

# Secure Chat on HM Desktop/Workstation

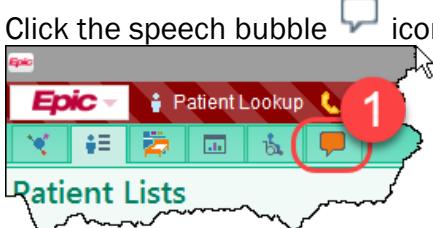
Audience: All staff using Epic

Here's how to use Secure Chat from a Houston Methodist desktop or workstation.

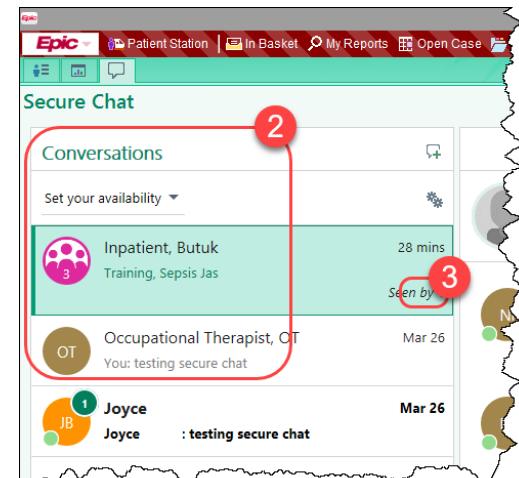
## Overview

Communicate quickly and safely with colleagues by sending secure instant messages in Epic using Secure Chat. You can send general or patient-specific messages.

1. Click the speech bubble icon to open Secure Chat.

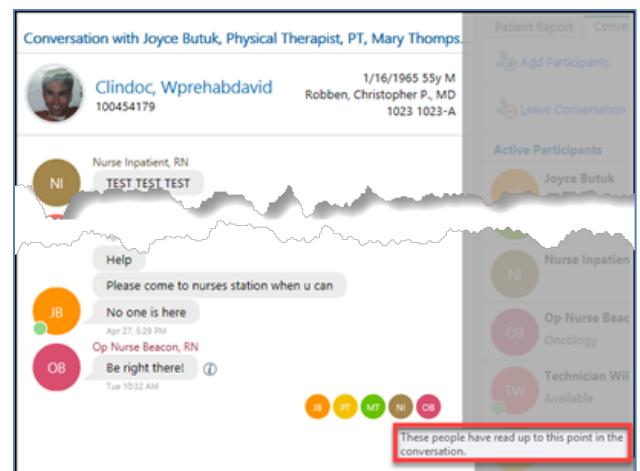


2. In the left sidebar, you'll see your active conversations, with the newest messages at the top.
3. If you've read a message, you'll see **Seen** below the date/time that you opened it.



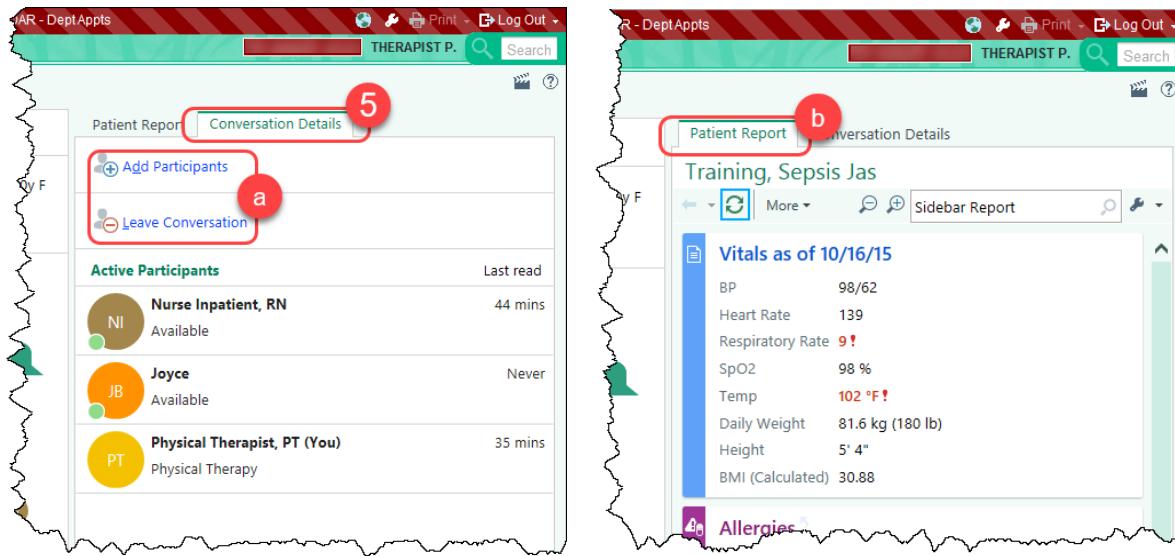
4. The selected conversation appears in the center pane.

