments
- View and Print eForms and Clinical Documents
- View Electronic Signatures
- Send a Document to Another Application
- Reply to a Message
- Forward a Message
- Resend a Message
- Compose a Message
- Complete and Attach an eForm
- Search for Providers
- Search for a Patient
- Search Audit Entries
- [Optional] Add a Patient
- [Optional] Edit a Patient
- Link Patient Records

Search Messages

To search messages:

1. On the *Search messages* screen, enter the **search information**. For details, refer to About the Search Messages Screen. Enter or select search criteria in as many fields as required to refine your search.

   You must include *Date* criteria in your search.

   Important: The default *Date* setting is *Today*. Change the default as required to meet your search needs.

   > You can use *Search messages* to find and display messages that are more than 30 days old, by setting the appropriate date range.

2. Click the **Search Messages** button. The results display at the bottom of the screen.

   > If no search results display, verify that your *Date* selection meets your needs. The default selection is *Today*.
   > To clear your search terms and start over, click **Clear Form**.

3. In the *search results* section, click a message to view it. For details, refer to the *View Message* screen.

RESULTS

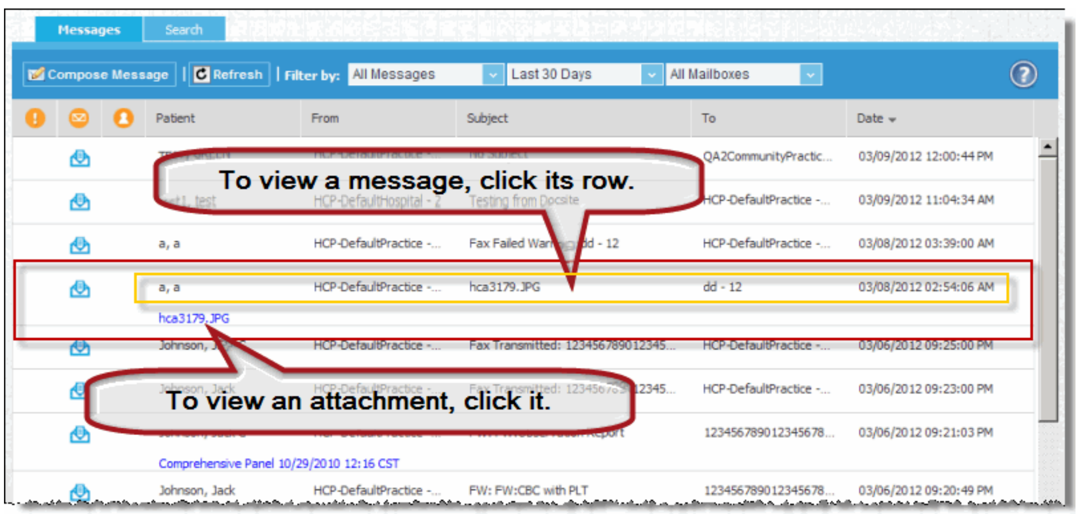
You have successfully searched for and found messages.

View a Message

To view a message:

1. In Inbox, select the Messages tab. The messages that meet filtering criteria display.
2. Change filtering criteria as required to view messages. For details, go to About the Messages Screen.
3. If needed, search the messages to find the message you want to view. For details, go to Search Messages.

You must use Search Messages if you want to view a message that is more than 30 days old...



4. In the list of messages, click the message you want to view. The message displays in the View Message screen.

RESULT

You have successfully opened a message for viewing.

View and Save Attachments

This procedure assumes you have displayed a message in the View Message screen.

To view or save documents attached to a message:

1. In the Save Attach*ments* field, click the **document name**. There are two ways in which attachments display:
    - If the attachment is an eForm or Clinical Document, the *Attachment Viewer* screen opens to display the document.
    - If the attachment is in any other format, you are prompted to save it or open it using PC software.
2. If you want to save the attachments to a folder in *Patient Documents*, click **Save Attachments**. The Save Attachments screen displays.
3. In the *Patient Documents* section of the screen, double-click folders to expand them and navigate to the folder in which you want to save the attachments.

> You can add a folder to the Patient Documents section or rename a folder by right-clicking an existing folder and selecting New Folder or Rename from the context menu. You will not be able to drag attachments into a *new folder* until you exit the Save Attachments screen and repeat steps 1 and 2 above.

4. Drag attachments from the *Attachments* section of the screen to the desired folder.
5. When you are finished saving attachments, click **Close Window**. The View Message screen displays.

View and Print eForms and Clinical Documents

To view an eForm or Clinical Document as a PDF:

1. On the menu bar of the *Attachment Viewer* screen, click **View PDF**. For details, go to About the Attachment Viewer Screen.
2. When the *File Download* dialog box displays, click the **Open** button. The PDF opens in a new window, using a software application such as Adobe Reader.
3. If you want to print the PDF, use your software application's printing capability.

To print an eForm or Clinical Document without previewing as a PDF:

1. On the menu bar of the *Attachment Viewer* screen, click **Print PDF**. For details, go to About the Attachment Viewer Screen.
2. When the *Print* window displays:
   a. Select your **local printer** from the drop-down list in the *Name* field.
   b. Click the **OK** button to print the document and close the *Print* window.

RESULT
You have successfully viewed and printed eForms and Clinical Documents.

View Electronic Signatures

This procedure is available only if the document is electronically signed. Electronically signed documents are indicated by a pencil icon.

To view the signature of an electronically signed document:

1. On the menu bar of the *Attachment Viewer* screen, click **View Signature**. The View Signature window opens to display signature information.
2. Click **Close Window** to dismiss the signature display.

RESULT
You have successfully viewed an electronic signature.

Send a Document to Another Application

This procedure is available only if your *Inbox* is configured to transmit documents to an application such as an EMR (Electronic Medical Records) system.

To send a Clinical Document to an application such as an EMR:

On the menu bar of the *Attachment Viewer* screen, click **Send To Application**. The attachment is routed to the application configured for your system.

RESULT
You have successfully sent a document to another application.

Reply to a Message

The Reply function is not available for messages sent from your facility.

This procedure assumes you have displayed a message in the View Message screen.

To reply to a message:

1. Click **Reply** on the menu bar. The *Compose Message* screen displays.
2. On the *Compose Message* screen in the *To* field, add or remove recipients as required. *For details, refer to Compose a Message.*

The *Patient* field is not editable.

3. In the Attached Documents field, add attachments as required.
4. Edit the *Subject* and *Message* fields as needed.
5. Click the **Send Message** button on the *Compose Message* screen to send the reply.

