

Secure E-Mail

(also known as “Direct” e-mail)

Secure E-Mail (also known as “Direct” e-mail) allows practices to communicate electronically with other practices, exchanging messages and patient documents. This feature allows you to:

- Send a message to a provider in another practice (or reply to one).
- Send a referral letter or copy of a progress note.
- Electronically send a CCD (an electronic summary of a patient’s chart).
- Electronically receive a CCD and import elements of it to your patient’s chart (problems, medications, allergies).
- Send selected documents in the patient’s chart.

HST has partnered with Surescripts, the nation’s leading practice network for ePrescribing and secure e-mail to provide this service.

Note: It is a Meaningful Use requirement that a minimum of 10% of transfers of care include a summary of care sent via secure e-mail. For primary care practices, this would mean sending patient info to consultants. For specialty practices, this would be used for sending progress notes back to the PCP.

Initial Set-Up

Secure e-mail addresses are registered by HST. An example of such an address would be:

RochesterFamilyPractice@MedicalServices.net or HenryFendersonMD@MedicalServices.net

MedicalServices.net is HST’s unique direct e-mail address domain. The actual address (e.g., “RochesterFamilyPractice”) is selected by the practice. You may elect to have an individual e-mail address for each provider and/or have a practice e-mail. Since the management of inbound e-mail will, in most cases, be handled by office staff in the same way that inbound faxes are managed, you will probably find a single e-mail address for the practice to be sufficient.

Secure e-mail addresses are not case sensitive. That is, RochesterFamilyPractice@MedicalServices.net is the same as rochesterfamilypractice@medicalservices.net

Secure e-mail addresses are *not* the same as “normal” e-mail addresses. Normal e-mail addresses are not secure (potentially, the contents of a normal e-mail could be intercepted and read by others). It is a HIPAA violation to send any patient protected health information (even if it’s just the patient’s name) in an unsecured manner. If you attempt to send a secure e-mail to a normal e-mail address it will bounce back, unsent. Presently, most secure e-mail addresses used for the exchange of medical information contain the word “direct”. This is done to isolate it from unsecured traffic on the same domain. The entire medicalservices.net domain is secure; therefore the word “direct” will not have to appear in your direct e-mail address.

HST will set-up your requested e-mail address and register it for you with the national directory. This will allow other practices who subscribe to the national directory to find you.

Entering Secure E-Mail Address of Other Practices

The screenshot shows a software interface titled "Referring Physician Table". At the top, there is a "Code" field with "HF" and navigation buttons. The main form is divided into several sections:

- Personal Information:** First Name: Howard, M.I.: R, Last Name: Fenderson.
- Organization:** Organization: [empty], Description: Fenderson, Howard, Address: 2085 S Clinton Ave, City: Rochester, State: NY, Zip Code: 14618, Phone: 585-442-2100.
- Professional Information:** Specialty: Critical Care - Pediatric, Category: Unspecified, Taxonomy Code: 207R00000X, UPIN: 12345, License: 144791, NPI: 1164563110, Group NPI: [empty].
- Communication Preferences:** Primary Care Physician, In Network.
- Secure E-Mail:** Secure E-Mail: hfendersonmd@medicalservices.net (circled in red), with a magnifying glass icon (circled in red) to its right.
- Other Fields:** Title: [empty], Salutation: [empty].

At the bottom, there are buttons for "Ins Enrollment", "Network Info", and "Communicate by:" with radio buttons for "Mail", "Fax", "E-Mail" (circled in red), and "None". Below these are "Save", "Delete", "Label", and "Cancel" buttons.

The most common use of secure e-mail is to and from physicians or practices in your Referring Physician table (Tables, Referring Physician). The three areas circled above pertain to secure e-mail:

1. Enter the physician's secure e-mail address.
2. You may use the look-up button to find the secure e-mail address of a physician from the national directory.
3. Indicate that E-Mail is the preferred method for you to communicate with this physician or practice.

Similarly, you may also enter a secure e-mail address in the Insurance Plans table for insurances and in the Address Book for any other contact with whom you will need to communicate securely.