**Note:** If a message has been read, you'll see an icon with the person's initials or picture and this message: "These people have read up to this point in the conversation." You'll see this when you hover over the circle.



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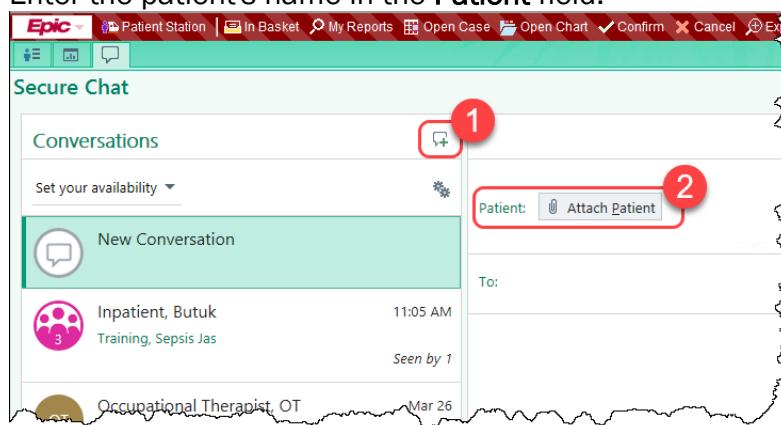
5. In the right sidebar, **Conversation Details** shows participants and when they were last active.
  - a. You can add participants to the conversation or leave the conversation.
  - b. If the highlighted conversation is about a specific patient, the **Patient Report** tab displays the patient's information.



6. If you have a new message when you're working in another activity, the speech bubble icon in the workspace tab changes color ( ).

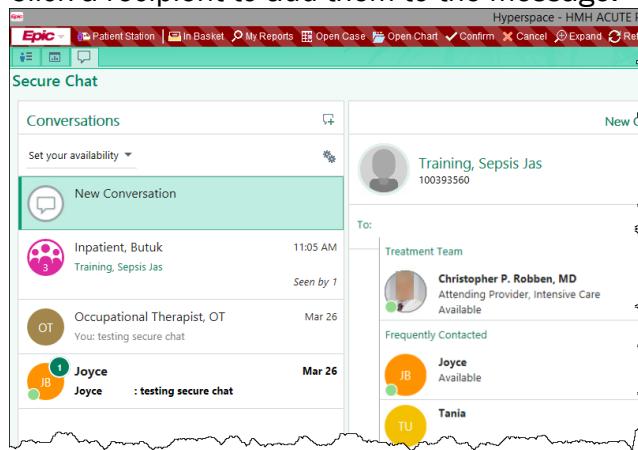
## Send a Secure Message

1. From Secure Chat, click the green plus sign to start a new conversation.
2. Attach a patient's chart to a chat:
  - o If you're sending a message about a specific patient, click **Attach Patient**.
  - o Enter the patient's name in the **Patient** field.