Forward a Message

This procedure assumes you have displayed a message in the View Message screen.

To forward a message:

1. Click **Forward** on the menu bar. The *Compose Message* screen opens.
2. On the *Compose Message* screen in the *To* field, select recipients. *For details, refer to Compose a Message.*

The *Patient* field is not editable.

3. In the Attached Documents field, add or remove documents as required.
4. Edit the *Subject*, and *Message* fields as needed.
5. Click the **Send Message** button on the *Compose Message* screen to send forward the message.

Resend a Message

The Resend function is available only for messages that were originally sent from your facility.

This procedure assumes you have displayed a message in the View Message screen.

To Resend a message:

1. Click **Resend** on the menu bar. The *Compose Message* screen opens.
2. On the *Compose Message* screen in the *To* field, add recipients as required*. For details, refer to Compose a Message.*

The *Patient* field is not editable.

3. In the Attached Documents field, add or remove documents as required.
4. Edit the *From, Subject*, and *Message* fields as needed.
5. Click the **Send Message** button on the *Compose Message* screen to send the reply.

Compose a Message

This procedure assumes you have accessed the Compose Message screen. For details, refer to About the Compose Message Screen.

To compose a message:

1. Select recipients:

a. In the *Compose Message* screen, click the **To** button. The *Provider Directory Search* window displays.

b. On the *Provider Directory Search* window, enter or select search criteria in at least one field.

You can enter partial information in all fields that allow text entry.

c. Click the **Search Directory** button. The search results display at the bottom of the screen.
d. Choose one or more **facilities** and **mailboxes** to which you want to send the message by selecting check boxes next to the *Facility Name* field in the search results.
e. Click **Save Recipients**. The *Provider Directory Search* window closes and the selected recipients display in the *To* field of the *Compose Message* screen.

To remove the recipients from the *To* field, click the clear field button.

2. Select a sender:

Your facility may have more than one mailbox. The default value is the first mailbox in the list. If your mailbox is not the default, you will need to select it from the list.

a. In the *From* field, click the **drop-down arrow**. The list of available mailboxes displays.

You can jump to the desired mailbox by beginning to type its name.

b. Select a mailbox to replace the default *From* field entry.

3. Select a patient:
   a. Click the **Patient** button. The *Patient Search* window displays.

b. On the *Patient Search* window, enter or select search criteria in at least one field.

You can enter partial information in all fields that allow text entry.

:

c. Click the **Search Patients** button. The results will display at the bottom of the screen.
d. Select a **patient** from the search results.
e. Click **Save Patient**. The *Patient Search* window closes and the selected patient displays in the *Patient* field on the *Compose Message* screen.

To remove the patient from the field, click the clear field button.

4. Attach documents (optional):

You must select a patient before you attempt to attach documents.

a. Click the **Attachments** button. The *Choose Attachment* window displays.
b. Select an attachment using either the *Choose Attachment* or *Patient's Documents* options:
   - **My Computer**: Click here to view instructions for using the My Computer feature to attach documents stored on your computer.
   - **Patient's Documents***:* Click here to view instructions for using the Patient's Documents feature to attach documents received by your facility for the selected patient.

5. Attach eForms (optional):
   a. Select the **eForms tab** below the *Subject* field. The list of available eForms displays.
   b. Navigate through the available eForms and select a form to attach to the email.

Click the folders' plus (expand the folder) or minus (collapse the folder) signs as required to navigate the collection of eForms.

c. When you select an eForm, it displays in a new screen. For details about saving, completing, and attaching the eForm, refer to Complete and Attach an eForm.
d. The eForm is attached to the message. Attach additional eForms as required.

6. Enter a **subject** in the *Subject* field.
7. Optional - Enter a **message** in the *Message* field.
   a. Click the **Message** tab.
   b. Type your message in the text entry window.

8. Click **Send Message**.

RESULT
You have successfully composed and sent a message.

My Computer

Use the **My Computer** screen when you want to attach documents that are stored on your computer or network. You can attach multiple documents to a message.

To select attachments:

1. Select the *My Computer* tab.
2. Click **Attachment 1**, **Attachment 2**, or **Attachment 3**. The *Choose File to Upload* pop-up window displays.
3. Navigate to and select the file you want to attach to the message.
4. Click the **Open** button. The *Choose File to Upload* window closes, and the selected document displays in the *Attachment 1, 2, or 3* field.
5. Repeat steps 2 through 4 until you are finished selecting attachments.
6. Click **Save Attachment**. The *Choose attachment* window closes, and the selected documents display in the *Compose Message* screen *Attachments* field.

If you need to attach more than three documents, repeat the process by clicking **Attachments** on the *Compose Message* screen and starting over at step 1 above.

To close the *My Computer* screen without saving your attachments, click the **Discard** button. If the *Confirm* pop-up window displays, click **Close Attachment** to complete the cancel process and return to the Compose Message screen.

Patient's Documents

Use the *Patient's Documents* screen to select and attach:

- Documents that have been received for this patient.
- eForms that have been completed for this patient.

To attach a patient document:

1. Select the **Patient's Documents** tab. The list of available documents displays.

If your facility has created folders, you may need to navigate through folders to locate and select the document you want to attach.

2. Click the check boxes as required to select the documents you want to attach to the message.
3. Click the **Save Attachment** button. The *Choose Attachment* window closes, and the *Compose Message* screen refreshes with the selected documents displayed in the *Attached Documents* field.

To close the *My Computer* screen without saving your attachments, click the **Discard** button. If the *Confirm* pop-up window displays, click **Close Attachment** to complete the cancel process and return to the Compose Message screen.

The Patient's Document screen includes the following fields and controls.

FIELD NAME	DESCRIPTION
Name	Displays the folder or document name.
Type	Displays the document type (i.e., folder, eForm, fax, print, file).
	Optional, display only for facilities that use patient document folders. Click the sign hide the documents from view. Click the sign to display the documents stored within a folder.
	Click the check boxes to select documents to attach to a message.

Complete and Attach an eForm

When you select an eForm in the Compose Message screen eForms tab, the eForm displays in a new screen titled with the name of the eForm. From the eForm screen, you can complete, save, sign electronically (optional), and attach the eForm.

To complete and attach an eForm:

1. Enter the required information in the eForm fields.

> If there is auto-populated information on the eForm, verify it meets the needs of your patient and circumstances. Modify the auto-populated information as required.

2. Click the **Save** button frequently to avoid losing your work.

> **Important**: You must click **Save** at least once before you can attach the eForm to the message from which you accessed the eForm.

