



Audience: All Epic Secure Chat Users (Including All Providers, Clinicians and Non-Clinical Users)

## Overview

- **What is Secure Chat?**
  - A HIPAA-compliant, secure messaging tool within Epic that you can use to communicate and collaborate with other Epic users.
  - You can chat 1:1 or in groups to exchange general messages or discuss detailed patient information, including photos.
- **How do I access Secure Chat?**
  - Access Secure Chat any time you're using Epic. No special set up is required.
  - **From a desktop computer, WOW or laptop:**
    - Click the Secure Chat workspace tab (looks like a speech bubble).
    - Unread messages are bold, with the number of unread messages in a green circle.
    - For details, review [Secure Chat on HM Desktop/WOW](#) tip sheet.
  - **From Haiku, Canto or Rover:**
    - Physicians, nurses and others can conveniently access Secure Chat using Epic mobile tools.
    - To use Secure Chat on a mobile device, you must have the appropriate Epic Mobile app installed.
  - **Providers:** To install Haiku (iPhone app)/Canto (iPad app), two options:
    - Contact the IT Help Desk at 832.667.5555, select option 2.
    - Reach out to your local IT Field Ops team.
- **When should I use Secure Chat?**
  - For non-urgent communication related to daily work activities.
  - *Use your current communication channels for urgent or immediate patient care needs.*
- **Is it mandatory that I use Secure Chat?**
  - Secure Chat is not mandatory at this time, but it will become the foundation for the future of our secure messaging platform.
  - We encourage you to start using Secure Chat now. Over the next year, we will add more features as we plan to sunset other secure messaging platforms by the end of 2020.
- **Who can use Secure Chat?**
  - Most Epic users will have access to Secure Chat.
  - Here's a [list of user groups](#).
- **Who can I communicate with on Secure Chat, and how do I do it?**
  - You can communicate with any Epic user who has Secure Chat access.
  - You can look up people by name.



- If someone doesn't have Secure Chat access, a pop-up message will say the person "does not have the required security to participate in chat."
- **Can I chat with more than one person in a conversation?**
  - Yes, you can initiate one-to-one conversations and add individuals to create group conversations.
  - Pre-defined groups, such as departments/units, are not available right now, but this functionality is coming soon.
- **Why are we making Secure Chat available now?**
  - During the COVID-19 pandemic, physicians and other caregivers expressed the need for a swifter, more efficient way to communicate with each other for patient care.
  - Secure Chat was in development and not available when we initially launched Epic – it is now a very robust communications tool.
  - It facilitates more efficient communication and is a fundamental part of our long-term clinical communications strategy post-pandemic.
- **Can I delete the messages I send?**
  - No, you can't delete any messages you send.
- **How long are messages retained?**
  - Messages are automatically deleted 30 days after they're sent.
- **Are messages included as part of the legal medical record?**
  - No, Secure Chat messages are not considered part of the legal medical record.
  - These messages are subject to discovery in legal proceedings.
  - **Note: As always, all care and treatment information should be documented in the medical record.**

## Access/Messaging/Setting Availability

- **How will I know if I have a Secure Chat message?**
  - You'll receive a notification when you have a new message. For details, click the tip sheet that applies to you.
    - [Secure Chat for Haiku/Canto \(providers\)](#)
    - [Secure Chat for Rover](#)
    - [Secure Chat on HM Desktop/WOW](#)
    - [Secure Chat for EVS and Patient Transport](#)
- **If I'm using Rover, what if I don't see the Secure Chat icon on my Zebra Smartphone?**
  - First, exit the patient's chart.
  - When you tap the **Epic** button, the icon appears in the top banner.



- **Do I have to be logged in to Epic to receive a Secure Chat message?**
  - No, you still receive messages even when you're logged out.
  - When you log in Epic, you'll see missed messages that were sent while you were logged out.
  - If your session times out (after 20 minutes), you won't see message alerts until you log back in.
  - If using Haiku/Canto, you'll see a notification on your device, just like any other push notifications/messages.
- **How can I let people know if I'm unavailable?**
  - Let colleagues know when you're out, in surgery or otherwise unavailable by changing your status. By default, your status is not set. No matter your status, you'll still receive messages and push notifications that you've set up in your notification preferences.
  - Note: After the specified end time, you automatically revert to having no status set. If you want others to see your availability, you'll need to update the status.
- **How do I set my availability?**
  - **Haiku/Canto**
    - From Secure Chat, tap **Set your availability** and set to **Available**, **Busy** or **Unavailable**.
    - Tap **Until** to specify how long you'll be in that status.
  - **Rover**
    - From Secure Chat, tap **Available** to select a status (**Available**, **Busy** or **Unavailable**).
    - Tap **Until** to specify how long you'll be in that status.
  - **HM Desktop/WOW**
    - In Secure Chat, click the gear icon above the list of conversations.
    - Select the appropriate option (**Available**, **Busy** or **Unavailable**).
    - Click **Until** to specify how long you'll be in that status.
    - You may enter an away message in the **Message** field, if you prefer, but it's not necessary.
- **Can I auto-forward Secure Chat messages?**
  - Yes, you can auto-forward messages for vacations or other times you're unable to respond.
  - **Haiku/Canto**
    - Tap the gear icon at the top of the **Conversations** column.
    - Tap **Change Auto-Forwarding**.
    - Tap the switch to enable **Auto-forward chat messages**.
    - Specify who will receive your messages, along with start and end times.
    - Tap the switch to specify whether you want to receive chat notifications.
  - **Rover**
    - From Secure Chat, tap the gear icon above the list of conversations.
    - Use **Chat Settings** to set up **Auto-Forwarding** or **Change Notification Settings**.



