Communication Center

Communication Center

Version : 2.3

Published : July 2026

TruBridge
54 St. Emanuel Street
Mobile, AL 36602
T(877) 424-1777
trubridge.com

Table of Contents

Chapter 1 Introduction

1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. The TruBridge Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on TruBridge's interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client's attestation, TruBridge bears no responsibility for attestation information submitted by the client.

1.2 What's New

This section introduces the new features and improvements for **Communication Center**. A brief summary of each enhancement is given referencing its particular location if applicable.

Chapter 2 Overview

The Communication Center is comprised of components which gives users the ability to send and receive faxes, as well as internal mail communications, all within the TruBridge EHR software.

NOTE*: Adoption of the Web Client is requisite to using the Communication Center.*

Chapter 3 Security for Communication Center

3.1 Applications

Communication Center is a purchased application and must be turned on by TruBridge prior to usage. The following Application permissions may be assigned to Users of the Communication Center.

1. From System Administration, select the desired **login** .

2. Select **Applications**.

3. Select **New**.

4. From Step 1: Select **Application Code**.

5. From Step 2: Select **Allow**.

6. From Step 3: Select **Application Code** and select **Add**. Next choose the following applications:
    - **Communication Center - Configuration**.
      This permission allows the user access to the configuration area of the Communication Center. This is recommended for the facility System Administrator.
    - **Communication Center - Faxing**
      This permission allows the user the ability to send and receive Faxes within the Communication Center.
    - **Communication Center - Messaging**
      This permission allows the user the ability to send and receive Internal Mail within the Communication Center.

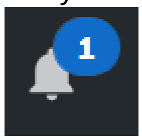
7. Select **Insert**. Then select the **back arrow** to access the rule builder screen.

8. Select **Save** and **enter a rule title** then select **OK** to save the rule.

NOTE*: Giving a user the Communication Center - Faxing or Communication Center - Messaging permission will automatically add that user to the Address Book.*

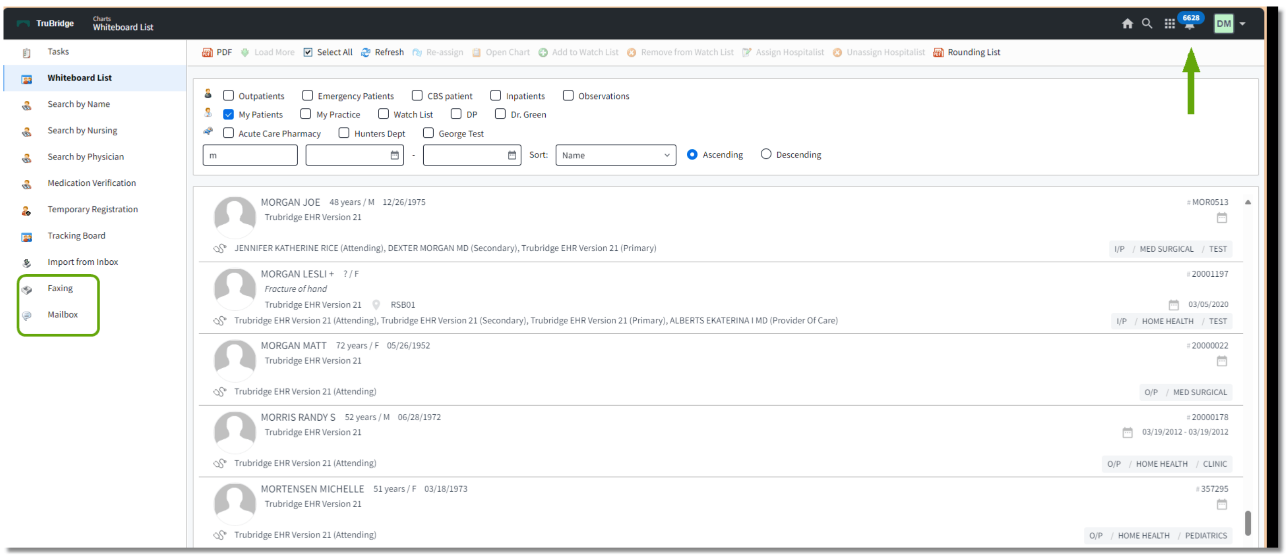
Chapter 4 Accessing Communication Center

Communication Center may be accessed in either of two ways:

- Select the **Bell Icon** 

 in the Action Bar. This will display the most recent incoming mail, faxes, and secure texts.
- Select **Mailbox or Faxing** from the Navigation Panel.

Select **Web Client**



Accessing Communication Center

Chapter 5 Faxing

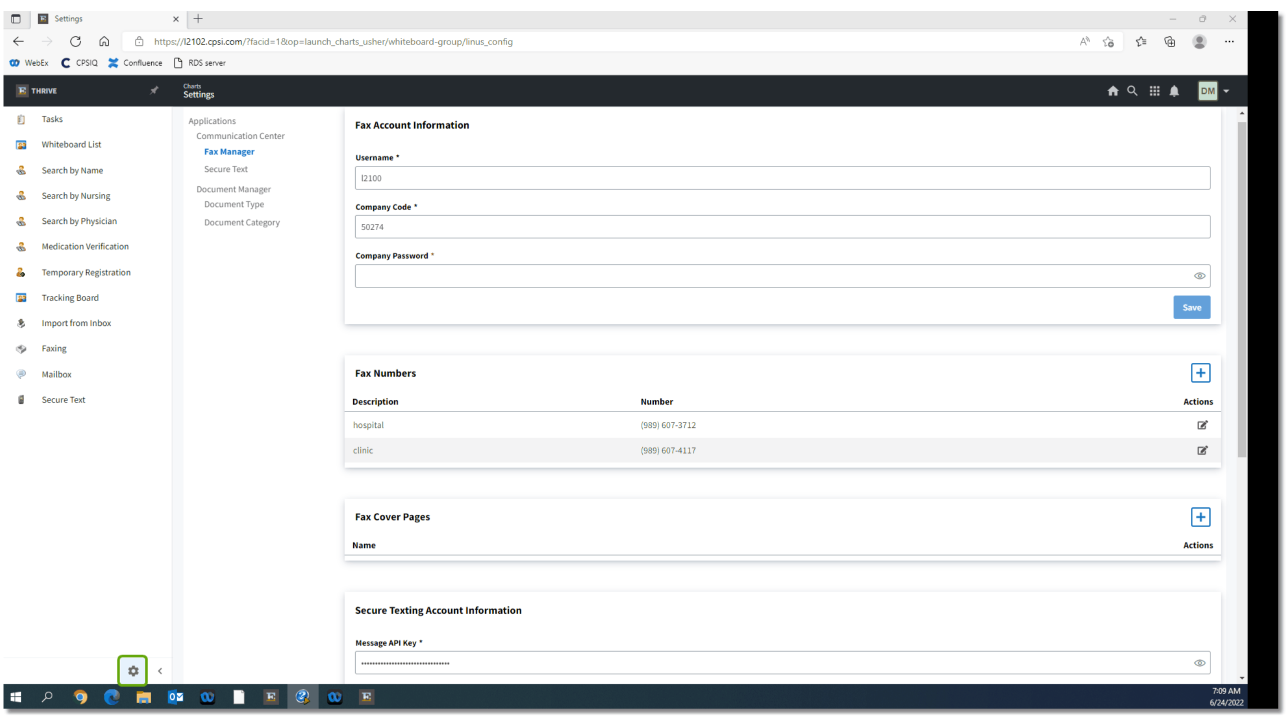
5.1 Required Setup

A profile with Faxage must be maintained to use the Faxing component of Communication Center. Please see the document "Faxage Account Setup Process" for more information on setting up an account. This document can be found on the Communication Center page on TruLearn.

Fax Number Setup

Select the **Configure Icon**  to open the Fax Manager. The Faxage Account information must be placed in the Fax Manager Information screen. ***NOTE: The Application permission for Communication Center - Configuration must be granted for access to the Configuration area***.

Select **Web Client** > **Configuration Icon** > **Fax Manager**



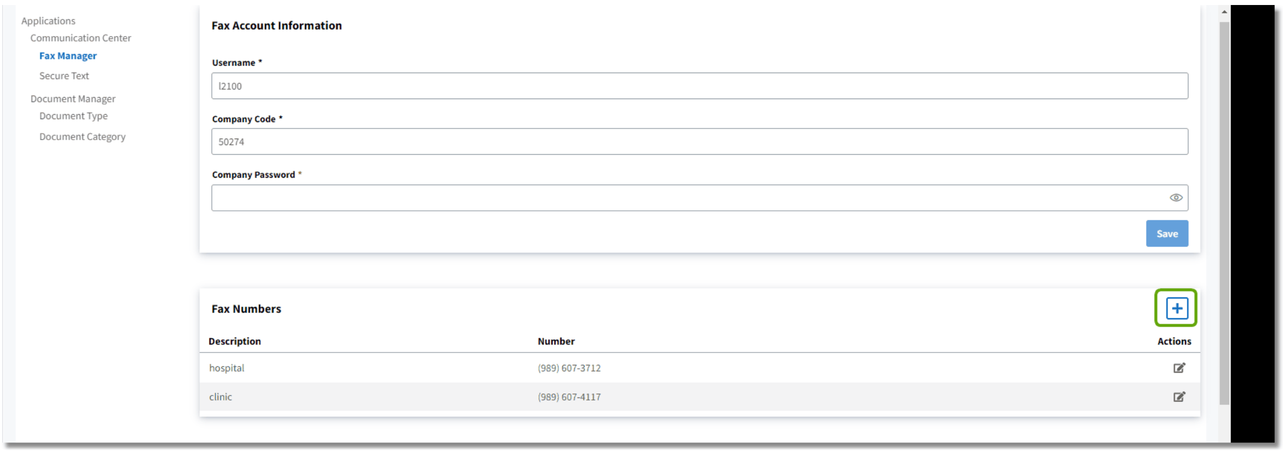
Fax Manager

The fax numbers which have been added from Faxage will be visible once credentials have been confirmed. If you would like to add a new number to your Faxage account without having to login to Faxage, you can select the Plus Sign icon  to choose your number. ***Note: Please refer to***

your Faxage account's pricing rates as adding a new number here is subject to a monthly fee.

The same steps as demonstrated below can be used to edit an existing fax number by selecting the **Edit Icon** instead of the Plus Sign. These steps are demonstrated at the end of this chapter.

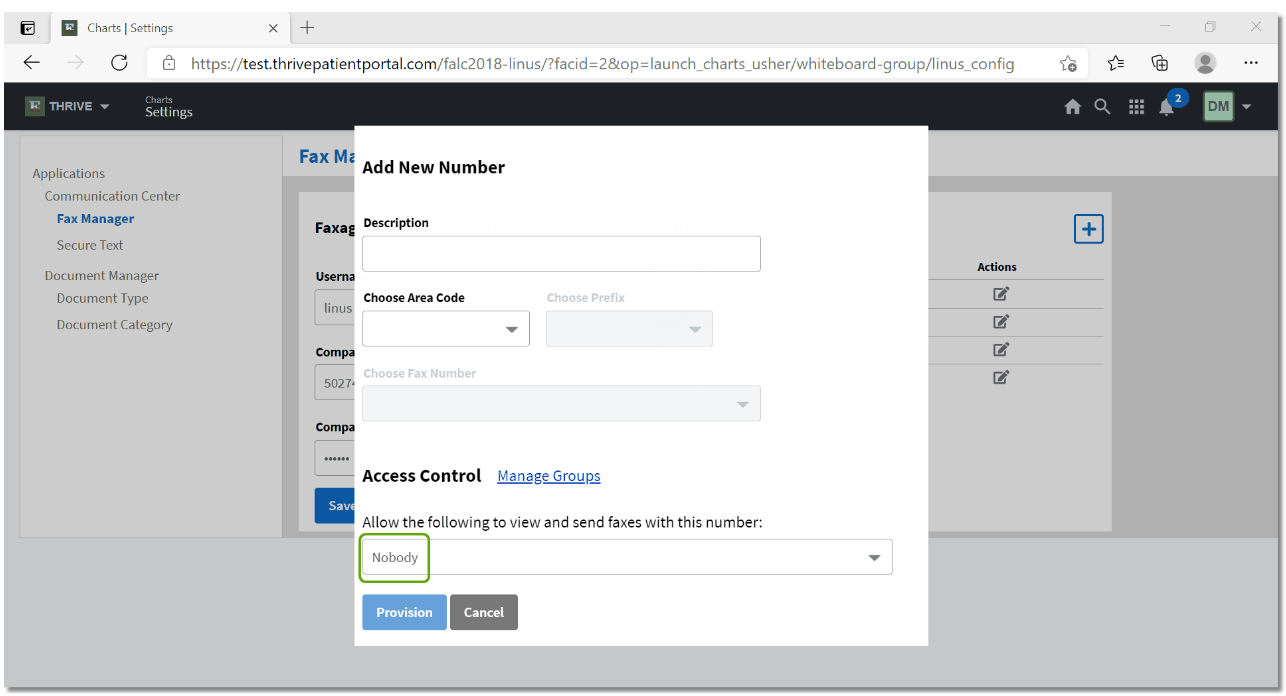
Select **Web Client** > **Configuration Icon** > **Fax Manager** > **<u>Plus Sign</u>**



Plus Sign Icon

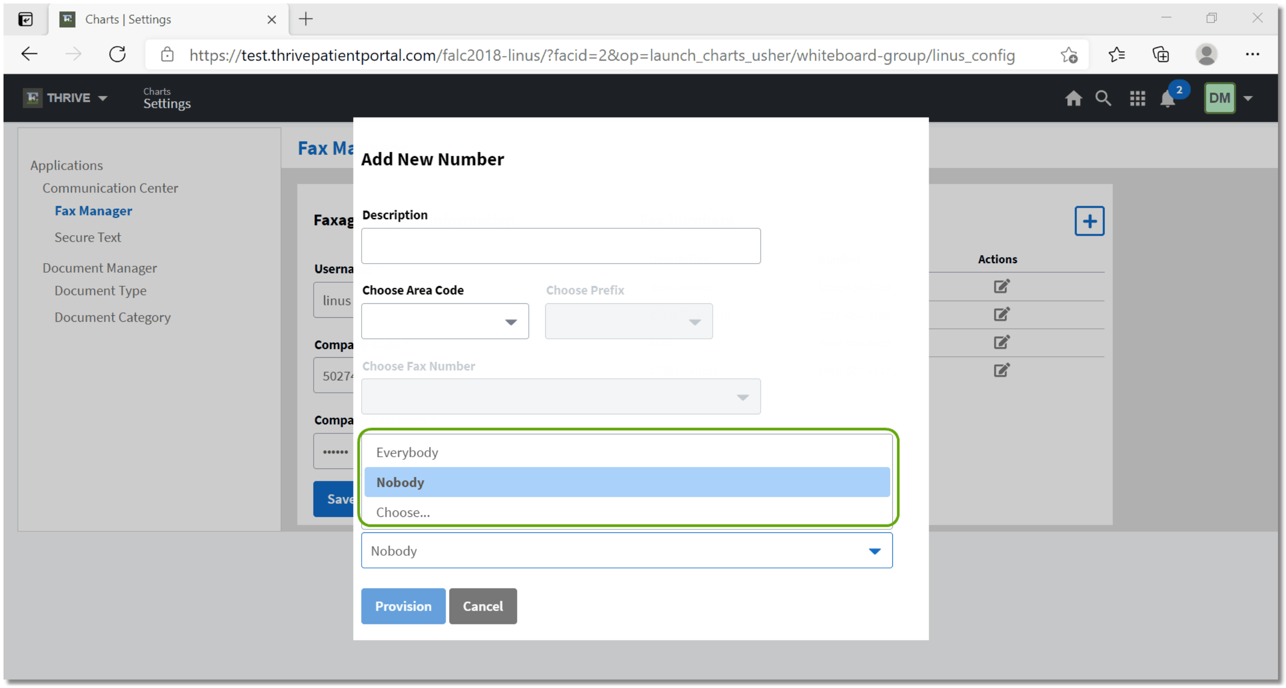
The default for the Access Control is "Nobody". This may be changed by selecting the Dropdown menu in the Access Control area.

Select **Web Client** > **Configuration Icon** > **Fax Manager** > **<u>Plus Sign</u>**



Access Control

Select **Web Client** > **Configuration Icon** > **Fax Manager** > **<u>Plus Sign</u>**



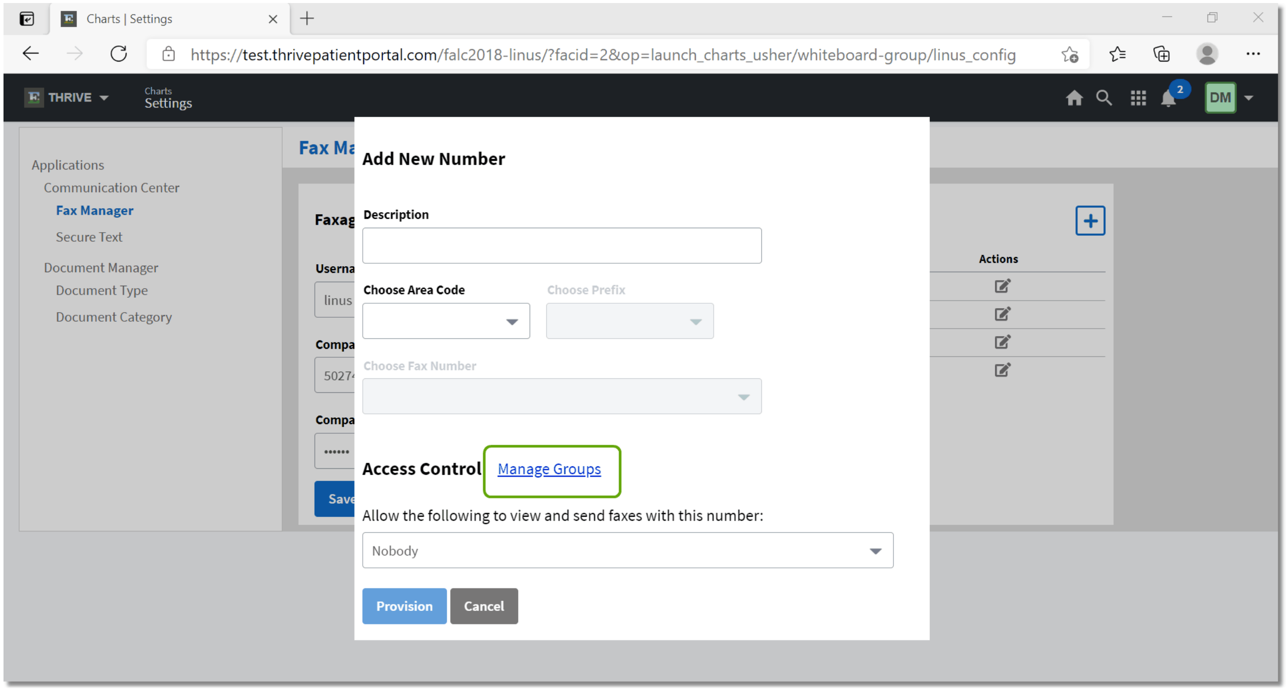
Access Control Dropdown

Other options will allow "Everybody" to view and send faxes from the designated fax number, or a specific "Group" may be set up and assigned the ability to view and send faxes from the designated number.

The directions for creating a group will now be shown:

Select Manage Groups from the Edit Screen.

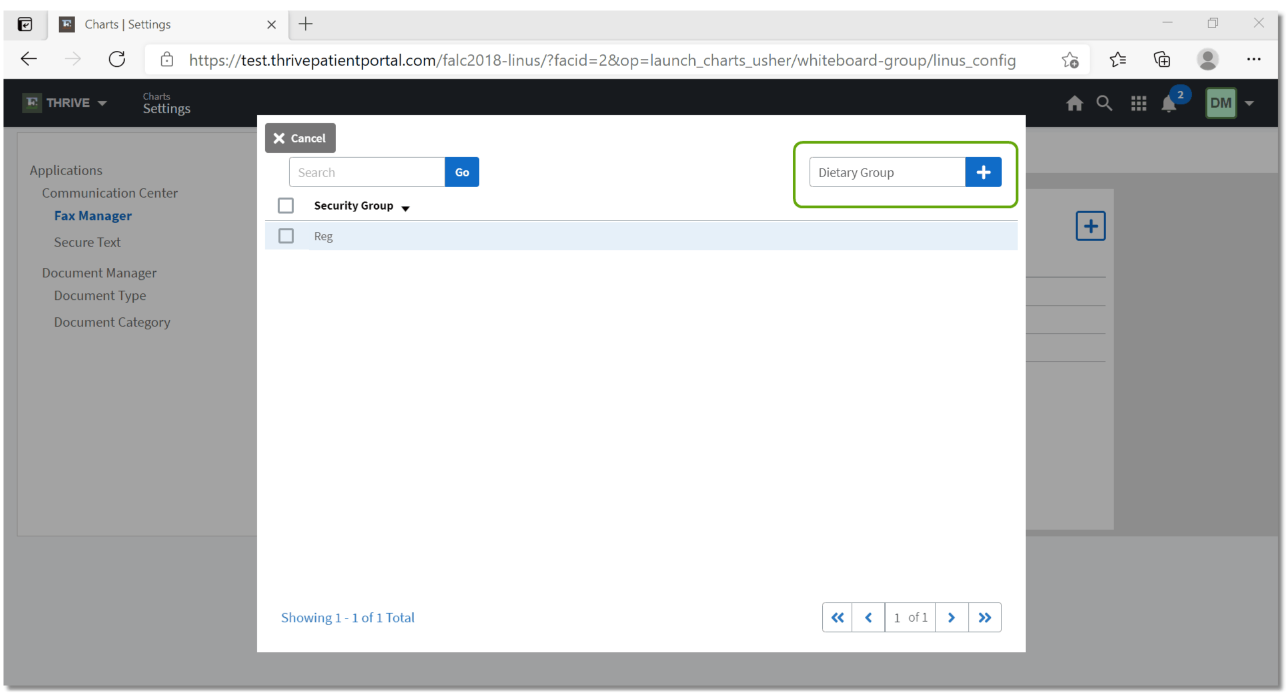
Select **Web Client** > **Configuration Icon** > **Fax Manager** > **Plus Sign** > **<u>Manage Groups</u>**



Manage Groups

Enter the name of the group and select the Plus (+) sign.

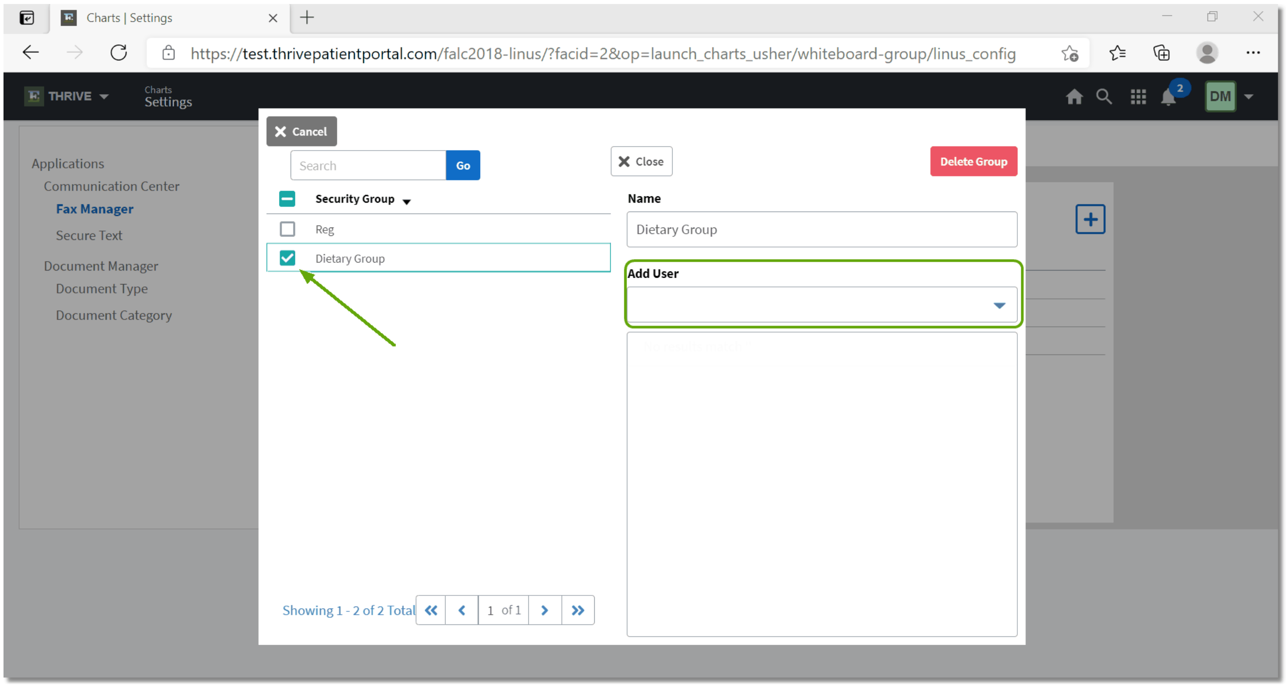
Select **Web Client** > **Configuration Icon** > **Fax Manager** > **Plus Sign** > **Manage Groups**



Create a Group

Select the check box beside the group name. From this screen users may be added to the group by entering their name in the **Add User** box.

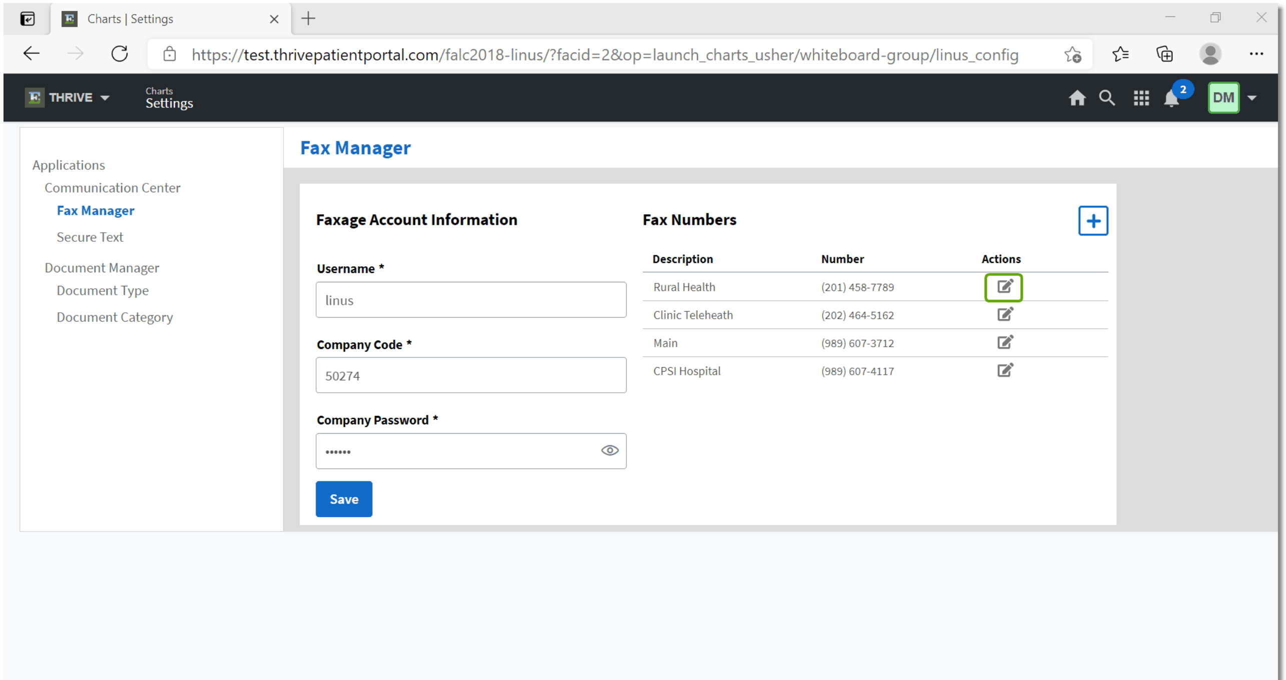
Select **Web Client** > **Configuration Icon** > **Fax Manager** > **Plus Sign** > **<u>Manage Groups</u>**



Add User

A saved fax number may be edited by selecting the **Edit Icon**  from the Fax numbers list.

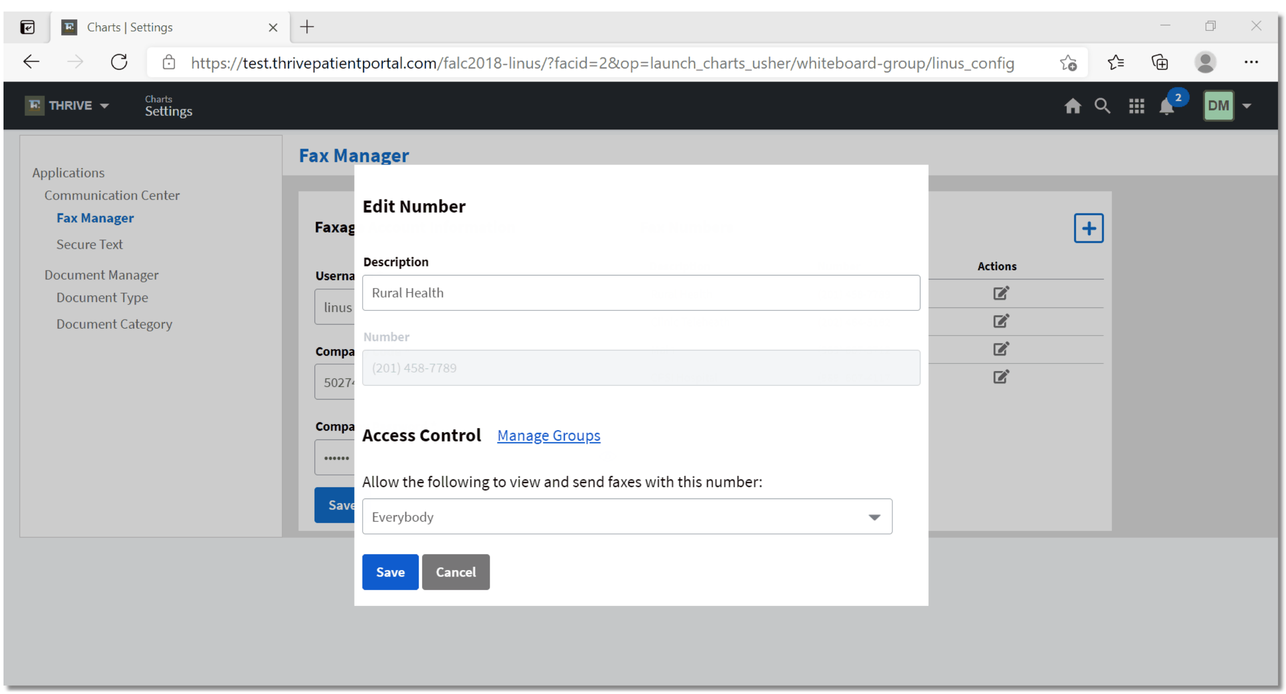
Select **Web Client** > **Configuration Icon** > **Fax Manager** > **<u>Edit Icon</u>**



Edit a number

From here, the **Description** and **Access Control** may be edited as demonstrated earlier in this section.

Select **Web Client** > **Configuration Icon** > **Fax Manager** > **Edit Icon**

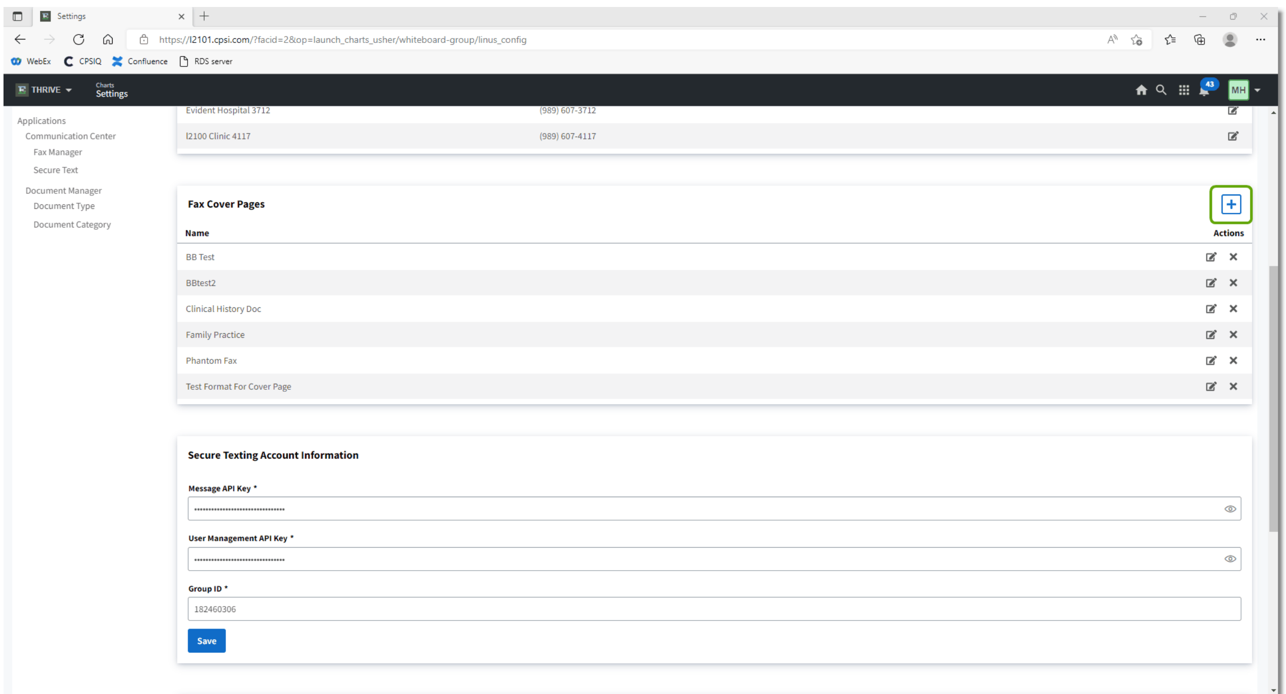


Edit a Number

Fax Cover Page

A Fax Cover Page may be built and assigned to your outgoing faxes. To build a new Fax Cover Page, Select the icon. An existing cover page may be Edited by selecting the icon or deleted by selecting the icon.

