

Secure Messaging Guide

The Valant EHR contains a HIPAA compliant way for Providers, Administrative Staff, and Patients to communicate, Secure Messaging, which works similarly to an email client within the Valant EHR, allowing practices to send messages and attachments. This guide will explain the features and functionality of Secure Messaging.

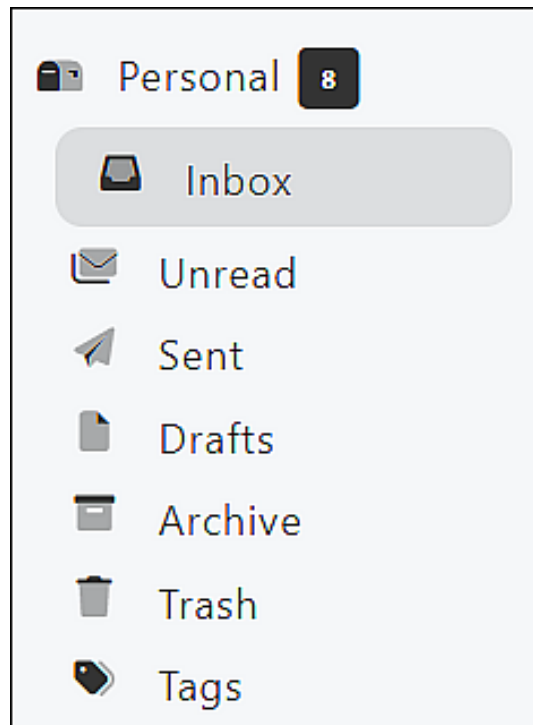
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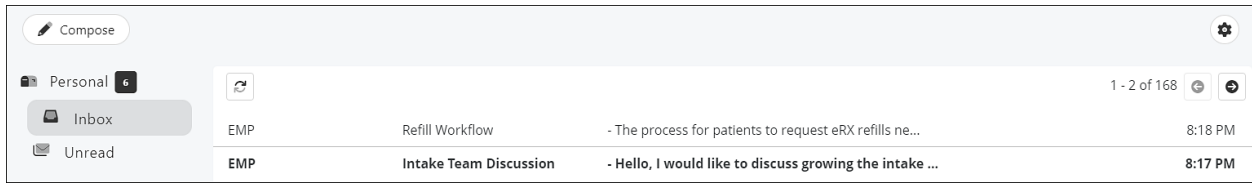
Personal

All users will have a Personal Inbox folder that is a mailbox unique to their user profile. The inbox will contain seven subfolders, similar to what one would see within an email tool. Users will have access to unread messages, sent folder, drafts, archive, trash, and tags. Tags are user generated organization of the inbox.



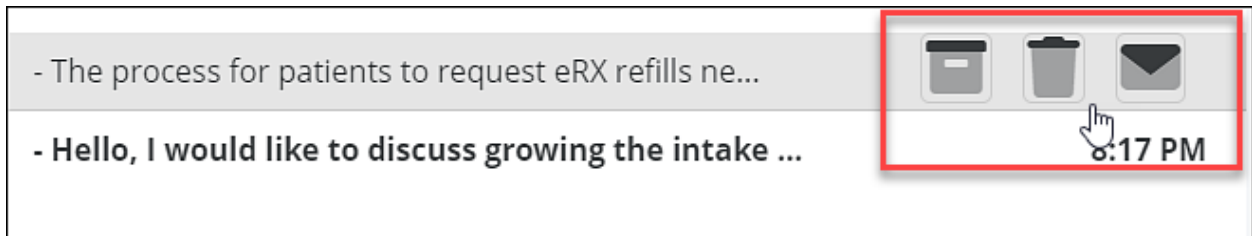
Inbox

The Inbox will contain all messages sent to a user via Secure Messaging. These can include messages sent from other users at the practice and patients. Practice users can also be carbon copied on a message by another user at a practice, or a message can be forwarded to that user. Messages will appear in chronological order with the newest messages at the top. Unread messages will appear in bold. When a message is received in the inbox the user will also receive an email letting them know they have a new secure message. That email does not give any specific details about the message due to privacy concerns.