3. When you are finished adding information to the eForm, click **Save**. If your system is configured to support electronically signing documents, the eSign button becomes available.
4. Optional. Electronically sign the eForm.
   a. Click the **eSign** button. If your configuration includes automatic eSign, skip to step 5. Otherwise, continue with step b.
   b. The *Add Signature* dialog displays.
   c. In the *Add Signature* dialog, read the legal statement, then enter your **Password**. This is the password associated with the account you use to log in to the Inbox.
   d. Click **Add Signature**. The eForm window displays.
5. Optional. If you want to save or print a PDF copy of the completed eForm:
   4.
   - Click **View PDF**. The eForm is converted to PDF and displays in your PDF viewer software. You can view, print, or save the PDF from your viewer software.
   - Click **Print** to print the form without viewing it as a PDF.
5. Click **Attach eForm**. The eForm screen closes and the *Compose Message* screen displays, with the eForm listed in the *Attachments* field. The eForm becomes available for future forwarding as a Patient Document. For details refer to Compose a Message.

The fields available vary with each eForm, and are not listed here. The following Menu Options are available, depending upon your system configuration.

Menu Bar options	
View PDF	Click **View PDF** to generate and preview a PDF of the form prior to printing.
Print	Click **Print** to print the document.

eSign	Click **eSign** (if available) to electronically sign the eForm.
(help)	Click (help)on the menu bar to display screen-level help.

RESULT

You have successfully attached eForms to a message. To complete and send the message, go to Compose a Message.

Search for Providers

To search for provider mailboxes:

1. In the *Provider Directory Search* screen, enter or select information in the search fields. At least one field must be completed to perform a search. Complete as many fields as possible to refine the search. For details, refer to About the Patient Search Screen.
2. Click the **Search Directory** button. The results display at the bottom of the screen.

To clear the fields and search results, click the **Clear** button.

To close the screen without saving your changes, click the **Close Window** button. If a *Confirm* pop-up window displays, click **Close Search** to complete the cancel process.

3. Select mailboxes by clicking the **check box** in the first column or any text in the desired row.
    - If you reached Provider Directory Search from the Compose Message screen, you can select multiple check boxes.
    - If you reached Provider Directory Search from the Search Messages screen, you can select only one check box.
4. Click the **Save Recipients** button. The *Provider Directory Search* window closes, and the selected provider mailboxes display in the appropriate field of the screen from which you accessed Provider Search.
    - The Compose Message **To** field.
    - The Search Messages **To** or **From** field.

RESULT

You have successfully searched for and selected providers. If you are in the process of composing a new message, go to Compose a Message to complete and send the message.

Search for a Patient

To search for a patient:

1. On the *Patient Search* screen, enter or select information in the search fields. At least one field must be completed to perform a search. Complete as many fields as possible to refine the search. For details, refer to About the Patient Search Screen.
2. Click the **Search Patients** button. The results display.

> To clear the fields and search results, click the **Clear Form** button.
>
> To close the screen without saving your changes, click the **Close Window** button. If a *Confirm* pop-up window displays, click **Yes** to complete the cancel process.

3. How you work with search results depends on how you accessed the *Patient Search* screen.

If you started from the...	Then...
Compose Message screen	1. Select a patient from the list of results. 2. Click **Save Patient**. 3. The Compose Message screen displays, with the selected patient in the Patient field.
Search Messages screen	1. Select a patient from the list of results. 2. Click **Save Patient**. 3. The Message Search screen displays, with the selected patient in the Patient field.
Inbox **Search** tab **> Patients** tab	1. Select a patient from the list of results. The *Edit Patient* screen displays. 2. View or edit patient information. For details, refer to Edit a Patient .
Inbox **Search** tab **> Audit Entries** tab	1. Select a patient from the list of results. 2. Click **Save Patient**. The *search audit entries* screen displays. 3. Complete the Audit Entries search. For details, refer to Search Audit Entries.

RESULT

You have successfully searched for and selected a patient.

Search Audit Entries

To search for audit entries:

1. On the Inbox screen, select the *Search* tab > *Audit Entries* tab. The *Search Audit Entries* screen displays using default entry selection criteria - all audit entries generated today.
2. If you want to filter by date or search for entries that meet your criteria, make one or more of the following changes:
   a. Select a different date filter or specify start and end dates for which you want to view audit entries.
   b. Enter or select search terms (a Patient, a User, or audit entry text).
3. Click the **Search Entries** button. The results are displayed at the bottom of the screen.

The displayed results are limited to 200 audit entries. If more than 200 entries are found, the system indicates you should further refine your search to limit the number of results.

To clear *all* the fields, click the **Clear Form** button.

:

4. Navigate through the list as required to view the desired entries in the *Audit Entry* column.

RESULT

You have successfully searched for and viewed audit entries.

Add a Patient

The ability to add or edit a patient from the Inbox is optional, and may not apply to your practice's configuration.

To add a patient:

1. From any *Patient Search* screen, click **Add Patient**. The Add Patient screen displays.
2. Add patient information as required. You must know the patient's first and last name and birthdate to add a patient.
3. Click **Add Patient**. The Add Patient screen closes and the patient is added to the Inbox. You are returned to the screen from which you added the patient.

To exit the screen without saving the patient, click **Discard**. If a *Confirm* dialog displays, click **Close Window** to exit, or **Cancel** to return to the *Add Patient* screen.

RESULT
You have successfully added a patient to Inbox.

Edit a Patient

The ability to add or edit a patient from the Inbox is optional, and may not apply to your practice's configuration.

To edit a patient:

1. Access the *Edit Patient* screen using one of the following methods:
   - Select **Search** tab **> Patients** tab, search for the patient you want to edit, click the patient's row in the search results.
   - Optional, when searching for a patient from screens such as Compose Message or Search Messages:
     - Click the **Patient** button. The **Patient Search** screen displays.
     - Search for a patient. The search results display.
     - Select a patient in the search results.
     - Click **Edit Patient**.

   The patient information displays in the *Edit Patient* screen.
2. Edit the patient information as required.
3. Click **Save Changes**. The Edit Patient screen closes and the patient information is updated in the Inbox. You are returned to the screen from which you accessed the Edit Patient screen.

To exit the screen without saving the patient information changes, click **Discard**. If a *Confirm* dialog displays, click **Close Window** to exit, or **Cancel** to return to the *Edit Patient* screen.

RESULT
You have successfully edited patient information.

Link Patient Records

When the Inbox receives a patient message, and the patient does not exist in the system, it adds the patient using Patient Name and Birthdate from received online message. Your practice may receive messages from multiple senders about the same patient but the patient records are not linked.

If the message for a patient displays an (unlinked) icon, link the patient to an existing patient record.