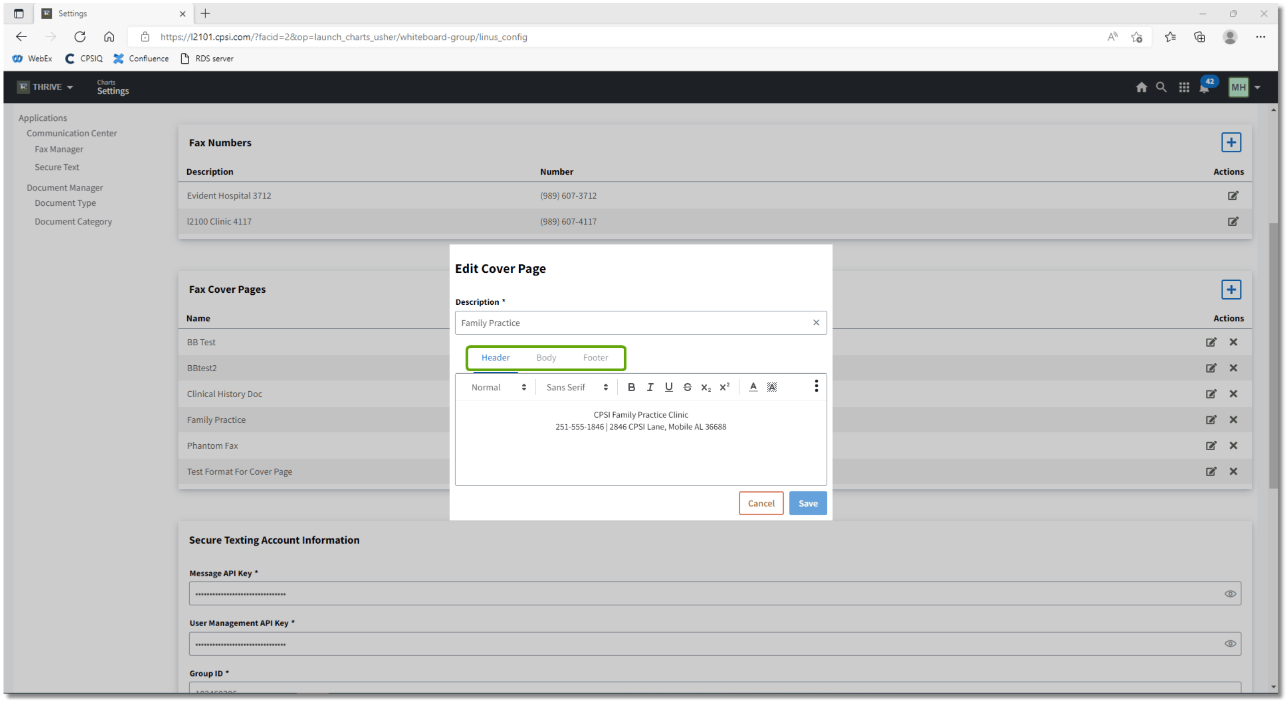
Select **Web Client** > **Configuration Icon** > **Fax Manager**



Fax Cover Pages

A customized Header, Body, and Footer may be added to the cover page by selecting the desired tab. When the cover page is completed, select the Save button.

Select **Web Client** > **Configuration Icon** > **Fax Manager**

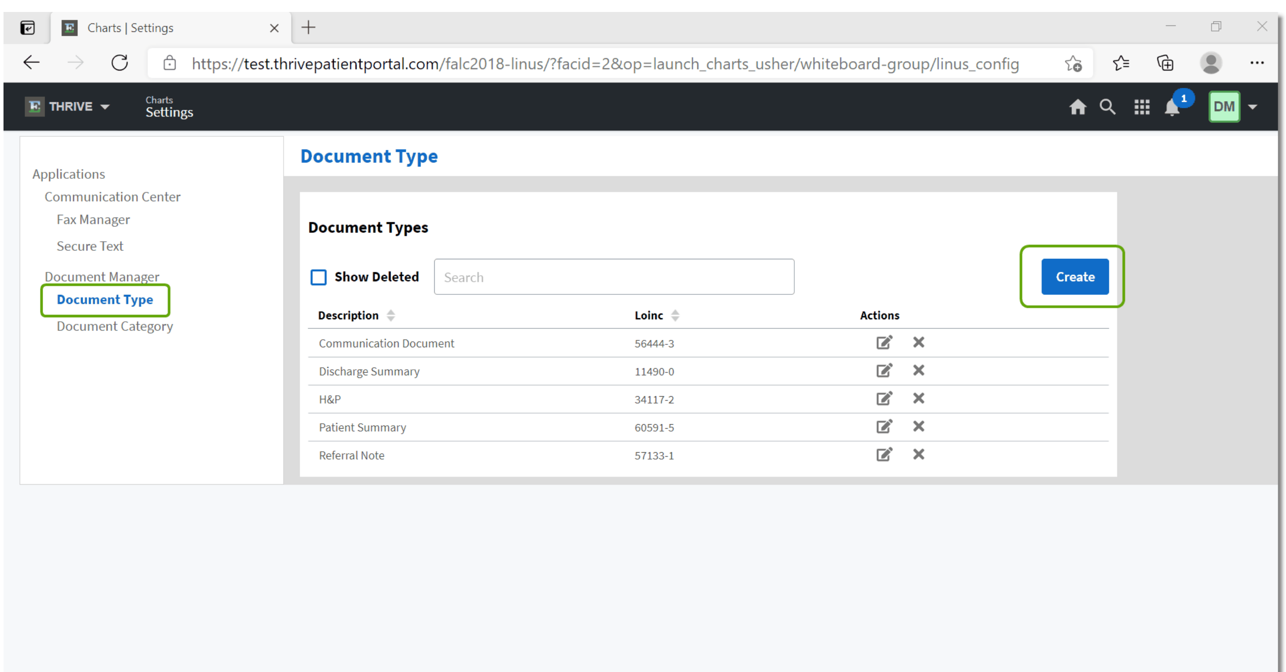


Document Type Setup

Site-specific dropdown menus for Document Type and Document Category will be created in the Configuration area as well.

To add a Document Type, select the **Create** Button.

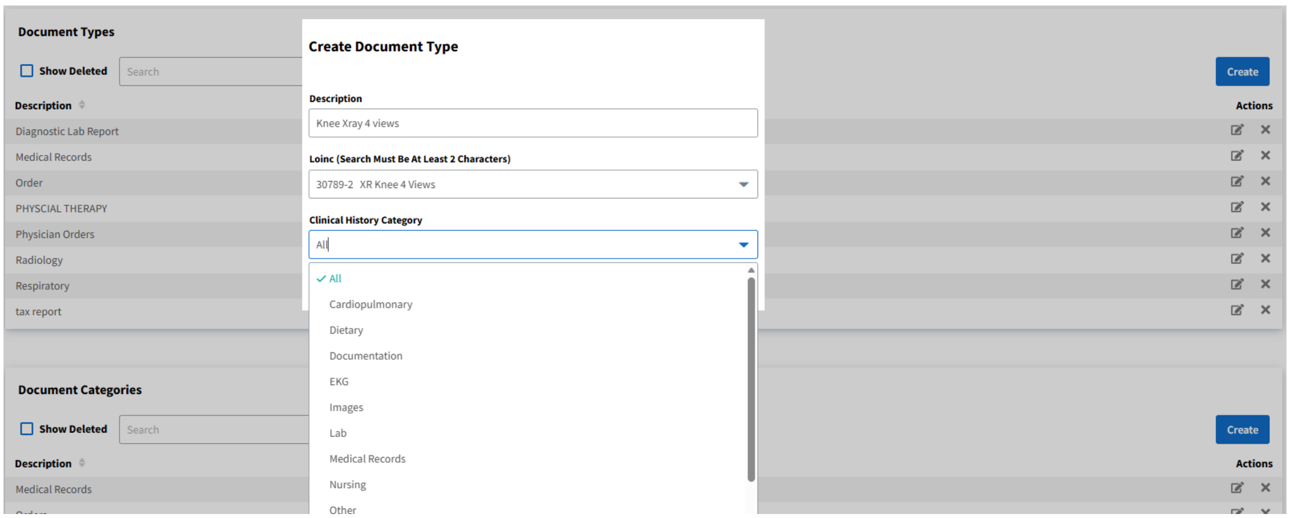
Select **Web Client** > **Configuration Icon** > **Document Type** > **Create Button**



A description and a LOINC code may be added. Recently added functionality allows a default Clinical History Category to be designated for the Note Type (although this can be changed when the communication is saved).

Select **Save**.

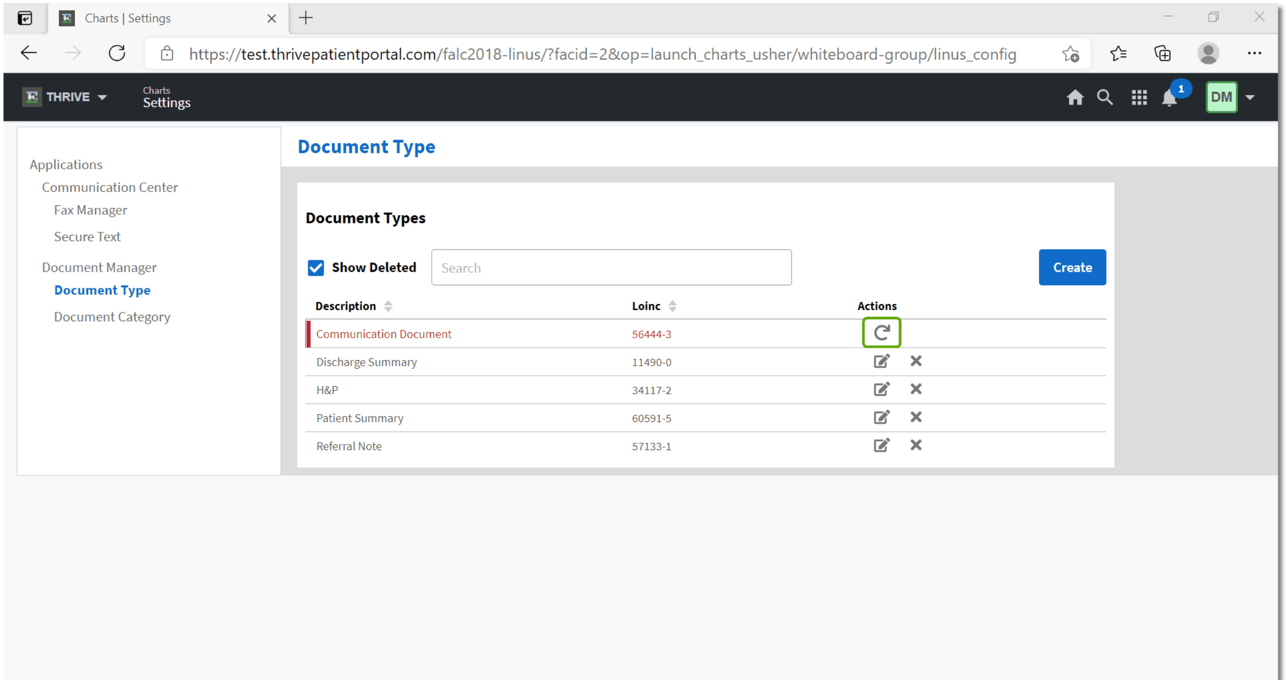
Select **Web Client** > **Configuration Icon** > **Document Type** > **<u>Create Button</u>**



Create Document Type

From the Actions column, a Document Type may be edited  or Deleted . A deleted Document Type may be restored by selecting the **Show Deleted** Button and then the **Restore** icon . Deleted Document Types will appear in the list with a red font.

Select **Web Client** > **Configuration Icon** > **Document Type** > **<u>Create Button</u>**

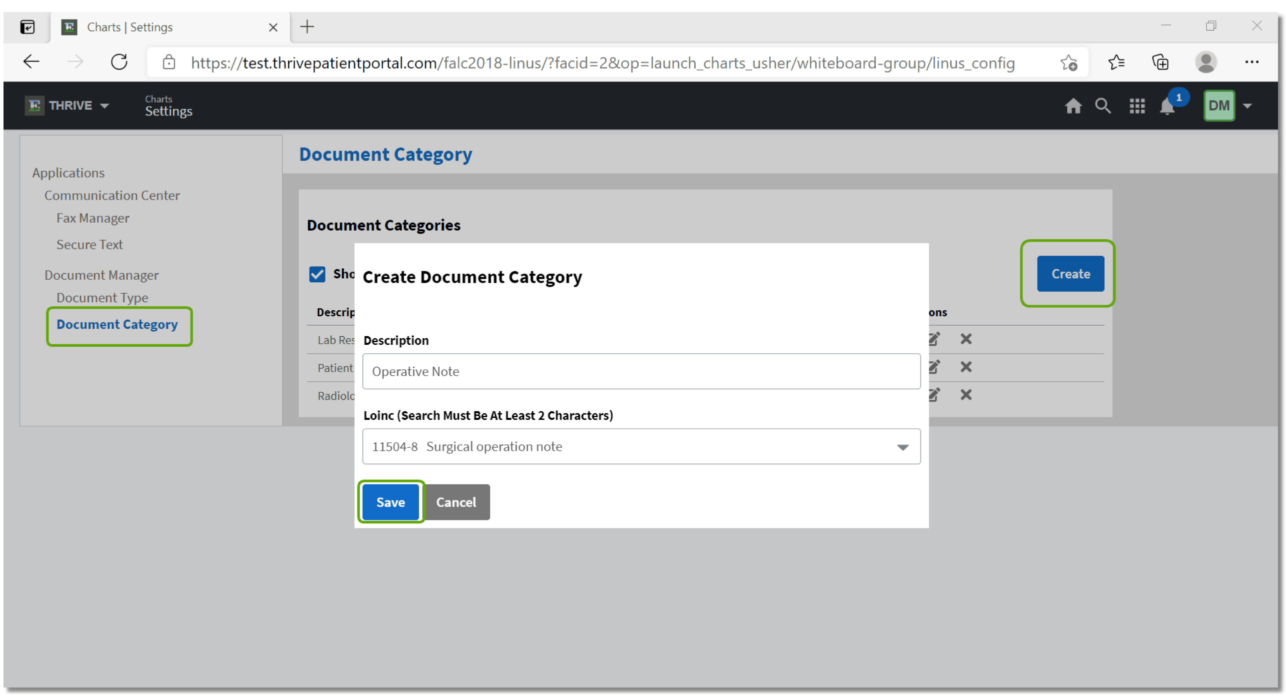


Restoring a Document Type

Document Category Setup

Document Categories are set up in the same way as Document Types. Select **Create** to set up a new Document Category, then give it a description and a LOINC code. Select **Save**.

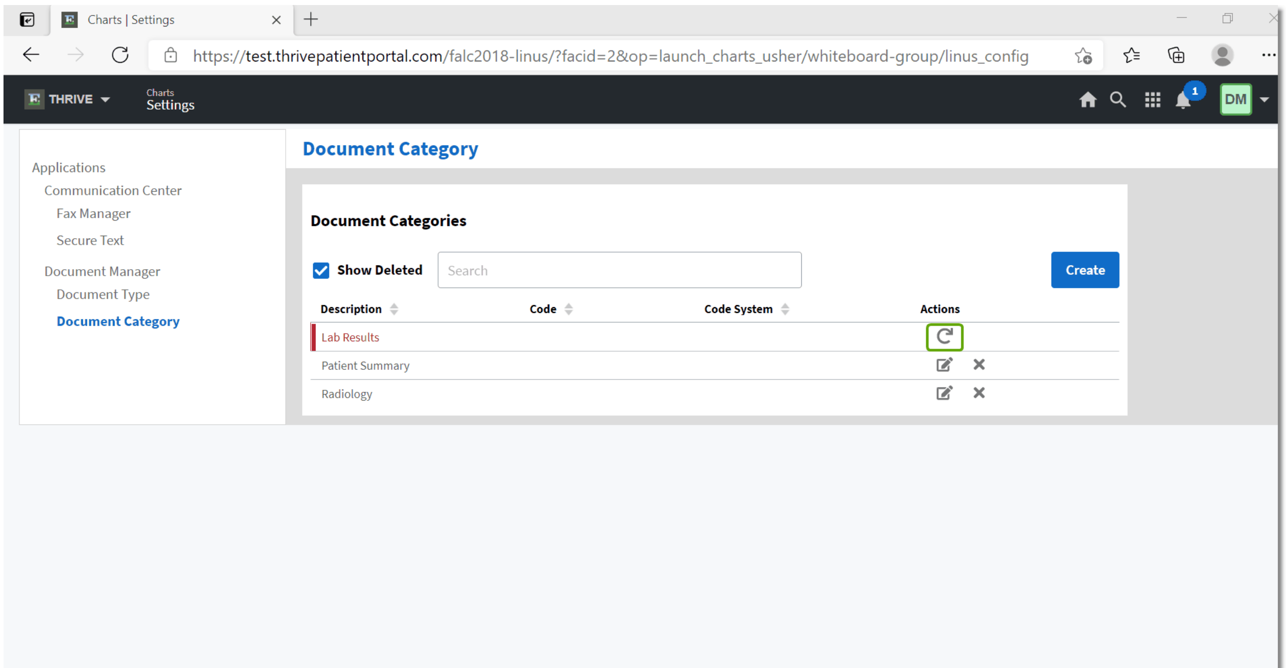
Select **Web Client** > **Configuration Icon** > **Document Category** > **Create Button**



Create Document Category

From the Actions column, a Document Category may be edited or deleted . A deleted Document Category may be restored by selecting the **Show Deleted** Button and then the **Restore** icon . Deleted Document Categories will appear in the list with a red font.

Select **Web Client** > **Configuration Icon** > **Document Category** > **Create Button**



Deleted Document Category

5.2 Viewing a Fax

Incoming Faxes may be viewed in TruBridge EHR from the two following areas:

- The Bell Icon in the Action Bar.
- The Navigation Panel from the Charts contextual navigation.

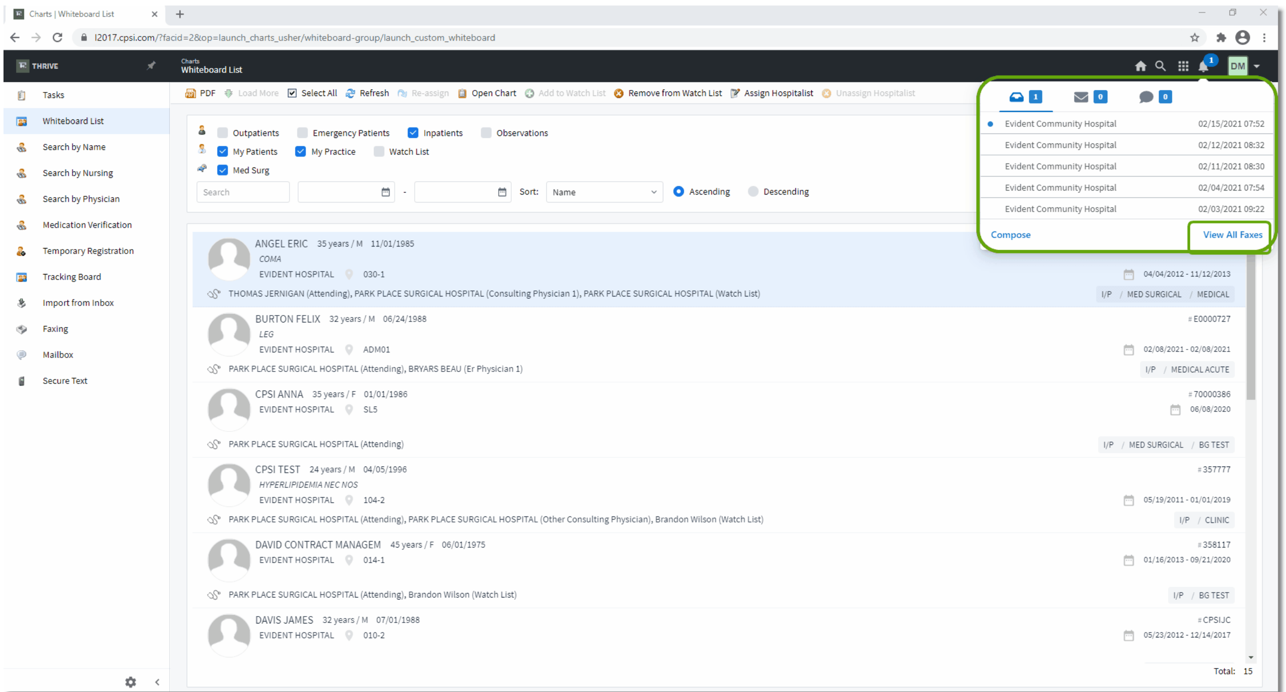
NOTE: The Application permission for Communication Center - Faxing must be granted for access to the Faxing component.

From the Bell Icon

By selecting the Bell Icon from the Action Bar, the user will be able to view the most recent incoming faxes, internal mail messages, and secure texts. The number to the right of the icon indicates the number of unread faxes, messages, and secure texts. Select the Tray icon

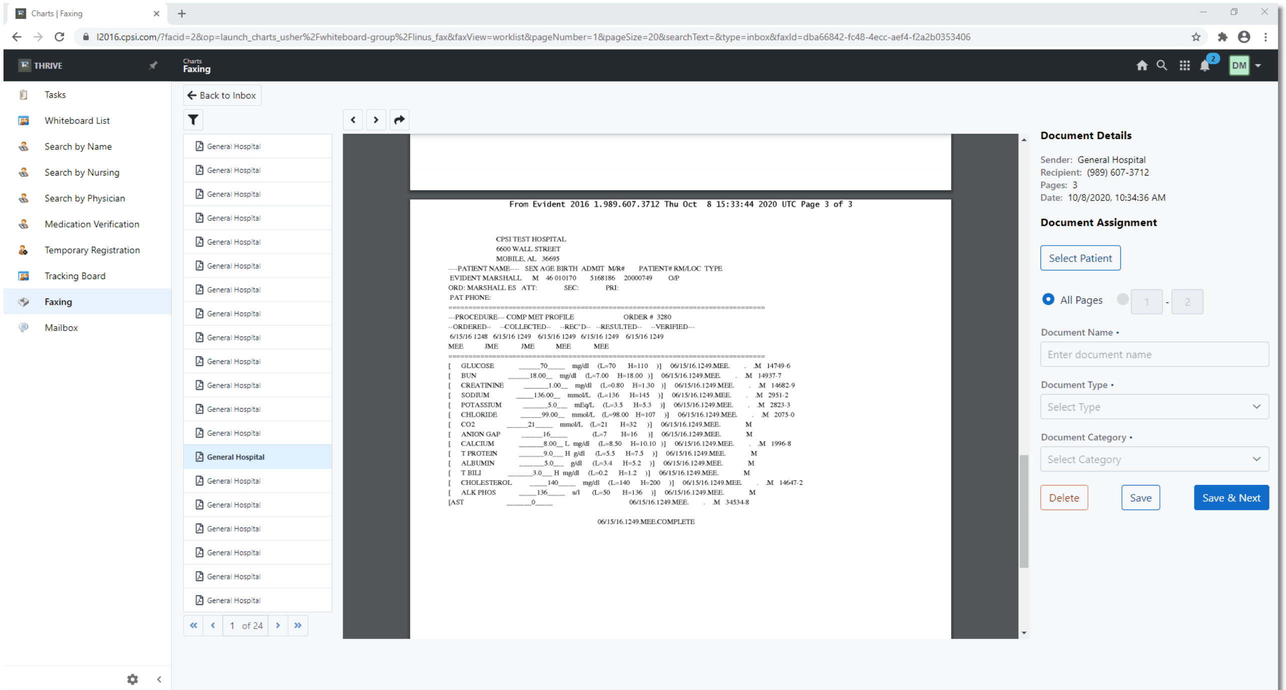
to see faxes. The most recent 5 will display. The number beside the icon will display the number of unread faxes. A blue dot to the left of the fax indicates an unread fax. Any displayed fax may be opened and viewed by selecting it. Select **Compose** to create a new fax, or **View All Faxes** to go to the Fax Inbox.

Select **Web Client** > **Bell Icon**



Bell Icon

Select **Web Client** > **Bell Icon** > **Select Fax**



Opened Fax

The selected Fax will open with the following screen options:

Fax View Screen options:

- Left icon - This will take the user to the previous fax in the list for viewing.
- Right icon - This will take the use to the next fax in the list for viewing.
- Right Arrow - This will allow the user to send the fax as a mail attachment.

Document Details:

- This area includes details of the fax including the Sender, the number to which it was faxed, the number of pages in the fax, and the date and time it was received.

Document Assignment:

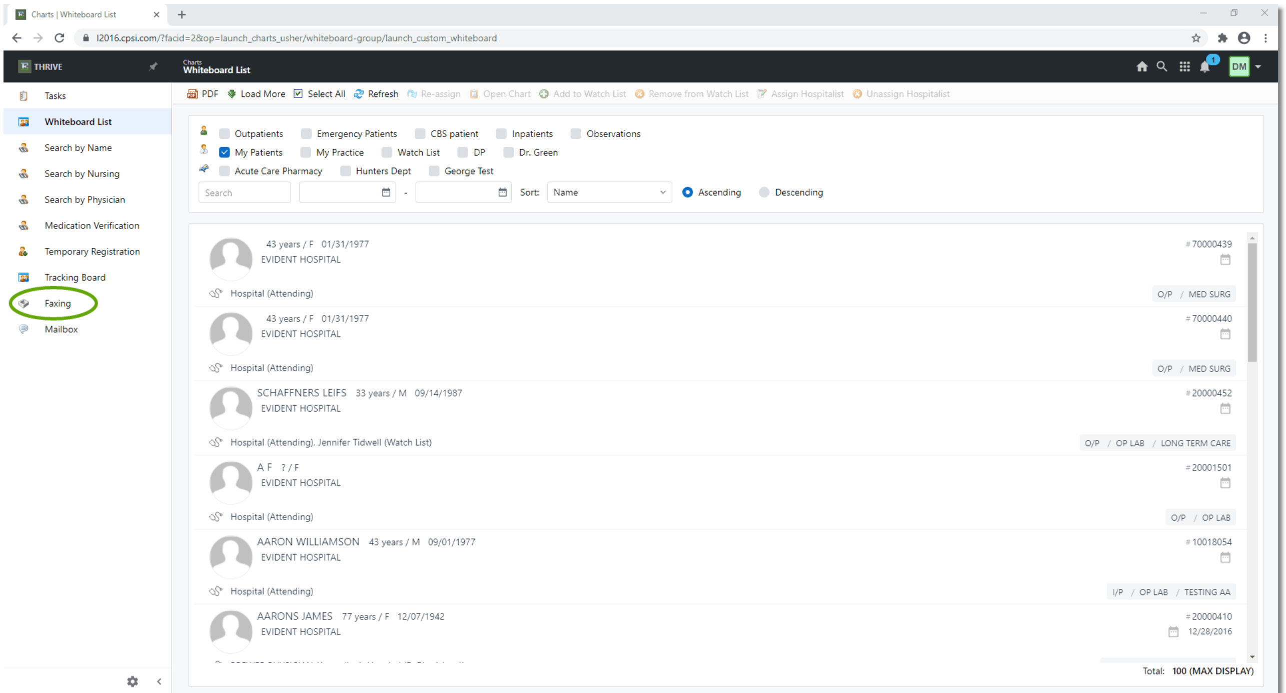
- The fax may be attached to a patient profile or encounter. After you select the patient, an option to choose an encounter will become available. Choosing an encounter is optional.
- Document Name: The Document may be given a user-generated name.
- Document Type: A Document Type may be assigned to the fax. These types are site-defined. Please see the chapter on Department Type Setup
- Document Category: A Document Category may be assigned to the fax. These categories are site-defined. Please see the chapter on Department Category Setup.

After the options for the fax have been chosen, the use may select to **Delete** the fax, **Save** the fax, or **Save & Next**, which will save the fax and take the user to the next fax on the list. Selecting **Delete** will send the fax to the Trash folder and will advance to the next item on the fax list.

From the Navigation Panel

To view an incoming fax from the Navigation Panel, select **Faxing.**

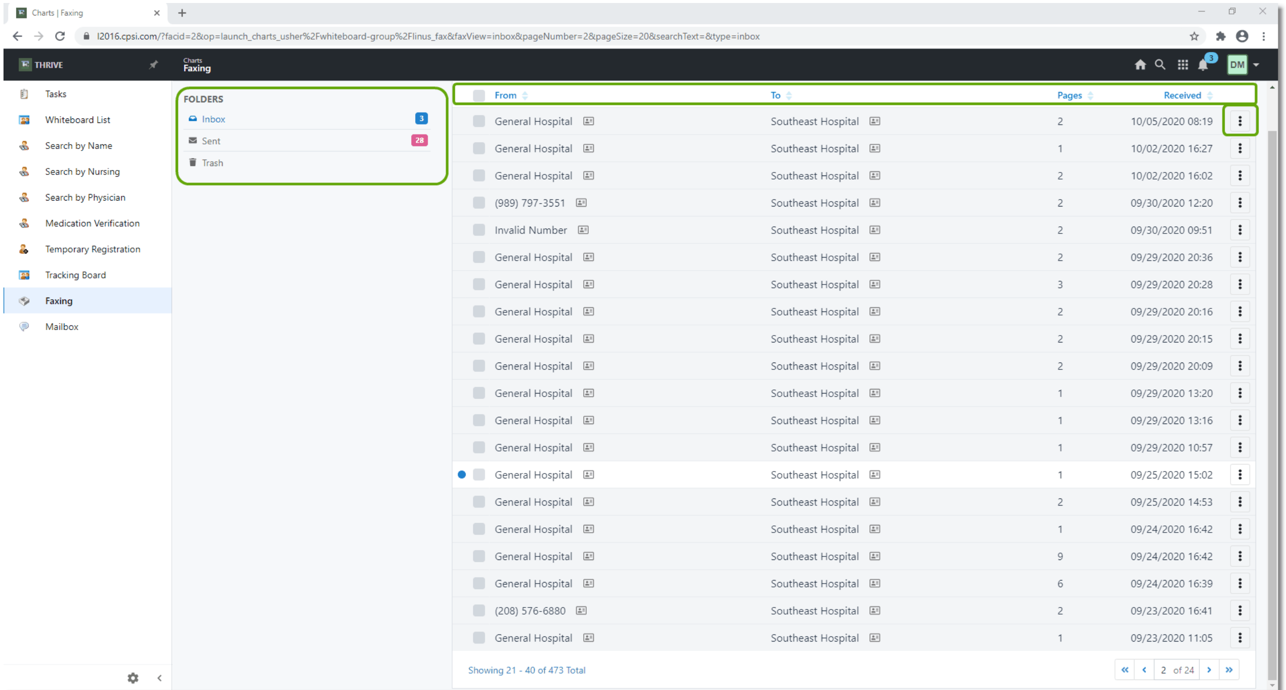
Select **Web Client** > **Faxing**



Navigation Panel

The **Fax Inbox** will display.

Select **Web Client** > **Bell Icon**



Fax Inbox

The Fax Inbox will display all incoming faxes in a list format. The column headings are:

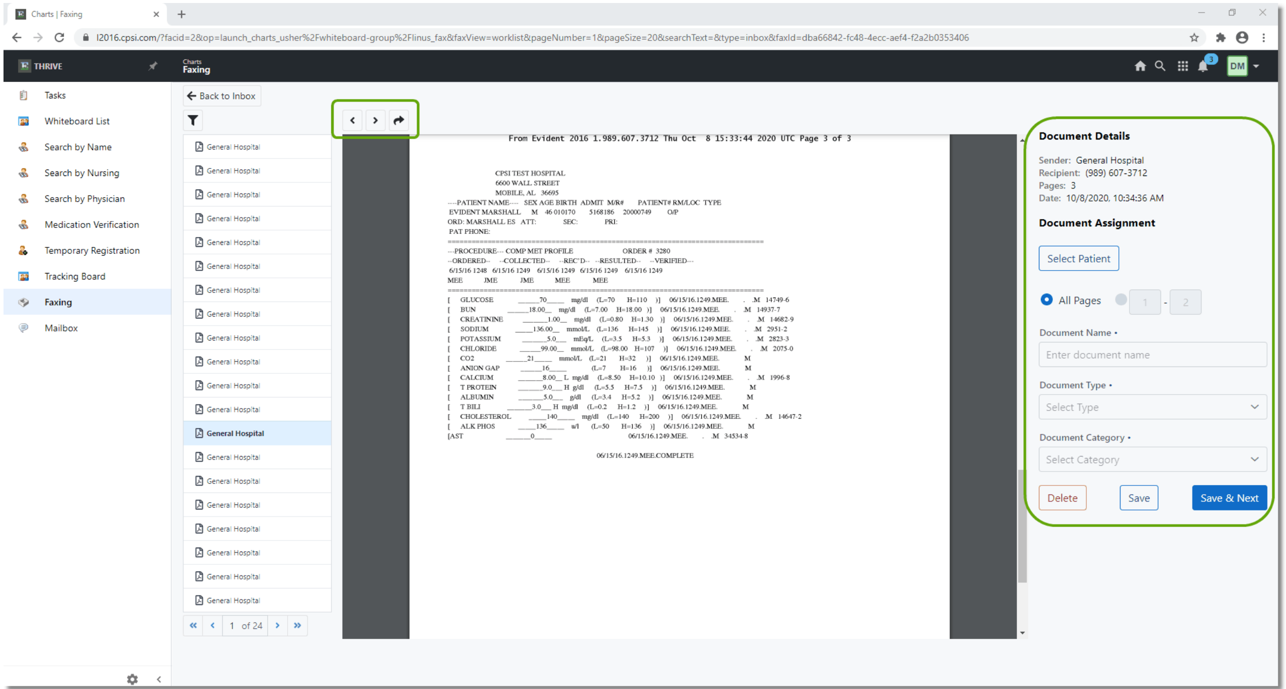
- From - Displays the sender of the fax. If the name of the sender is not in the Address Book, the sender's number will display instead. If the number is not currently in the Address book, select the icon to the right of the number to **Add to a Contact** or **Create New Contact**. A blue dot to the left of **From** column indicates that the fax is unread.
- To: Displays to whom the fax was sent.
- Pages: Displays how many pages are in the fax.
- Received: Displays a time and date stamp of when the fax was received.
- The box with the 3 circles : Click on this box to Delete, Forward, or mark a fax as Unread.

There are 3 folders options to the left. They are:

- Inbox: Displays all incoming active faxes. The number to the right indicates unread faxes.
- Sent: Displays all outgoing or forwarded active faxes. The number to the right indicates faxes that are unsent.
- Trash - Displays all faxes that have been deleted from the active lists.

To View a Fax:
Select the desired fax from any of the 3 folders.