Hovering your mouse over the right side of the grid next to a message will reveal icons to:

- Archive
- Mark as Read/Unread
- Delete (Move to Trash)



Unread

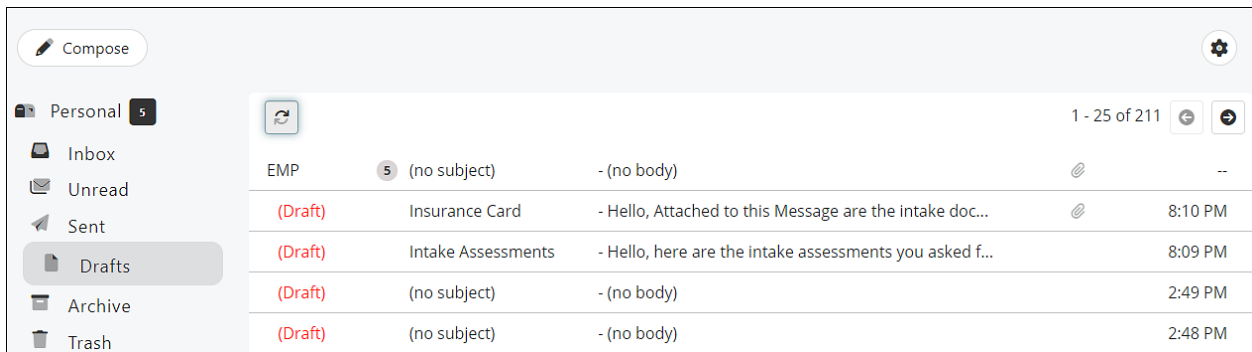
The Unread Folder is a quick way for a user to view their unread messages. All messages that are in the user's personal inbox that are either new or that are marked as unread will appear in the view.

Sent

The Sent Folder will contain all message sent by a user. This includes both messages sent to other practice users as well as patients.

Drafts

The Drafts folder contains messages that were saved when a user was composing a message. Messages will also auto-save when they are being composed. Messages saved either manually or automatically while being composed will appear in the drafts folder.



Archive

The Archive folder is way to store messages that are no longer needed in the inbox, but that a user wants to keep for future reference without moving to the trash or crowding up their inbox. Should a user ever need to access the message it can be kept in the Archive folder

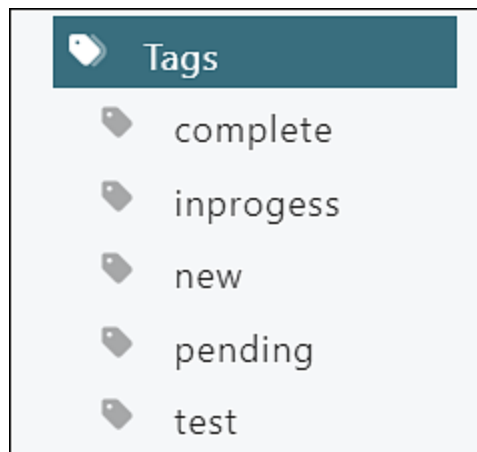
Trash

The Trash folder is used for messages that are no longer needed and a user does not want to save for future reference. Messages that are moved into the trash can be moved to the archive, or back to the inbox at any time. Items in the trash can still be accessed and opened. Any attachments will appear in the messages as well.

Currently there is not a way to empty the trash folder. The ability to empty the trash folder and have items automatically removed from the trash after 30 days is functionality that is coming soon to Valant Secure Messaging.

Tagging

Adding messages to a tags folder is a way to categorize or organize your personal inbox. These tags work similarly to Folders in Outlook or Labels in Gmail. Tags must be alphanumeric characters and do not contain any spaces or special characters. All tags will appear lowercase and do not recognize capitalization. To create a tag just simply type into the field and click enter. All tags will appear under the Tags sub-header.



Some examples of tagging use are having different tags for items that are new, in progress, pending, or complete. Users may also create tags with patient ID to categorize their caseload, or any organization method they would like.

Tags

Select...

Select All

complete

inprogress

new

pending

Auto-Reply

Secure Messaging gives all users the ability to configure their Auto-Reply settings by clicking the gear icon on the top right of the Secure Messaging. This will open a pop-up menu to enable/disable, set dates and compose message content. Images are supported in the content and if a message is received in your inbox the auto-reply will go to the sender.

Auto-Reply Settings
✕

Send Auto-Reply

Enabled Disabled

First Day *

12/23/2022 📅

Ends After

Last Day

12/26/2022 📅

Message Contents *

Select Macro... + Size Font B / S U ☰ ☰ ☰ ☰ Normal text ☰ ☰ ☰ ☰ ☰ ☰

Hello,

I will be out of the office for the Holiday Weekend. I will respond to all messages within 2 business days of 12/26.

Best,

Dr. John

Save Cancel

Compose

To initiate a message to a patient or someone at the practice users will use the Compose button. Clicking Compose on the top-left corner of secure messaging will open the form. The form will contain all the options when starting a message thread in secure messaging detailed below.