To link a patient record:

1. On the Message screen, click the **unlinked** icon. The *Link Patient* screen displays.
2. On the *Link Patient* screen, the Patient Name and Birthdate are populated in the search fields.
3. Click the **Search** button to search for matching patient records. The search results display.
4. In the search results, click the **check box** of the patient to which the message should be linked.
5. Click the **Link** button to link the message to the selected patient. You are returned to the Messages screen, and the message is no longer flagged with the unlinked icon.

RESULT
You have successfully linked a patient record.

ADMINISTRATOR SCREENS AND FIELDS

This book includes the following topics, which describe screens accessible only by Administrators:

- About the Mailboxes Screen
- About the Rules Screen
- About the Add/Edit Rules Screen
- About the eForms Screen

About the Mailboxes Screen

Only administrators can access the Setup > *Mailboxes* screen.

For help with procedures you can perform from this screen, go to:

- Add Mailboxes
- View or Edit Mailboxes

This topic includes the following sections:

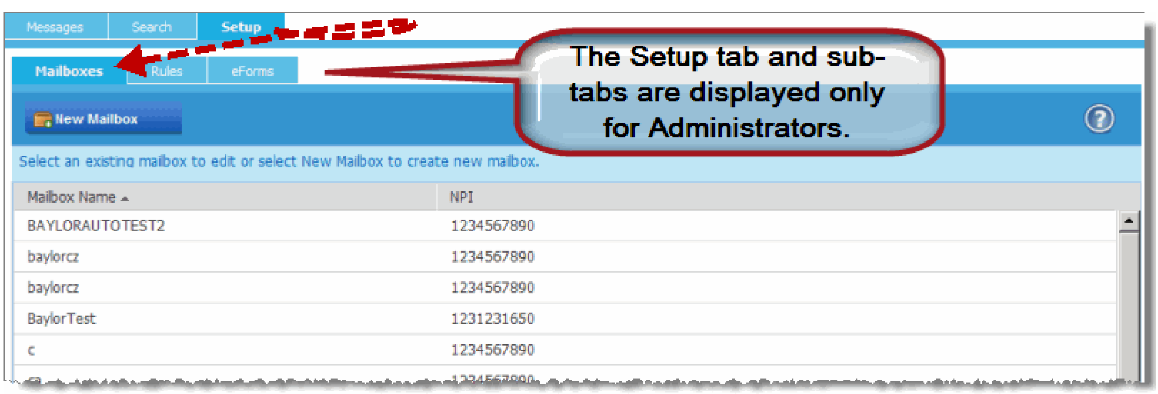
- Mailboxes Screen Overview
- Field Descriptions

Mailboxes Screen Overview

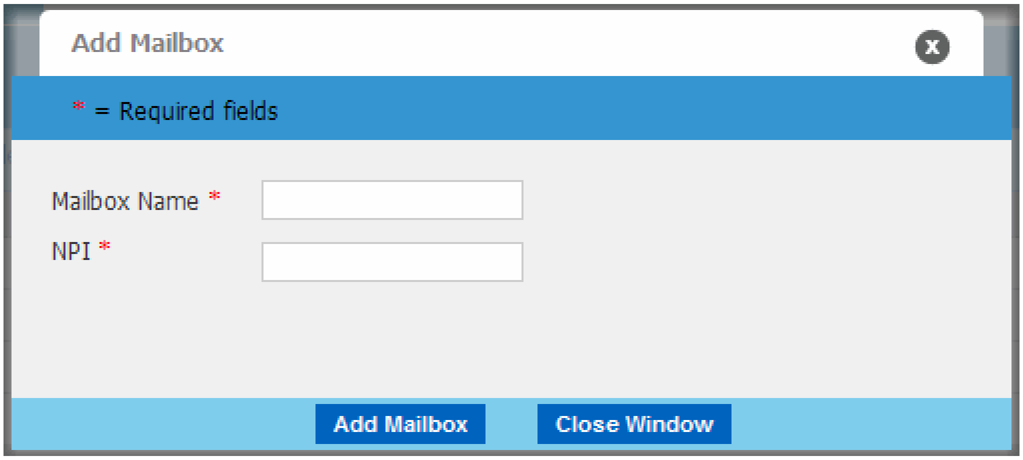
Administrators can make Inbox communications more targeted by creating custom mailboxes associated with practice users (Doctor Jones, Nurse Practitioner Smith) and workflows (Referrals, Lab Results, Consultations). Typically an administrator will determine the mailboxes that are needed within an organization and create them. Mailboxes should have names that are meaningful to people who need to communicate with the organization.

Administrators use the Inbox *Mailboxes* screen to add mailboxes and view or edit existing mailboxes.

Mailboxes Screen



Add Mailbox screen



Field Descriptions

The following describes the Fields and Menu Options on the Mailboxes and Add Mailbox screens.

FIELD NAME	DESCRIPTION
Mailbox Name	Display or enter the mailbox name.
NPI	Display or enter the National Provider ID number. The NPI is a 10-digit number, which begins with either 1, 2, 3, or 4.
Add Mailbox	On the Add Mailbox screen. Click to add the new mailbox.
Close Window	On the Add Mailbox screen. Click to exit the screen without adding a mailbox.

Menu Bar options	
New Mailbox	Click New Mailbox on the menu bar to open the *Add Mailbox* screen.
(help)	Click (help) on the menu bar to display screen-level help.

About the Rules Screen

Only administrators can access the *Setup* tab > *Rules* tab.

For help with procedures you can perform from this screen, go to:

- Add a Rule
- Edit a Rule
- Delete a Rule

This topic includes the following sections:

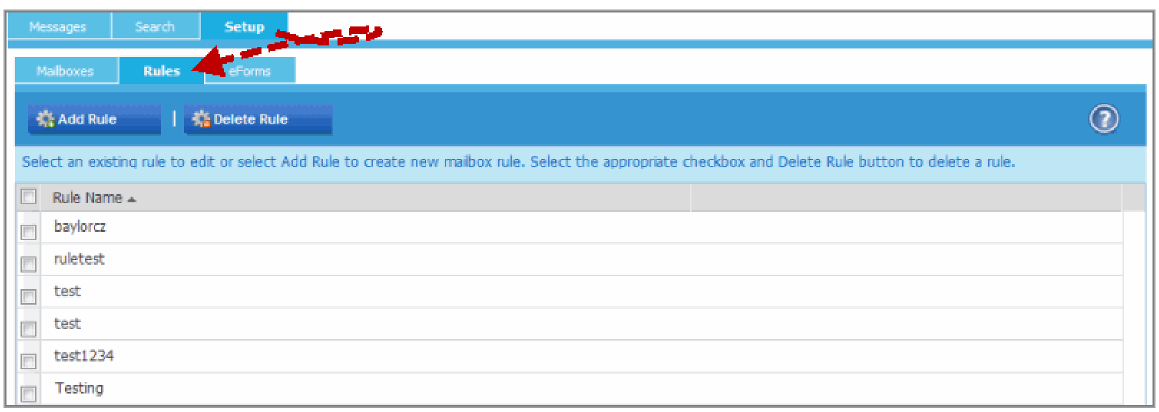
- Rules Screen Overview
- Field Descriptions

Rules Screen Overview

Administrators can create, edit, or delete Inbox message processing rules. Rules are optional. Rules are processed in the order in which they are listed on the screen.