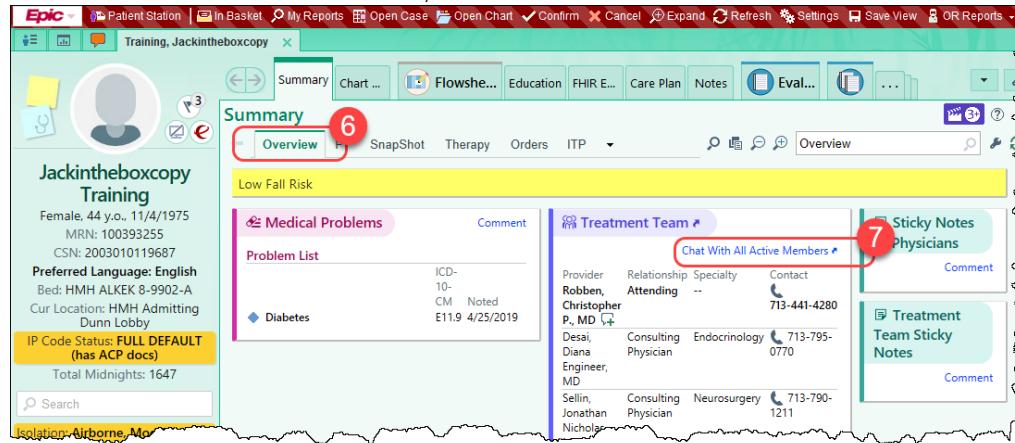
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3. Enter the name of the person you're texting in the **To** field.
  - a. You can add as many people as desired to the **To** field.
  - b. When you click **To**, Secure Chat automatically suggests members of the patient's care team.
  - c. Click a recipient to add them to the message.



4. Enter your message at the bottom and click **Enter** to send.
5. To send a message to all active treatment team members, open the patient's chart.
6. From **Summary**, click **Overview**.

7. In the **Treatment Team** section, click **Chat With All Active Members**.



8. Secure Chat then opens a new message with all **Active Treatment Team Members** in the **To** field.



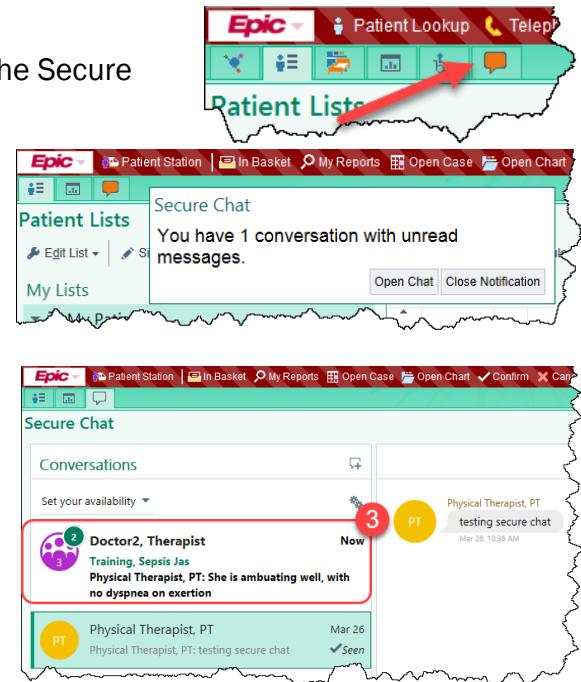
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## Read New Messages

1. When you have a new message, the speech bubble on the Secure Chat home workspace tab is filled in.

**Note:** When you have an unread message, you'll also see a notification window in your opening screen.

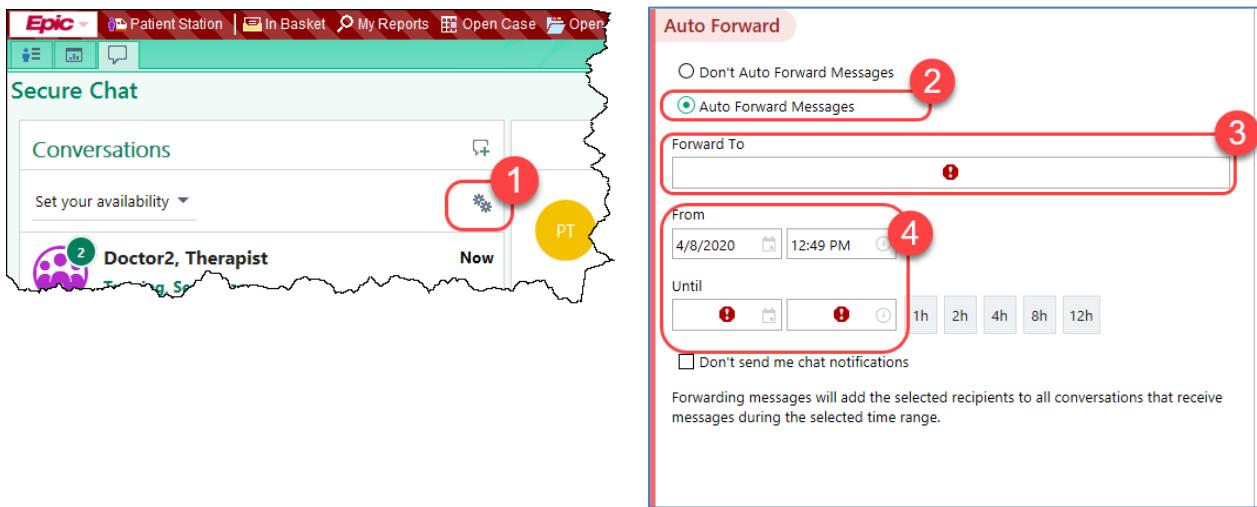
2. To read the message, click the speech bubble .
3. In Secure Chat, conversations with unread messages appear in bold, with the number of unread messages in a bubble.
4. Select the conversation from the left.