Select **Web Client** > **Faxing** > **Select Fax**



Opened Fax

The selected Fax will open with the following screen options:

Fax View Screen options:

- Left icon (<) - This will take the user to the previous fax in the list for viewing.
- Right icon (>) - This will take the use to the next fax in the list for viewing.
- Right Arrow - This will allow the user to send the fax as a mail attachment.

Document Details:

- This area includes details of the fax including the Sender, the number to which it was faxed, the number of pages in the fax, and the date and time it was received.

Document Assignment:

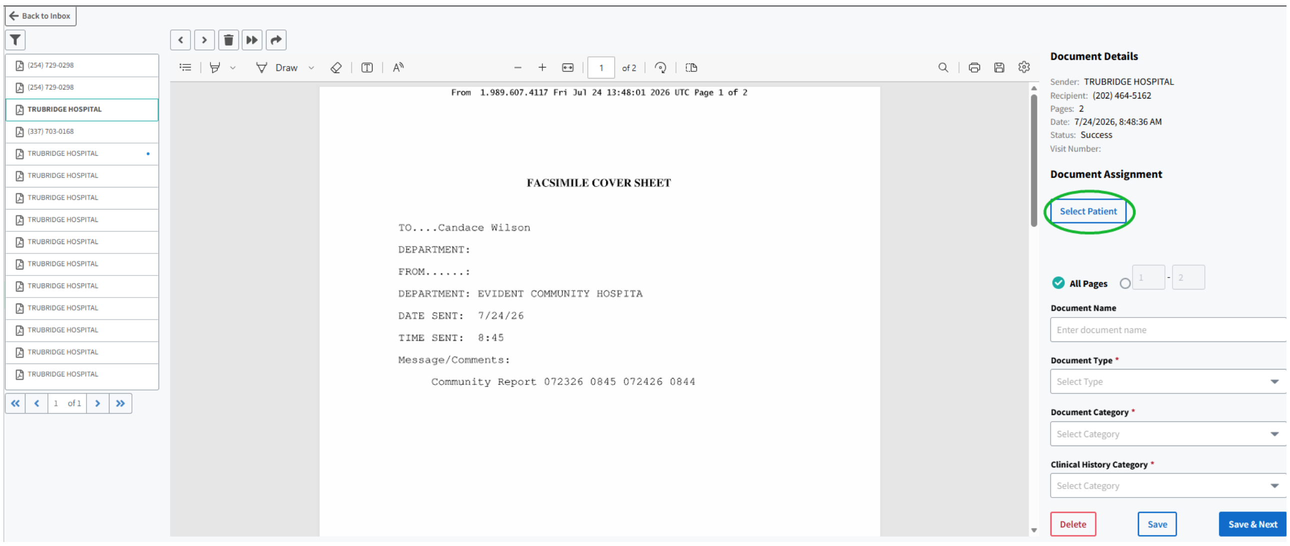
- The fax may be attached to a patient profile encounter. After you select the patient, an option to choose an encounter will become available. Choosing an encounter is optional.
- Document Name: The Document may be given a user-generated name.
- Document Type: A Document Type may be assigned to the fax. These types are site-defined. Please see the chapter on Document Type Setup.
- Document Category: A Document Category may be assigned to the fax. These categories are site-defined. Please see the chapter on Document Category Setup.

After the options for the fax have been chosen, the use may select to **Delete** the fax, **Save** the fax, or **Save & Next**, which will save the fax and take the user to the next fax on the list. Selecting **Delete** will send the fax to the Trash folder and will advance to the next item on the fax list.

Attaching a Fax to a Patient

A fax can be attached to a patient on the profile level or to a specific patient encounter. Please follow the steps below to attach a fax to a patient profile or specific encounter.

Select **Web Client** > **Faxing** > **Select Fax** > **<u>Document Assignment</u>**

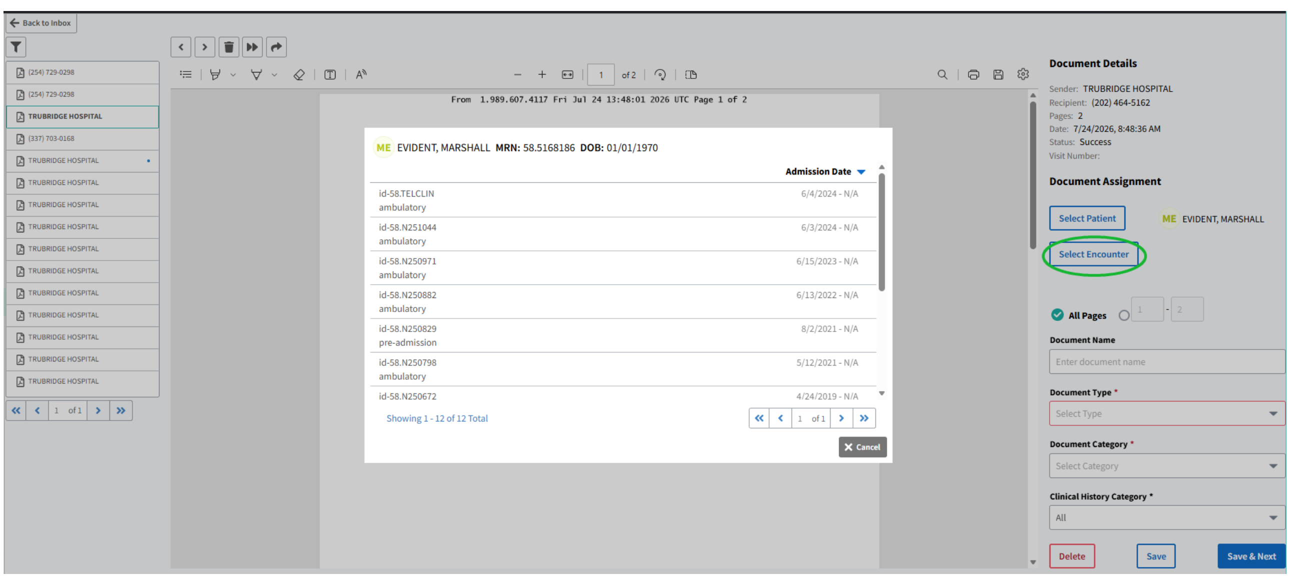


Fax Viewer

From the Document Assignment area:

- Select the desired patient from the Select Patient button

Select **Web Client** > **Faxing** > **Select Fax** > **Document Assignment** > **<u>Select Encounter</u>**



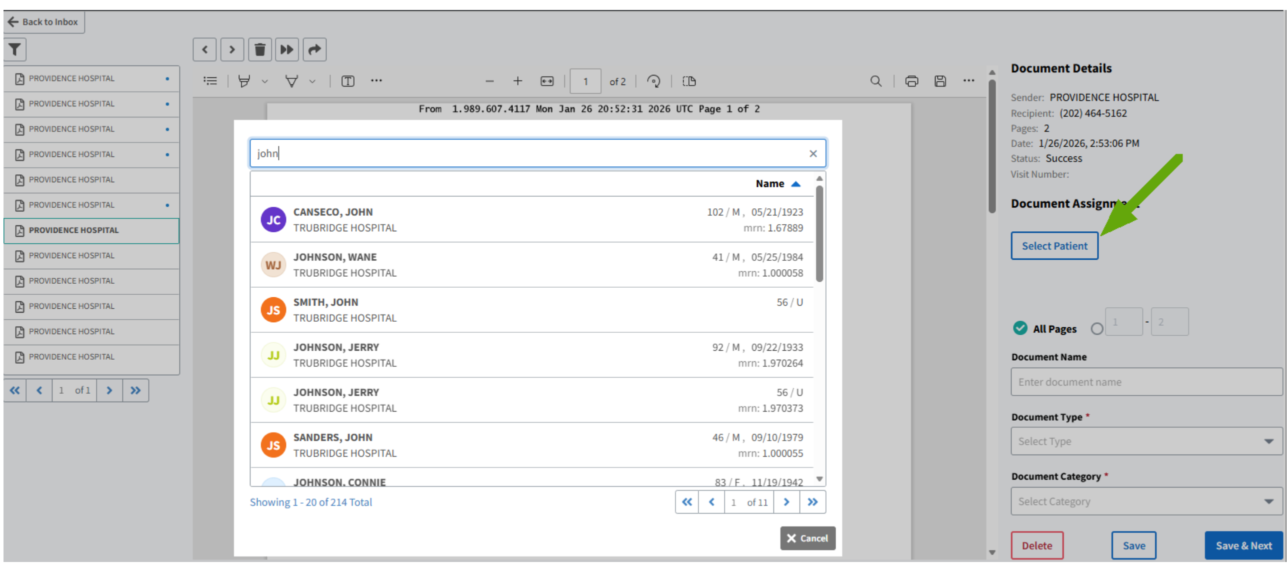
Select Encounter

- After choosing the patient, the **Select Encounter** button will activate, allowing for the fax to be attached to a specific encounter, if desired.
- Choose the pages to be attached.
- **Document Name**, **Document Type**, and **Document Category** are required fields in order to save the fax. Document Type and Document Category are facility-defined. If the Document Type selected has a default Clinical History Category, this will automatically pull into the Clinical History Category dropdown box. This can be changed if desired. Please see the chapter on Document Type Setup and Document Category Setup.
- After all selections have been made, the user may decide to **Save**, and **Save and Next** (which will save the current fax and then take you to the next fax in the listing).
- **Delete** may be selected at any time to delete the fax, and to advance to the next item in the fax list.

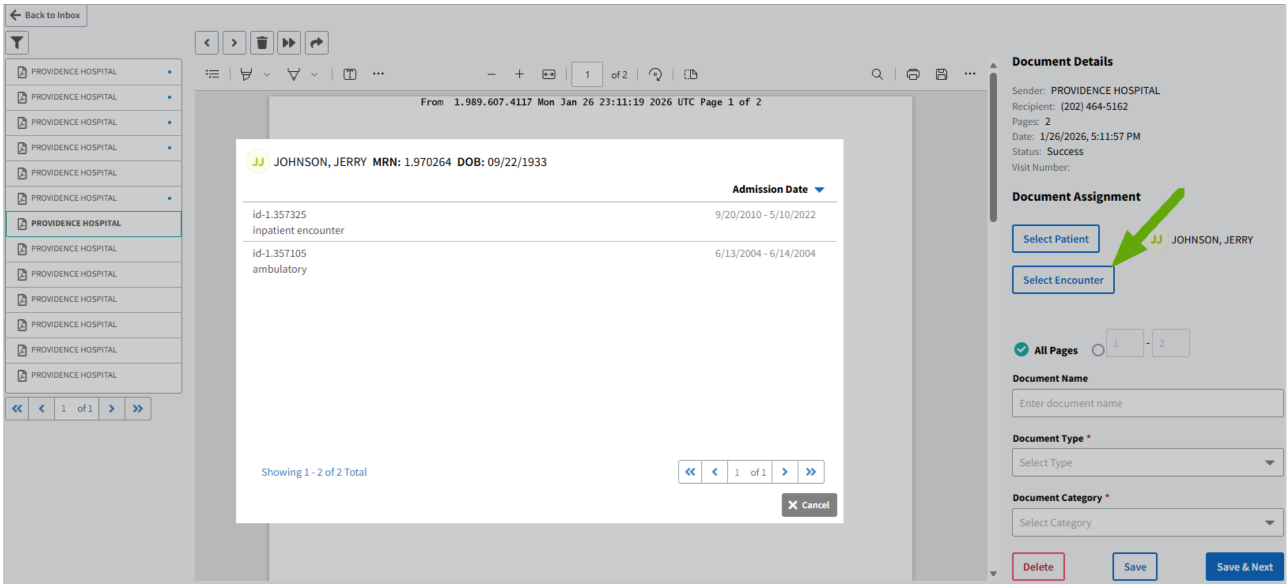
Routing a Fax to a Provider Esign Queue

With the 22.03.01 system update, there will be the ability to route a document directly to a provider's Esign queue. The system no longer requires linking image titles and sending documents to the assign scanned images queue
Please follow the steps below.

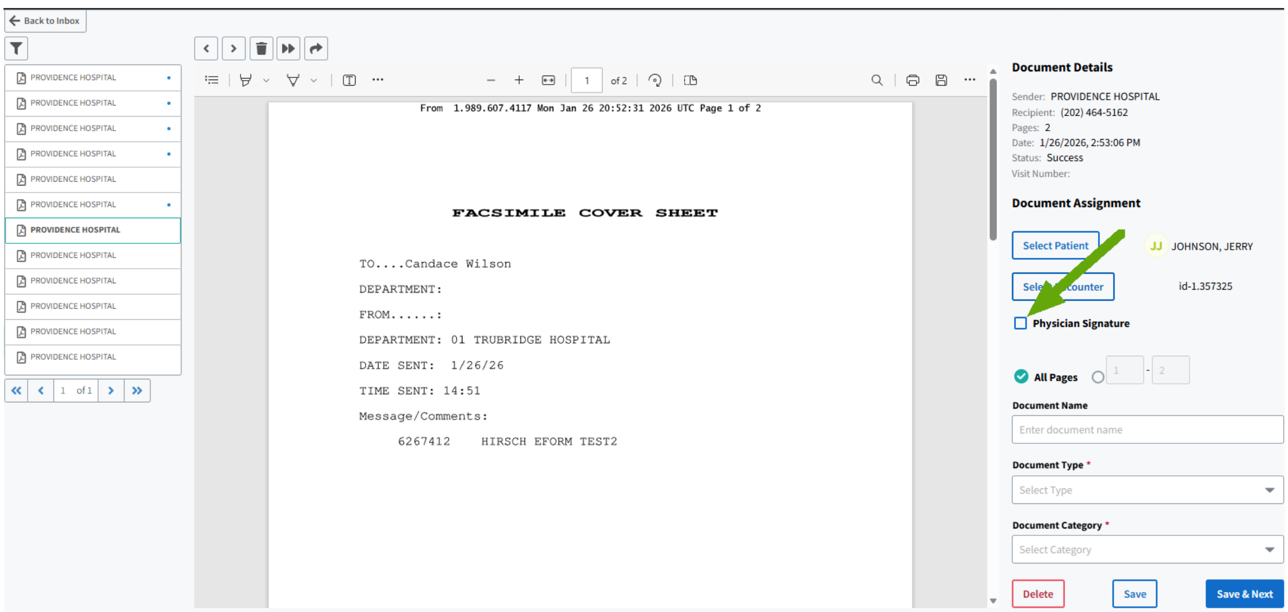
Step 1. From an open document, select the desired Patient.



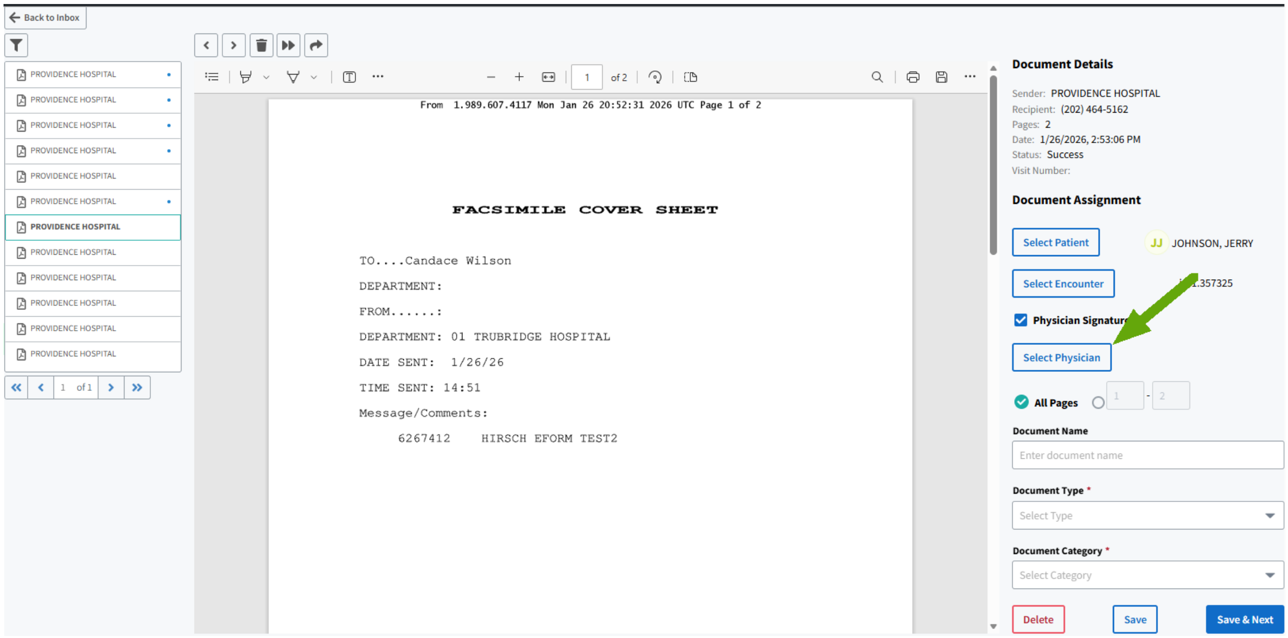
Step 2. Select the Encounter.



Step 3. Select **Physician Signature**.



Step 4. Select and Search for the proper physician.



The documents will be shown in the Esign queue and the Esign View folder in Tasks.

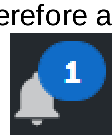
5.3 Composing a Fax

TruBridge EHR offers several options for composing a new fax:

- The Bell Icon in the Action Bar.
- The Navigation Panel from the Charts contextual navigation.
- Clinical History from within a patient chart.
- Other options for composing a fax will be programmed in updates to Communication Center.

From the Bell Icon

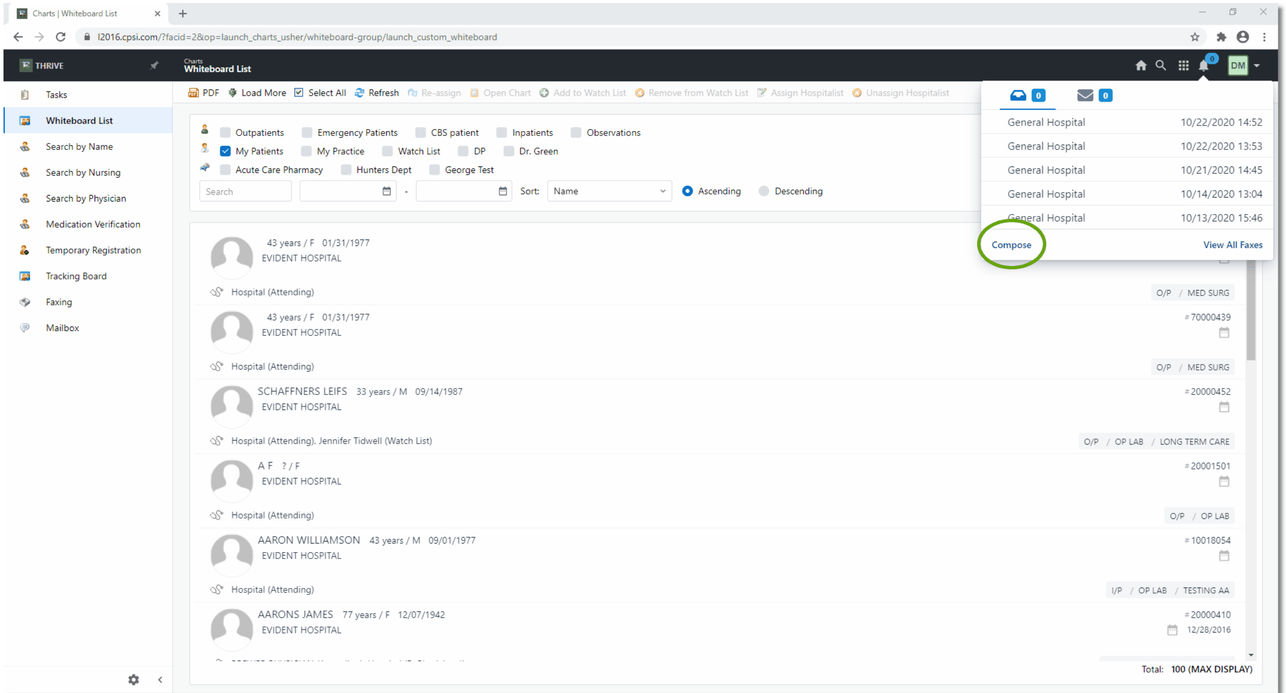
The Bell Icon is on the Action Bar, and is therefore accessible at any time while in TruBridge EHR.

To compose a new fax, select the **Bell Icon** 

, select the **Fax tray** 

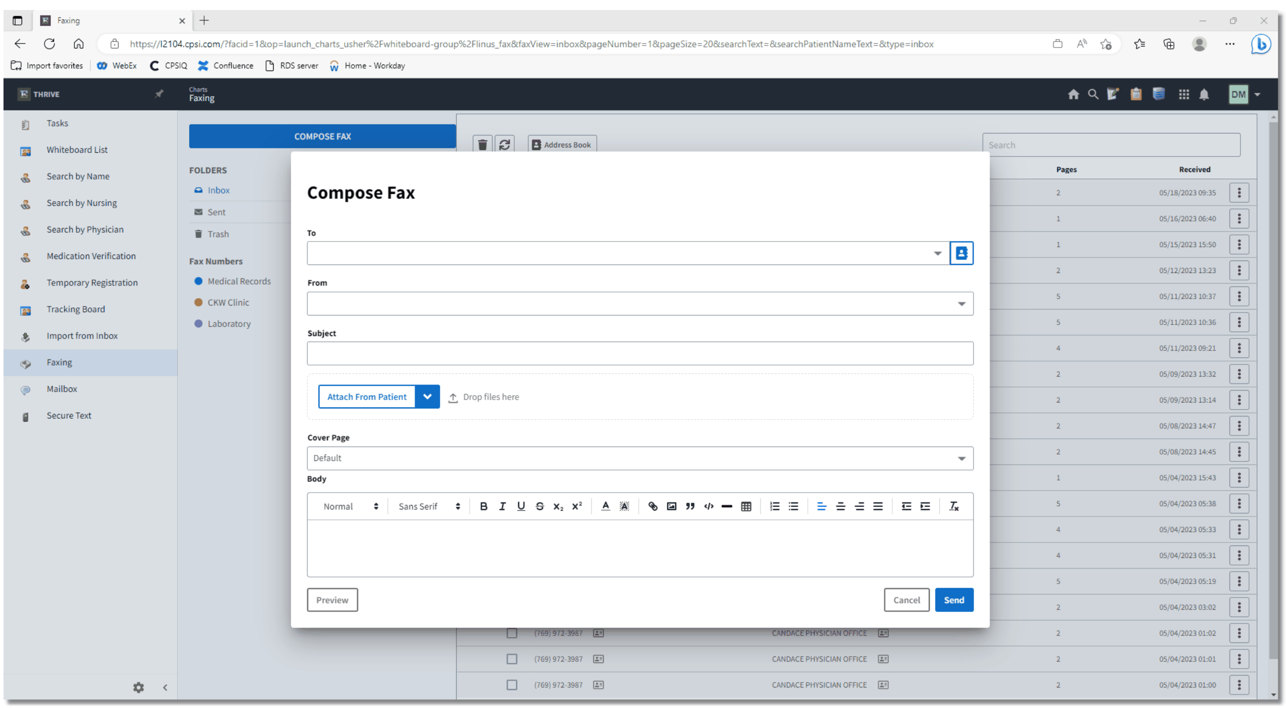
, then select **Compose**:

Select **Web Client** > **Bell Icon**



Communication Center

Select **Web Client** > **Bell Icon** > **Tray Icon** > **<u>Compose</u>**



Compose Fax

From the Compose Fax screen, follow the steps below to compose and send a fax:

The "To" field is for the recipient of the fax. There are 2 options for this field:

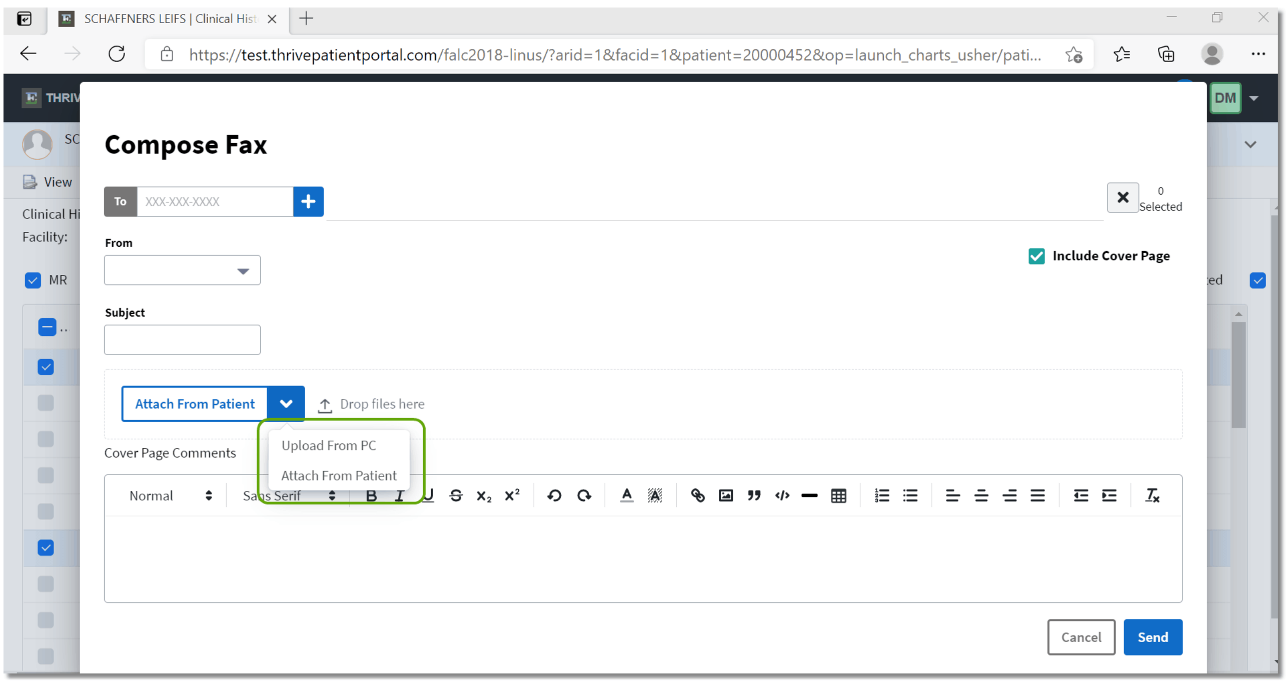
- Begin by entering the name of the recipient. This will search the Address Book for matches.
- Enter a 10-digit number directly in the number field. This will also search for any matching numbers.

The "X" to the right of each recipient's name in the "To" field will remove that specific individual. There is no limit to the number of recipients of the fax.

The "From" field will have a site specific dropdown menu from which to select. The options will be the fax numbers that have been set up through Faxage and to which the user has been given access. Select the "Cover Page" dropdown box to have a cover page attached as the first page of the fax. This will display a listing of all fax cover pages. See the Fax Cover Page section under "Required Setup" for instructions on creating a Cover Page.

Attachments may be added to the fax. They may be uploaded from the user's computer or directly from the patient chart.

Select **Web Client** > **Bell Icon** > **Tray Icon** > **Compose** > **<u>Attach from Patient</u>**



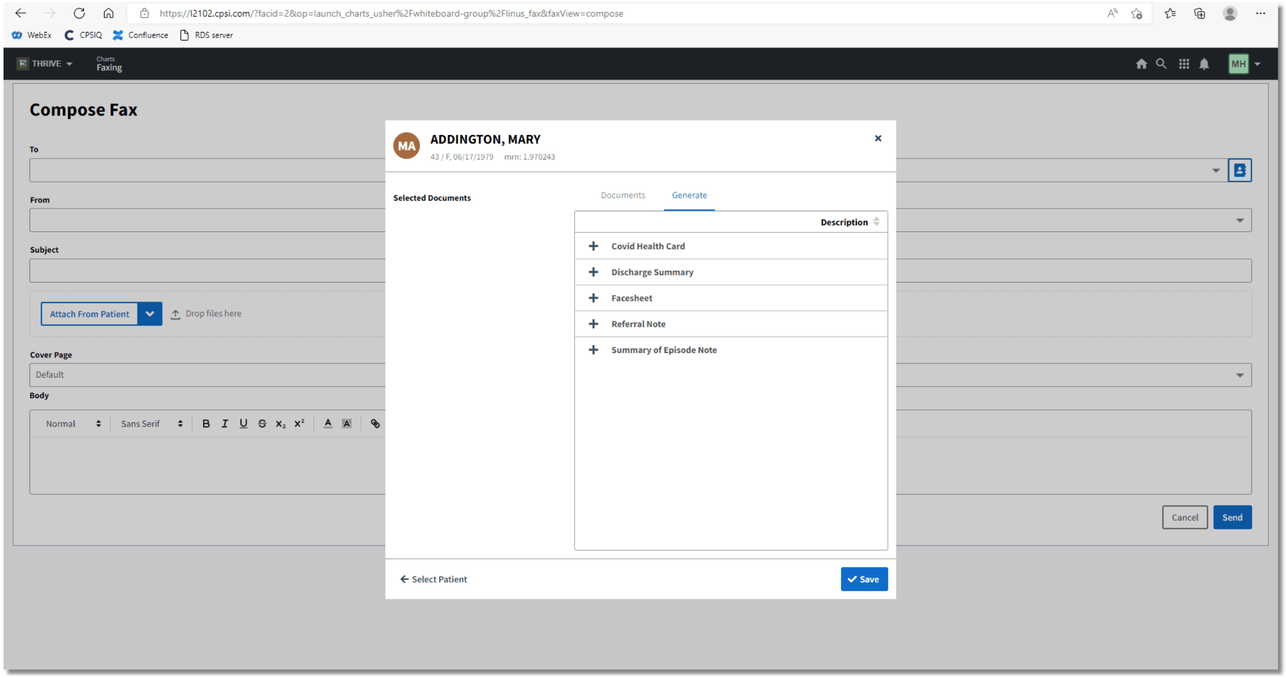
Add additional attachments

In addition to documentation from the Patient chart, other documents may be generated that may be attached to the fax. These documents include:

- Covid Health Card
- Discharge Summary
- Facesheet
- Referral Note
- Summary of Episode Note

Select the desire document and select **Save** to attach the document to the outgoing fax. Attached documentation may be previewed prior to sending.

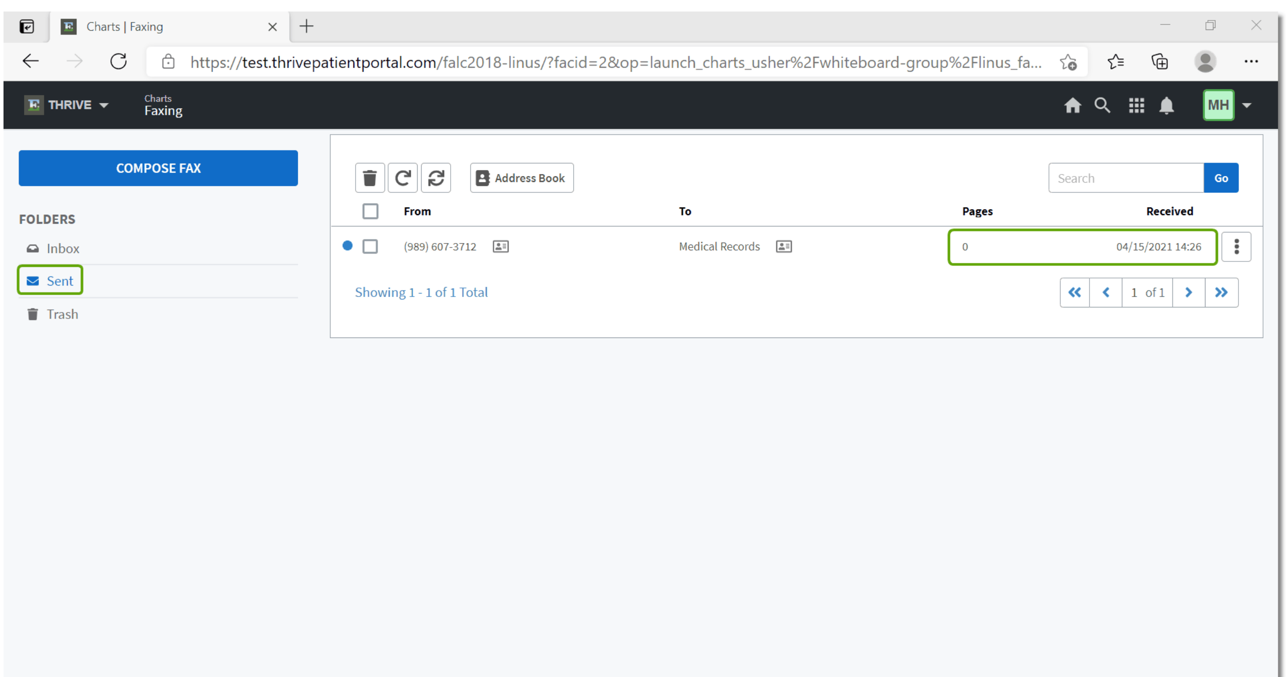
Select **Web Client** > **Bell Icon** > **Tray Icon** > **Compose** > **<u>Attach from Patient</u>**



Generate documents

In order to view a fax that was sent, select the **Sent** folder. A time/date stamp will display in the **Sent** column. The number of pages sent will display in the **Pages** column.