The screenshot shows a web-based compose form for Secure Messaging. At the top, there are radio buttons for 'Patient' (selected) and 'Practice'. Below this is the 'From' field, which is pre-filled with 'John Fairfax, MD'. The 'To Patient:' field is a dropdown menu with the text 'Choose Patient Recipient' and a red exclamation mark icon. The 'To Practice Users:' field is another dropdown menu with the text 'Choose Practice Recipients'. The 'Cc' field is a text input with 'Select...' placeholder text. The 'Subject' field is a large text input, currently empty, with a red exclamation mark icon. Below the subject field is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, font size, font color) and list creation (bulleted, numbered). At the bottom of the form are four buttons: 'Send', 'Attach', 'Save and Close', and 'Trash'.

Message Type

Secure Messaging supports two types of messages:

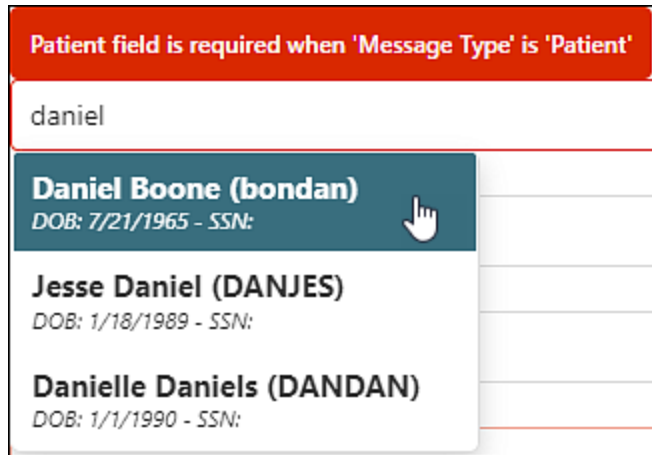
- **Practice:** This is a message that is send only to other practice users such as Providers, Patients, and Superusers who have access to the account. Users cannot include a patient on this type of message.
- **Patient:** This type of message can be used to send a message to one patient and the patient must be included on this type of message. Only one patient can be included. Secure Messaging does not currently support sending a single message to multiple patients. Patient messages can include multiple other practice users.

From

The From field is a field on the compose form that cannot be edited. It will default to the inbox owner name that the user is currently viewing. If a user has access to Shared Inboxes and they are viewing a shared inbox and click on the Compose button, then the shared inbox name will appear in the From field. (More on shared inboxes later in this document.)

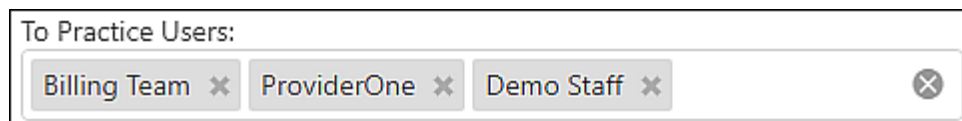
To Patient

On the Patient message type, the “To Patient” field is a searchable drop-down menu that allows users to select a patient to be included in the message. Only one patient at a time can be selected in this field. If the message type “Practice” is selected, then the “To Patient” field is not visible.



To Practice Users

Office Staff, Providers, Superusers and Shared Inboxes can be found in the “To Practice Users” field. Typing one character in the field will reveal a drop-down of potential selections. This field can have multiple selections of recipients. On a Practice message type there are no limits to who can be included in this field. On a Patient Type Message, only Office Staff and Providers can be selected in this field to be included on a Patient Message.



Carbon Copy (CC)

Secure messaging supports the ability to CC practice users on messages. This will include the message in the user’s inbox, and they can access the message. Only practice users can be included in the CC field. Patients cannot be included in the CC field.

Subject

This required field is used to give context about the message and a value must be entered to send a message. There is a 235-character limit for the subject field.

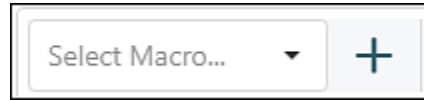
Body

The main text field where the users will include the message content is the body which needs to be populated to send a message. There are many options when configuring the message content. There are number of different text editor options as well as in-line images.