## Auto-Forward Messages

If you'll be unable to respond to messages, you can forward your messages to other staff members.

1. In Secure Chat, click the gear icon above the list of conversations.
2. Select **Auto Forward Messages**.
3. In **Forward To**, enter who should receive the messages.
4. Use **From** and **Until** to set the auto-forwarding beginning and ending.
5. Click **Accept**.



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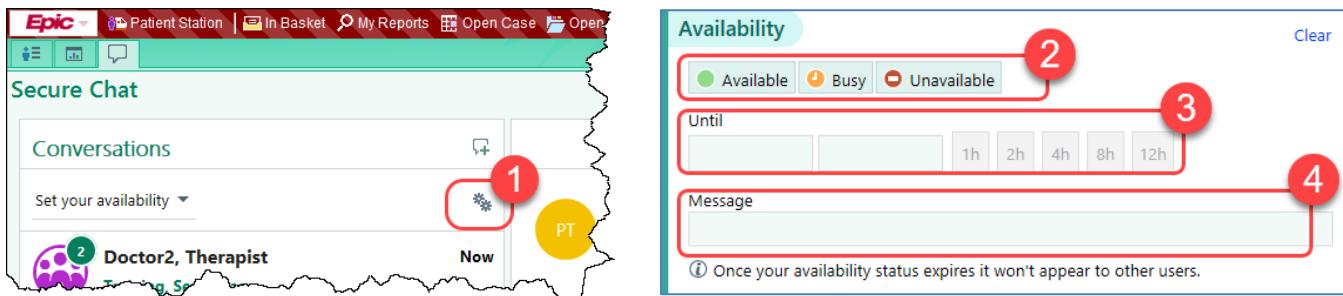
## Set Availability

Let colleagues know when you're out, in surgery or otherwise unavailable by changing your status. By default, you do not have a status set. Statuses do not prevent you from receiving messages.

1. In Secure Chat, click the gear icon above the list of conversations.
2. Select the appropriate option (**Available**, **Busy**, **Unavailable**).
3. Click **Until** for the time you'll be in that status.

**Note:** After the specified end time, you are automatically reverted back to having no status set in Secure Chat. If you want others to see your availability, you'll need to update your status.

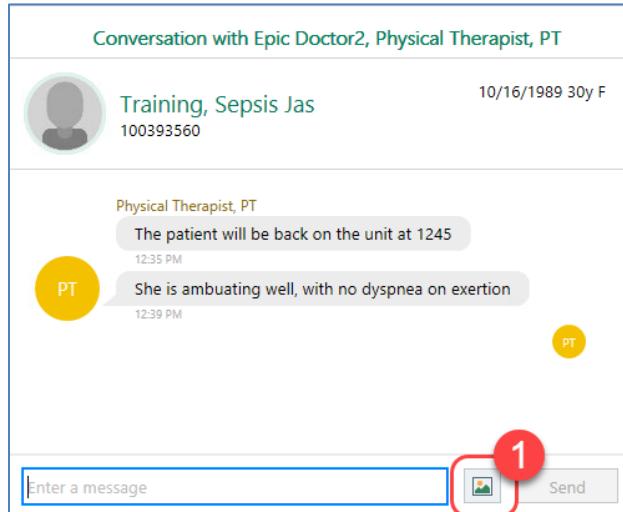
4. You may enter an away message in the **Message** field.



## Send an Image

You can send an image from the patient's chart as part of a Secure Chat message.

1. In the conversation, click the image icon. A list of images in the patient's chart appears.



2. Find the image you want to include, select it and click **Send**.

**Note:** Follow your unit's policy on sending patient images.