Select **Web Client** > **Faxing** > **<u>Sent Folder</u>**

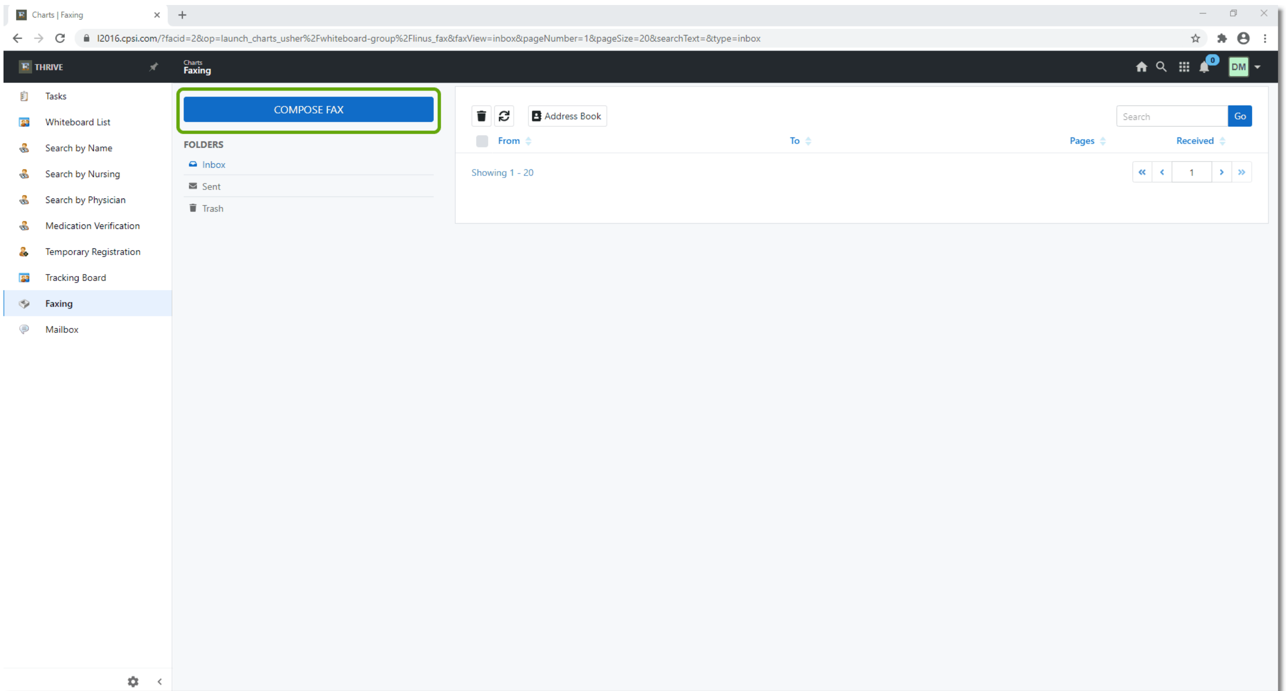


Fax Confirmation

From the Navigation Panel

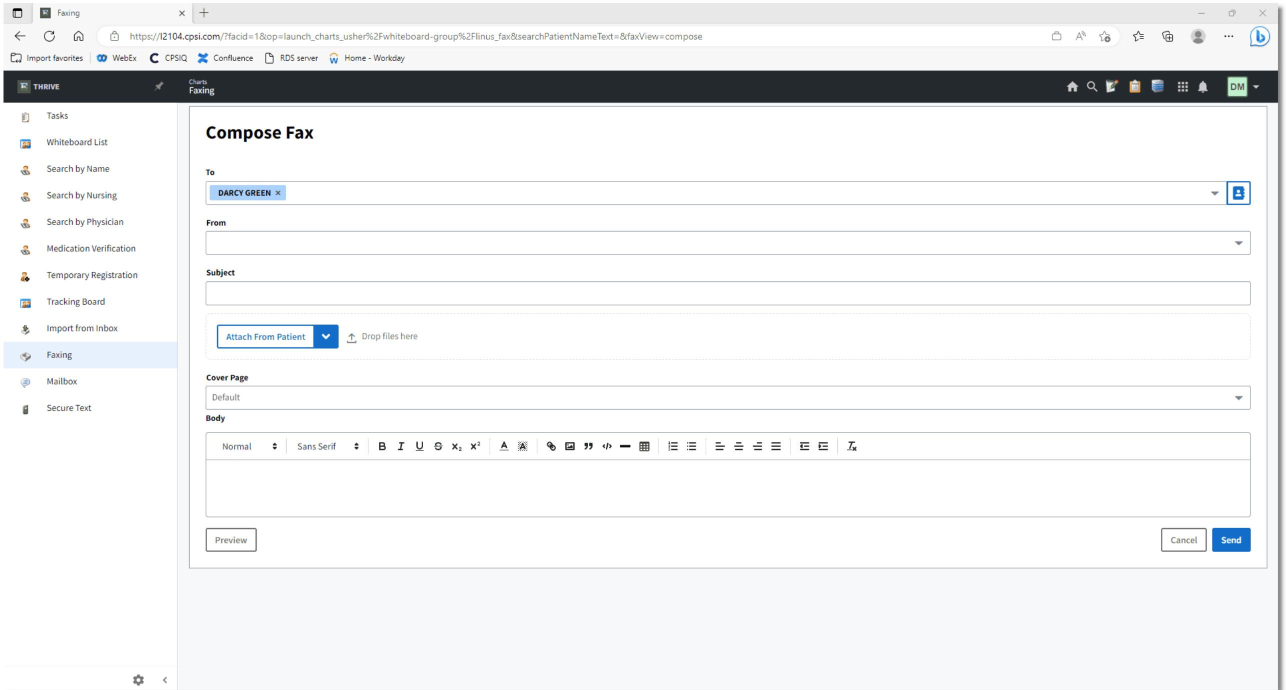
Faxing may be accessed from the Charts contextual Navigation Panel. To compose a fax from the Navigation Panel, select Faxing and then Compose Fax.

Select **Web Client** > **Faxing**



Faxing from the Navigation Panel

Select **Web Client** > **Faxing** > **Compose Fax**



Compose Fax

From the Compose Fax screen, follow the steps below to compose and send a fax:

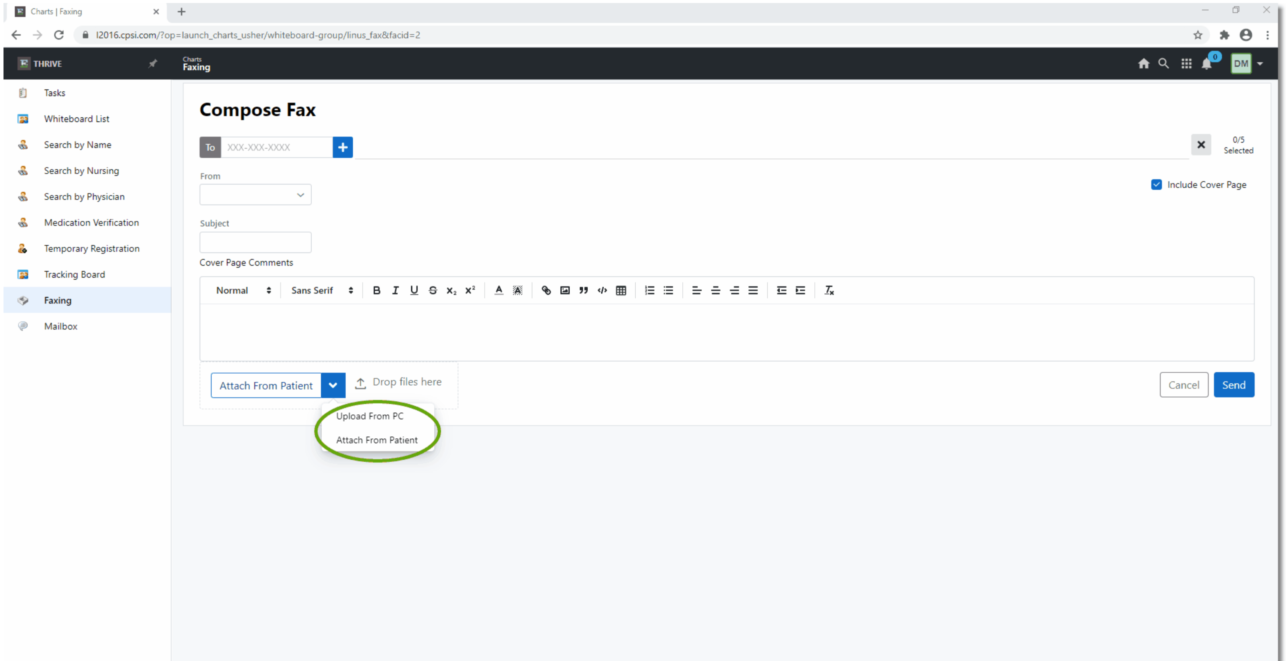
The "To" field is for the recipient of the fax. There are 2 options for this field:
- Begin by entering the name of the recipient. This will search the Address Book for matches.
- Enter a 10-digit number directly in the number field. This will also search for any matching numbers.

The "X" to the right of each recipient's name in the "To" field will remove that specific individual. There is no limit to the number of recipients of the fax.

The "From" field will have a site specific dropdown menu from which to select. The options will be the fax numbers that have been set up through Faxage and to which the user has been given access. Select the "Cover Page" dropdown box to have a cover page attached as the first page of the fax. This will display a listing of all fax cover pages. See the Fax Cover Page section under "Required Setup" for instructions on creating a Cover Page.

Attachments may be added to the fax. They may be uploaded from the user's computer or directly from the patient chart. Attached documentation may be previewed prior to sending.

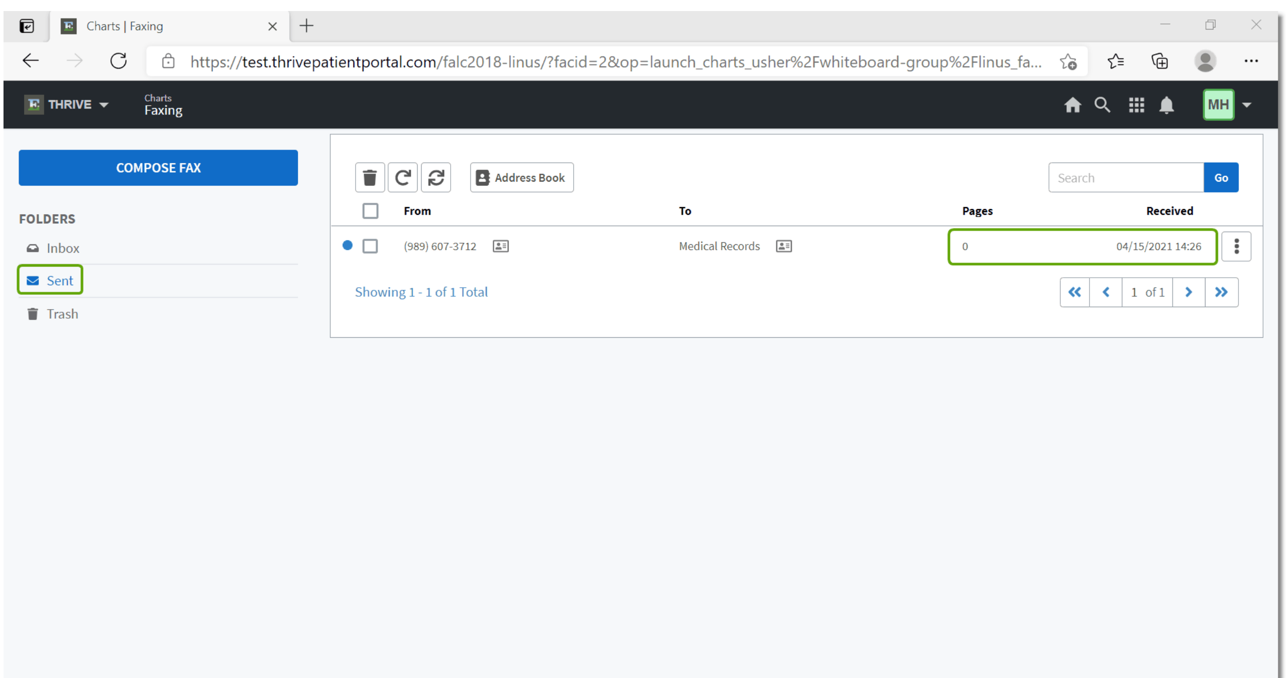
Select **Web Client** > **Faxing** > **Compose Fax** > **Attach from Patient**



Attach from Patient

In order to view a fax that was sent, select the **Sent** folder. A time/date stamp will display in the **Sent** column. The number of pages will display in the **Pages** column.

Select **Web Client** > **Faxing** > **<u>Sent Folder</u>**

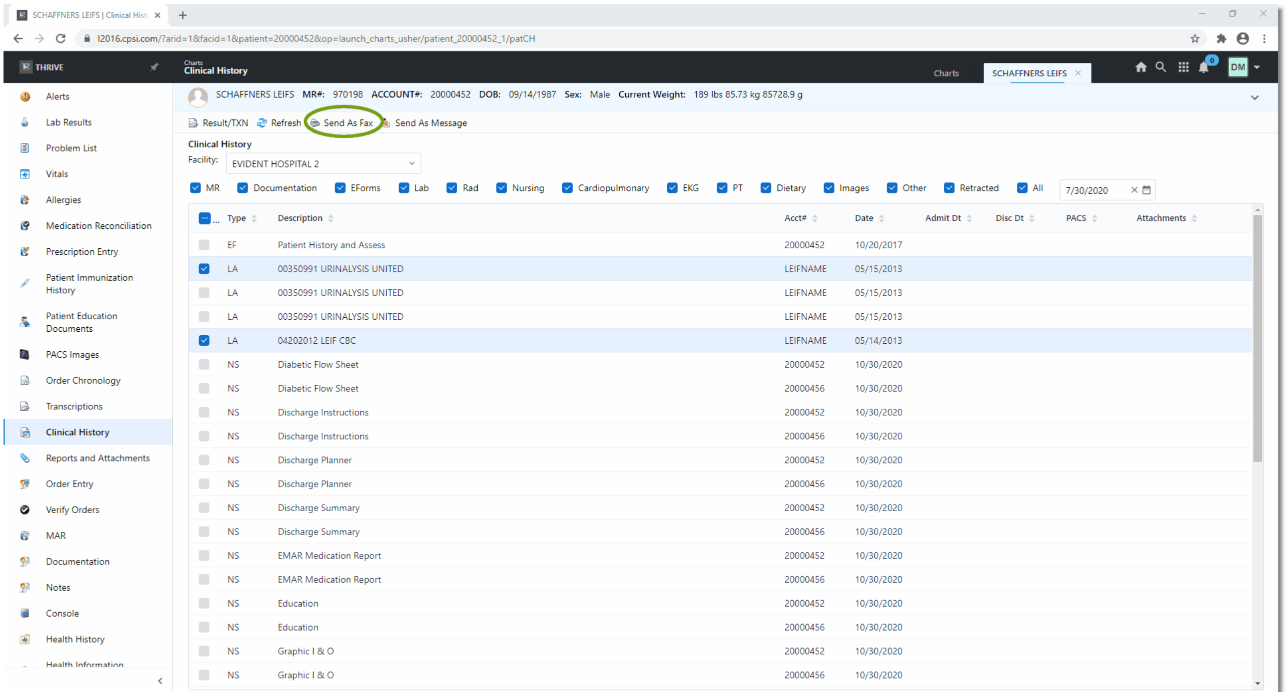


Fax Confirmation

From Clinical History

From the Clinical History application within a patient chart, select the box to the left of the item(s) to be faxed. Then select **Send As Fax.**

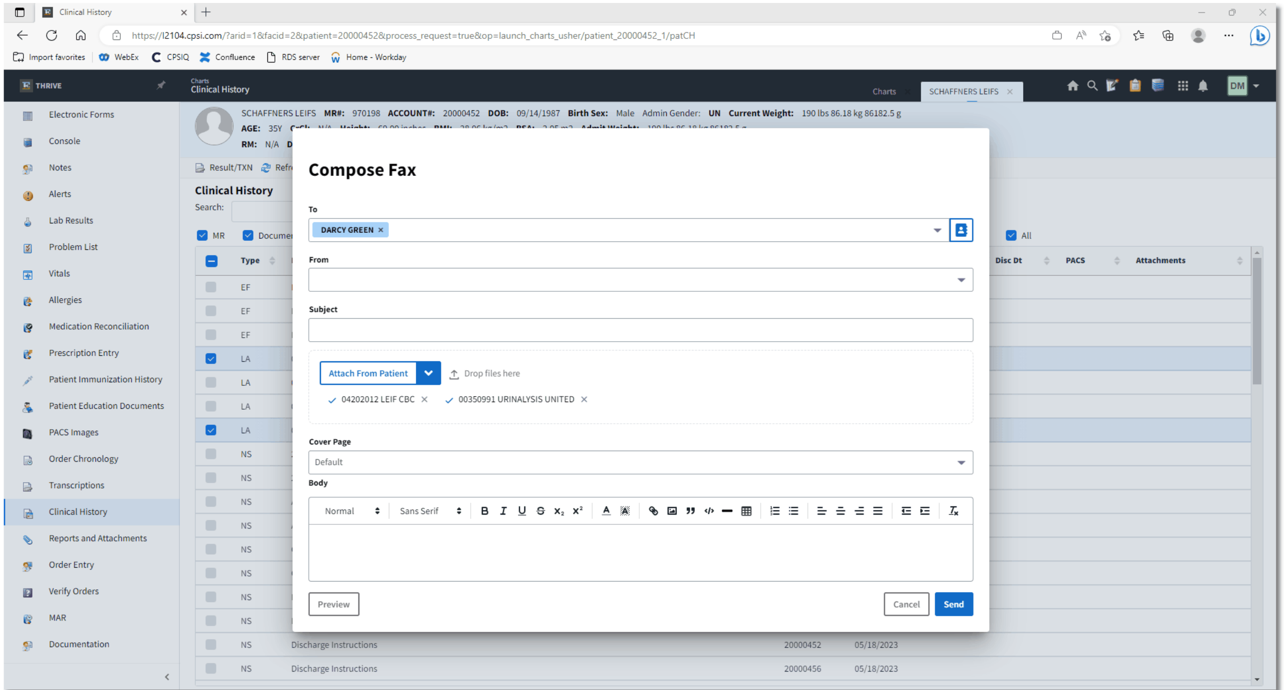
Select **Web Client** > **Whiteboard List** > **Select Patient** > **Clinical History**



Clinical History

The selected documents will now be Attachments on the Fax.

Select **Web Client** > **Whiteboard List** > **Select Patient** > **Clinical History** > **Send as Fax**



Compose Fax

From the Compose Fax screen, follow the steps below to compose and send a fax:

The "To" field is for the recipient of the fax. There are 2 options for this field:

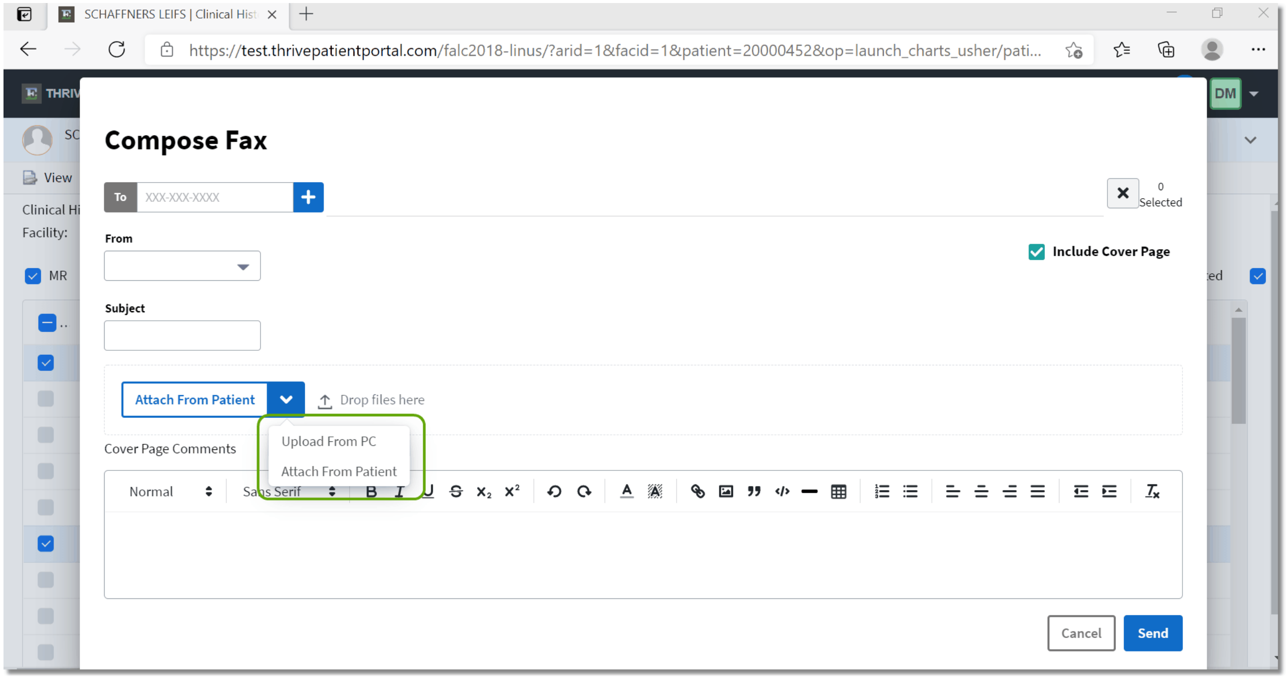
- Begin by entering the name of the recipient. This will search the Address Book for matches.
- Enter a 10-digit number directly in the number field. This will also search for any matching numbers.

The "X" to the right of each recipient's name in the "To" field will remove that specific individual. There is no limit to the number of recipients of the fax.

The "From" field will have a site specific dropdown menu from which to select. The options will be the fax numbers that have been set up through Faxage and to which the user has been given access. Select the "Cover Page" dropdown box to have a cover page attached as the first page of the fax. This will display a listing of all fax cover pages. See the Fax Cover Page section under "Required Setup" for instructions on creating a Cover Page.

Additional attachments may be added to the fax. They may be uploaded from the user's computer or directly from the patient chart. Attached documentation may be previewed prior to sending.

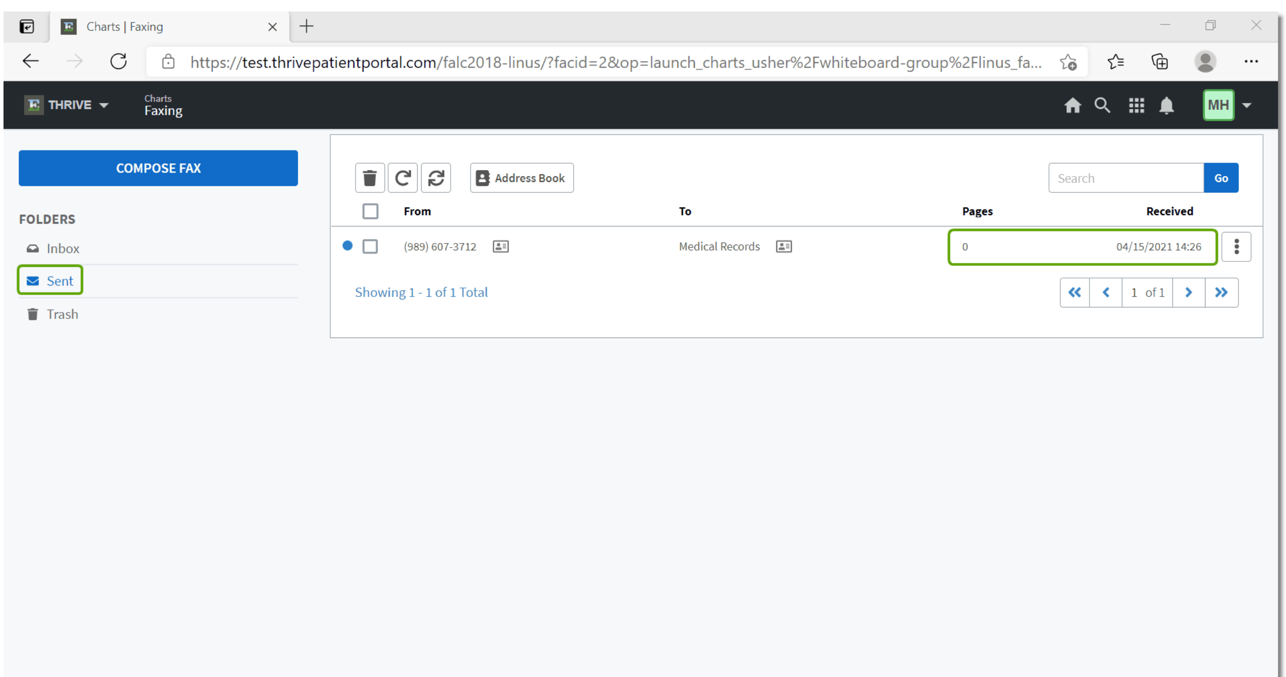
Select **Web Client** > **Whiteboard List** > **Select Patient** > **Clinical History** > **Send as Fax**



Add additional attachments

In order to view a fax that was sent, open Faxing from the Navigation Panel and select the **Sent** folder. A time/date stamp will display in the **Sent** column. The number of pages will display in the **Pages** column.

Select **Web Client** > **Faxing** > **<u>Sent Folder</u>**



Fax Confirmation

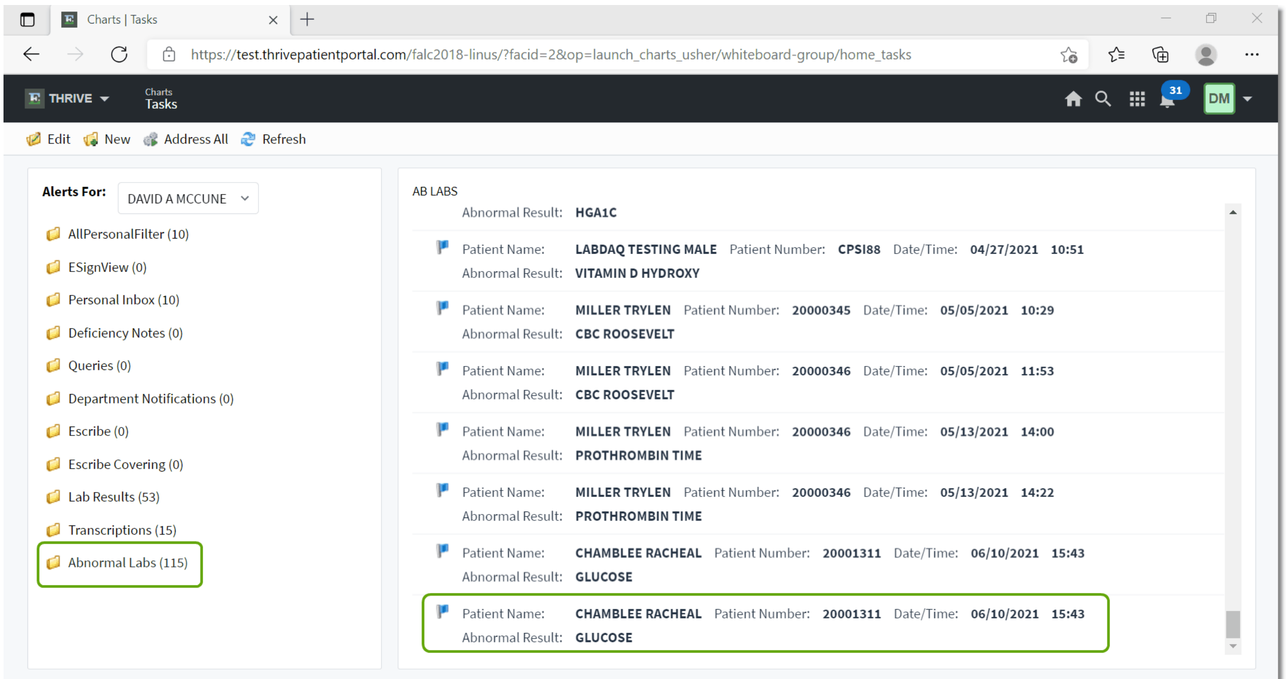
From the Task Screen

A fax may be sent from the following folders in the Task Screen:

- Lab Results
- Abnormal Lab Results
- Transcriptions

Select the desired folder and notification.

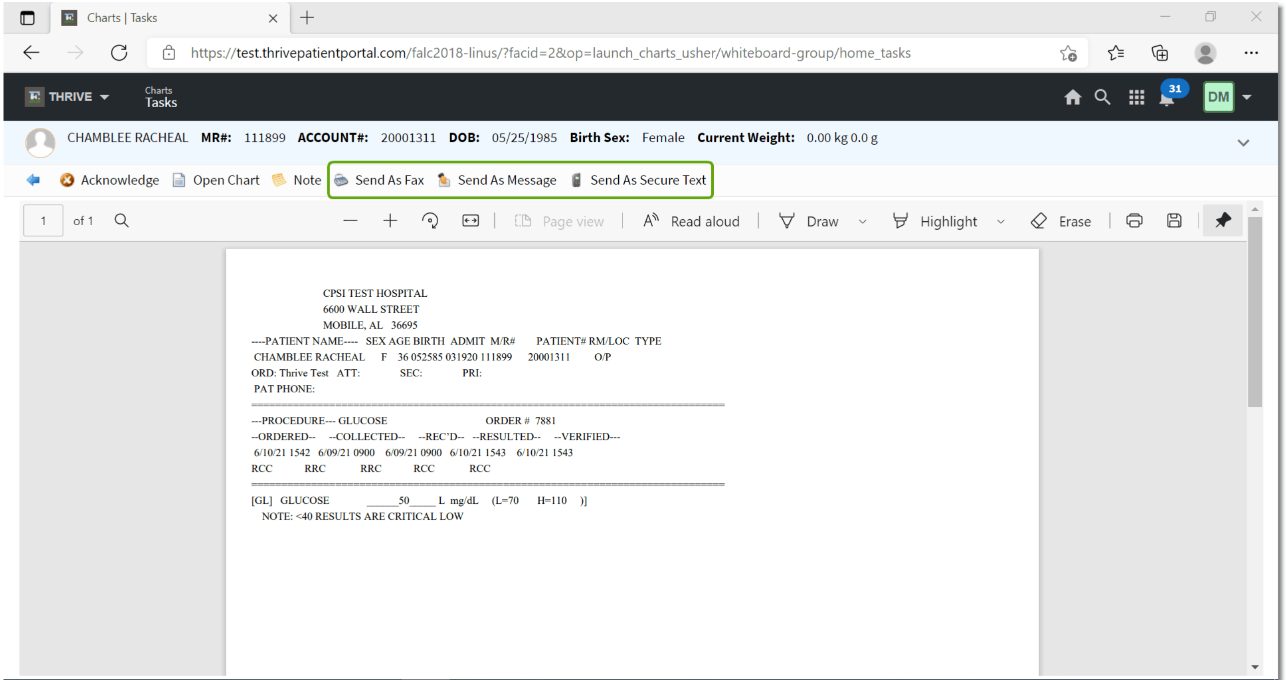
Select **Web Client** > **Tasks**



Task Screen

The notification may be sent as a Fax, Message, or Secure Text. Select the desired option and follow the standard directions for sending.

Select **Web Client** > **Tasks**



Send as Fax, Message, or Secure Text

Fax Acknowledgment

Beginning with the 22.05.00 update, the fax acknowledgement is updated to show both the "**Sent Date/Time**" as well as the "**Completed Date/Time**". This will be automatic and will not require any setup for the user.

From your "Sent" folder, select any fax to see the Fax Acknowledgment.

Select **Web Client** > **Tasks** > **Faxing** > **Sent Folder** > **Select Fax**

Fax Acknowledgement

Sender: (989) 607-4117
Sender Name: PROVIDENCE HOSPITAL
Recipient: (202) 464-5162
Recipient Name: CANDACE PHYS CLINIC
Patient Name:
Visit Number: CANDACE
Sent Date/Time: 06/27/2026 13:46:10 UTC
Completed Date/Time: 06/27/2026 13:47:22 UTC
Number of Pages: 2
Status: Success

Fax Acknowledgment

Chapter 6 Internal Mail

6.1 Viewing Mail

Thrive offers two ways to view Internal Mail:

- From the **Bell Icon** on the Action Bar.
- From **Mailbox** on the Charts contextual Navigation Panel.

***NOTE: The Application permission for Communication Center - Messaging must be granted for access to the Internal Mail component*.**

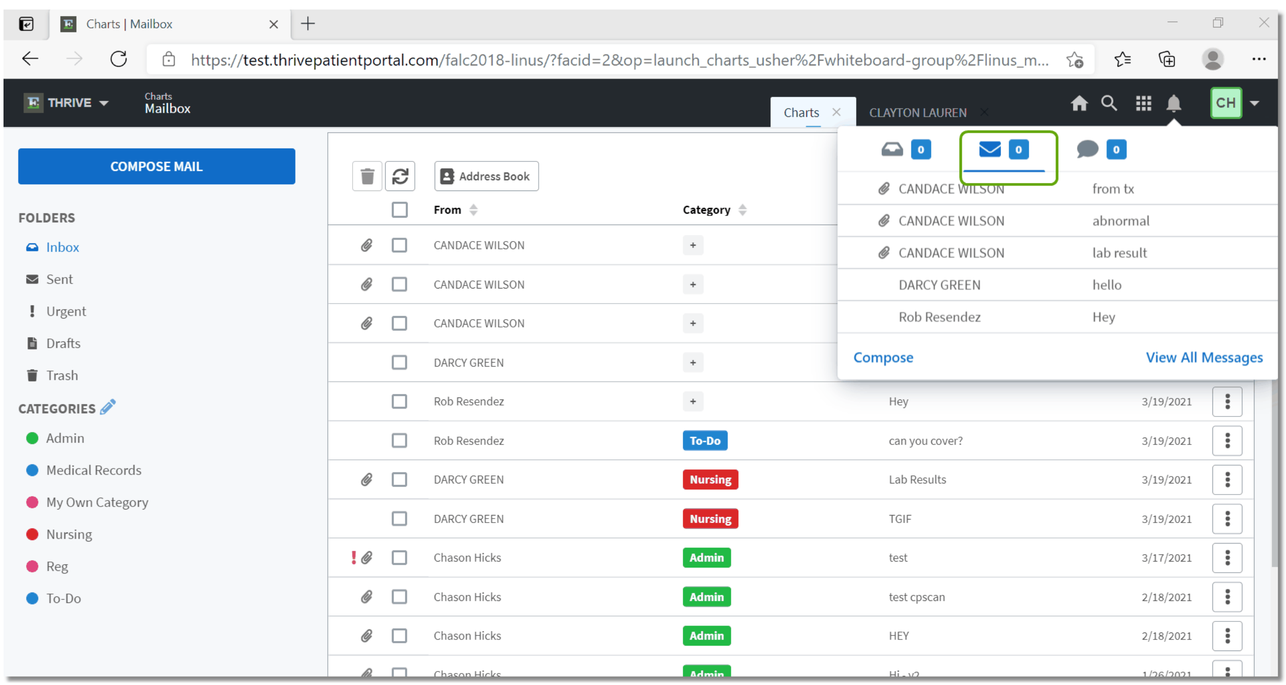
From the Bell Icon

From the Bell Icon 

on the Action Bar, select the Envelope icon 

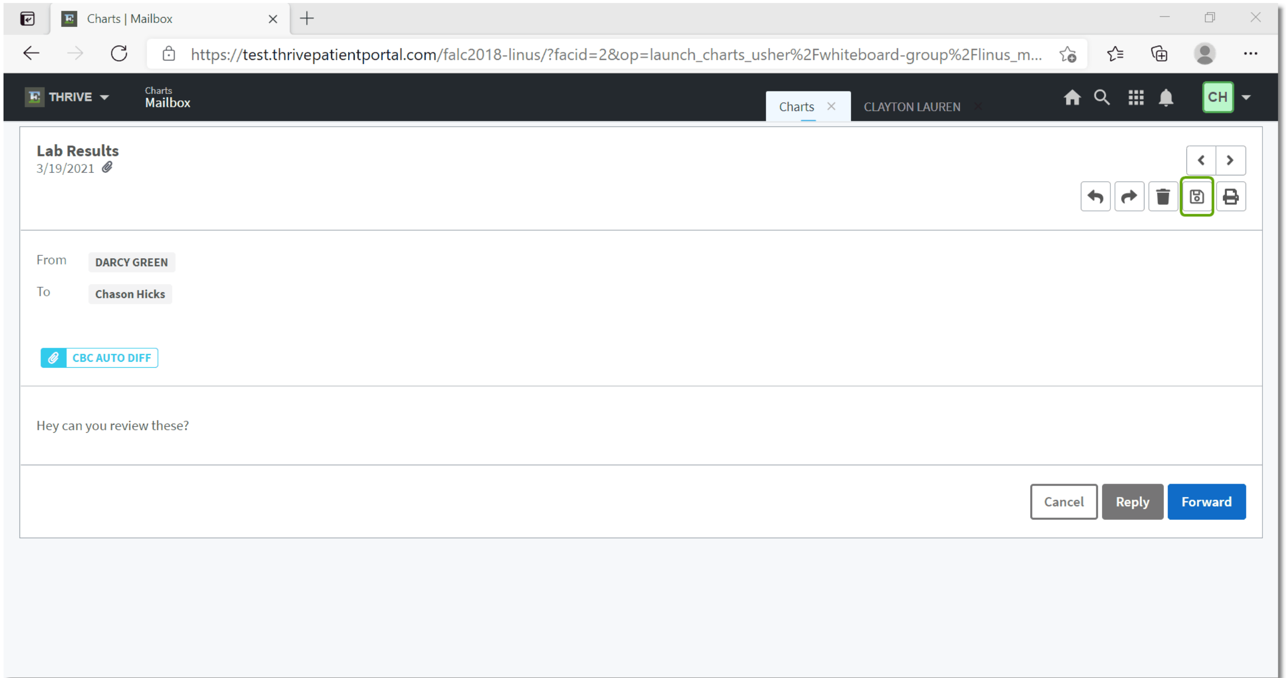
to see the most recent incoming mail. The number beside the icon will display the number of unread messages. A blue dot to the left of the mail indicates that it is unread. Any displayed message may be opened and viewed by selecting it. Select **Compose** to create new mail, or **View All Messages** to go to the Mail Inbox.