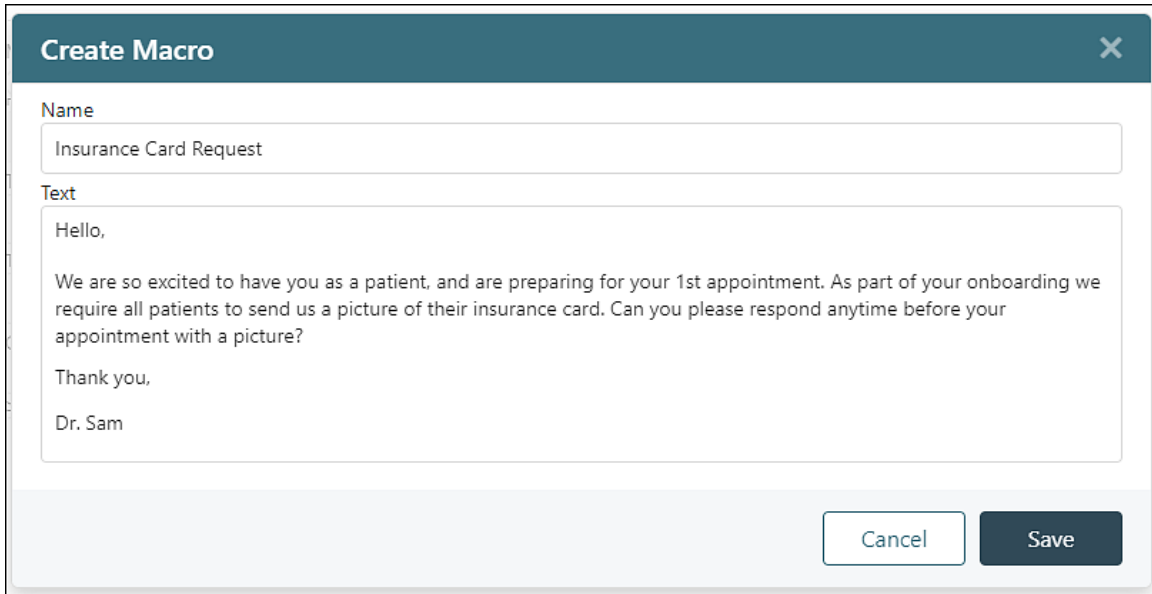


Macros

Editor Macros are used by providers in Valant like Mobile Notes and Web Editor Notes. This feature allows users to access their list of Macros to appear in the body of secure messages and allows users to create templates to help standardize common messages and inquiries.



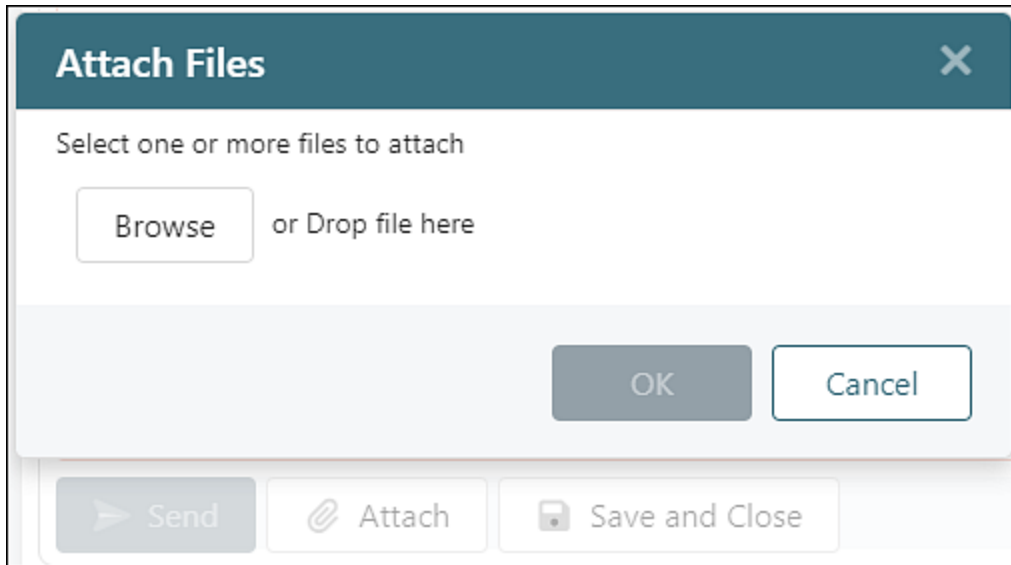
Users can also use the + icon to create new macros.

A dialog box titled "Create Macro" with a close button (X) in the top right corner. The dialog has a light gray background. It contains two main sections: "Name" and "Text". The "Name" section has a text input field containing "Insurance Card Request". The "Text" section has a larger text area containing the following text: "Hello, We are so excited to have you as a patient, and are preparing for your 1st appointment. As part of your onboarding we require all patients to send us a picture of their insurance card. Can you please respond anytime before your appointment with a picture? Thank you, Dr. Sam". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save".

Users who do not have the “Edit Documents” permission will not be able to use or create Macros in Secure Messaging. They will see the option greyed out but will not be able to access macros.

Attachments

Secure Messaging supports functionality to add attachments to messages. Both patients and practice users can add up to 25 MB of attachments. This can be one file 25 MB or multiple files that add up to 25 MB or less.



Attachments will appear at the bottom of messages and can be seen on the message grids noted with a paperclip icon.

