Secure Chat on HM Desktop/WOW
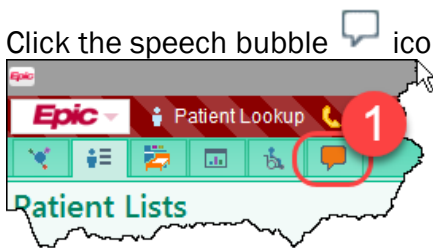
Audience: All staff using Epic

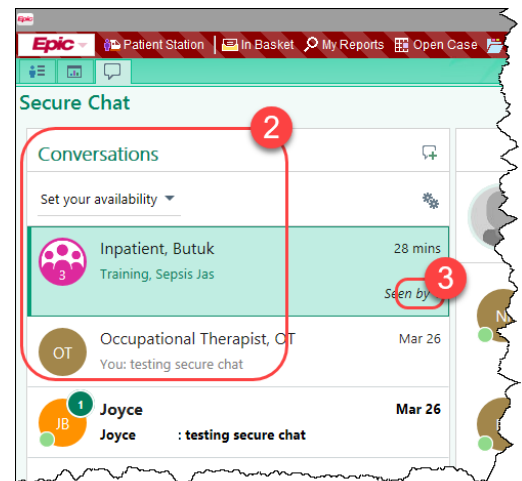Here's how to use Secure Chat from a Houston Methodist desktop or WOW.

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.

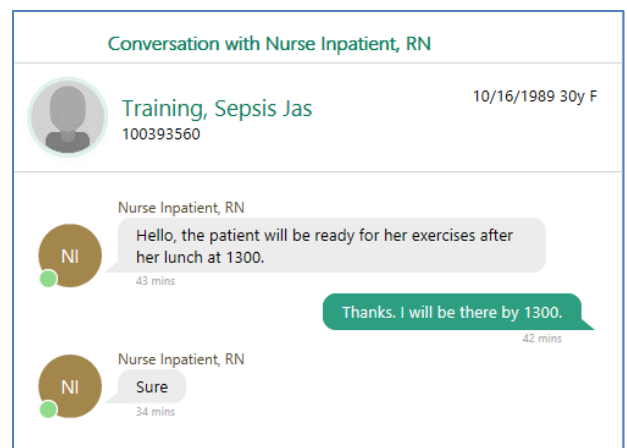1. Click the speech bubble 🗨 icon to open **Secure Chat**.

2. In the left sidebar, you'll see your active conversations, with the newest messages at the top.

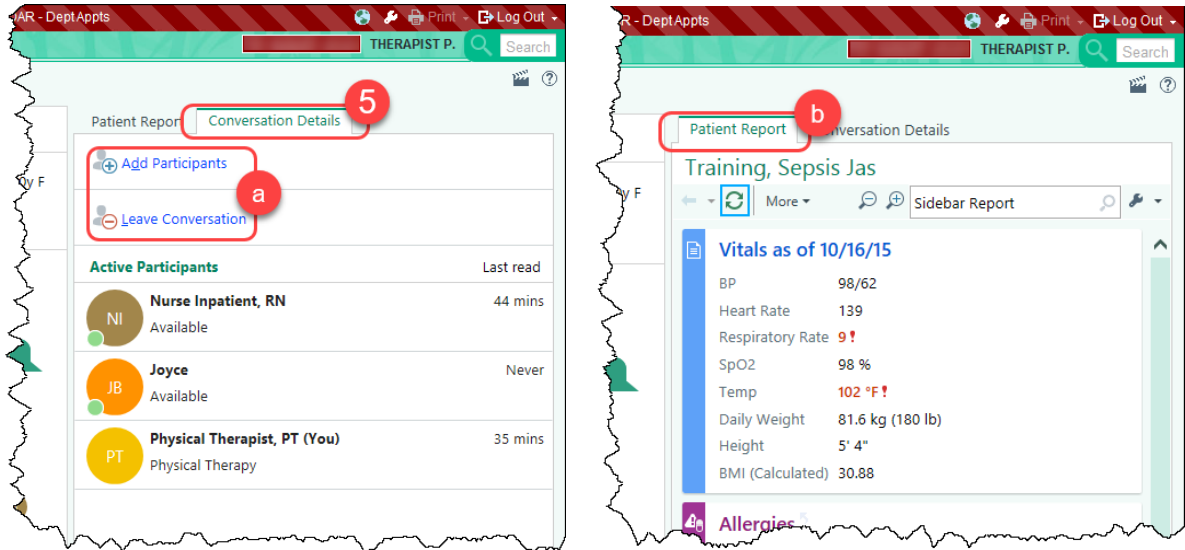3. If you've read a message, you'll see **Seen** below the date/time that you opened it.