Select **Web Client** > **Bell Icon**



Mail

Select **Web Client** > **Bell Icon** > **Select Mail**



View Mail

The selected message will open with the following screen options:

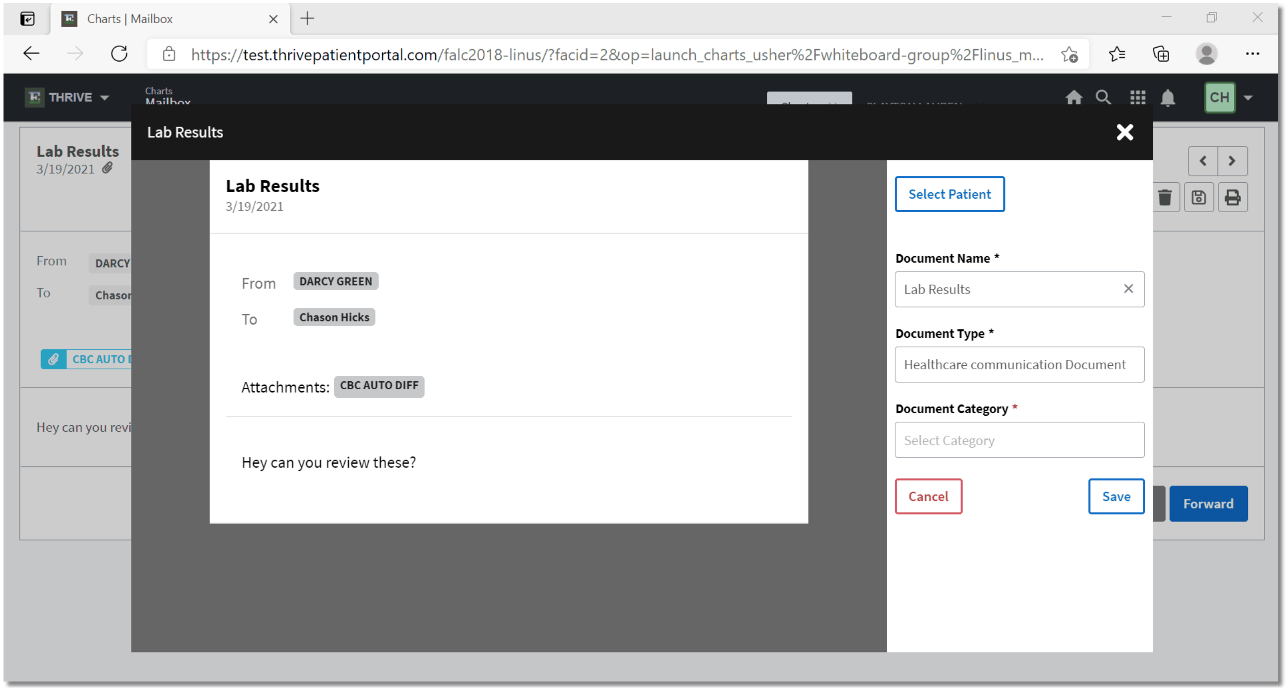
- Left icon - (<) This will take the user to the previous message in the list for viewing.
- Right icon - (>) This will take the user to the next message in the list for viewing.
- Left Arrow - Allows the user to Reply to the current message. (The user could also select the **Reply** button at the bottom of the message.)
- Right Arrow - Allows the user to Forward the current message to another internal user. (The user could also select the **Forward** button at the bottom of the message.)
- Trash Can - Deletes the current message.
- Save icon - Allows the user to Save the mail to a patient chart. Please see below for more information regarding saving a mail message to a patient chart.
- Printer - Allows the current message to be printed.

All attachments to the message are labeled and may be opened by selecting the attachment.

The user has the option to **Cancel, Reply** back to the sender, or **Forward** to another internal user.

To save the Mailbox message to a patient chart, select the Save Icon

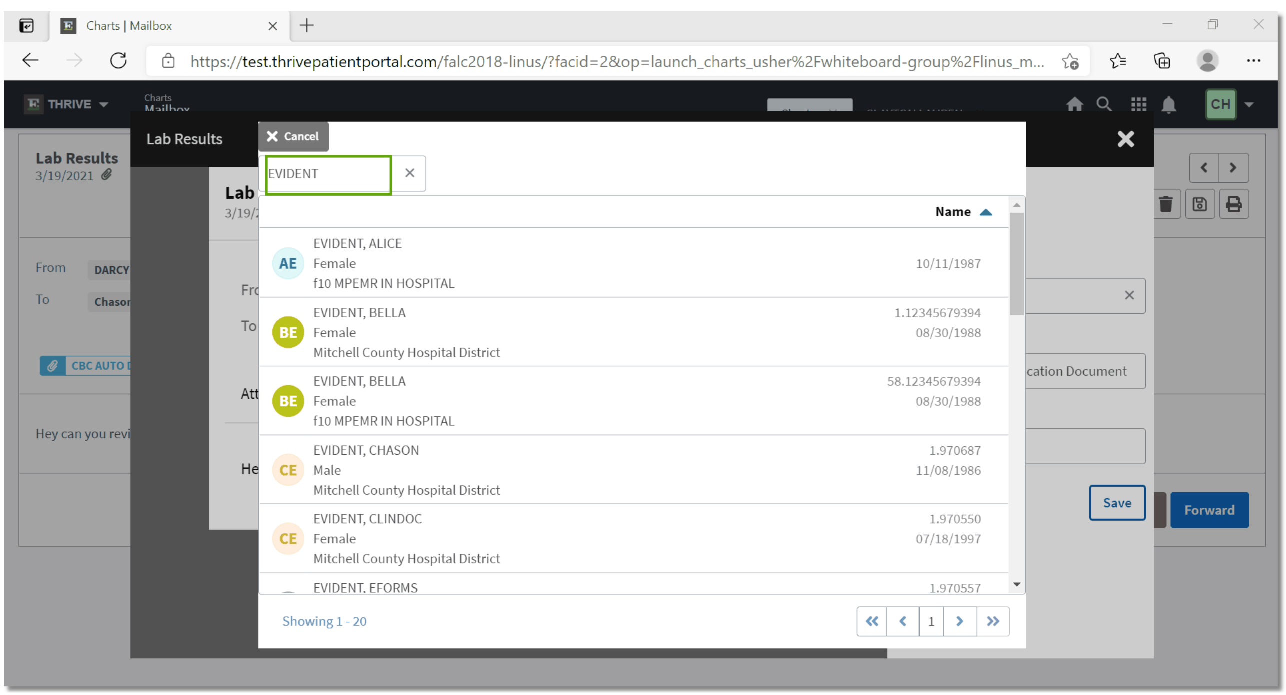
Select **Web Client** > **Bell Icon** > **Select Mail** > **Save Icon**



Save to Patient

Choose **Select Patient** to attach the message to a patient chart. Enter the patient's name in the Search field and then select the correct patient.

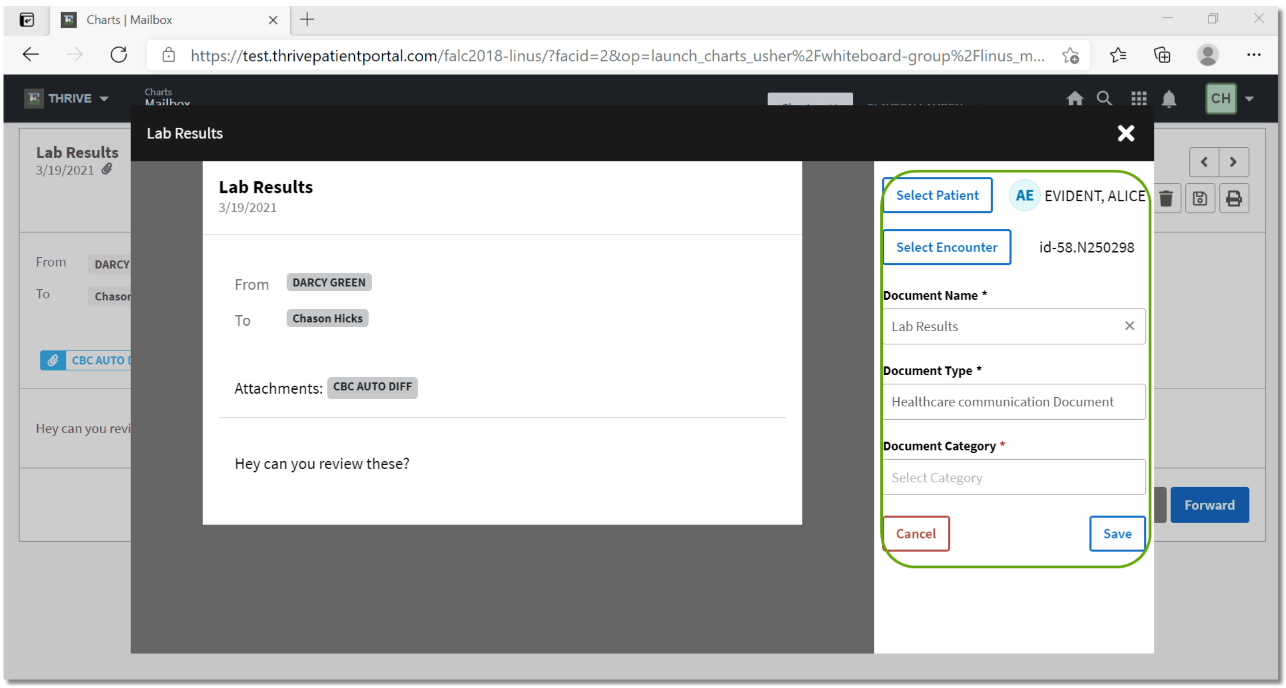
Select **Web Client** > **Bell Icon** > **Select Mail** > **Save Icon** > **<u>Select Patient</u>**



Select patient

The message will be saved to the patient on the profile level. If the message is to be saved to a specific encounter, choose **Select Encounter** and choose the desired patient encounter**. A Document Name** can be given to the saved message, along with a **Document Type** and a **Document Category.** The **Document Type** is defaulted to **Healthcare Communication Document.** The user may overwrite this default if desired. Select **Save**.

Select **Web Client** > **Bell Icon** > **Select Mail** > **Save Icon**

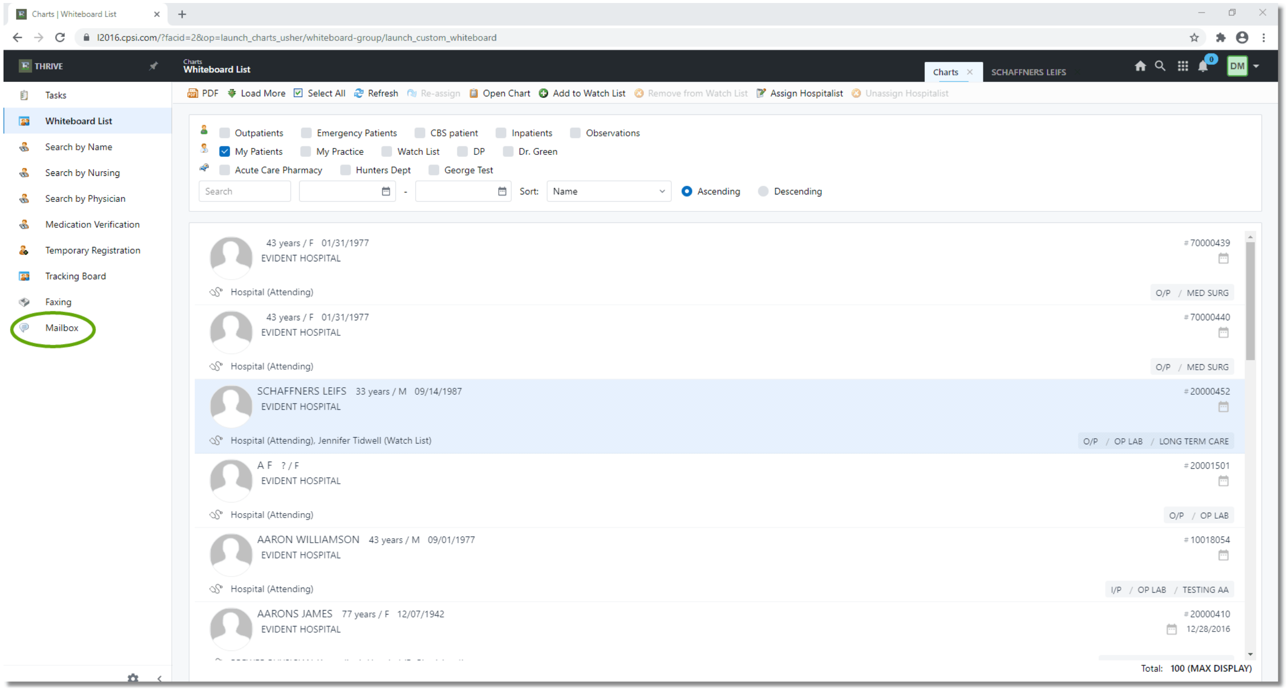


Add to Encounter

From the Navigation Panel

From the Navigation Panel, Select **Mailbox**.

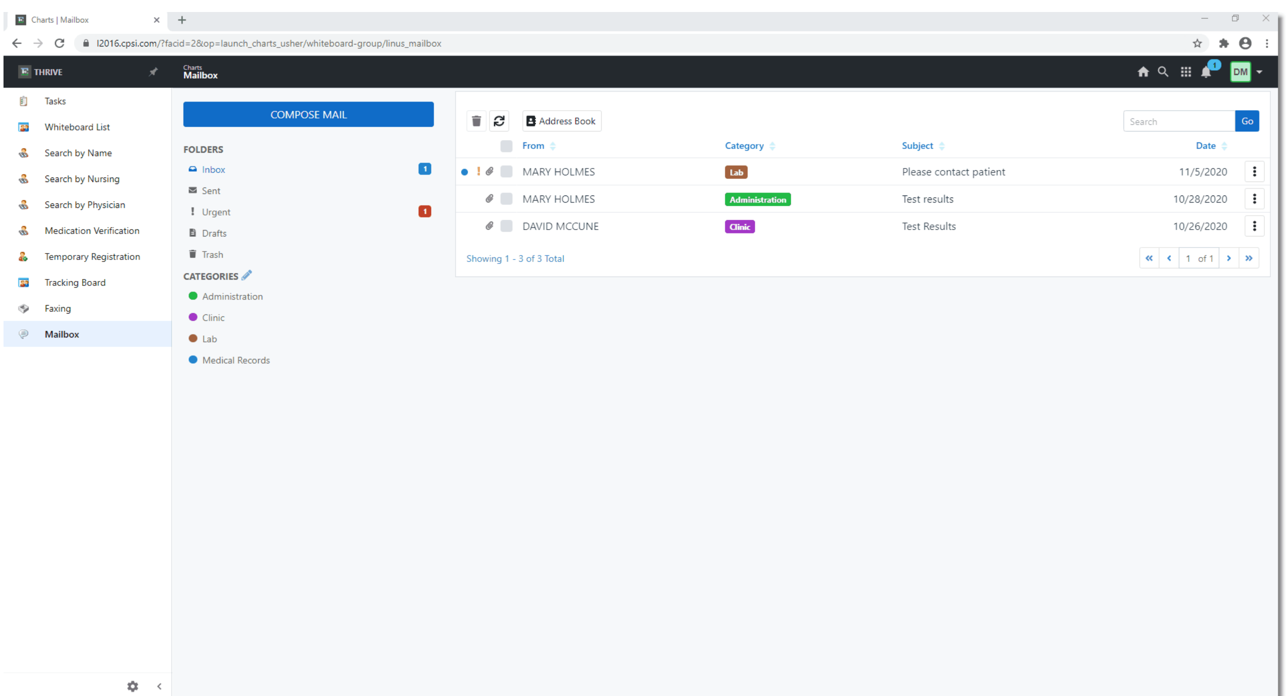
Select **Web Client** > **Mailbox**



Navigation Panel

The **Mail Inbox** will display.

Select **Web Client** > **Mailbox**



Mail Inbox

The Mail Inbox will display all incoming mail in a list format. The column headings are:

- **From** - Displays the sender of the mail. If the name of the sender is not in the Address Book, the sender's number will display instead. A blue dot to the left of From column indicates that the message is unread. A paper clip icon indicates that there is an attachment on the message. A red Exclamation Point indicates that the message is Urgent. Select the arrow in the column header to have the messages display in reverse alphabetical order.
- **Category**: This allows the user to group messages according to user-defined categories. Select the arrow in the column header to filter all messages by Category.
- **Subject**: Displays the title of the message from the sender. Select the arrow in the column header to have the messages in reverse alphabetical order.
- **Date**: Displays a date stamp of when the message was received. Select the arrow in the column header to have the messages display in reverse chronological order.
- **The box with the 3 circles** : Click on this box to **Reply, Reply All**, **Forward**, **Mark as Unread**, or **Delete** a message.

There are 5 folders options to the left. They are:
- **Inbox**: Displays all incoming active messages. The number to the right indicates unread messages.
- **Sent**: Displays all outgoing or forwarded active messages.
- **Urgent**: Displays all received messages that were marked with "!" by the sender.
- **Drafts**: Displays all composed messages that have been "Saved" but not yet sent.
- **Trash:** Displays all messages that have been deleted from the active lists.

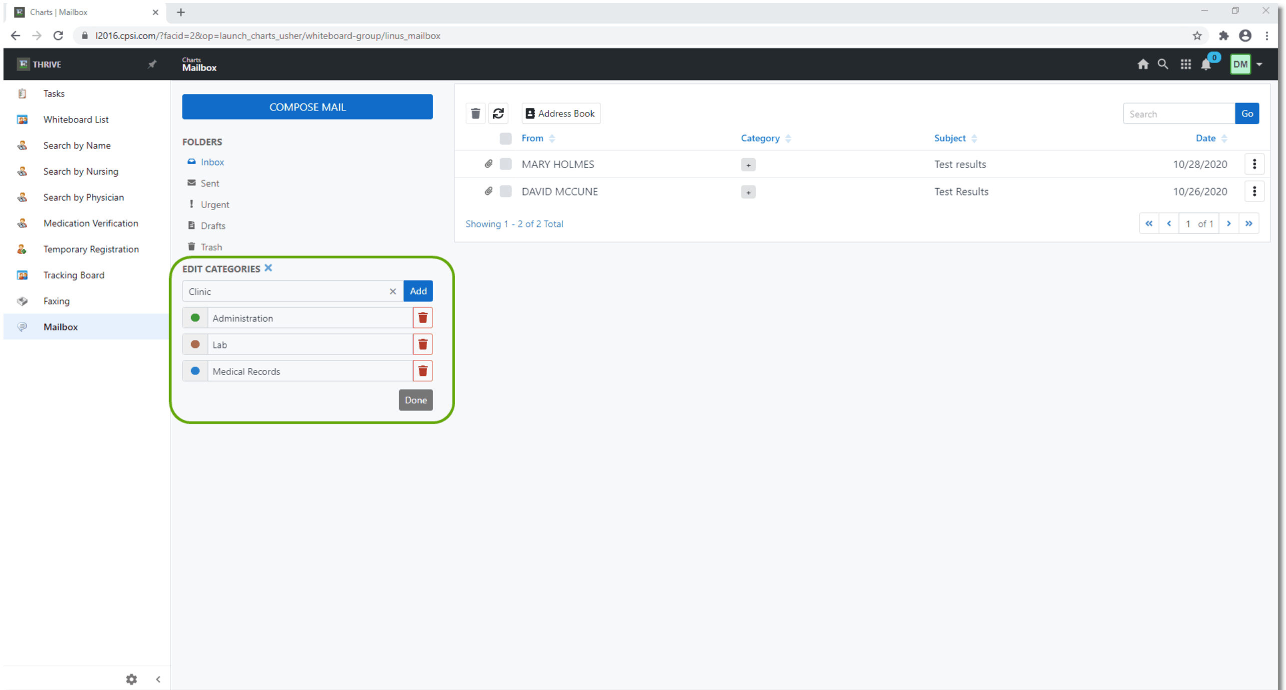
User-defined Categories may be created in order for the user to group and filter messages.
To create or Edit/Delete a Category:

- Select the **Pencil Icon** .
- **Enter** the desired description of the Category.
- Select **Add**.
- Select **Done** when finished.

- A Category may be deleted by selecting the Trash Can Icon after selecting the Pencil icon. Thrive will send a prompt message if a Category to be deleted has messages attached to it.

Thrive will automatically color-code each category to make the categories easier to use.

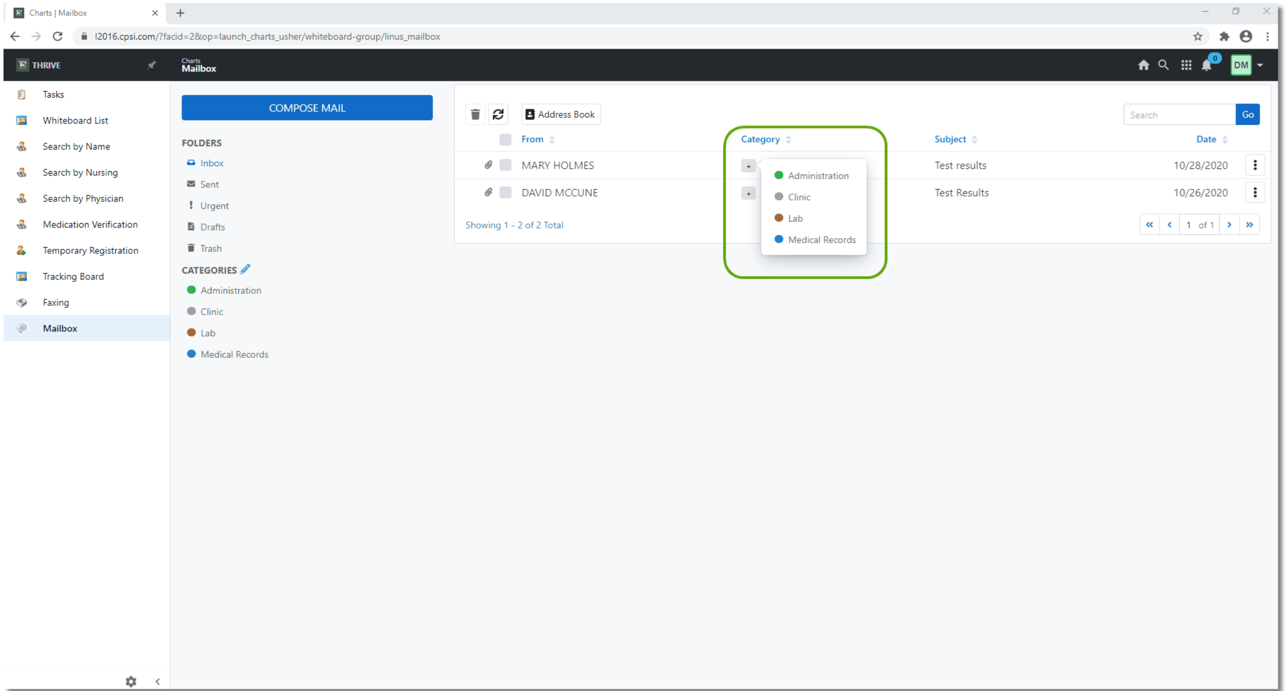
Select **Web Client** > **<u>Mailbox</u>**



Categories

To attach a message to a specific Category:
- Select the **Plus Sign** icon (+) in the Category column.
- Once Categories have been attached to messages, the Category column may be filtered by group.

Select **Web Client** > **Mailbox** > **Categories**

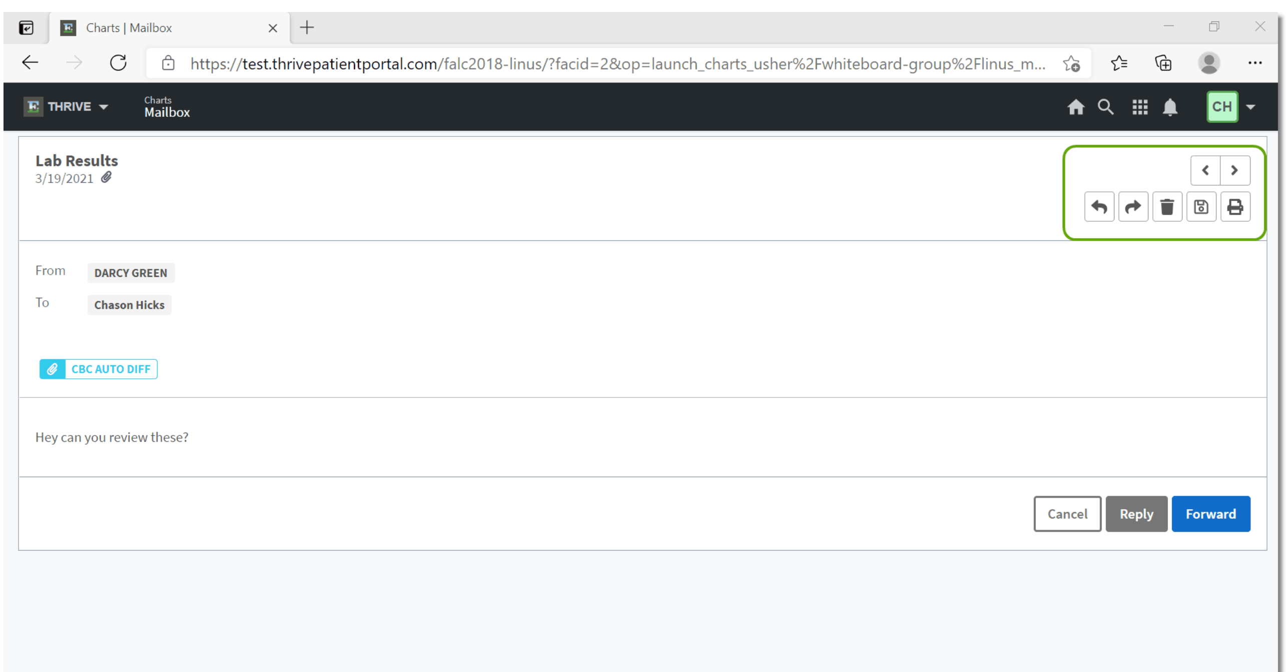


Categories

To View a Message:

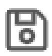
Select the desired message from any of the 5 folders.

Select **Web Client** > **Mailbox** > **Select Mail**



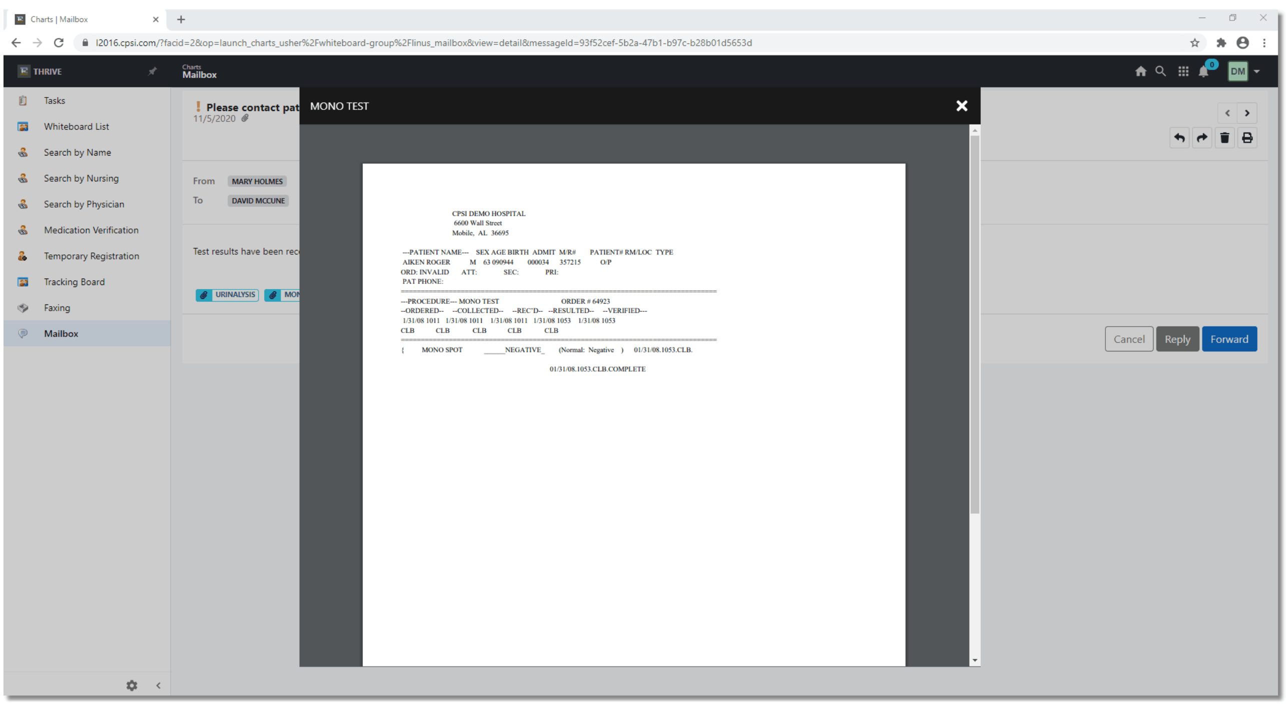
Select Mail

The selected Message will open with the following screen options:

Mail View Screen options:
- Left icon (<) - This will take the user to the previous message in the list for viewing.
- Right icon (>) - This will take the use to the next message in the list for viewing.
- Left Arrow - This will allow the user to Reply to the message. (User may also select the Reply button.)
- Right Arrow - This will allow the user to Forward the message to another user. (User may also select the Forward button.)
- Trash Can Icon - This will allow the user to Delete the message.
- Save Icon  - This will allow the user to save the message to a patient profile or visit.
- Printer Icon - This will allow the user to Print the message.

Attachments on the message may be opened by selecting them.

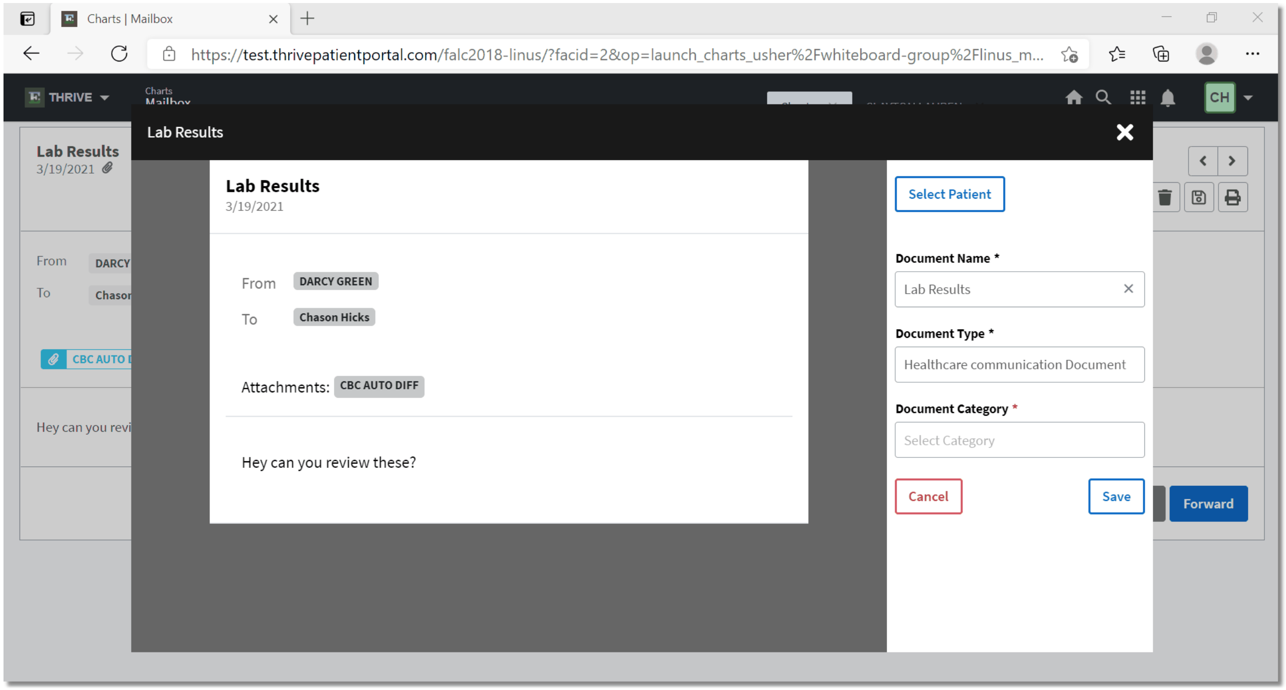
Select **Web Client** > **Mailbox** > **Select Mail** > **<u>Open Attachment</u>**



Open Attachment

To save the Mailbox message to a patient chart, select the **Save** Icon  .