Sending Documents

There are three ways to send secure e-mail:

1. Send a manual message
2. Queue a document (or list of documents) to be sent
3. Automatically send a referral letter at Close Visit

Manually sending a message

To manually send a message, with the patient's chart open, right-click on blank grey space and select **Send Secure E-Mail** from the resulting menu. The following window opens:

Send Secure Message

Patient-Related Recipients
Hira, Bruce

Address Book One-Time

Hira, Bruce

Include a Continuity of Care Document

Subject: Message from Clinic One

Note: The above Subject text is not encrypted - do not include sensitive or private information in it. PHI should only be included in the text below.

Patient: Blackwell, David DOB: 11/03/03

Bruce,

Attached please find the CCD for the above patient whose case we discussed on the phone this afternoon.

Warm regards,

Howard

Send Save Cancel

You may select the recipient of the message from the **Patient-Related Recipients** drop-down box at the top of the window. This list will include the patient's primary care physician, referring physician, any active specialists in the patient's chart (in the Referral list/window), as well as the patient's pharmacy or insurance plans – all of the recipients already linked to the patient that have a secure e-mail on file.

If the desired recipient is not already on file for the patient, you may select one from the Address Book. You may also use the **One-Time** button quickly add the information of a one-time contact to whom you want to send the message.

Often it may be appropriate to include a Continuity of Care Document. This document contains basic demographic info on the patient, problems, medications, allergies, immunizations, lab results, etc.). This is especially helpful when corresponding with a specialist as it allows their system to easily import these elements into their chart without having to manually enter them.

The **Subject** of the message is automatically entered by the system as a Message from [your practice name]. As noted on the screen, you do not want to include the patient's name or any PHI in the subject as the subject is not encrypted when it is sent. This is part of the "direct" standard. PHI should never be included in the subject.

The text of the message is encrypted. The program, therefore, as a convenience, automatically enters the patient's name and date of birth for identifying purposes. The rest of the message is typed manually.

The program does allow you to **Save** and **Load** commonly used messages so that you do not have to type them from scratch every time. The **Save** and **Load** buttons are located right above the large text box, to the right.

Clicking **Send** sends the message.

The Document Queue allows you to view the status of outbound messages. (They are a **Method** that can be selected in the drop-down box). Additionally, should an outbound message fail to send, you will get a pop-up message indicating that. The most common reasons for a message to fail is that you attempted to send a message to a non-secure e-mail address, or the e-mail address is not registered in the national directory.

For Meaningful Use purposes, the program tracks specialists in the patient's chart with whom you have communicated via secure e-mail. In the **Referrals** form (large button in the chart), each specialist has a checkbox that indicates whether or not a Summary of Care was sent, and, whether or not it was sent securely. The Meaningful Use Analyzer pulls its data directly from these checkboxes. If you used another means (an outside vendor) to manually send a summary of care and it was sent securely, make sure you check these two boxes so that you get credit for it. The program automatically checks the boxes when you use it to communicate securely.

Queuing a document to send securely

You may send any document in the patient's chart securely. To do so, simply view the document and click the **Queue** button (red Q button above the document viewing area). This opens the following window:

The screenshot shows a dialog box titled "Queue Document" for patient "Hira, Bruce". It features a "Patient Specific" section with a dropdown menu showing "Hira, Bruce". Below this is an "Other" section with buttons for "One-Time", "Select Ref Phys", "Select Pharmacy", "Select Insurance", and "Address Book". There are radio buttons for "Mail", "Fax", "E-Mail" (which is selected), and "Inbox". A "Send Now" checkbox is present and unchecked. There is also an "Include Cover Sheet Document" checkbox, which is unchecked. Below these are buttons for "Fax Cover Info", "Attach", "OK", and "Cancel".

Just like sending a message manually, you may easily select from the **Patient Specific** drop-down box any contact already associated with the patient. If the desired recipient is not already associated with the patient, you may use any of the buttons in the **Other** section to select him/her.