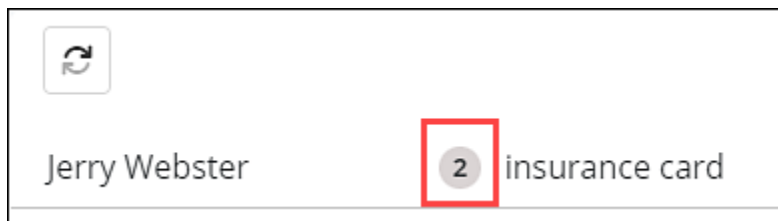
Secure Messaging supports the following file types: doc,.docx,.docm,.mdi,.odt, .pdf, .rtf, .txt, .wpd, .wps, .xls, .xlsx, .bmp, .jpg, .jpeg, .png, .tif, .tiff, .dss, .dvf, .mp3, .msv, .wav, and .wma

This is the same list of file types supported in Valant IO.

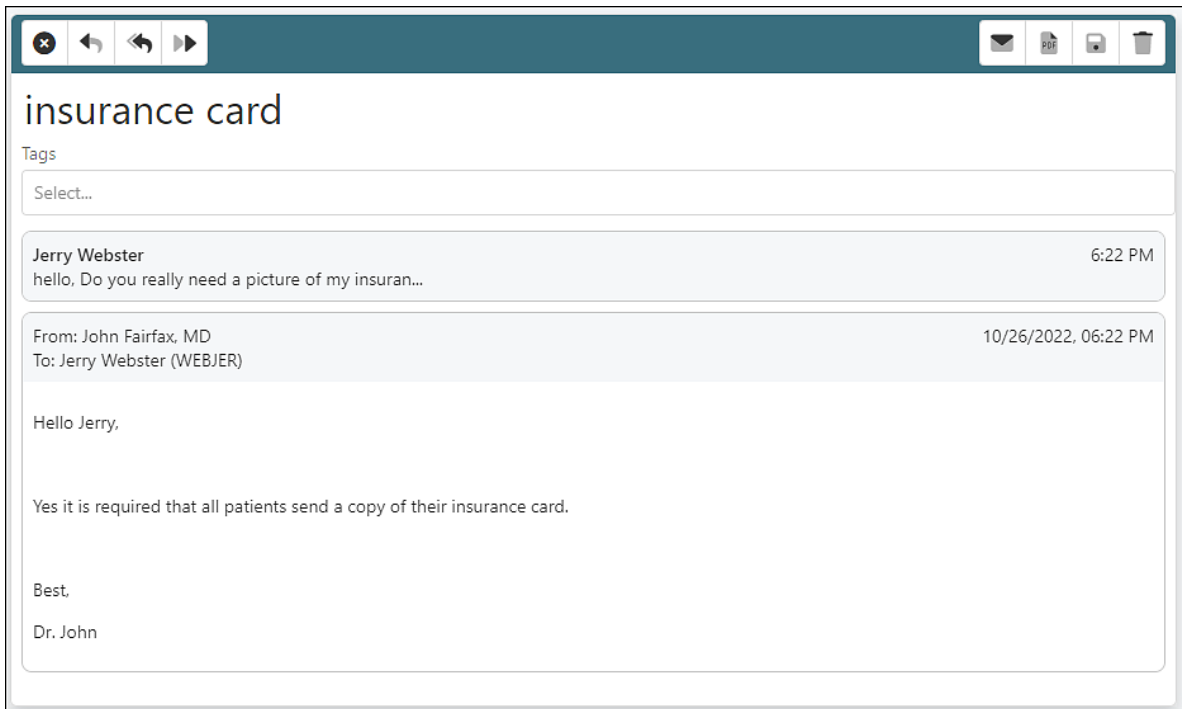
Note: Video file types are not supported at this time.

Message Threads

Message threads are a “chain” that is comprised of the original message and responses to that message. Message threads are indicated with a number between the sender information and the subject line.