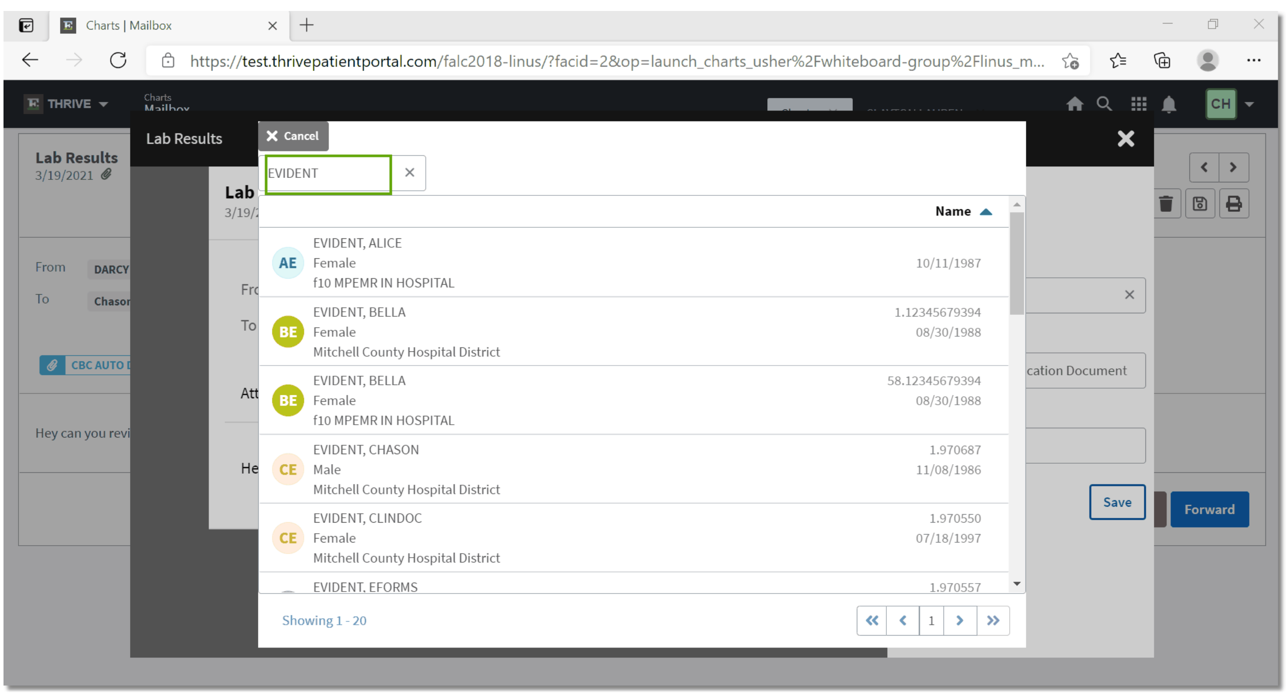
Select **Web Client** > **Bell Icon** > **Select Mail** > **<u>Save Icon</u>**



Save to Patient

Choose **Select Patient** to attach the message to a patient chart. Enter the patient's name in the Search field and then select the correct patient.

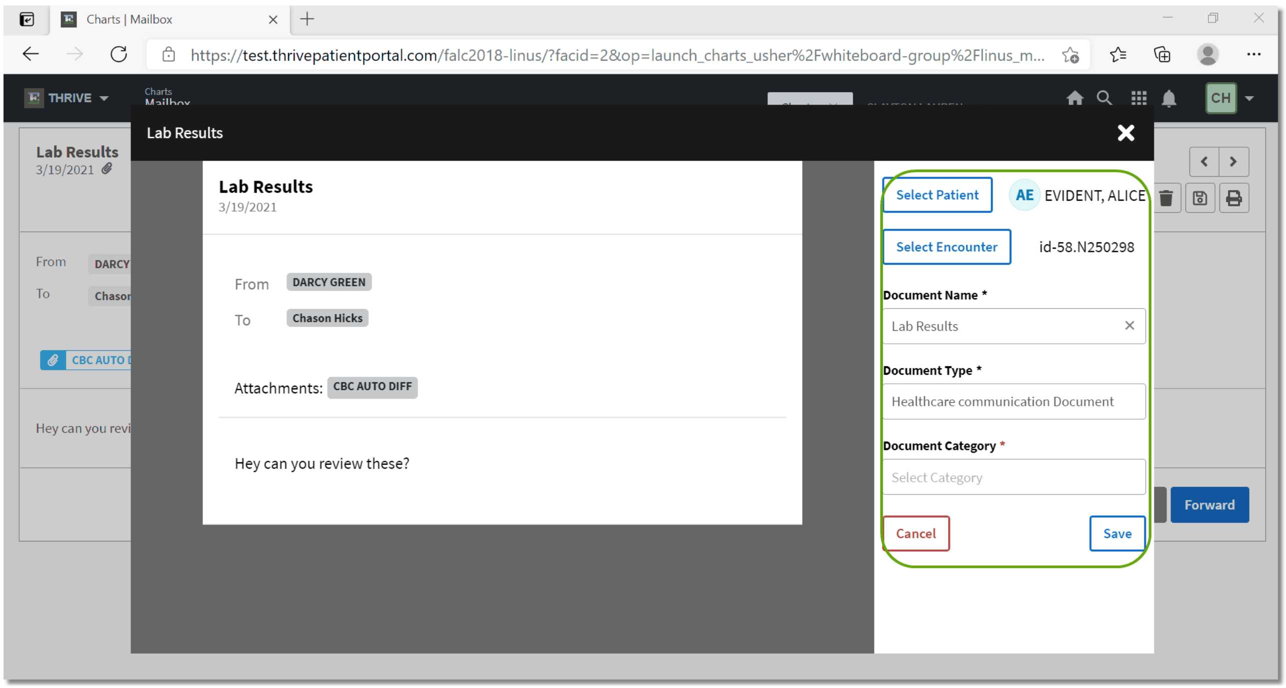
Select **Web Client** > **Bell Icon** > **Select Mail** > **Save Icon** > **Select Patient** > **<u>Search for Patient</u>**



Select patient

The message will be saved to the patient on the profile level. If the message is to be saved to a specific encounter, choose **Select Encounter** and choose the desired patient encounter. **A Document Name** can be given to the saved message, along with a **Document Type** and a **Document Category.** The **Document Type** is defaulted to **Healthcare Communication Document.** The user may overwrite this default if desired. Select **Save**.

Select **Web Client** > **Bell Icon** > **Select Mail** > **<u>Save Icon</u>**



Add to Encounter

6.2 Composing Mail

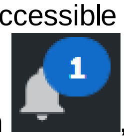
TruBridge EHR offers several options for composing internal mail:

- The Bell Icon in the Action Bar.
- The Navigation Panel from the Charts contextual navigation.
- Clinical History from within a patient chart.

Please note that only users with permission to access the Mail component will be listed in the Address Book as users, and therefore able to receive mail.

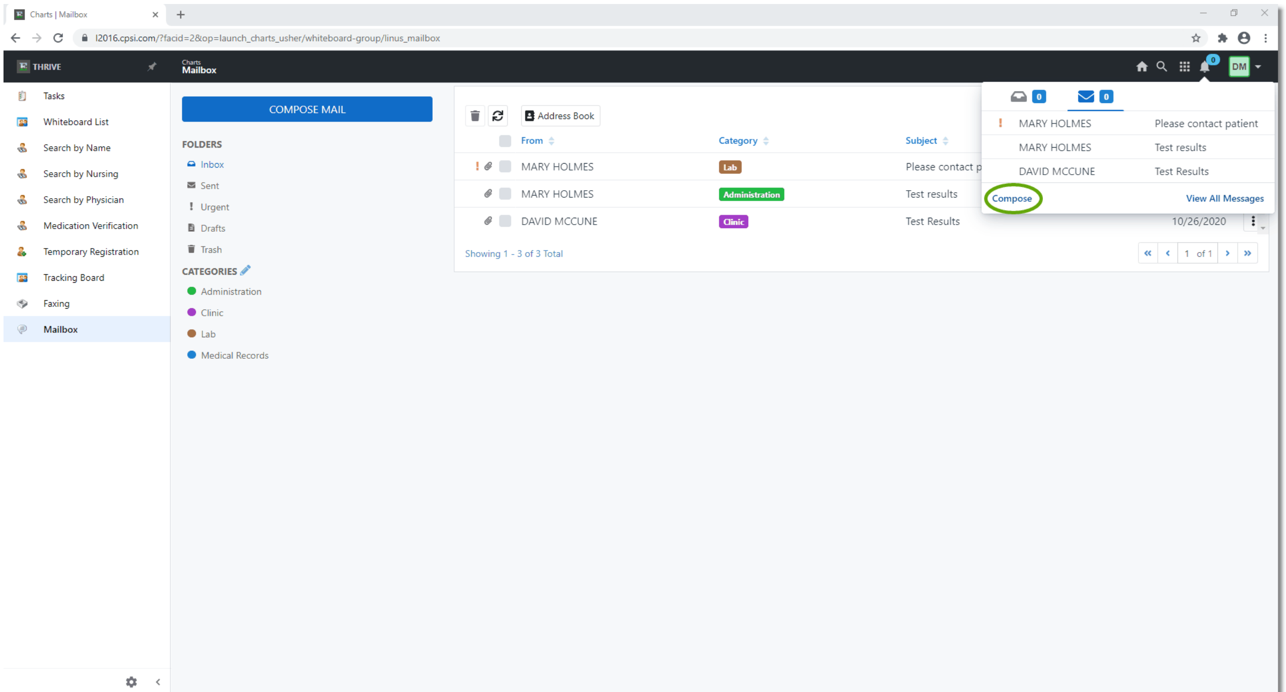
From the Bell Icon

The Bell Icon is on the Action Bar, and is therefore accessible at any time while in TruBridge EHR.

To compose a new Internal Mail, select the **Bell Icon**  , select the **Envelope icon**

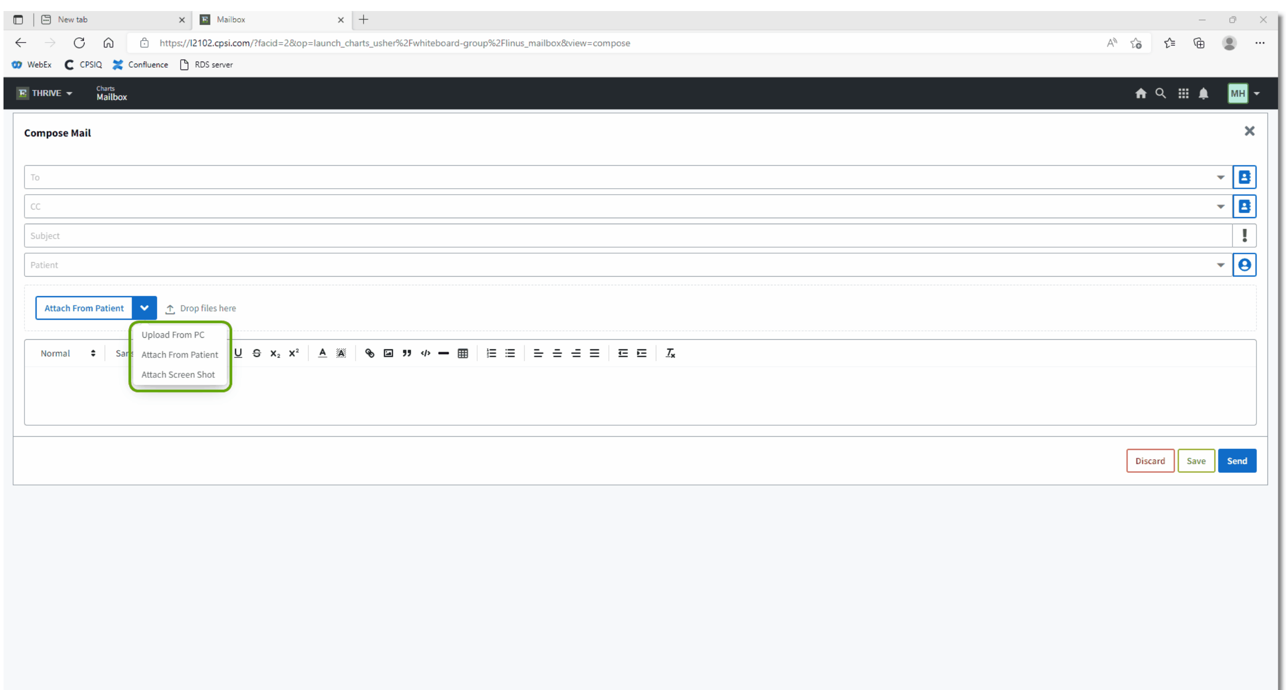
 , then select **Compose.**

Select **Web Client** > **Bell Icon** > **Envelope Icon** > **<u>Compose</u>**



Compose Mail

Select **Web Client** > **Bell Icon** > **Envelope Icon** > **<u>Compose</u>**

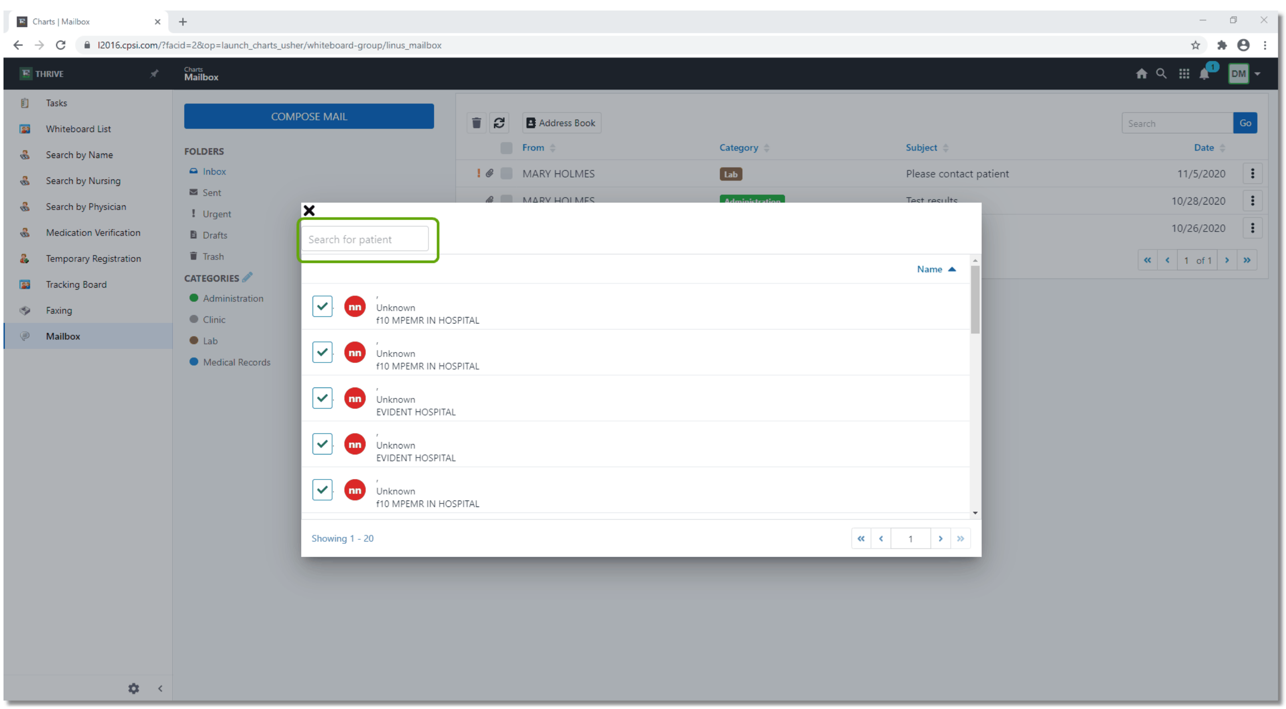


Compose Mail

Follow these steps to compose an internal mail message:

- Select the receiver of the message:
  - Enter the first few letters of the recipient's name. Thrive will open a list of all Address Book entries that fit the search.
  - Select the **Person icon**  to the right of the "To" box to open the Address Book.
- Repeat the above instructions for adding a "Carbon Copy" receiver of the mail.
- Enter a subject for the message in the Subject field.
- If the message is Urgent, select the **Exclamation Point icon**  to the right of the Subject box.
- Enter the body of the mail message.
- If this message is regarding a patient, and patient documents need to be attached to the message, select the Attach From Patient dropdown menu. You will be given three options:
- Upload from PC - Allows an image from the user's PC to be attached to the mail.
- Attach From Patient - Allows documentation from the patient chart to be attached to the mail.
- Attach Screen Shot - Allows the user to take a screen shot of any window and attach to the mail.

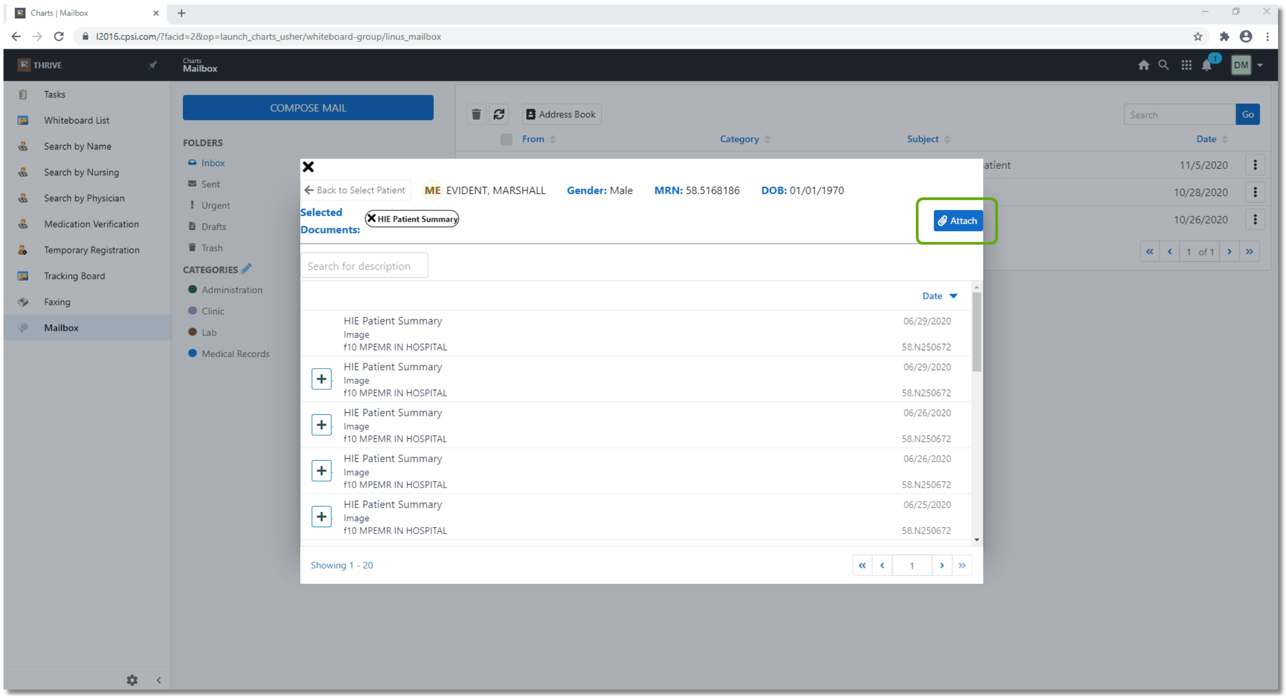
Select **Web Client** > **Bell Icon** > **Envelope Icon** > **Compose** > <u>**Attach from Patient**</u>



Attach from Patient

Enter the desired patient name and select the documents to attach. Attached documentation may be previewed prior to sending. Select **Attach**.

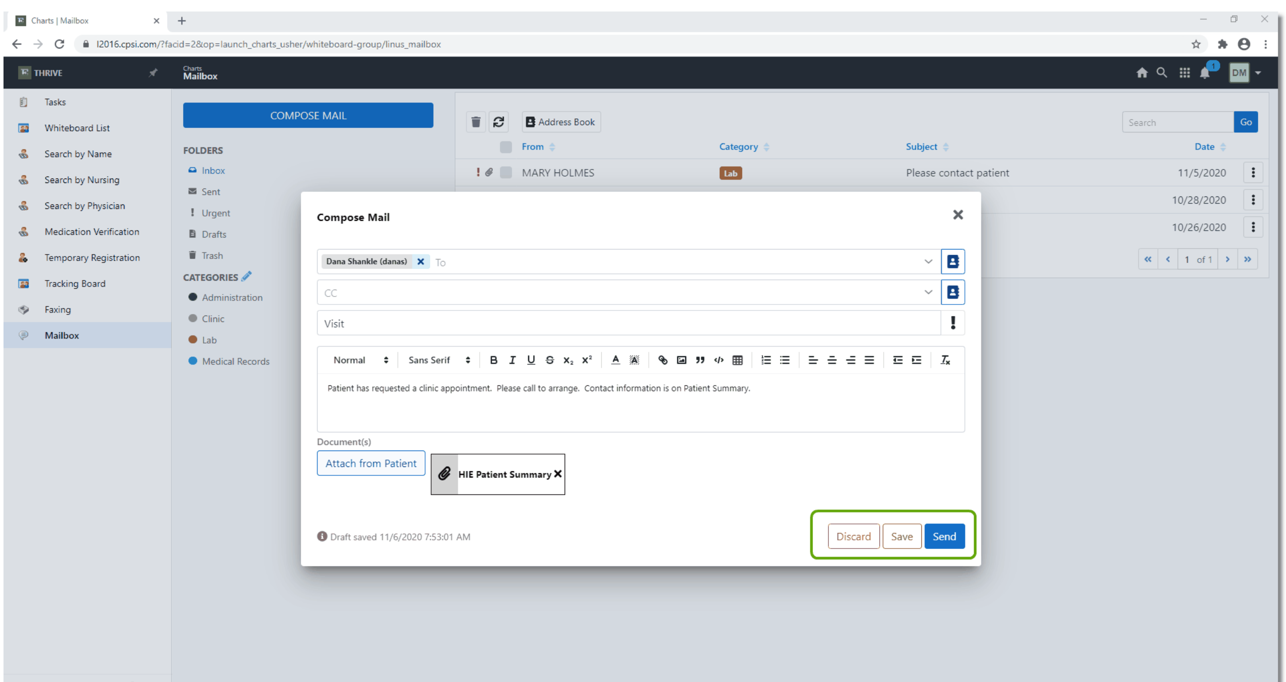
Select **Web Client** > **Bell Icon** > **Envelope Icon** > **Compose** > <u>**Attach from Patient**</u>



Attaching a document

Compose the message and select **Send**. To delete the message, select **Discard**. To save the message without sending, select **Save**.

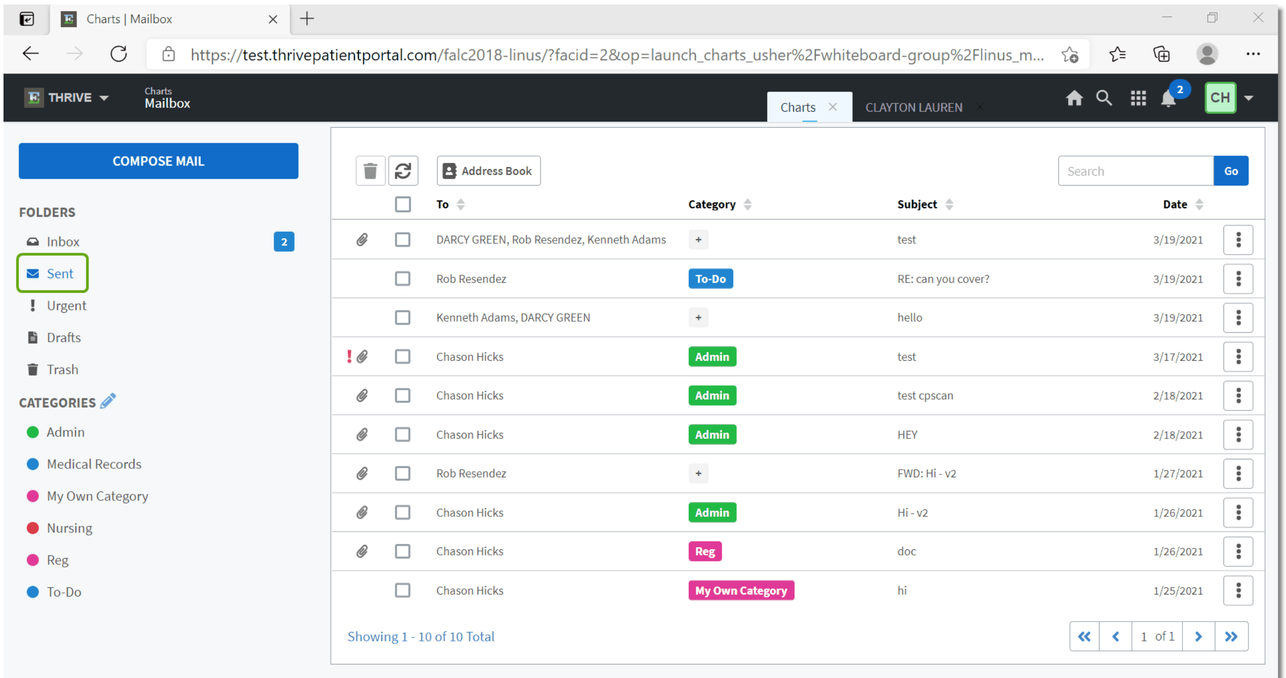
Select **Web Client** > **Bell Icon** > **Envelope Icon** > **Compose** > **<u>Attach from Patient</u>**



Compose Mail

Internal Mail that has been sent may be viewed from the **Sent** folder in the Mailbox Application.

Select **Web Client** > **Mailbox** > **<u>Sent</u>**

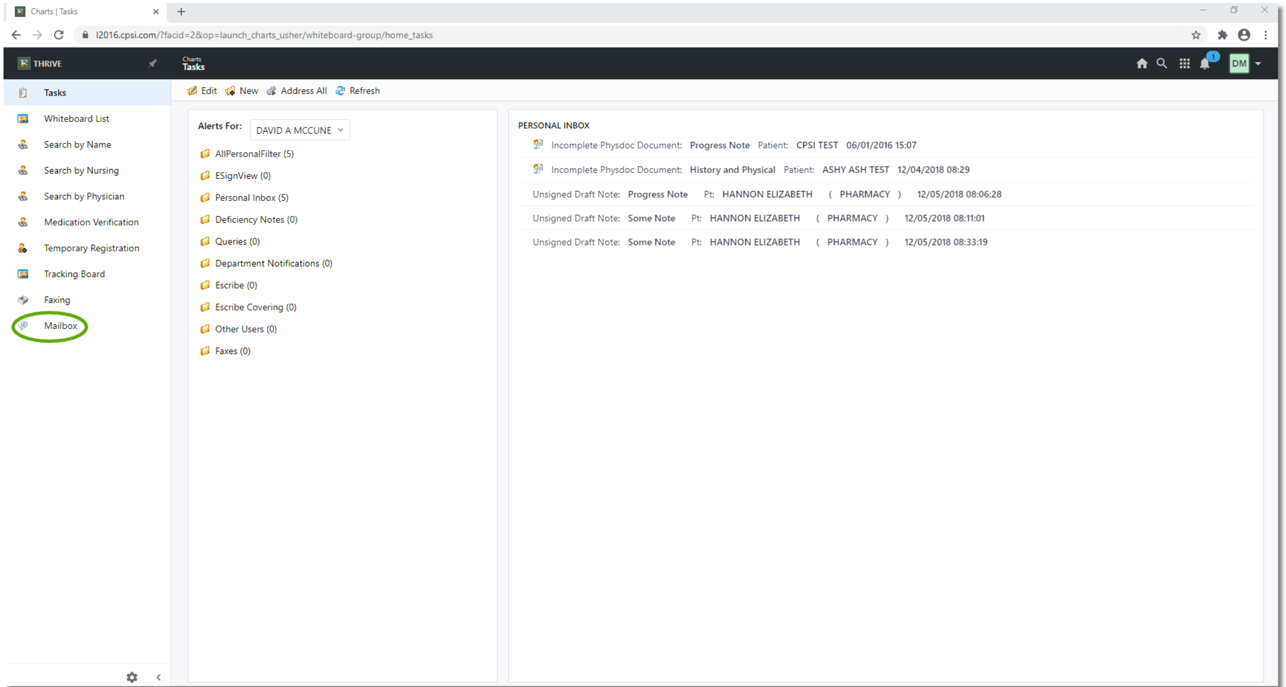


Sent Mail

From the Navigation Panel

To compose an internal message from the Mailbox, select **Mailbox** from the Navigation Panel.

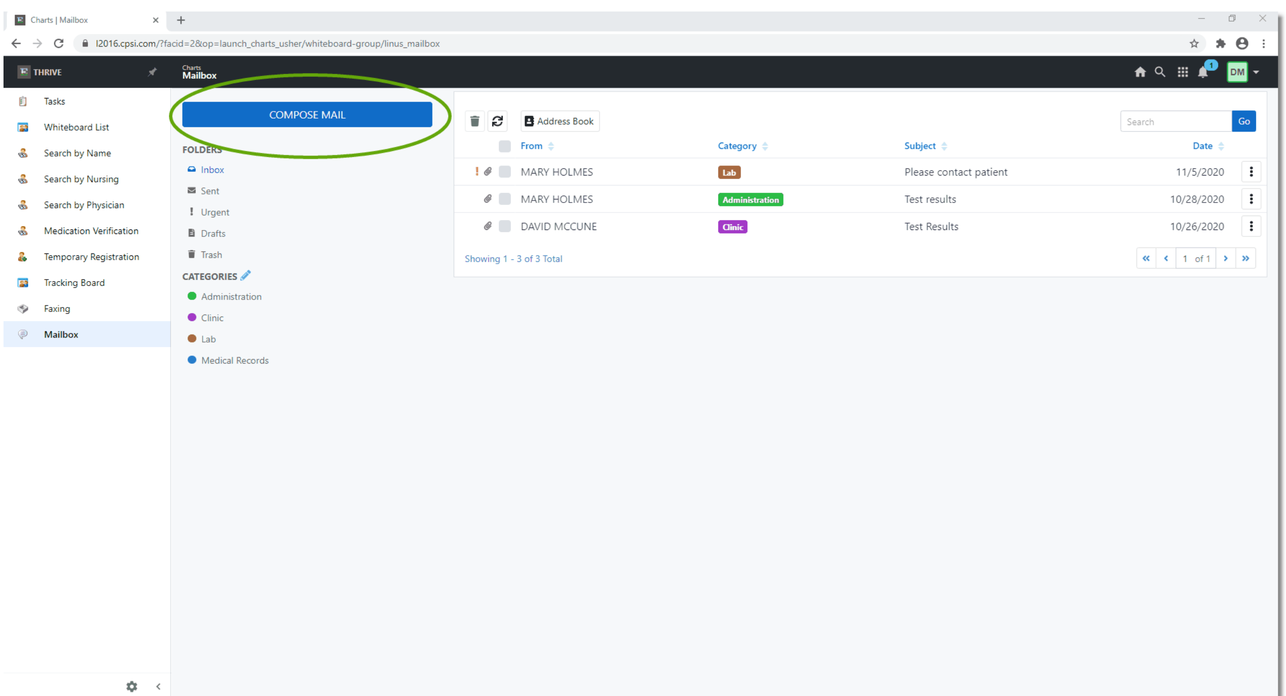
Select **Web Client** > **<u>Mailbox</u>**



Mailbox

Select **Compose Mail**

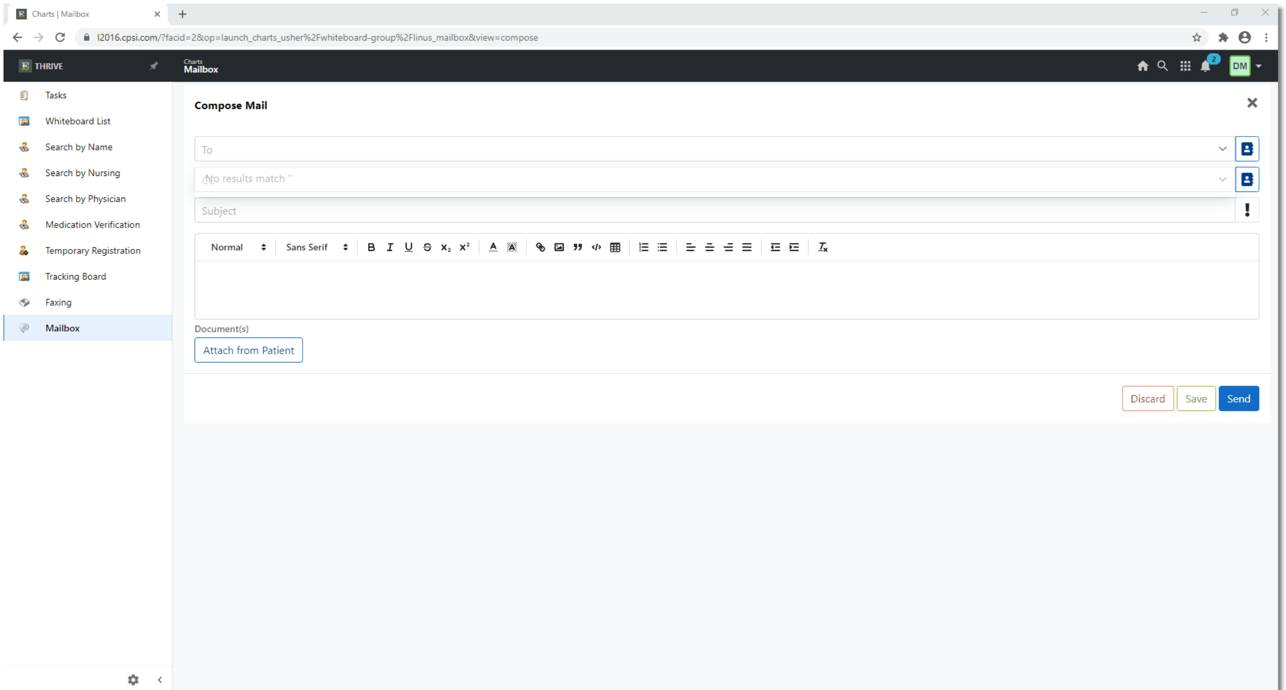
Select **Web Client** > **Mailbox** > **<u>Compose Mail</u>**



Compose Mail

The Compose Mail screen will open.