4. The selected conversation appears in the center pane.

   <u>Note</u>: Here's how to tell that someone has read your message – you'll see a small colored circle with the person's initials below it.
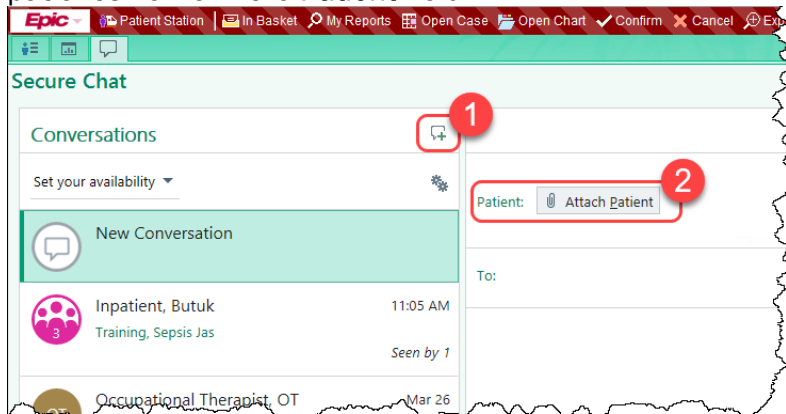
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5. In the right sidebar, you can view **Conversation Details** showing conversation participants and when they were last active.
   a. You can add participants to the conversation or leave the conversation.
   b. If the highlighted conversation is about a specific patient, a report about that patient also appears in the **Patient Report** tab.

6. The speech bubble 💬 icon in the workspace tab changes color (💬) to indicate it you have a new message when you're working in another activity.
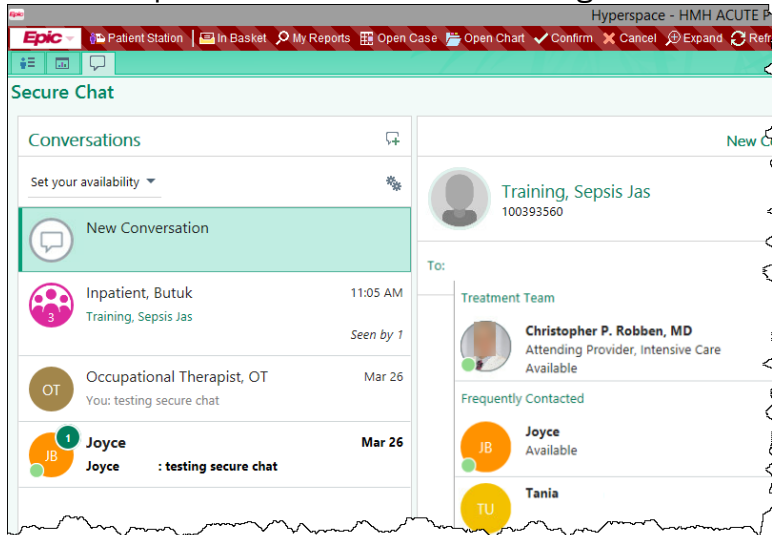
Send a Secure Message

1. From Secure Chat, click the green plus sign 🗨️ to start a new conversation.
2. If you're sending a message about a specific patient, click the **Attach Patient** button, and enter the patient's name in the **Patient** field.

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**, members of the patient's care team are automatically suggested.
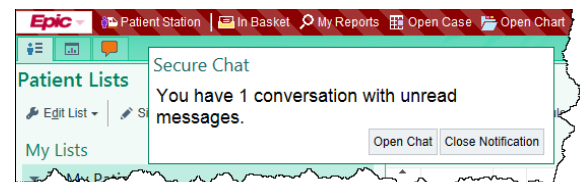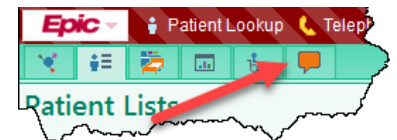   c. Click a recipient to add them to the message.

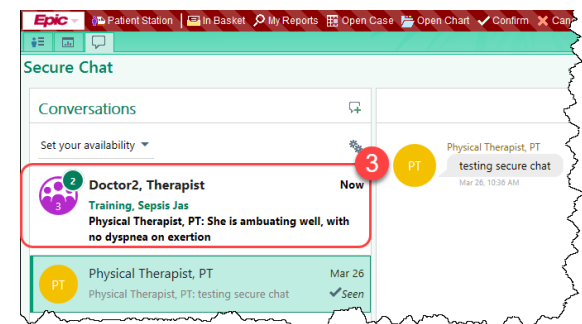4. Enter your message at the bottom and click **Enter** to send.