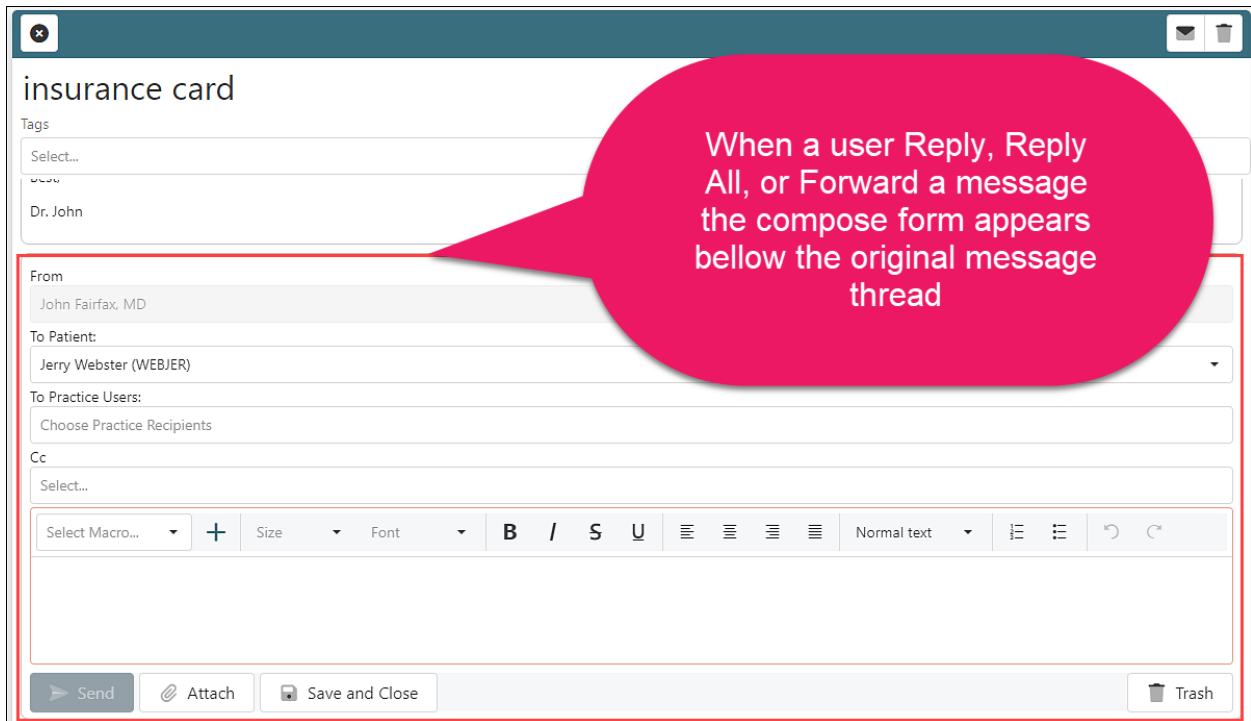


When a message thread is opened it will contain the original message at the top, with subsequent replies below the original message. The most recent message will be expanded, and the original message and replies can be expanded to view their full contents.



Reply, Reply All and Forward

On the top left of the message thread window users will see the icons that give options to close the window, reply to a message, reply all, and forward. Reply will simply allow a user to reply to the original sender of a message. Reply all will allow a reply to all participants of a message. Forward will allow a message to be forwarded to other practice users. Messages cannot be forwarded to a patient. When messages are either replied to or forwarded from the message thread then the compose form will appear below the most recent message.

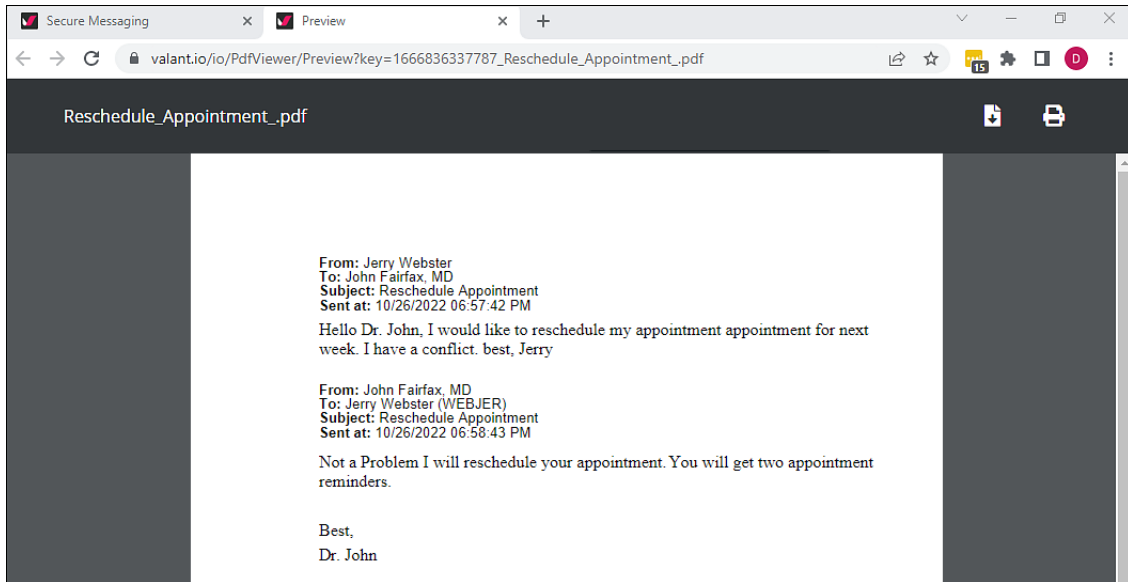


Open as PDF

When a message thread is open there is a PDF icon on the top right of the message window.