Select **Web Client** > **Mailbox** > **Compose Mail**

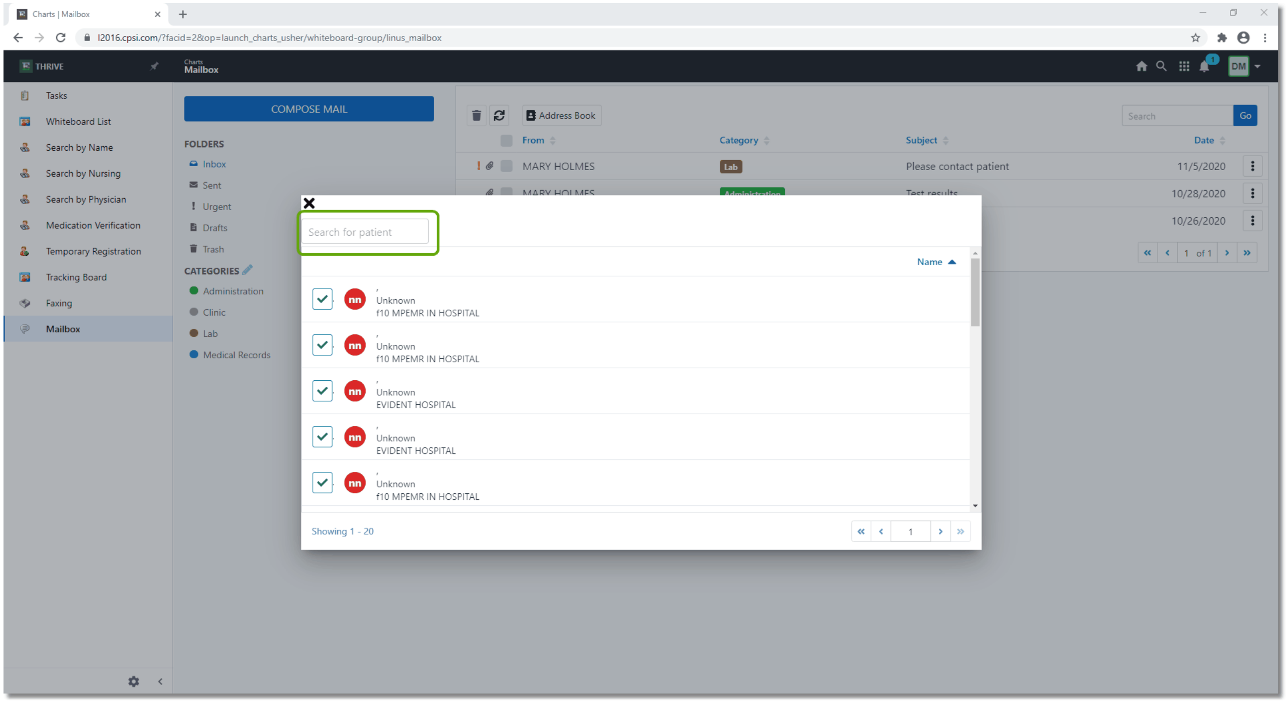


Compose Mail

Follow these steps to compose an internal mail message:

- Select the receiver of the message:
  - Enter the first few letters of the recipient's name. Thrive will open a list of all Address Book entries that fit the search.
  - Select the **Person icon** to the right of the "To" box to open the Address Book.
- Repeat the above instructions for adding a "Carbon Copy" receiver of the mail.
- Enter a subject for the message in the Subject field.
- If the message is Urgent, select the **Exclamation Point icon** to the right of the Subject box.
- Enter the body of the mail message.
- If this message is regarding a patient, and patient documents need to be attached to the message, select **Attach from Patient**.

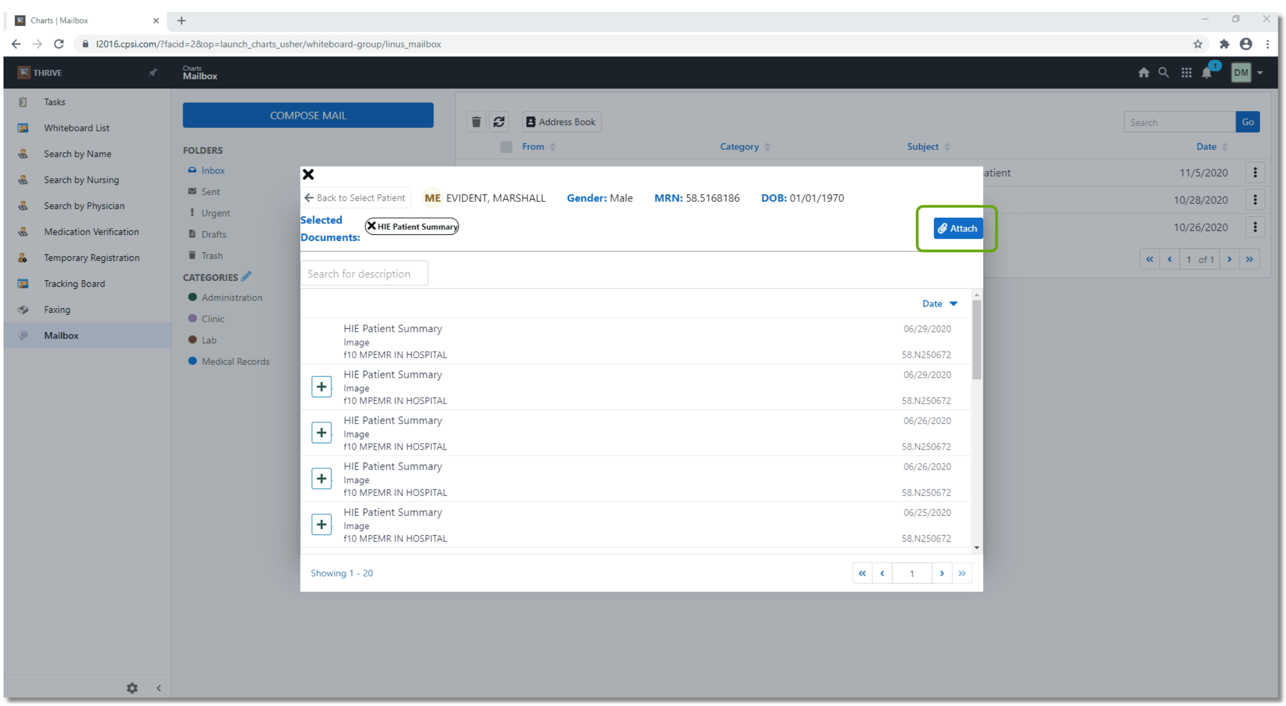
Select **Web Client** > **Mailbox** > **Compose Mail** > **Attach from Patient**



Attach from Patient

Enter the desired patient name and select the documents to attach. Attached documentation may be previewed prior to sending. Select **Attach**.

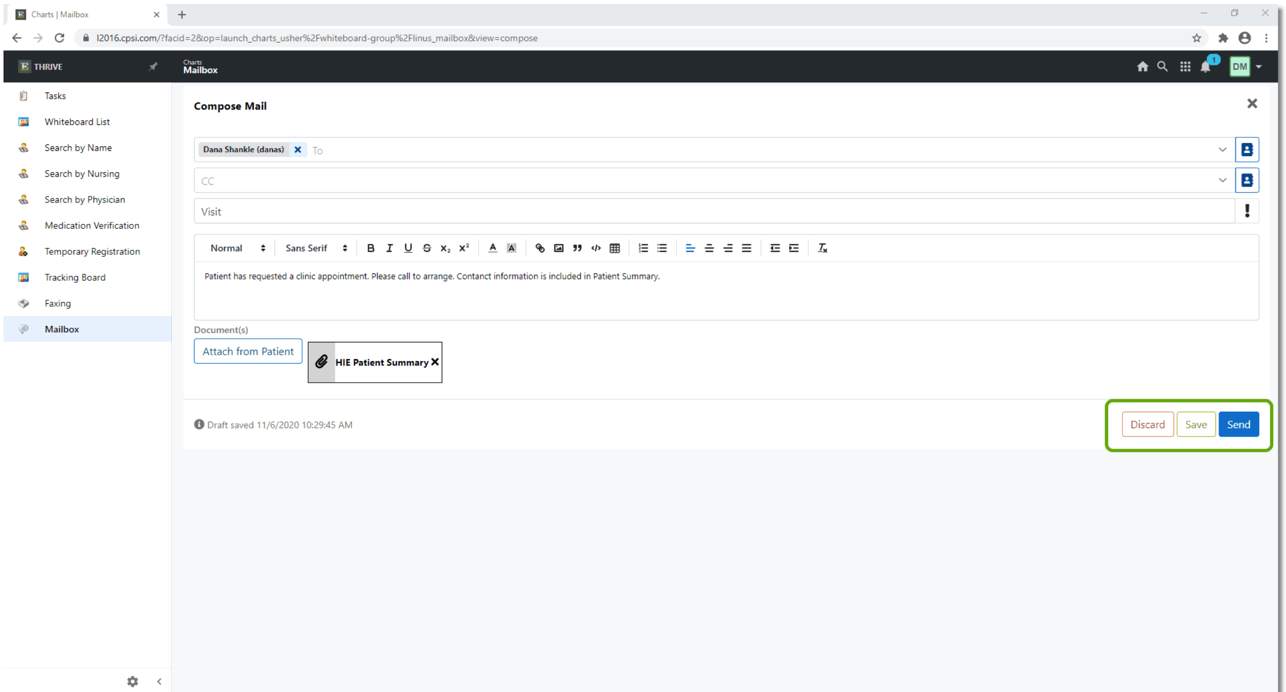
Select **Web Client** > **Mailbox** > **Compose Mail** > **Attach from Patient**



Attaching a document

Compose the message and select **Send**. To delete the message, select **Discard**. To save the message without sending, select **Save**.

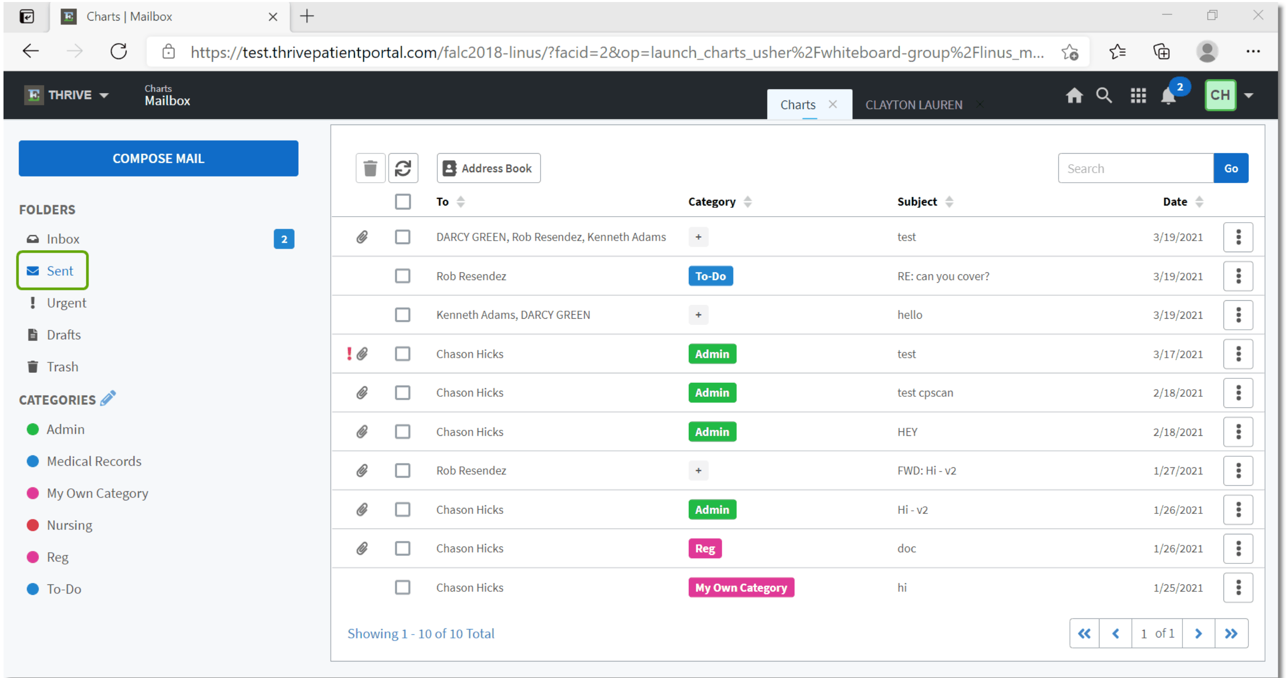
Select **Web Client** > **Mailbox** > **Compose Mail** > **Attach from Patient**



Send Mail

Internal Mail that has been sent may be viewed from the **Sent** folder in the Mailbox Application.

Select **Web Client** > **Mailbox** > **Sent**

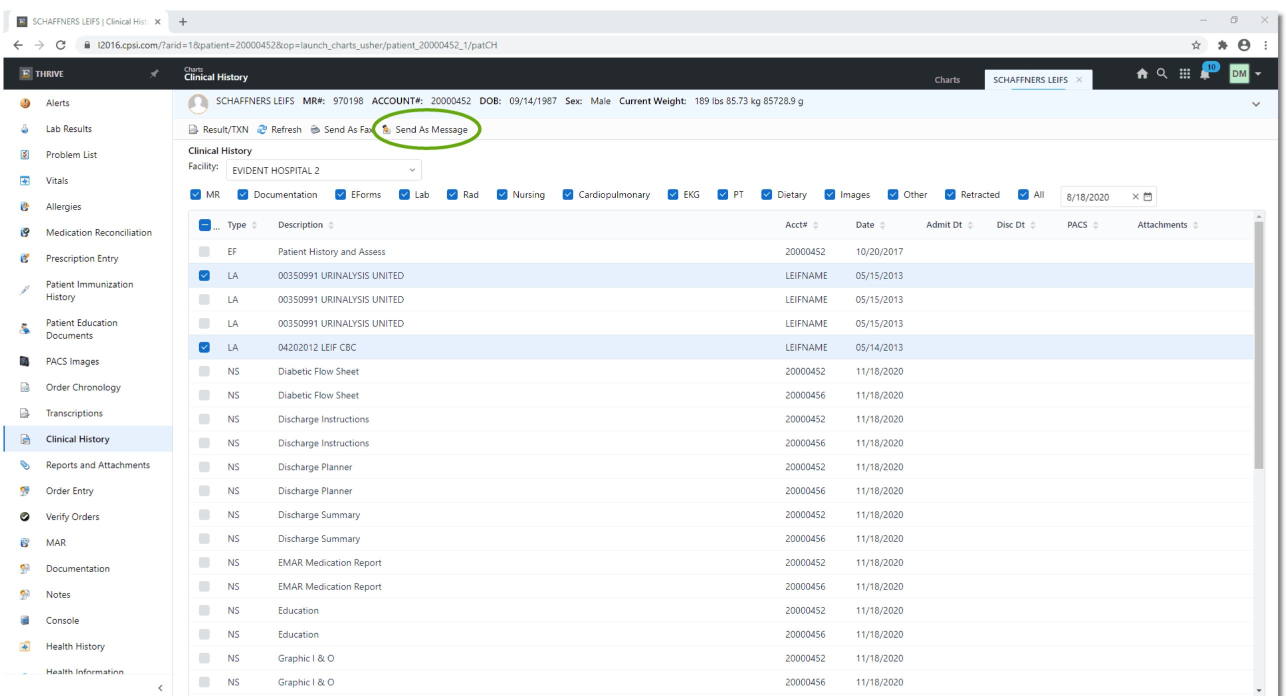


Sent Mail

From Clinical History

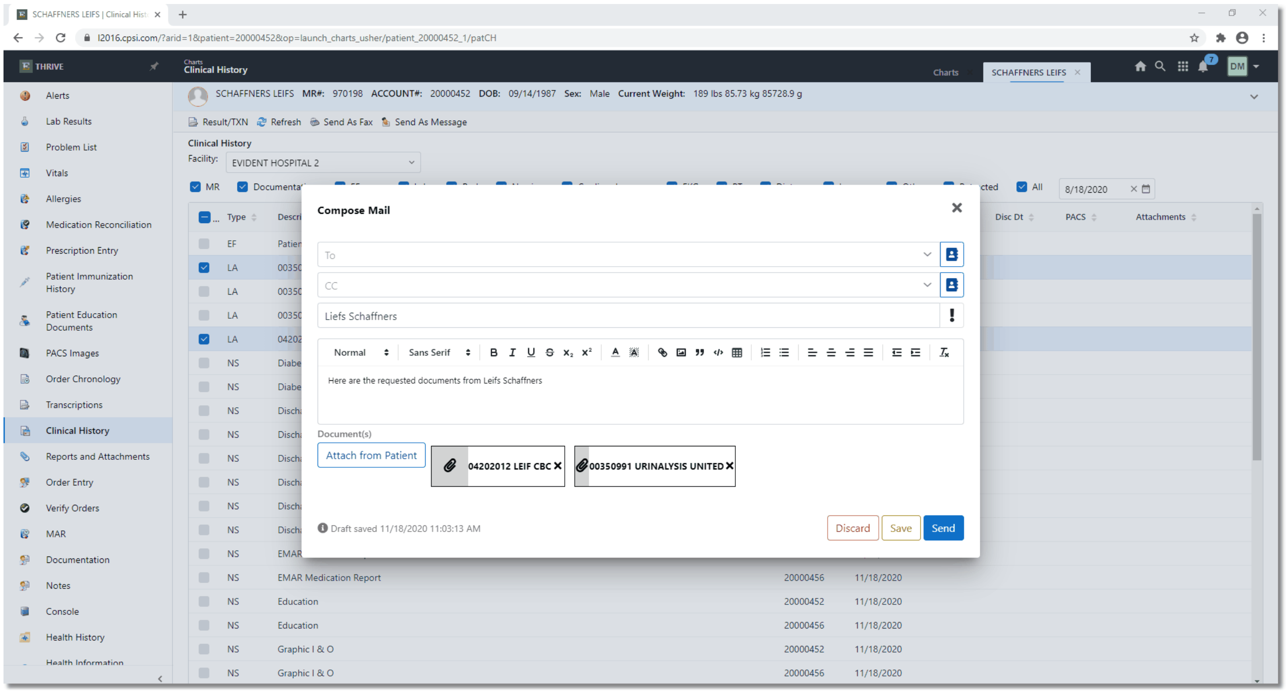
From the Clinical History application within a patient chart, select the box to the left of the item(s) to be attached to a message. Then select **Send As Message**.

Select **Web Client** > **Whiteboard List** > **Select Patient** > **Clinical History**



Clinical History

Select **Web Client** > **Whiteboard List** > **Select Patient** > **Clinical History** > **Send as Mail**



Send Mail

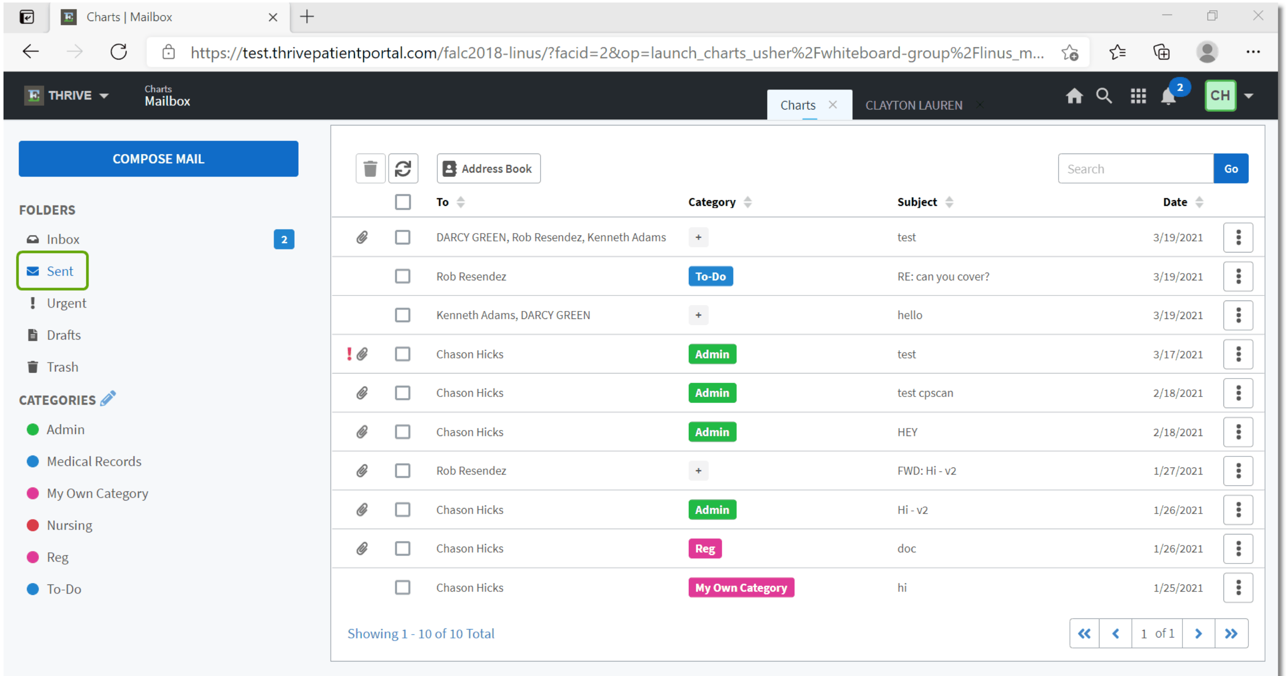
Follow these steps to compose an internal mail message:

- Select the receiver of the message:
    - Enter the first few letters of the recipient's name. Thrive will open a list of all Address Book entries that fit the search.
    - Select the **Person icon**  to the right of the "To" box to open the Address Book.
- Repeat the above instructions for adding a "Carbon Copy" receiver of the mail.
- Enter a subject for the message in the Subject field.
- If the message is Urgent, select the **Exclamation Point icon**  to the right of the Subject box.
- Enter the body of the mail message.
- The selected documents from Clinical History will automatically be attached to the email, but others may be added by selecting **Attach From Patient.** Attached documentation may be previewed prior to sending.

Compose the message and select **Send**. To delete the message, select **Discard**. To save the message without sending, select **Save**.

Internal Mail that has been sent may be viewed from the **Sent** folder in the Mailbox Application.

Select **Web Client** > **Mailbox** > **Sent**



Sent Mail

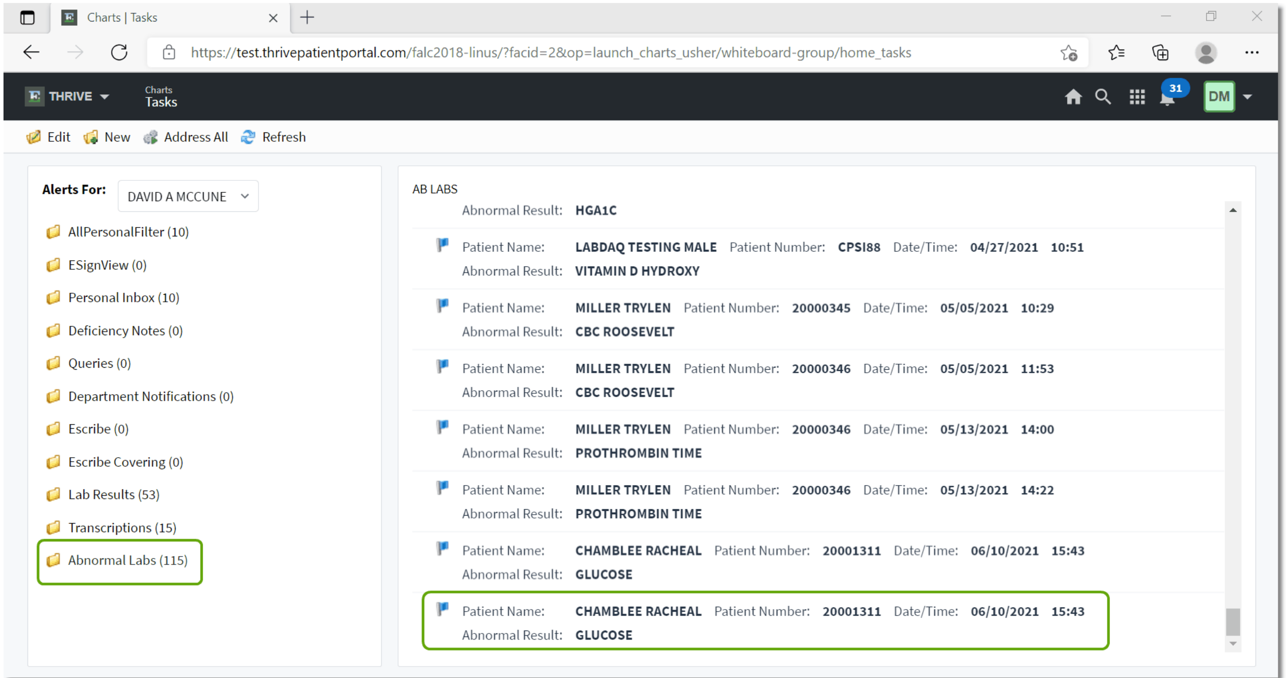
From the Task Screen

An Internal Mail message may be sent from the following folders in the Task Screen:

- Lab Results
- Abnormal Lab Results
- Transcriptions

Select the desired folder and notification.

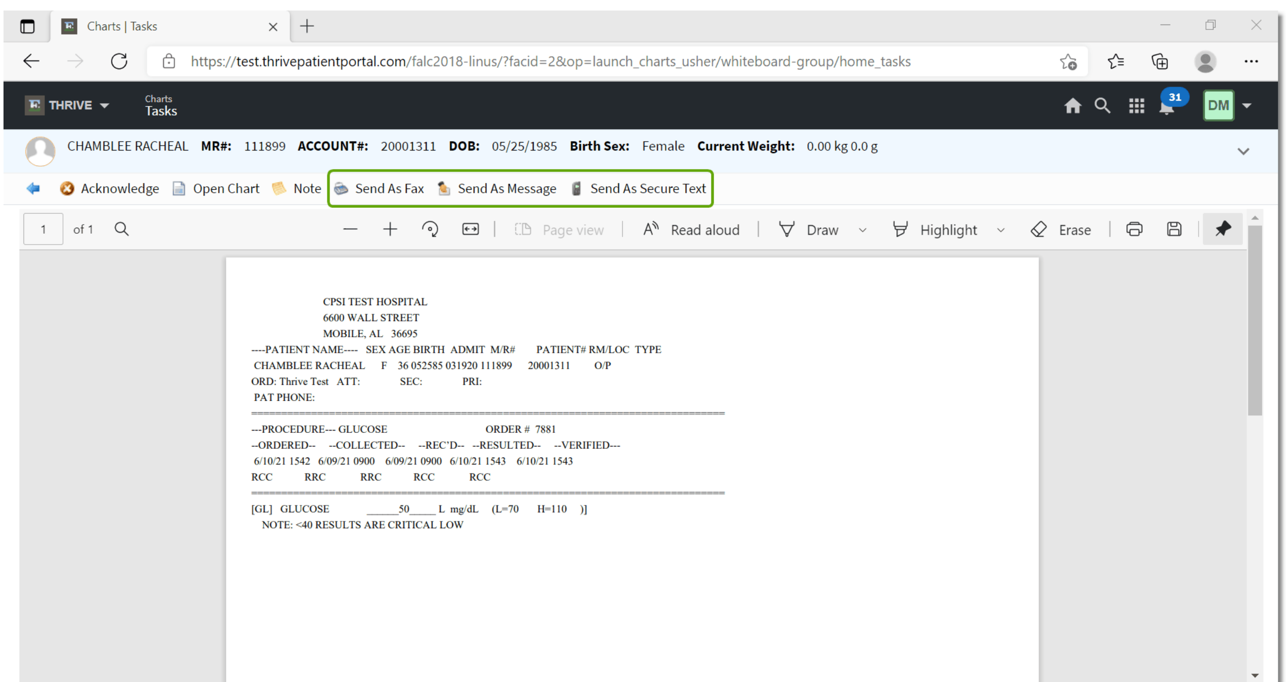
Select **Web Client** > **Tasks**



Task Screen

The notification may be sent as a Fax, Message, or Secure Text. Select the desired option and follow the standard directions for sending.

Select **Web Client** > **Tasks**



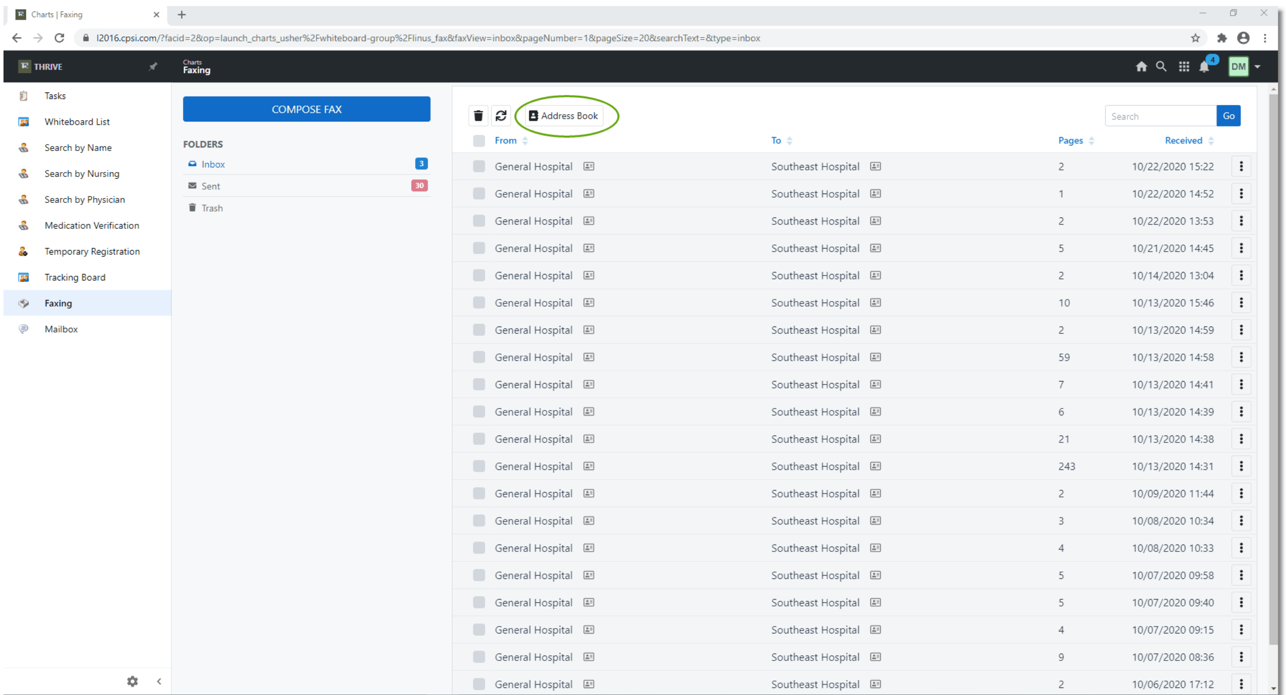
Send as Fax, Message, or Secure Text

Chapter 7 Address Book

7.1 Overview

The Address Book allows the user to select from a list of Individuals or Organizations to send a fax or mail. The Address Book may be accessed from either the Faxing or Mailbox screens. ***PLEASE NOTE: Any Thrive user will automatically show up in the Address Book when the Behavior permission for Faxing or Messaging is granted.***

Select **Web Client** > **Faxing**

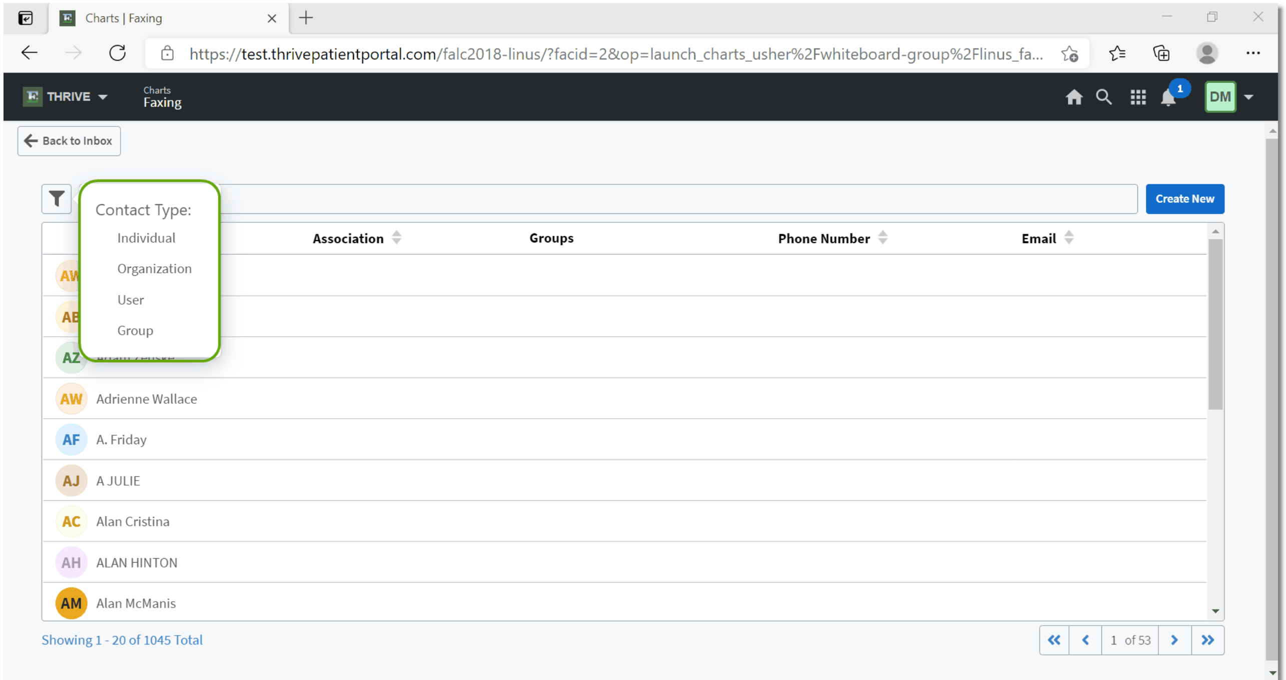


Address Book

7.2 Viewing an Address Book Entry

The Address Book may be searched for a contact name. If desired, the contacts may be filtered by Individual, Organization, User, or Group. This step is optional.

