

# Internal Messaging / Notes



Internal messaging tools enable caregivers, nurses, and administrators to coordinate patient care, share vital information, and manage schedules efficiently.

## Internal Messaging

The Internal Messaging option is used to send internal messages from the patient to the employee. The user has to click +Add New Message option to send the messages.

**Client >> List >> Select Patient from List >> Internal Messaging**

The screenshot shows the 'Internal Messaging' tab selected in the top navigation bar. Below the tabs, there is a checkbox for 'Assigned to me only' and a green '+ Add New Message' button. A table displays one message record:

Message	Assignee	Status	Added By	Added Date	Action
erlelelet	Catts, Tanya	Open	Admin, Master	10/07/2023	 

Below the table, it says 'Showing 1 to 1 of 1 records'.

Select the Employee name and enter the message for the employee in the system. Click Save option to send the message.

The screenshot shows the 'Add New Message' modal form. At the top, it says 'EDIT PATIENT - CLARK, SAMUEL 45Y 7M MALE / #3357951852 / LOCATION: N/A / STATUS: ACTIVE'. The modal has a close button (X) in the top right corner. Inside the modal, there is a dropdown menu for 'Assignee\*' with the text 'Select Assignee' and a text area for 'Message\*'. At the bottom, there are 'Cancel' and 'Save' buttons. In the background, the 'Internal Messaging' tab and table are visible.

## Notes

The Notes Tab is used to update the internal notes for the patient in the system. Click +Add Note option to enter the notes.

**Client >> List >> Select Patient from List >> Notes**

EDIT PATIENT - CLARK, SAMUEL 45Y 7M MALE / #3357951852 / LOCATION: N/A / STATUS: ACTIVE

Patient Details

Documents

Billing/Prior Authorization

Care Plan





Calendar

Block Employees

Internal Messaging

Notes

+ Add Note

Note	Added By	Category	Added Date	Action
reports	Master Admin		10/10/2023	 
documents	Master Admin		10/10/2023	 

Now, update the notes for the patient and click Save option.

EDIT PATIENT - CLARK, SAMUEL 45Y 7M MALE / #3357951852 / LOCATION: N/A / STATUS: ACTIVE

Patient Details

Documents

reports

documents

Add Note

Role\* PCA/CNA

Assignee\* Assignee is required

Category Category is required

IsPrivate ☒

+ Add Note Sentence

Note\*

Note

Cancel

Save

Click Delete option under Actions in the system to Delete the Notes.

Patient Details

Documents

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Block Employees

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+ Add Note

Note	Added By	Category	Added Date	Action
reports	Master Admin		10/10/2023	 
documents	Master Admin		10/10/2023	 
notes	Master Admin		10/18/2023	 

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