

Prom the Office of Clinical Informatics Quick Reference Guide (QRG) Message Center: Manage Documents September 10, 2019

This Quick Reference Guide (QRG) reviews the processes for managing documents using the Message Center.

Common Buttons & Icons

	= 1 Message Center	Message Center button
Communicate ▼		Communicate drop- down arrow (in PowerChart toolbar)
Redirect		Redirect button
Reschedule		Reschedule button
✓ Complete		Complete button
Save Addendum		Save Addendum button
Save Addendum/Complete		Save Addendum/Comple te button
⇒ \$ Create ▼		Create drop-down arrow
	Next	Next button
	OK & Close	OK & Close button
	OK & Next	OK & Next button
Summary View / Inbox View		Summary View and Inbox View buttons
🕰 Reply		Reply button

₹ High	High Priority button
🕻 Notify	Notify button
Message Journal (13)	Message Journal button
Å	Search icon
<u>★</u> Delete	Delete button
© Communicate ▼	Communicate button (in Messages toolbar)
Add Results	Add Results button
東	Favorite icon
⊘ / ⊘ / ∆	Individual Accept / Reject / Modify order icons
Reject All and Next	Reject All and Next button
S Accept All and Next	Accept All and Next button
	Modify icon

Manage Documents

> From the Message Center:

STEP 1: Click Documents in Inbox Items.

STEP 2: Double-click the document you wish to review or sign.

NOTE: To modify preliminary reports prior to signing them, click the Modify icon. Once a document

is signed, you can only make an addendum, not a modification.

STEP 3: Click the appropriate action in the Action Pane: Sign or Refuse.

NOTE: If you refuse, you need to document a reason why in the Reason field.

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NOTE: To forward a document to another provider, complete the following steps:

- Select the Additional Forward Action check box.
- Click the Additional Forward Action drop-down arrow; then click the appropriate action: Sign or Review.
- Enter the recipient in the To field; then click the Search icon.
- Double-click the appropriate recipient.
- Click OK.
- Enter a comment in the Comments field, if desired.
 - o The Comments field should only be used for provider to provider communication.

STEP 4: Click OK & Close.