Secure Chat in Epic

Send secure instant messages to colleagues from within Epic with the Secure Chat feature.

Messages can be sent to multiple recipients, have a chart attached and supports multiple conversations. Secure Chat **does NOT save to a client’s medical record** and **conversations will disappear after 14 days**. Acceptable uses include:

- Telemedicine visit communication between assistant and provider (especially if at different sites)
- To alert provider the client is ready “client ready in exam room 1”
- To ask for supplies or request updates to the record “please update treatment plan”
- To alert the record is ready to be reviewed “X-rays are ready for review”
- To ask a colleague to call you or anything you would leave on a sticky note for someone
- To ask an eligibility specialist to review financial information.

Secure Chat is **NOT a substitute for placing orders** and **can NOT be used for verbal orders**. Providers should continue to use the legal medical record for following up on abnormal lab results, responding to refill requests, or routing encounters.

To access Secure Chat:
1. Click on the Secure Chat icon (or Ctrl-Alt-5)
2. To start a new message click on the New Conversation icon (or Alt-Shift-N)
3. Click Attach Patient to link to a specific client.
4. In the To field enter the recipient or recipients.*
5. Type your message in the message field.
6. Click Send

*Note: Multiple recipients can be added to a chat conversation but cannot be saved as a Group. OCHIN Epic does not support Groups due to Epic licensing rules.
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Other Secure Chat functions:
A. Open a client’s chart by clicking on the name.
B. You can have multiple chat conversations at one time, viewable on the left.
C. View the entire conversation in the middle and

When a new message arrives, the Secure Chat icon will fill with color.

A pop-up alert will also appear in the lower right corner from wherever you are in Epic.

Secure Chat can also be used with Haiku and Canto from county owned devices. If you would like Haiku or Canto added to a county owned phone or tablet, call the Clinical Systems Help Desk X84357 Option 3.