A rule consists of *Conditions* and *Actions*. When a message meets the conditions in a rule, it is processed as required by the actions.

For example, rule-based processing can result in the system sending a person an email to notify them that an Inbox message that meets rule requirements has been received. The notification email prompts the person to access the Inbox and review the associated message.



Field Descriptions

The following describes the Fields and Menu Options on the Rules screen.

FIELD	DESCRIPTION

NAME	
Rule Name	The name, which is defined by the Rule Description field in the Add/Edit Rule screens.
(Check box)	Check to select a rule for deletion.

Menu Bar options	
Add Rule	Click to display the Add Rule window.
Delete Rule	Click to delete one or more selected rules.
(help)	Click (help) on the menu bar to display screen-level help.

About the Add/Edit Rules Screen

Only administrators can access the *Setup* tab > *Rules* tab.

For help with procedures you can perform from this screen, go to:

- Add a Rule
- Edit a Rule

This topic includes the following sections:

- Add/Edit Rules Screen Overview
- Field Descriptions

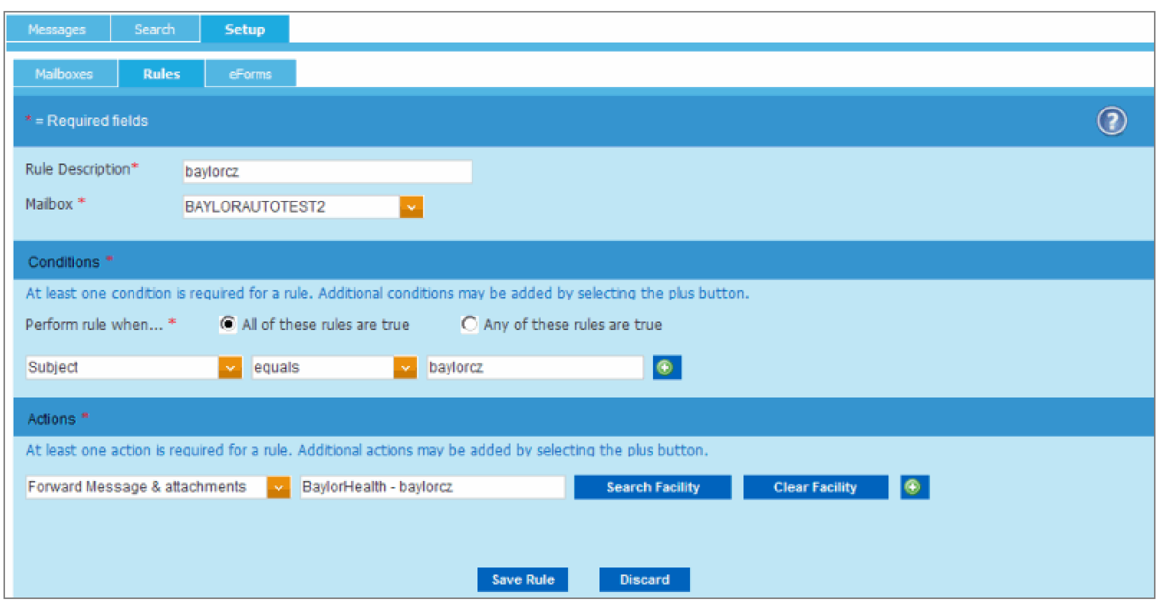
Add/Edit Rules Screen Overview

Administrators can create, edit, or delete Inbox message processing rules. Rules are optional. Rules are processed in the order in which they are listed on the screen.

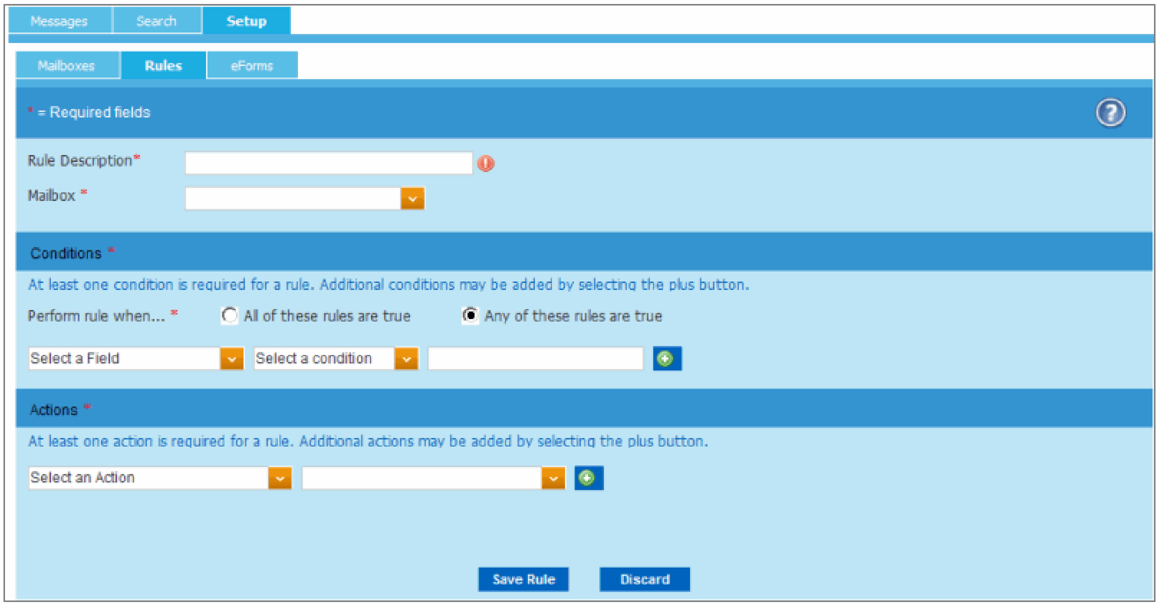
A rule consists of *Conditions* and *Actions*. When a message meets the conditions in a rule, it is processed as required by the actions.

