

# **PowerSoftMD Certified**

## **Electronic Messaging**

### **Setup (One Time)**

We strongly recommend you do these steps along with a Data Tec Technician.

- \_\_1. From the Utility Menu Select the Advanced Utility Menu.
- \_\_2. Select Meaningful Use Settings
- \_\_3. Check:
  - “Activate Stage 2 Patient Portal & Secure Messaging”*
  - “Automatic Generate and Store Patient Summary whenever a SOAP Note is signed”*
- \_\_4. If you haven't already registered your Doctor(s) for Secure Messaging use the *“Register Doctors for Secure Messaging”* button.

### **Set up Patient Portal Access for each Patient**

- \_\_1. From the Primary Menu select the Drop-Down Arrow next to the EMR Icon
- \_\_2. Select *“MU Central”*
- \_\_3. Select *“Patient’s Portal UserID Definitions”*
- \_\_4. Search for the desired patient and select their name
- \_\_5. Fill in the patient's email address, if they don't have an email address you can use the *“Generate Fake Email”* button to create a dummy one.
- \_\_6. Use the green *“Print Patient Info”* button to print out the information and give it to the patient.
- \_\_7. Use the red *“Add User to Portal”* button, wait for the On-Screen confirmation.

### **How to Send Messages to Patients**

- \_\_1. From the Primary Menu select the *“Portals”* button
- \_\_2. Select the *“Send Message to Patient Portal”*
- \_\_3. You can look up patient and type a message
- \_\_4. You can also use the attach button and send a pdf from the patient's documents Folder

### **How to Receive Message from Patients and Doctors**

- \_\_1. From the Primary menu select the *“Portals”* button
- \_\_2. Select the *“Secure Messages from Patient Portals & Doctors”*

### **How to Monitor when Messages are available to receive**

- \_\_1. From the Primary Menu select the *“eScripts”* button
- \_\_2. Select the *“Launch Status Check”* button
- \_\_3. Be patient it takes a few moments for all the values to be filled in

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### How to Send Secure Message to Doctors

#### From Primary Menu

- \_\_1. Create any CCDA's or have the documents available you would like to send.
- \_\_2. From the Primary Menu select the "Portals" button.
- \_\_3. Click the "Send Secure Message to Doctor" button.
- \_\_4. Click the Binoculars "Find Doc" Icon to select the Patient being referred too.
- \_\_5. Click the "Find Doc" and find the Doctors electronic address.  
You can also manually type in the Doctors electronic address or use the Pop Up list.
- \_\_6. Fill in the Subject line.
- \_\_7. Use the Attach buttons to include CCDA's or patient documents.
- \_\_8. Fill in any message you want in the Message window.
- \_\_9. Click the "Send" button.

#### From NewCrop Screens

- \_\_1. Bring up Patient's SOAP Note screen
- \_\_2. Optionally: If you want to send a CCDA see topic "*Creating CCDA's*" below
- \_\_3. Open eScripts option from top toolbar
- \_\_4. Select brown button "*CCDA's and/or Secure Messaging*"
- \_\_5. In the Box on the screen click "**Compose**"
- \_\_6. Search for the Doctors address and select it, or if you know it just type it in
- \_\_7. Type in the subject, and any text message
- \_\_8. If you created a CCDA to send, click the "*Browse*" button and navigate to the Location you jotted down in step 2 g
- \_\_9. You can also use the "*Browse*" buttons to attach other documents
- \_\_10. Then click the "*Send*" button
- \_\_11. Exit the eScripts Screen
- \_\_12. On the "*Secure Message*" Pop-Up screen:
  - If you uploaded a CCDA: click the light green "*Summary of Care CCDA Uploaded*"
  - if you didn't upload a CCDA, click "*Nothing Uploaded or Received*"

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### **How to Refer Patient to another Doctor using Secure Messaging**

- \_\_1. Bring up Patient's SOAP Note screen
- \_\_2. Use top toolbar "*MU Central*", select "*Refer Patient to Doctor or Facility*"
- \_\_3. Click "*Search for Referral Name*", and select doctor
- \_\_4. Click "*Electronic Care Summary of Care CCDA*"
- \_\_5. Click the red "*Generate*" button
- \_\_6. Jot down "*Output CCDA XML Path and File Name*"
- \_\_7. Open eScripts option from top toolbar
- \_\_8. Select brown button "*CCDA's and/or Secure Messaging*"
- \_\_9. In the Box on the screen click "**Compose**"
- \_\_10. Search for the Doctors address and select it, or if you know it just type it in
- \_\_11. Type in the subject, and any text message
- \_\_12. Click the "*Browse*" button and navigate to the location you jotted down in step 6
- \_\_13. Then click the "*Send*" button
- \_\_14. Exit the eScripts Screen
- \_\_15. On the "*Secure Message*" Pop-Up screen: Click the light green "*Summary of Care CCDA Uploaded*"

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## **Creating CCDA's**

- \_\_1. Open a Patient's SOAP Note screen.
- \_\_2. Open the latest signed SOAP Note
- \_\_3. Click on the top toolbar "*MU Central*"
- \_\_4. Click button "*CCDA Clinical Summary for EHR*"
- \_\_5. If it's for a patient Click "*Patient*" option
- \_\_6. If it's for another Doctor:
  - Click the option "*Another Doctor*"
  - Use the "*Find Ref Doc*" button to fill in the doctor number
- \_\_7. Click red "*Generate*" button
- \_\_8. Jot down "*Output CCDA XML Path and File Name*"
- \_\_9. Exit Generate CCDA screen