Secure Chat: Epic Desktop

Reference Guide for All Caregivers

To Open Chat

In the menu bar, the Secure Chat icon appears orange when you have a new message. Click the Secure Chat icon to open Chat/view your message(s).

To Start a New Chat

1. Click.
2. In the Patient field, enter the patient’s name or medical record number if you would like to attach their chart to the message.
3. In the To field, enter the caregiver’s last name.
4. In the Enter a message field, type your message to the caregiver.
5. Click [Send].

Review or Continue Previous and Ongoing Conversations

At the left under Conversations, all previous conversations appear with a status. Click the conversation to review/continue.

Take Note

- Do not use Secure Chat Messages to place orders; place all orders in the Ordering section.
- Do not use Secure Chat Messages to communicate critical changes in a patient’s clinical condition or for communicating critical lab or imaging results. Communicate this information via telephone or face to face.
- Messages will be saved in Epic for a period of 14 days, then they are deleted.
Auto Forward Chat Messages

1. Click ⚙.
2. Complete the appropriate information.
3. Click [Accept].

Take Note

You can only configure auto forward of chat messages in Epic on a desktop.