For example, rule-based processing can result in the system sending a person an email to notify them that an Inbox message that meets rule requirements has been received. The notification email prompts the person to access the Inbox and review the associated message.

Edit Rule Screen



Add Rule Screen



Field Descriptions

The following describes the Fields and Menu Options on the Add Edit Rule screen. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION
Rule Description *	Enter a description for the rule. For example, "Doctor Smith Messages."
Mailbox *	Click the arrow and select a mailbox from the list of available mailboxes. The rule will apply to incoming messages addressed to the selected mailbox.
Conditions *	Select the "Perform rule when..." answer. • All of these conditions are true (the rule is applied only to messages that meet all the conditions). • Any of these conditions are true (the rule is applied when a message meets any of the conditions). Complete the condition details. • **Select a field** to which the condition applies. ○ If you select *From Facility Name*, use the Search feature to select the facility. The selected facility is added to the right of the condition operator field. ○ If you select *Results Attachment*, the condition and text fields are automatically set to *equals Abnormal Result*. • **Select a condition** operator.

- **Enter text** that is relevant to the selected field and condition operator.

  When an Inbox message arrives and text in the selected field matches the text you enter in the way defined by the condition operator, the message is processed as defined by the rule's *Actions*.

Add Condition	Click the Add Condition button to add a condition to the rule. A rule can include multiple Conditions and Actions.
Remove Condition	If a rule has multiple Conditions, the Remove Condition button displays beside each condition. To remove a condition: • Click the **Remove Condition** button. A *Confirm* dialog displays. • In the Confirm dialog, click **Delete Condition**. The condition is deleted. If a rule has only one condition, the *Remove Condition* button is not available. A rule must have at least one condition.
Actions *	Complete the Action details. • If you select the **Alert a user by email** action, then select a user from the associated drop down list. • If you select the **Forward Message & attachments** action, then click the **Search Facility** button. Search for and select the *Facility Name / Mailbox Name* combination to which you want to forward messages that meet the rule's conditions. When an Inbox message that meets the required *Conditions* arrives, it is processed as defined by the *Actions*.
Add Action	Click the Add Action button to add an action to the rule. A rule can include multiple Conditions and Actions.
Remove Action	If a rule has multiple Actions, the Remove Action button displays beside each action. To remove an action: • Click the **Remove Action** button. A *Confirm* dialog displays. • In the Confirm dialog, click **Delete Action**. The action is deleted. If a rule has only one action, the *Remove Action* button is not available. A rule must have at least one action.

Menu Bar options	
(help)	Click (help) on the menu bar to display screen-level help.
Save Rule	Click to save the new or edited rule.
Discard	Click to discard your changes and return to the *Setup -> Rules* screen.

About the eForms Screen

For help with procedures you can perform from this screen, go to:

- Manage eForms Folders
- Add or Delete eForms
- Set eForm Defaults

This topic includes the following sections:

- eForms Screen Overview
- Field Descriptions

eForms Screen Overview

Important: Covisint provided a set of eForms with your system. The set, and the options for creating new eForms, can vary depending on your contract with Covisint. When you manage eForms, you are organizing the available eForms into folders so they are easier to work with - you are not creating new eForms.

If you think you need more eForms, please contact the person who manages your contract with Covisint to determine what options are available..

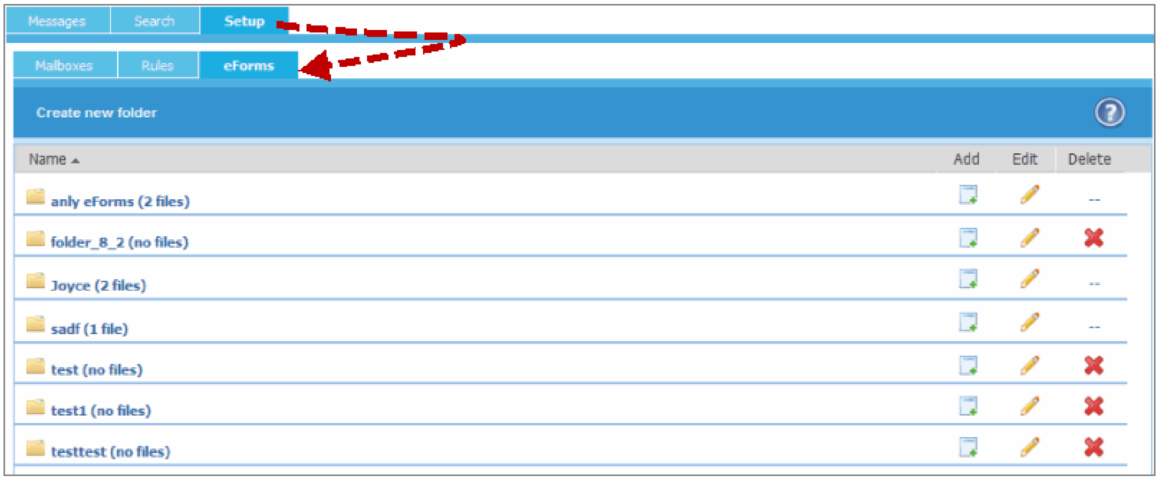
Administrators use the Inbox *Setup* > *eForms* tab to manage eForm folders and their contents. The process of managing eForms consists of creating a folder structure that is meaningful to Inbox users, and moving available eForms into, or out of the folder structure as required. When administrators manage eForms and folders, they are not creating or deleting eForms, they are just providing the equivalent of 'shortcuts' to available shared eForms stored on the network.

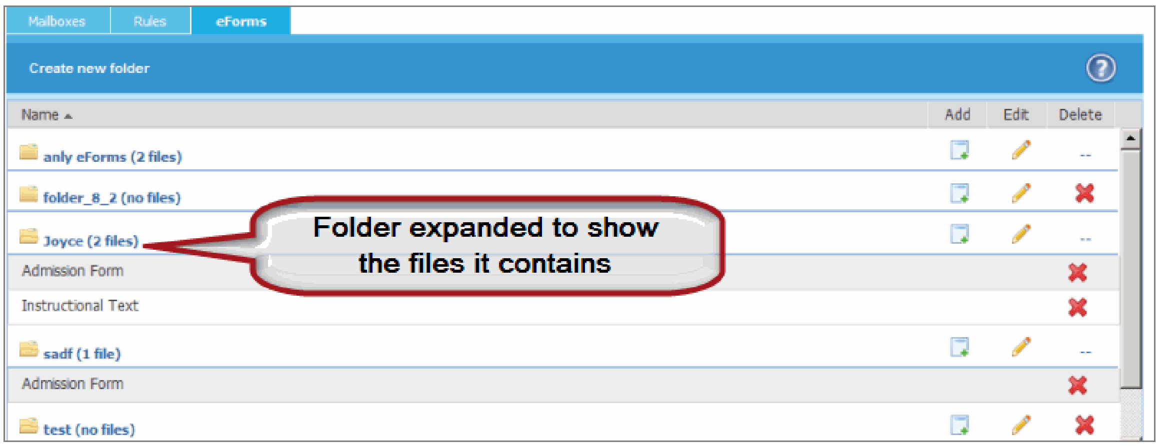
Developing and maintaining eForms requires tools that are not included with the Inbox. For information about eForm development, contact your Covisint representative.