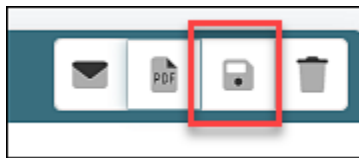


This button will generate a PDF of the message thread in a new window. This works similarly to previewing documents in Valant where the PDF will be opened in a new tab. The PDF will not be downloaded automatically. There are options to download and print should the user choose to do so.



Save to Chart

Secure Messaging is also going to give the option to directly save message threads and attachments to the patient chart in a simple workflow. The workflow will vary a little depending on what you want to save to the chart and if you are a Provider or Office Staff User. To begin, all users will click on the floppy disk icon on the top right of the page.



Save Message Threads to Chart

All users who click the button will open the “Save to Chart” window and give users several options for saving the message thread. The subject line of the message will default to the file name. This can be edited or changed by editing the text field. Users will need to select the “Document Type”. The Provider field will be automatically populated for provider users and will need to be selected by office staff users. The user’s local time and date will automatically be populated but can be edited. The next step will vary by user type.

- Providers: When a provider clicks OK the message will automatically be saved to the patient chart.
- Office Staff:
 - Clinical document type: When an office staff adds a message thread to the patient chart it will be sent to the Providers’ Uninitialed Documents where the provider can initial them before becoming part of the patient record.
 - Non-clinical document type: When an office staff adds a message thread to the patient chart it will automatically be added to the patients chart. This follows the same workflow of staff uploading documents in the Valant EHR.

The image shows a 'Save to Chart' dialog box with a dark teal header and a close button (X) in the top right corner. The main content area is white and contains the following fields:

- Message Thread** (text label)
- File Name** (text input field containing 'Insurance Card .pdf')
- Document Type** (dropdown menu showing 'Insurance Documents')
- Provider** (dropdown menu showing 'JF: John Fairfax, MD' with a close button and a dropdown arrow)
- Date and Time** (text input field containing '10/26/2022, 8:38 PM' with a calendar icon)

At the bottom of the dialog box, there are two buttons: a dark teal 'OK' button and a white 'Cancel' button with a dark teal border.

Save Attachments to the Chart

Message threads that contain attachments can also be saved to the patient chart following a similar workflow. When saving a message thread or attachment to the patient chart, instead of an “OK” button the user will see a “Next” button. This will allow the user to configure the attachment before being saved to the patient chart. Users can configure the file name, document type, provider, and date and time, just as they can the message thread. The file name will default to the file name of the attachment, but that can be changed if the patient used an ambiguous file name. Users can also omit saving one or more attachments from being included by selecting the radio button “Do not include this attachment”. This window will persist until all attachments are addressed. Then the user clicks “OK”. The same workflow for providers and office staff is in place for saving attachments to the patient chart. If it is a clinical document type it will need to be initialed by a provider. If it is a non-clinical document type then it will go directly into the patient chart.

Save to Chart ✕

3 of 3 Attachments

File Name

Document Type

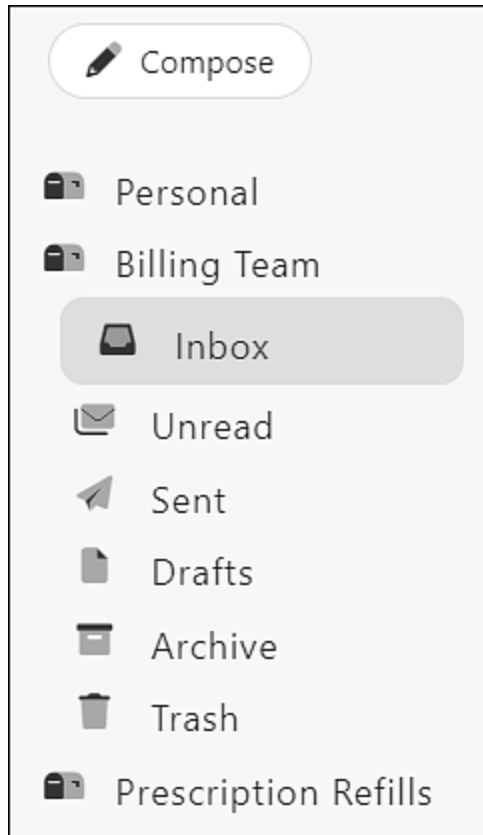
Provider

Date and Time

Do not include this attachment

Shared Inboxes

To allow practices to create their own customer workflows and have multiple users access the same inbox, Valant has built the Shared Inboxes feature. A shared inbox is a mailbox that can be accessed by multiple users to access and respond to patient messages. Rather than all messages going to individual mailboxes, shared inboxes can be a powerful tool to allow multiple users to address messages, allowing administrative staff to handle things like billing, scheduling, and non-clinical tasks while allowing providers to focus on clinical tasks, fulfilling prescription refills, and answering medical questions. Shared inboxes can be configured (customized?) multiple ways to meet the practice's specific needs.