- **HM Desktop/WOW**
  - In Secure Chat, click the gear icon above the list of conversations.
  - Select **Auto Forward Messages**.
  - In **Forward To**, enter who should receive the messages.
  - Use **From** and **Until** to set the auto-forwarding beginning and ending.
  - Click **Accept**.
- **How do I enable Secure Chat push notifications?**
  - You can set up your device to receive quick notifications for things like key lab results.
  - **Haiku/Canto**
    - Tap **More**.
    - Tap **Notifications**.
    - Tap the gear icon.
    - Modify your **Notification Settings**. Some settings to look for are:
      - Enable **Push notifications**.
      - **Send reminders**.
      - Change **Notification sound** (visible by scrolling down).
      - Show banner/sound alerts for messages of your choice.

## Provider-Focused FAQs

- **Does Secure Chat replace PerfectServe?**
  - Secure Chat is not replacing PerfectServe at this time.
  - By 2021, however, PerfectServe will be phased out as more Secure Chat features become available, including call scheduling and routing.
- **Does Secure Chat replace our current method for contacting on-call physicians?**
  - No. Continue using your existing method to contact on-call physicians.
  - We will add on-call scheduling and routing to our Secure Chat messaging platform in the future.
- **Will I be able to tell whether someone is using the mobile or desktop version of Secure Chat when I'm sending them a message?**
  - No, you can't see if someone is using an Epic mobile app or a desktop.
  - To avoid possibly missing messages, don't use Secure Chat for urgent messages.
- **Can I enter orders using Secure Chat?**
  - Per CMS Conditions of Participation, orders can't be given through any secure messaging app.
  - Orders can be efficiently entered using Epic Haiku/Canto apps via the **Orders** tab.



- If you're already using Secure Chat on your mobile device, you can simply click the banner within the conversation. This takes you right to the chart to enter the orders.
- *Note: At this time, Android devices do not support order entry in Haiku.*
- **Do I need to have Epic mobile (Haiku/Canto) to use Secure Chat?**
  - No, Secure Chat is available for all physicians, advanced practice providers and residents in Epic (desktop) and Epic Mobile.
  - Secure Chat is synchronized across all platforms but to maximize efficiency, we recommend that providers use the push notifications for mobile tools.
- **How do I set up/customize Secure Chat push notifications?**
  - **Haiku/Canto**
    - Tap **More**.
    - Tap **Notifications**.
    - Tap the gear icon.
    - Modify your **Notification Settings**. Some settings to look for are:
      - Enable **Push notifications**.
      - **Send reminders**.
      - Change **Notification sound** (visible by scrolling down).
      - Show banner/sound alerts for messages of your choice.
- **What if I'm not available to receive messages?**
  - Let colleagues know when you're out, in surgery or otherwise unavailable by changing your status. By default, you do not have a status set. No matter your status, you'll still receive messages and push notifications that you've set up in your notification preferences.
  - Note: After the specified end time, you automatically revert to having no status set. If you want others to see your availability, you'll need to update the status.
    - **Haiku/Canto**
      - From Secure Chat, tap **Set your availability** and set to **Available, Busy** or **Unavailable**.
      - Tap **Until** to specify how long you'll be in that status.
  - In addition, providers can set up auto-forwarding to another provider.
    - **Haiku/Canto**
      - Tap the gear icon at the top of the **Conversations** column.
      - Tap **Change Auto-Forwarding**.
      - Tap the switch to enable **Auto-forward chat messages**.
      - Specify who will receive your messages, along with start and end times.



- **Can my covering provider get Haiku/Canto?**
  - Yes, Haiku/Canto is available for all Houston Methodist providers with Epic access.
  - To install Haiku/Canto (two options):
    - Contact the IT Help Desk at 832.667.5555, select option 2.
    - Reach out to your local IT Field Ops team.
  
- **What if my covering provider doesn't use Haiku/Canto?**
  - Providers can still receive/send messages when logged in Epic on a desktop/laptop, but providers won't receive push notifications of messages.
  - They will have to log in Epic to see messages.
  
- **Do I have to share my cell phone number to use Secure Chat?**
  - No, you aren't required to provide a phone number to use Secure Chat. The communication takes place in Epic.
  
- **Can I send messages to external providers (not affiliated with Houston Methodist) or patients using Secure Chat?**
  - No, Secure Chat is built on our Houston Methodist Epic profiles and is for internal use only.
  
- **In addition to using Secure Chat, what other features are available in Epic Haiku/Canto mobile apps?**
  - Most used features on iOS devices:
    - Order outpatient and inpatient medications/procedures.
    - Manage your In Basket.
    - Review notes, meds, allergies.
    - Complete interval updates for upcoming procedures.
    - Get push notification for labs and radiology.
    - Take photographs.
    - View radiology images/studies.
    - Enter charges.
  - To install Haiku/Canto (two options):
    - Contact the IT Help Desk at 832.667.5555, select option 2.
    - Reach out to your local IT Field Ops team.