Administrators can add default information, such as facility name, address, etc., to eForms to reduce the effort required to complete the form.

Only administrators can access the *Setup* tab > *eForm* tab.

Select the **Setup** tab **> eForms** tab to manage eForm folders.





Field Descriptions

The following describes the Fields and Menu Options on the *eForms* screen. An asterisk * indicates a **required field**.

FIELD NAME	DESCRIPTION
Name	Displays the name of the folder or eForm. Click a folder name icon to view its eForms. Clicking a folder icon alternates between expanded view (show eForms) and collapsed view.
Add	Click the Add icon in a folder row to add an existing eForm to the folder.
Edit	Click the Edit icon in a folder row to modify the folder name.
Delete	Click the Delete icon in a folder row to delete a folder. Click the Delete icon in an eForm row to delete the eForm from the folder. • The Delete icon is not available for a folder that includes eForms. You must delete all the eForms in a folder before you can delete the

folder.

- When you delete an eForm from a folder, you are not deleting it from the system, you are only deleting its access from the folder.

Menu Bar options	
Create new folder	Click *Create new folder* to add an eForm folder.
(help)	Click (help) on the menu bar to display screen-level help.

INBOX ADMINISTRATOR-ONLY PROCEDURES

This book includes the following procedures, which support tasks that can be performed only by Administrators:

- Add Mailboxes
- View or Edit Mailboxes
- Add a Rule
- Edit a Rule
- Delete Message Rules
- Manage eForms Folders
- Add or Delete eForms
- Set eForm Defaults

Add Mailboxes

Only administrators can access the Setup > *Mailboxes* screen.

To add a mailbox:

1. On the Inbox screen, select the **Setup** tab **> Mailboxes** tab. The list of available mailboxes displays.
2. Click **New Mailbox**. The *Add Mailbox* screen displays.
3. In the *Add Mailbox* screen:
    a. Enter the **Mailbox Name**
    b. Enter the **NPI**.
4. Click **Add Mailbox**. The *Add Mailbox* screen closes, and your mailbox is added to the Mailboxes display.

To close the screen prior to saving the information:

a. Click the **Close Window** button. A *Confirm* dialog box opens.
b. Click **Close** Window to confirm the action to close the screen, or click **Cancel** to return to the *Add Mailbox* screen.

RESULT

You have successfully added a mailbox.

View or Edit Mailboxes

Only administrators can access the Setup > *Mailboxes* screen.

To view and edit mailboxes:

1. On the Inbox screen, select the **Setup** tab **> Mailboxes** tab. The list of available mailboxes displays.
2. Sort the list as desired by clicking the **Mailbox Name** or **NPI** column headings.
3. To edit a mailbox:
    a. Click its **Mailbox Name** or **NPI**. The *Edit Mailbox* screen displays.
    b. Modify the Mailbox Name and NPI as required.
    c. Click **Save Changes**. Your changes are saved, the *Edit Mailbox* screen closes, and the *Mailboxes* screen displays.

To close the screen prior to saving the information:

a. Click the **Close Window** button. A *Confirm* dialog box opens.
b. Click **Close Window** to confirm the action to close the screen, or click **Cancel** to return to the *Edit Mailbox* screen.

RESULTS

You have successfully viewed and edited mailboxes.

Add a Message Rule

Only administrators can access the *Setup* tab > *Add Edit Rule* tab.

To add a rule:

1. Access the *Add Rule* screen by clicking **Add Rule** on the Setup tab > Rules tab. For details, refer to About the Rules Screen.
2. On the *Add Rule* screen, create the **rule** by completing the fields as required. You must complete the *Mailbox*, *Conditions*, and *Actions* fields. For details, refer to About the Add/Edit Rules Screen.

Click the **Add** button to add rows of *Conditions* or *Actions*.

Click the **Remove** button to remove *Conditions* or *Actions*. You cannot remove the last remaining condition or action. A rule must have at least one of each.

:

3. Click the **Save Rule** button. The new rule is saved and the new Rule Name displays in the list of rules.

To close the screen prior to saving the information:

a. Click the **Discard** button. A *Confirm* dialog box opens if you had added any field information.
b. Click **Close Window** to confirm the action to close the screen, or click **Cancel** to return to the *Add Rule* screen.

RESULT

You have successfully added a message processing rule.

Edit a Message Rule

Only administrators can access the *Setup* tab > *Rules* tab.

To edit a rule:

1. On the *Setup* tab > *Rules* tab, click the **Rule Name** field of the rule you want to edit. For details, refer to About the Rules Screen. The rule details display for editing.
2. Edit rule fields as required. For details, refer to About the Add/Edit Rules Screen.

Click the **Add** button to add rows of *Conditions* or *Actions*.

Click the **Remove** button to remove either a row of *Conditions* or *Actions*. However, you will not be able to remove the first condition or action as a rule must have at least one of each.

3. Click **Save Rule**. The rule changes are saved.

To close the screen prior to saving the information:

a. Click the **Discard** button. A *Confirm* dialog box opens if you had added any field information.
b. Click **Close Window** to confirm the action to close the screen, or click **Cancel** to return to the *Add Rule* screen.

RESULT

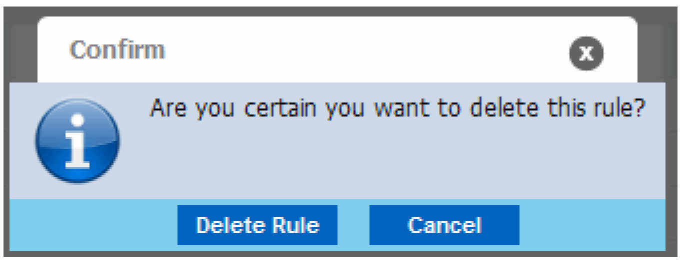
You have successfully edited a message processing rule.