The image above is a view of a provider's secure messaging page (account?) which has access to two shared inboxes, Billing Team and Prescription Refills

Shared Inbox Administration

Users that have the "Practice" permission will see Shared Inboxes under "Persons and Institutions" on the left navigation menu in Valant. From this page users will be able to create Shared Inboxes.

The Mailbox has fields for name, description (internal only), inactive to hide a Shared Inbox, and a "include sender name in message from this inbox" option that will include a user signature line so a practice can easily identify who sent a message.

Billing Team

- Mailbox**
- Participants
- Contact Management
- Auto Replies
- History

Name
Billing Team

Description
This inbox is for the billing team to send statement follow-ups and answer any billing or insurance related questions.

Inactive

Include sender name in message from this inbox

The Participants tab is where a practice will configure who can access a shared inbox. All office staff and providers will appear in the drop-down list and can be added to an inbox.

Billing Team

- Mailbox
- Participants**
- Contact Management
- Auto Replies
- History

+ Add

Name	
John Fairfax, MD	Remove
Joan Scheduler	Remove
Melanie Therapist, PhD	Remove

The Contact Management tab lets a practice configure if patients can initiate a message to a Shared Inbox by default. There is also an option on this page to create an exclusion list to prevent certain patients from initiating a message to a specific inbox.

Billing Team

- Mailbox
- Participants
- Contact Management**
- Auto Replies
- History

Allow all patients to initiate messages to this inbox

Restricted Patients - Patients in this list can receive and reply to messages from this inbox, but they cannot initiate a message to this inbox

+ Add


Name	
Adrienne Landrie	Remove
Amy "Amy" Chandler	Remove


Each shared inbox also has an option to configure an Auto-Reply that works the same as the personal inbox and will reply to the sender whenever a message is received.

Billing Team

Mailbox | Participants | Contact Management | **Auto Replies** | History

Send Auto-Reply
 Enabled Disabled

First Day *
 10/26/2022 

Ends After Last Day 

Message Contents *

Select Macro... + Size Font **B** / **S** U Normal text

Thank you for contacting the Billing Team. Someone will reply to your message in the next two business days.
 If you are in need of immediate response please call our office at (555)909-4343
 Thank you,
 LP Behavioral Health Billing Team |

There is also a history tab that will audit any changes made to a shared inbox.

Patient Secure Messaging Configuration

Under Persons and Institutions | Patients | Portal tab there are options for customizing on a per patient level with whom a patient can initiate a message. Patients can be configured to initiate messages with multiple providers, and office staff. If a patient has a care team, the whole care team can be included. By default, when a patient is created, they will be allowed to initiate a message with their assigned provider.

There is also an inclusion list for shared inboxes. Even if a shared inbox is configured to not allow patients to initiate a message to a shared inbox, certain patients can be included in a small (or large) list of users who can initiate a message with that inbox.

Jerry Webster (WEBJER) ▾

▲ Demo Custom Guardians Appts Ins Misc. School Elig **Portal** History

User Name
jwebster

Account Setup Status
Active

Manage Account ▾

Secure Messaging

Patient can initiate secure messages

Providers and Staff

John Fairfax, MD ✕ Allen Psychologist, PsyD ✕ ✕ ▾

Shared Inboxes

Prescription Refills ✕ Billing Team ✕ ✕ ▾

Superusers

Users that work with multiple practices using the same login will now be able to use secure messaging. When superusers login to an account they will have access to a personal inbox and can message other practice users. They can both send and receive messages to office staff and providers. They cannot be added to shared inboxes or messages to patients.

FAQ

Can I message multiple patients with one secure message?

No, only one patient can be included on a secure message

Is there a limit to the number of Shared Inboxes I can create?

Practices can setup as many shared inboxes as they would like.

Is there a limit to the number of tags I can create?

There is no limit to the number of tags a user can create.

Is there a way to prevent someone from replying to a message?

There is not currently a way to prevent someone from replying to a secure message.

Can I setup secure messaging so my patients can only message shared inboxes?

Yes, you could configure every patient so they could not initiate a message with their assigned provider and could only initiate message with shared inboxes. This could help route messages away from providers and have administrative staff filter through them first.