Read New Messages

1. The speech bubble on the **Secure Chat** home workspace tab is filled in when you have a new **Secure Chat** message.

   <u>Note</u>: When you have an unread message, you will also see a notification window in your opening screen, alerting you to the unread message.

2. To read the message click the speech bubble icon 🗨.

3. Within **Secure Chat**, conversations with unread messages will appear in bold, with the number of unread messages in a bubble.

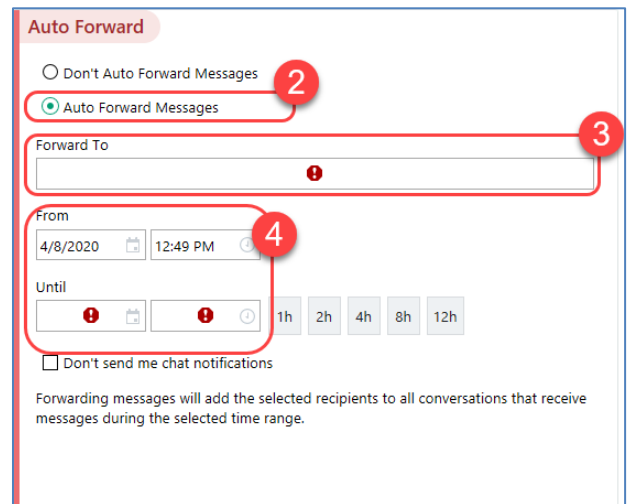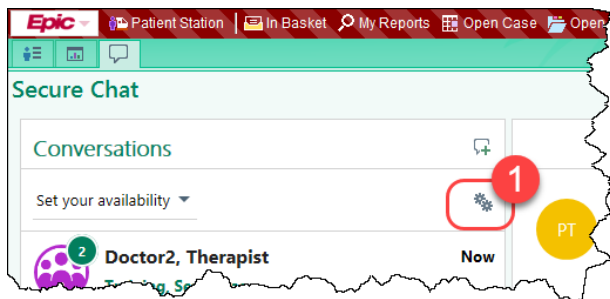4. Select the conversation from the left.

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.
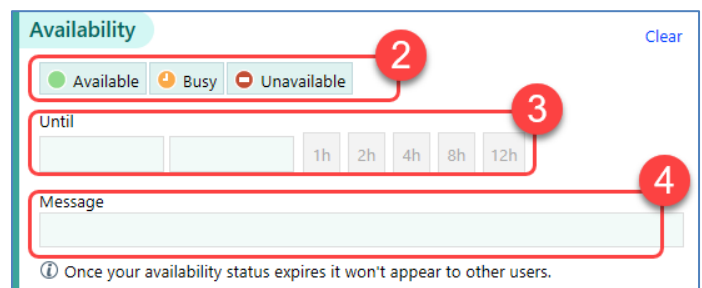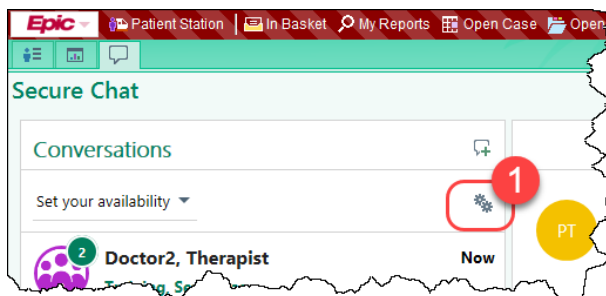5. Click **Accept**.

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. You will need to update the status if you want others to see your availability.

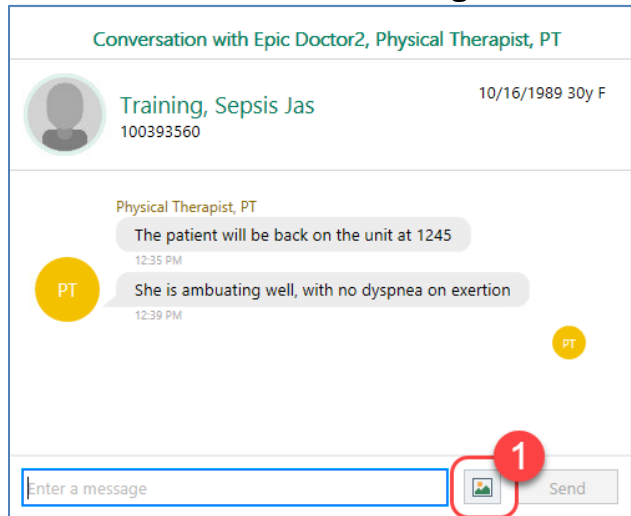4. You may enter an away message in the **Message** field.

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**.

   <u>Note</u>: Follow your unit's policy on sending patient images.