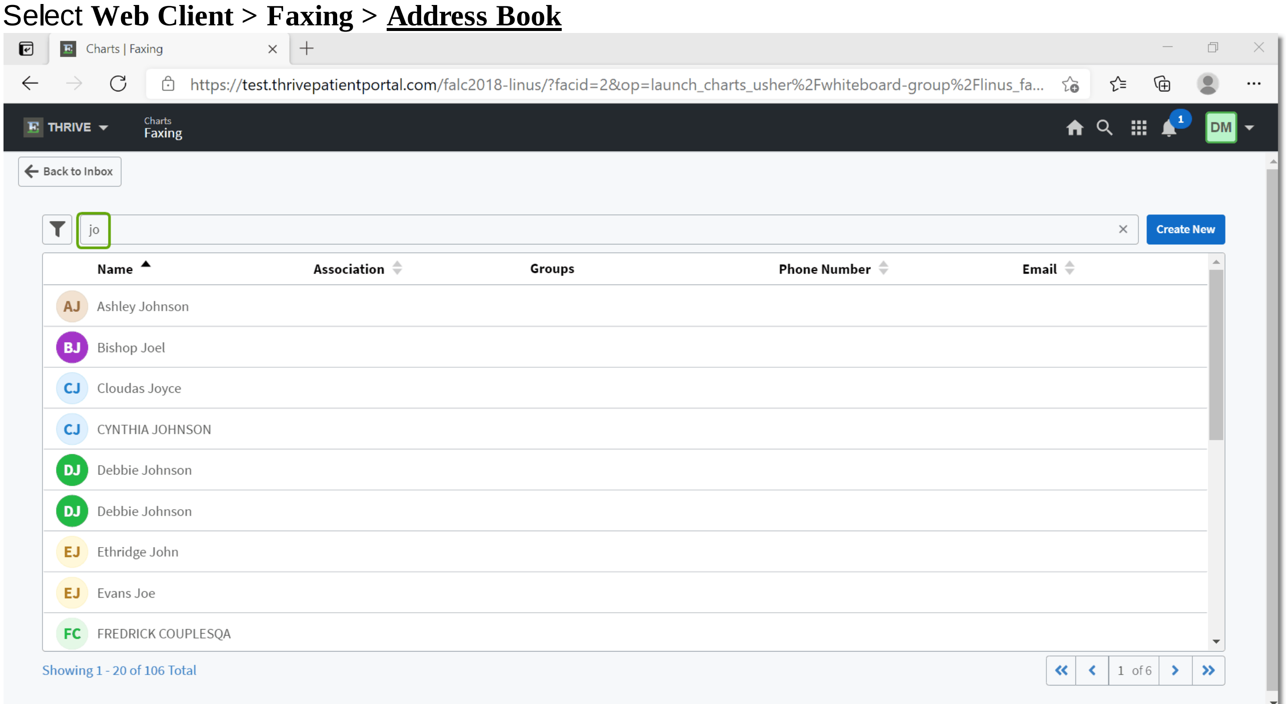
Select **Web Client** > **Faxing** > **Address Book** > **Filter Icon**



Address Book Filter

Enter several letters of the name and the search feature will display all names that meet the criteria.

Select **Web Client** > **Faxing** > **<u>Address Book</u>**



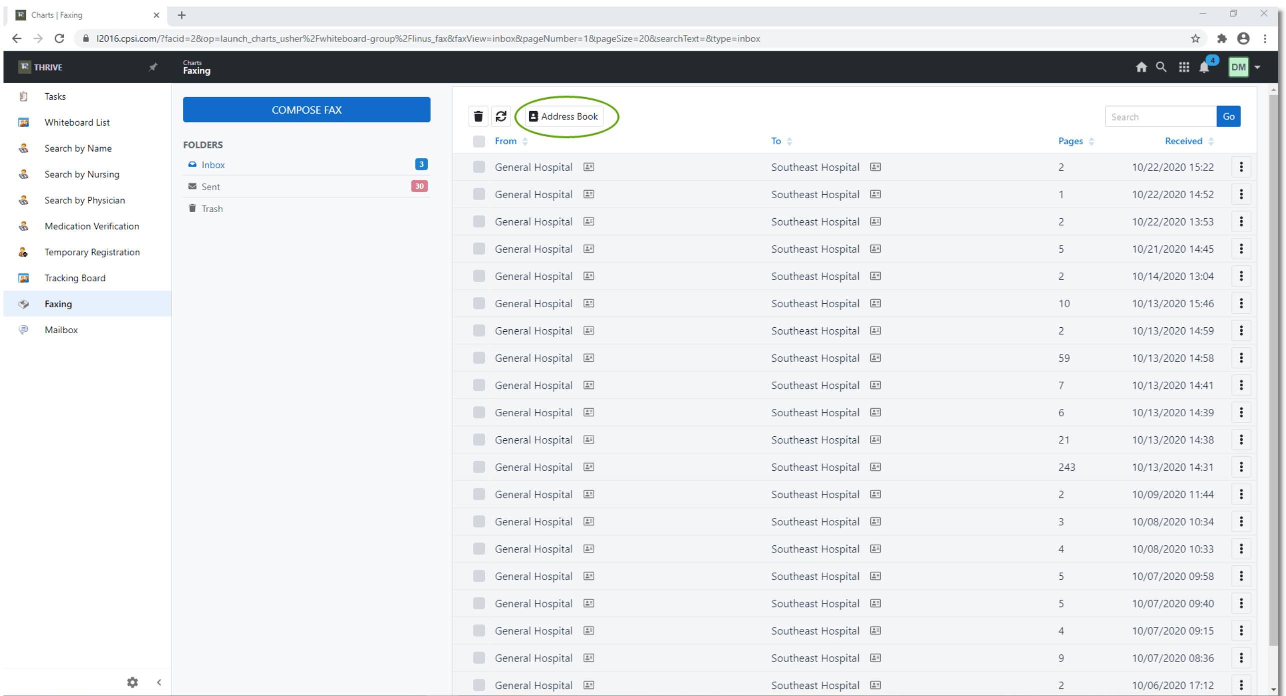
Search

7.3 Creating an Address Book Entry

New Address Book entries may be created and saved as an Individual, Organization, or placed in a group of the user's preference. ***Please note that Users within your facility will automatically be added to the Address Book when they are given the Application permission for Faxing or Messaging in System Administration.***

The Address Book may be accessed from either the **Faxing** or **Mailbox** component.

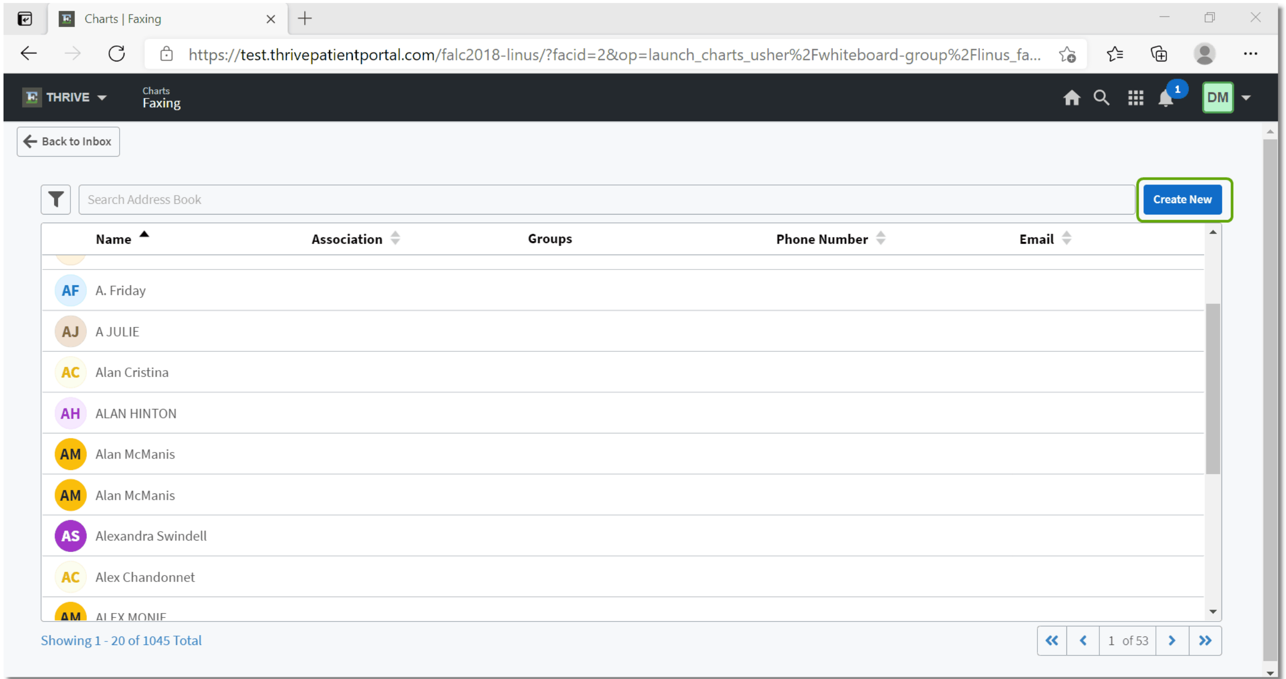
Select **Web Client** > **Faxing** > **Address Book**



Address Book

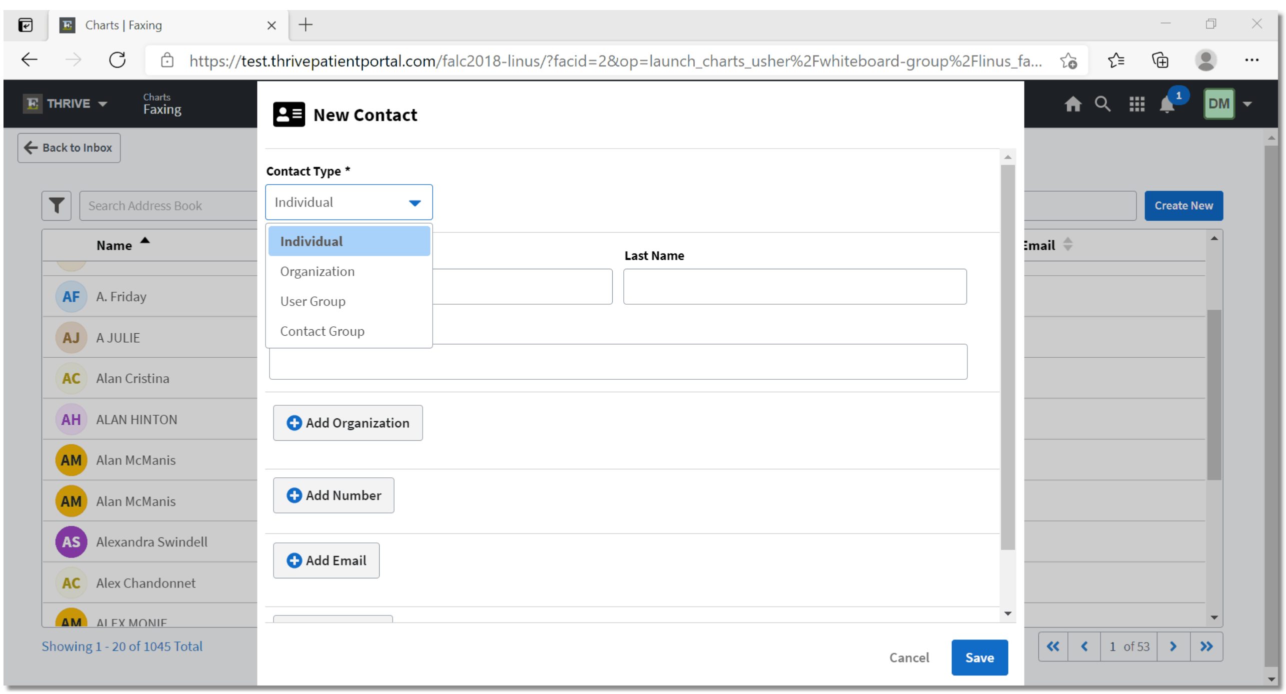
Select **Create New**.

Select **Web Client** > **Faxing** > **Address Book** > **Create New**



Create New

Select **Web Client** > **Faxing** > **Address Book** > **<u>Create New</u>**



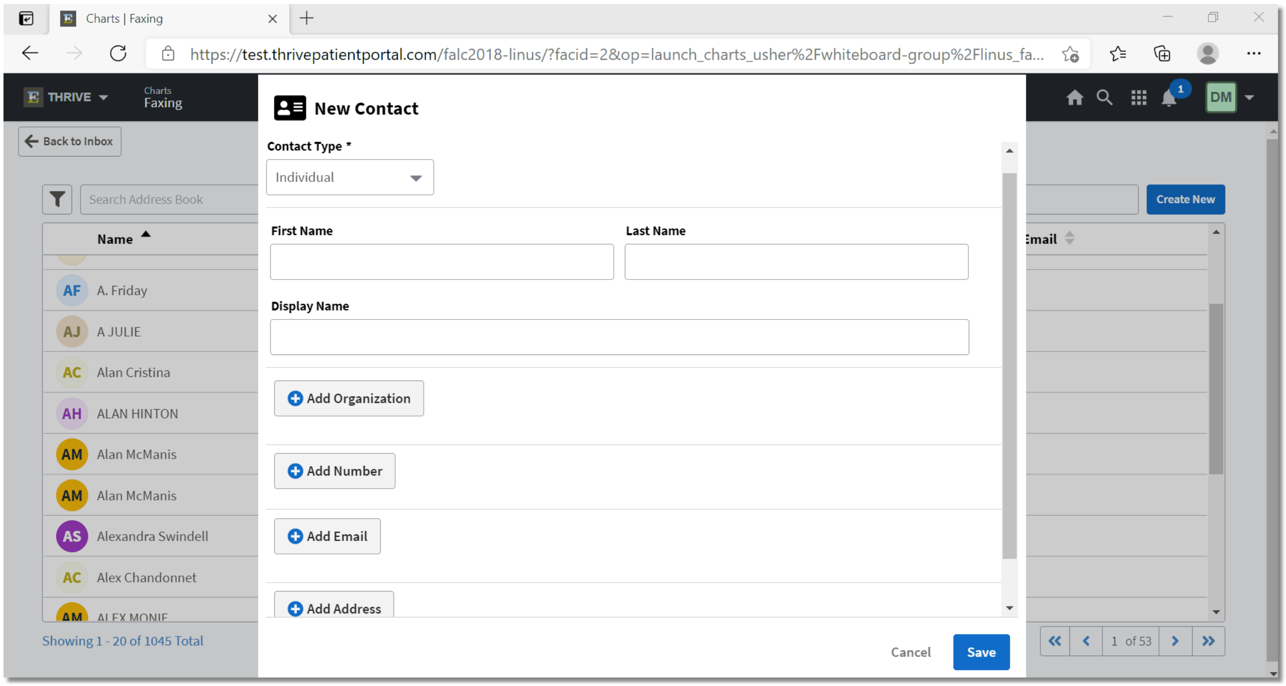
Create New

Select one of the four options for a new contact:

- Individual - Global
- Organization - Global

- User Group - User-defined group of Individuals.
- Contact Group - User-defined groups of contacts.

Select **Web Client** > **Faxing** > **Address Book** > **Create New**



Create New Contact

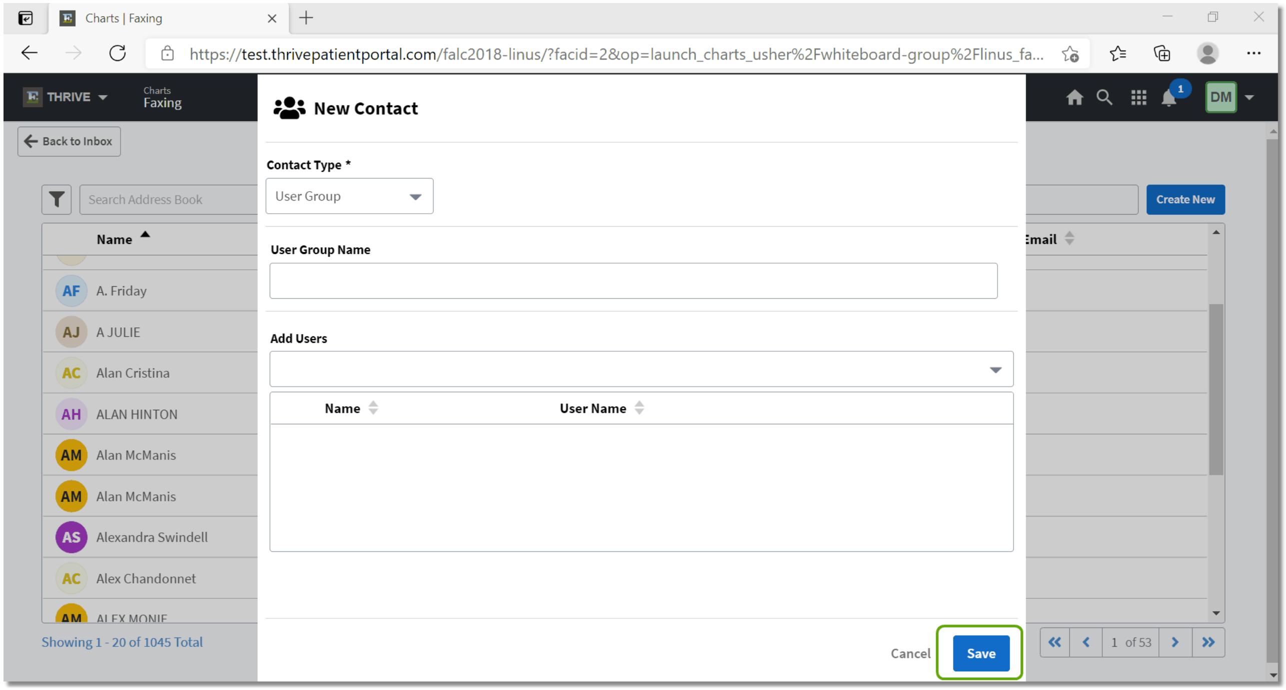
The following information may be saved for an Individual Address Book Contact:

- First Name
- Last Name
- Display Name
- Organization
- Phone Number. If out of the country, this option also allows for a country code to be added.
- Email Address
- Physical Address

The following information may be saved for an Organization Address Book Contact:
- Organization Name
- Phone Number
- Email Address
- Physical Address

A User Group and Contact Group are user-defined groups.

Select **Web Client** > **Faxing** > **Address Book** > **Create New**



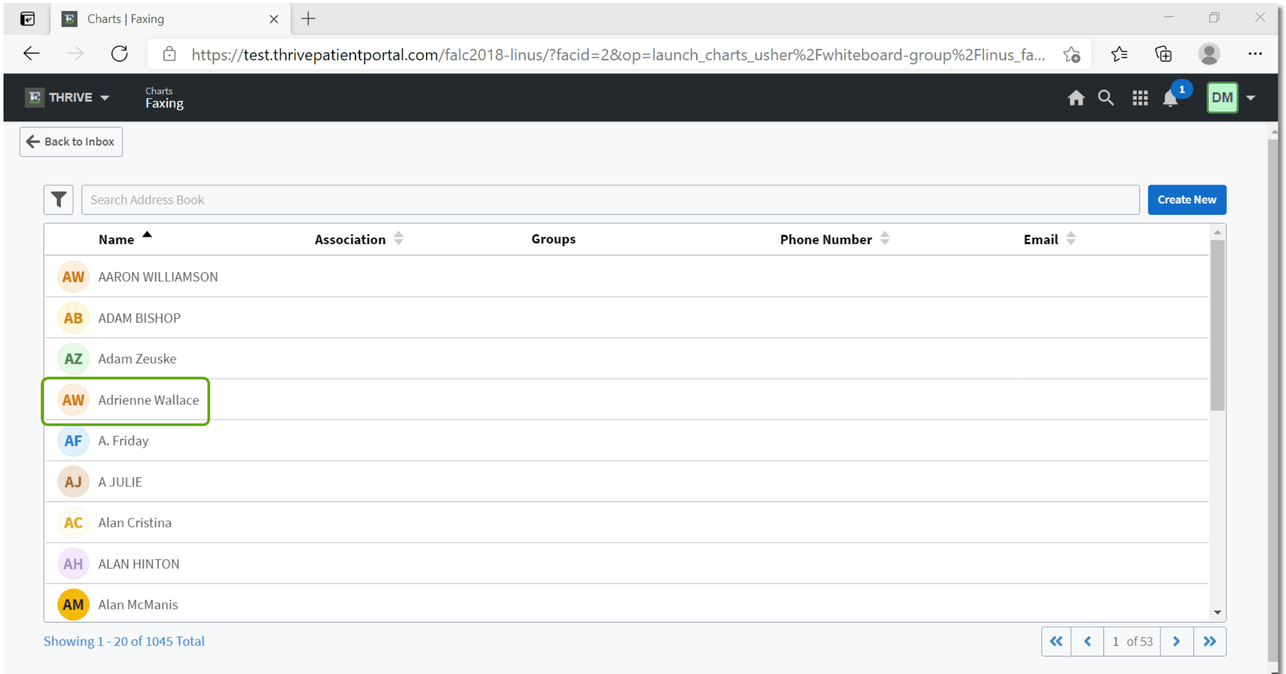
Create User Group

To create either a User Group or a Contact Group, enter a name for the Group and add the users or contacts. When finished, select **Save.**

7.4 Editing/Deleting an Address Book Entry

An Individual or Organization address may be edited. To **Edit** an Individual or Organization, select the contact from the Address Book.

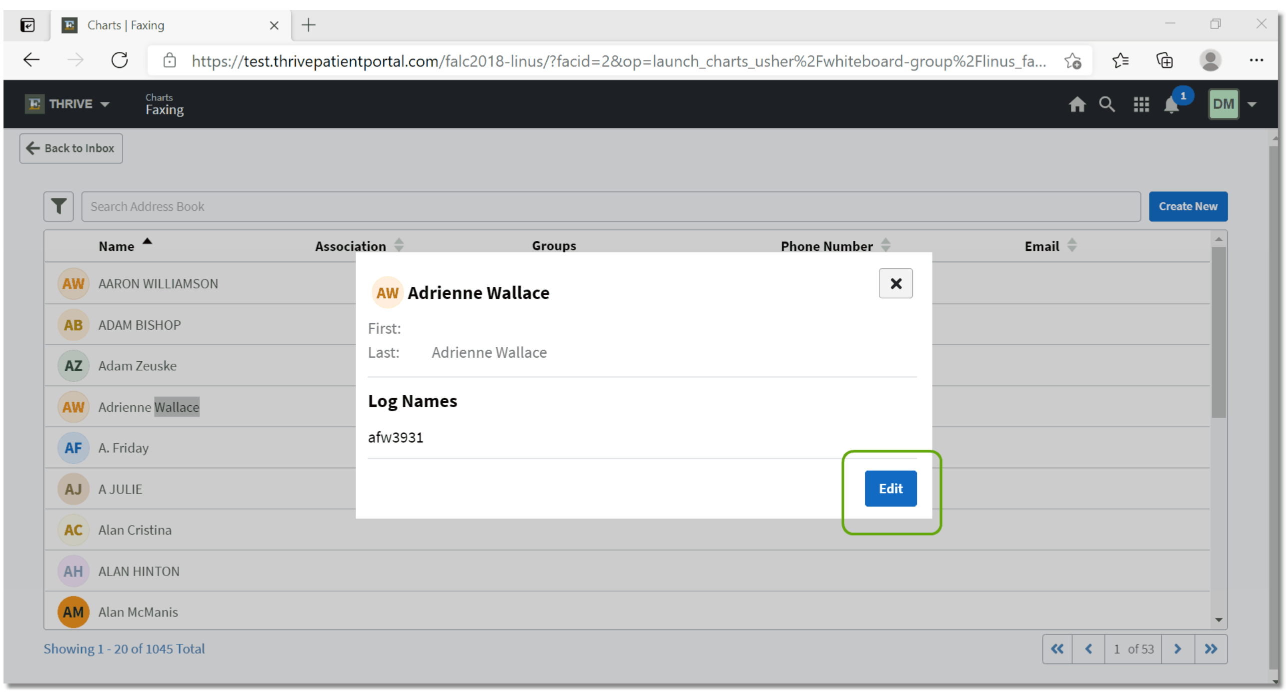
Select **Web Client** > **Faxing** > **Address Book** > **<u>Select Contact</u>**



Selecting a Contact

To Edit the contact, select **Edit**.

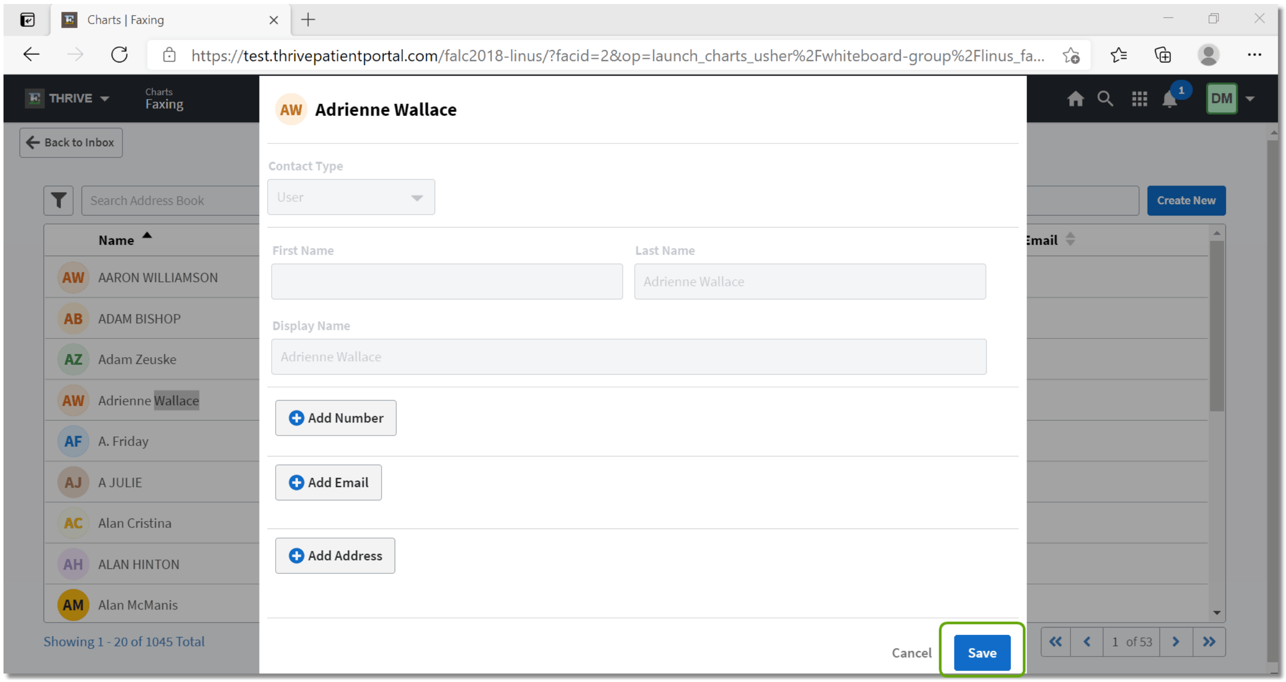
Select **Web Client** > **Faxing** > **Address Book** > **Select Contact** > **Edit**



Editing a contact

Additional contact information may now be added to the contact. After the edits are complete, select **Save**.

Select **Web Client** > **Faxing** > **Address Book** > **Select Contact** > **Edit** > **Save**



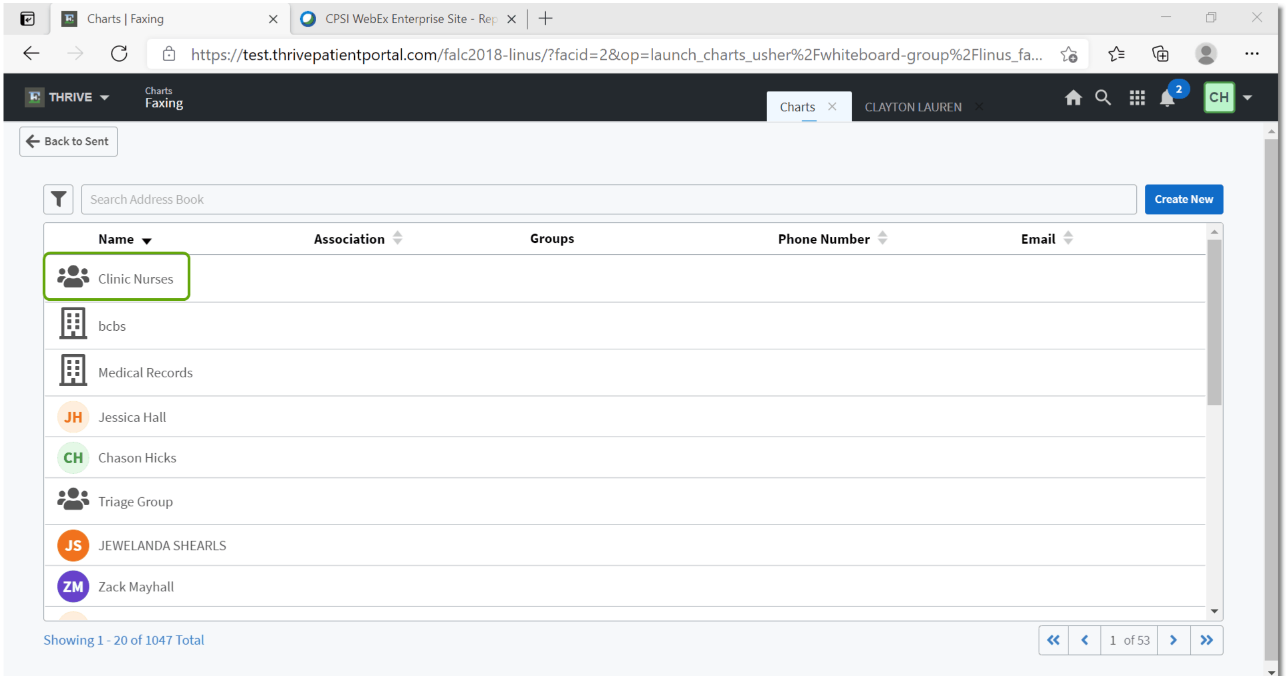
Saving Edits

Deleting A User-Created Contact:

The only contacts that may be deleted are user-created contacts: User Groups and Contact Groups.

To delete a user-created group, select the group from the search screen

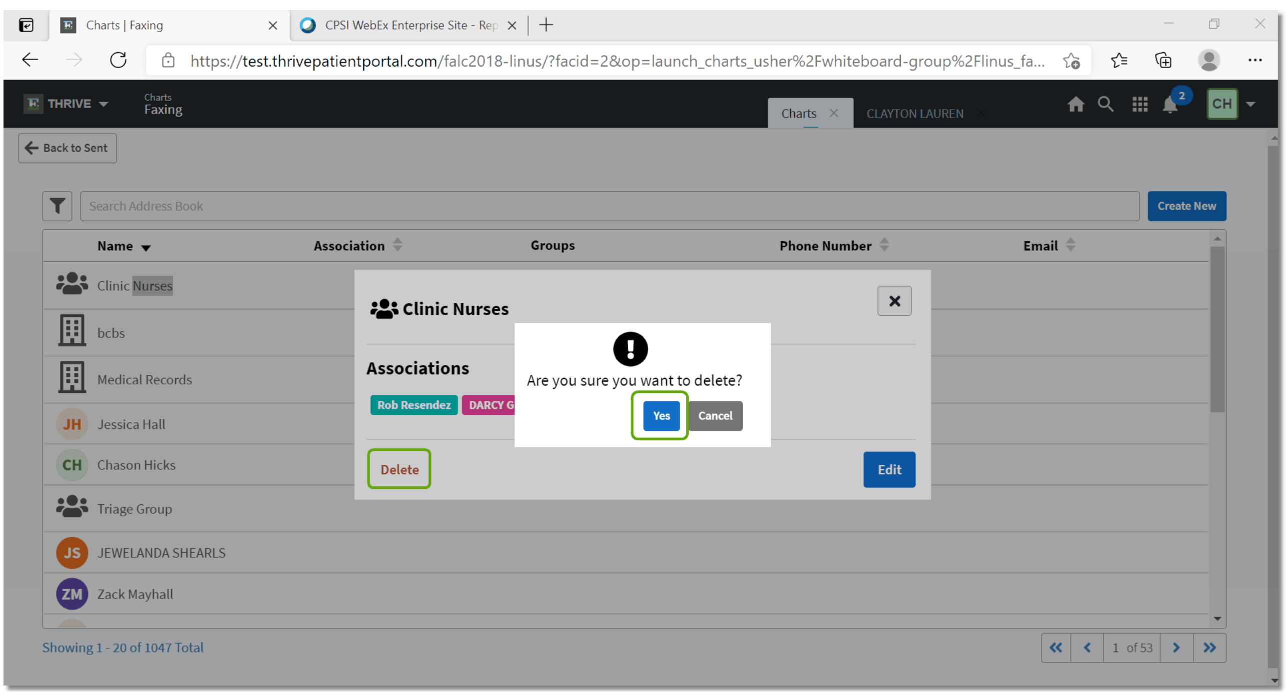
Select **Web Client** > **Faxing** > **Address Book** > **Select Contact**



Select Group

Select **Delete** and then **Yes** to the prompt message.

Select **Web Client** > **Faxing** > **Address Book** > **Select Contact** > **Delete**



Deleting a Group

*Please Note that an alternate path to delete a user-created group is by selecting the **Edit** button and then selecting **Delete**.*

Chapter 8 Single Solution Audit

The Single Solution Audit allows for the auditing of service requests within the Fax and Internal Mail messaging components of the Communication Center.

The user of the audit must be given the Application permission to Single Solution Audit. Currently, the Communication Center is the only application using the Single Solution Audit although this may change with future programming.