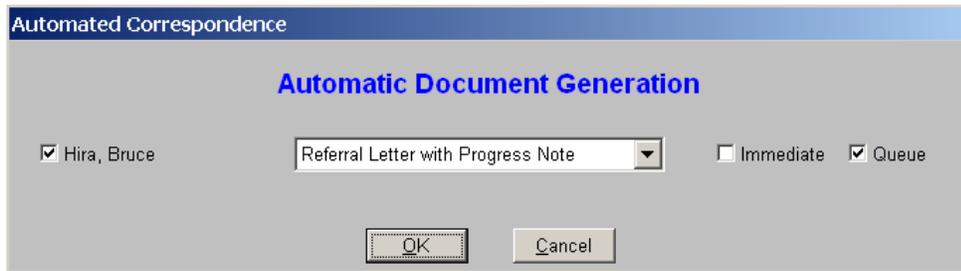
If the selected recipient has E-Mail as their preferred communication method, E-Mail will automatically be selected among the radio buttons.

Besides the document you are currently viewing (which most commonly would be a letter or a progress note), you can click the **Attach** button to include any other document on file in the patient's chart. All documents will be sent as PDF attachments.

Once you click **OK** a window will appear that allows you to enter the text of the e-mail message itself. This is optional. The text itself will automatically contain the patient's name and date of birth. If you want to include other text with the documents you may do so.

Automatically sending a referral letter at Close Visit

If your visit included a referral to a specialist, at Close Visit, the system will open the Automated Correspondence window. This window lists active referrals and allows you to send your standard (or special) referral letter after you have signed your visit note.



If this window does not open for you automatically, contact Customer Support. You may have previously requested the feature be turned off.

Clicking **OK** creates an entry in the Document Queue for the referral letter. It is essentially just a place holder until you sign today's progress note. Once the note is signed, the next time the office staff processes the queue, the letter will be generated and sent securely, including a Continuity of Care Document, to the specialist.

For this to work properly, it is assumed that you have on file a standard referral letter and this letter is set up to require a signed visit note before generation. If you do not have one setup, contact Customer Support to have one installed for you.

The referring physician's preferred communication method must be set to e-mail for this process to automatically send the summary of care electronically.

Receiving Documents

Secure messages are received via the Document Manager. Office staff that you wish to manage inbound secure messages must be indicated as such in their User Access Information (Tools, System Utilities, User Access). Check the box **Process External Messages** in the **Privileges** tab. This allows the user to manage inbound messages from both, the patient portal, and from other physicians via secure e-mail.

When new messages have been received, the user gets a notification in the Document Manager that *New secure messages have arrived*. To view and manage these messages, the user simply clicks the **Retrieve External Messages** button (looks like a globe). This same button is used to import messages from the patient portal.

Unlike portal messages, messages received via secure e-mail are not already linked to a patient's chart. They need to be filed in a chart just as scanned or faxed documents do: Click the **File** button and select the patient and document type.

If the message contains file attachments (such as PDF documents or Continuity of Care documents), the core message will indicate that. A list of documents will be clearly identified in the text of the message. These documents will automatically be filed in the patient's chart along with the secure message. They will appear as separate documents in the patient's Table of Contents

These messages can, like any other document received, be forwarded to the appropriate clinical staff.

You may also reply to a secure message the same as you would reply to an intra-office message. The reply is sent securely to the original sender of the message.

Importing data elements from a Continuity of Care document

If you have received a Continuity of Care document you can easily import selected elements of it into your chart (problems, medications, or allergies). This is helpful for specialists who receive a CCD from a primary care physician. It is also helpful for primary care physicians to make changes to the chart (like new medication entry).

To reconcile the CCD to your patient's chart, while viewing the CCD document in the patient's chart, right-click on the document. Select Reconcile To Chart from the resulting menu. A window will open that displays your data on the right side and data from the CCD, the other practice's data, on the left.

First select the appropriate radio button on the right side to select Medications, Allergies, or Problems.

To "accept" items on the left and import them into your chart, check all the items you want to keep. Then click **Add To Chart**.

You may, from this window, manually edit items on your side to reconcile them to the items on the left side.

When you are finished, click **Reconciled** to flag the document as having been reconcile (and give you credit for such by the Meaningful Use Analyzer) and close the window.

Fees

- There is a **one-time** set-up fee of \$150 for each e-mail address.
- **There is an annual Surescripts network fee \$200 per provider.**
- There is an ongoing **monthly** fee of \$25 per provider for the Secure Messaging Module. (The Patient Portal also requires the Secure Messaging Module; if you are already using the portal there is not an additional monthly fee for secure e-mail).