Secure Chat Guidelines

Audience: Epic users who have Secure Chat

Guidelines for Use and Etiquette

Please follow these guidelines when using Secure Chat:

- **Only use Secure Chat for professional, quick, and non-emergent communications.**
- **Additional communication tool available.**
  - **Not mandatory.**
  - **Does not replace current methods to contact on-call providers.**
- **Send clear and concise messages.**
  - Keep chats simple, short and to the point, using only the minimum information required.
  - If you need several chat exchanges to convey a message, consider making a phone call instead.
  - Use abbreviations sparingly, and only when you're sure others will know the meaning.
- **Stay HIPAA-safe.**
  - Be mindful of recipient lists when chatting about a patient so the right people are included on the message.
  - Only those who are actively involved in the patient's care should be included.
- **Messages.**
  - Aren't included in a patient's chart but are legally discoverable.
  - Auto-delete 30 days after they're sent.
- **Notifications.**
  - You can receive notifications even when your mobile device is locked.
  - You will receive a read receipt when your message is opened.
  - You'll see a sent message immediately when you and other participants have the conversation open.
  - If you are sending your chat from an Epic desktop or WOWs.
    - The Epic chat bubble turns orange when you have a new message.
    - You'll see a pop-up notification in the bottom right-hand corner indicating a message is unread.
- **If you are away.**
  - You can set your availability status and/or auto-forward messages to others.
- **Orders.**
  - Orders can't be placed through Secure Chat.
  - Providers can launch a patient's chart through Secure Chat and place an order through Haiku/Canto, Epic desktop or WOWs.
- **Access patient's chart.**
  - You can easily access a patient's chart through the banner within a Secure Chat conversation.
- **What not to do.**
  - Don't take screenshots of Secure Chat messages.
  - Don't send clinical information, including de-identified information, related to peer review or Quality Assurance.

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