Delete Message Rules

Only administrators can access the *Setup* tab > *Rules* tab.

To delete a rule:

1. On the *Setup* tab > *Rules* tab, select the check box for the **Rule Name** of each rule you want to delete. For details, refer to About the Rules Screen.
2. Click **Delete Rule**. A confirmation dialog similar to the following displays.



3. Click **Delete Rule** to delete the selected rules and return to the Rules screen. Click **Cancel** to exit without deleting rules.

RESULT

You have successfully deleted message processing rules.

Manage eForms Folders

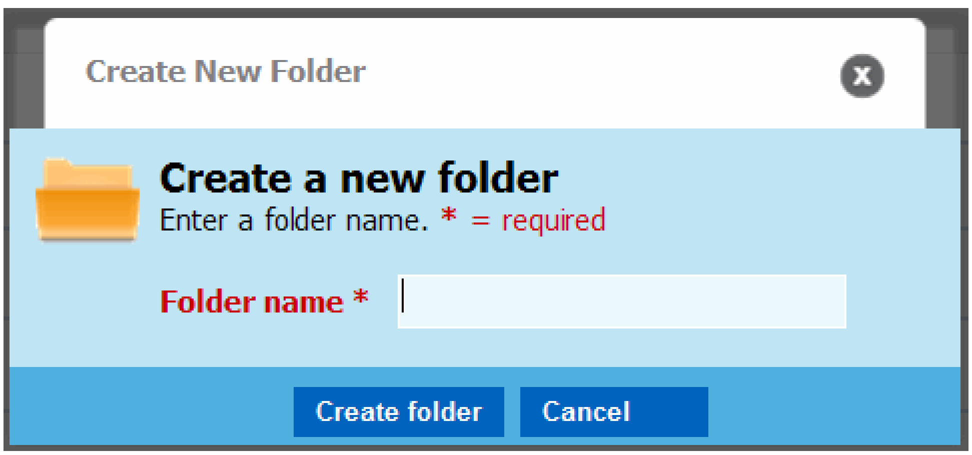
Only administrators can access the *Setup* tab > *eForm* tab.

Select the **Setup** tab **> eForms** tab to manage eForm folders. This topic includes the following folder management procedures:

- Create a Folder
- Rename a Folder
- Delete a Folder

To create a folder:

1. On the *eForms* screen, click **Create new folder**. The *Create new folder* dialog displays



2. Enter the **Folder name**.
3. Click **Create folder**. The dialog closes and the new folder displays in the *eForms* screen. Folders are sorted alphabetically by folder name.

To cancel the folder addition, click Cancel in the *Create new folder* dialog.

To Rename a folder:

1. On the *eForms* screen, click the **Edit** icon of the folder you want to rename. The *Edit Folder Name* dialog displays.
2. Edit the **Folder name** field as required.
3. Click **Save changes**. The folder's modified name displays in the eForms screen.

To cancel the folder change, click **Cancel** in the *Edit Folder Name* dialog.

To Delete a folder:

You cannot delete a folder that contains eForms. To delete a folder with eForms, you must first delete the eForms as described above.

1. On the *eForms* screen, click the **Delete** icon of the folder you want to delete. The *Delete Empty Folder* confirmation dialog displays.
2. In the Delete Empty Folder dialog, click **Delete Folder**. The folder is removed from the eForms screen display.

To cancel the deletion, click **Cancel** in the *Delete Empty Folder* confirmation dialog.

RESULT

You have successfully managed eForm folders.

Add or Delete eForms

Only administrators can access the *Setup* tab > *eForm* tab.

Important: When you add or delete eForms, you are organizing the available eForms into folders so they are easier to work with - you are not creating new eForms or permanently deleting eForms from your system. For details, refer to About the eForms Screen.

To Add an eForm to a Folder:

1. On the *eForms* screen, click the folder Name to which you want to add an eForm. The folder expands and the list of eForms available in the folder displays.
2. Click the **Add** icon in the folder row. The *Add Forms to This Folder* screen displays.
3. In the *Add Forms to This Folder* screen, search for and select the eForms you want to add to the folder with one of the following methods:

Method	Steps
Search on *Form name*	a. If you think you know the form name, enter the beginning of the name in the Form name field. **Important**: The text you enter must be an exact match starting with the beginning of the eForm name. For example, if you want to search for a form named *CMS Lab Results*, your search text **must** begin with "CMS." If you search for "Lab," the search results will not include the desired eForm. b. In the search results, click the check boxes of the eForms you want to add to the folder.
Search on form *Owner*	a. If you think you know the form Owner, such as a facility, enter the beginning of the owner's name in the Owner field. Note: To search for organizational eForms provided with your system, search on *system* as the owner. **Important**: The search text you enter must be an exact match starting with the beginning of the Owner name. For example, if you want to search for a form owned by *HCP Medical Practice*, your search text **must** begin with "HCP." If you search for "Medical," the search results will not include eForms of the desired owner. b. In the search results, click the check boxes of the eForms you want to add to the folder.

4. Click **Add forms to folder**. The eForms screen displays the added forms under the folder name.

Click **Cancel** in the *Add Forms to This Folder* screen to cancel the eForm addition.

5. Optional - to verify that you added the correct eForms:
    a. Double-click an eForm. The form displays in the document viewer screen.
    b. Review the eForm.
    c. Click **Close Window** to return to the eForms screen.
    d. If you added an eForm in error, you can remove it from the folder by clicking its click to delete form icon.

To Delete an eForm from a folder:

1. On the *eForms* screen, click a folder name to expand the folder and view its eForms. The list of eForms available in the folder displays.
2. Click the **Delete** icon of the eForm you want to delete. The screen refreshes and the eForm is no longer displayed under the folder name.

When you delete an eForm from a folder, you are not deleting it from the system, you are only deleting its access from the folder.

RESULT
You have successfully added or deleted eForms.

Set eForm Defaults

Only administrators can access the *Setup* tab > *eForm* tab.

Use this procedure when you want to modify the default information that is pre-populated when your users attach an eForm.

To Set eForm defaults:

1. On the *eForms* screen, click a folder name to expand the folder and view its eForms. The list of eForms available in the folder displays.
2. Double-click the eForm to which you want to add default information. The eForm opens in the Document Viewer screen.
3. Enter the desired default information in the eForm fields. This information will display by default when practice users attach the eForm to a patient message. They will be able to change the default information as required, if it does not apply to their specific need.
4. Click **Save Defaults**. The default information is saved with the eForm and you are returned to the eForms screen.

RESULT
You have successfully set eForm default information.