

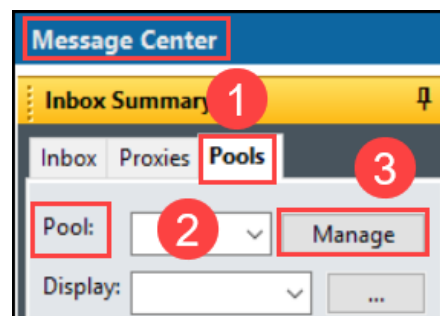
Message Center Pools Overview

A Pool in Message Center is a shared inbox that can be accessed by multiple care team members. The contents of the inbox are visible to all members of the Pool, however the best practice is to have only one care team member act on the item to avoid duplicate work. Pool functionality allows a team of staff to share the responsibility for managing results, documents, and messages for a group of patients. The Pool inbox will function the same as an individual's personal inbox in Message Center, with the exception being the ability to Assign who is working on a message. The list of available pools and pool permissions are clinic specific.

Accessing a Pool in Message Center

Complete the following steps to access a Pool inbox:

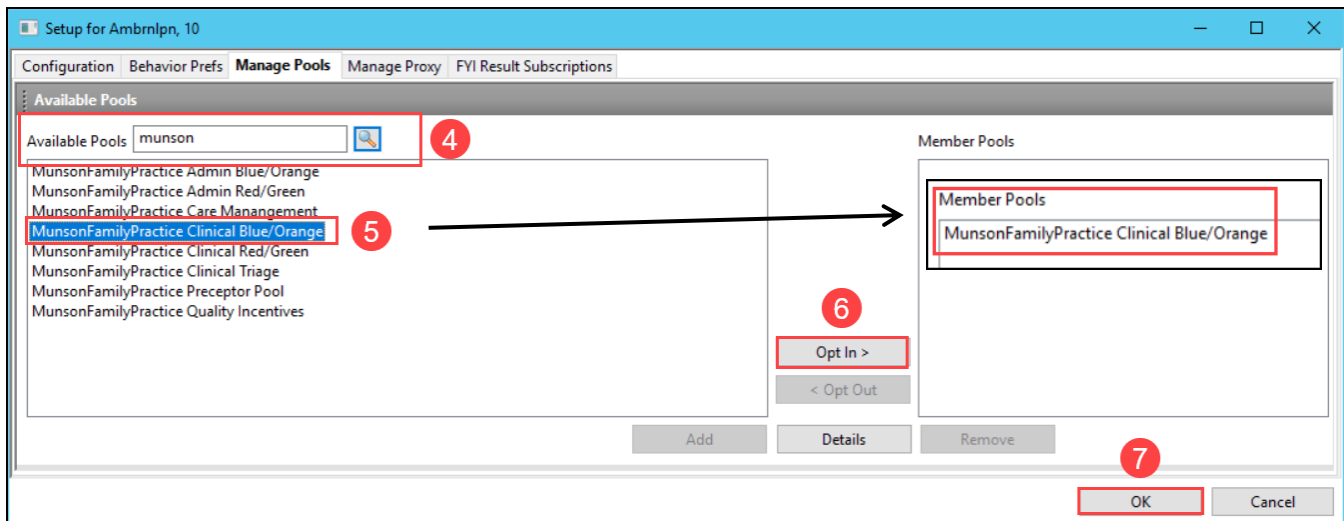
1. In Message Center, click the Pools tab.
2. Select the desired Pool to access from the Pool list.



To Add a Pool to a Pool list:

3. Click Manage.
4. In Available Pools, search for the Pool name.
5. Select the Pool name.
6. Click Opt In to add the Pool to Member Pools.
7. Click OK when complete.

Note: Select additional Pools to Opt into as needed. Follow practice guidelines regarding what Pools each care team member should add.

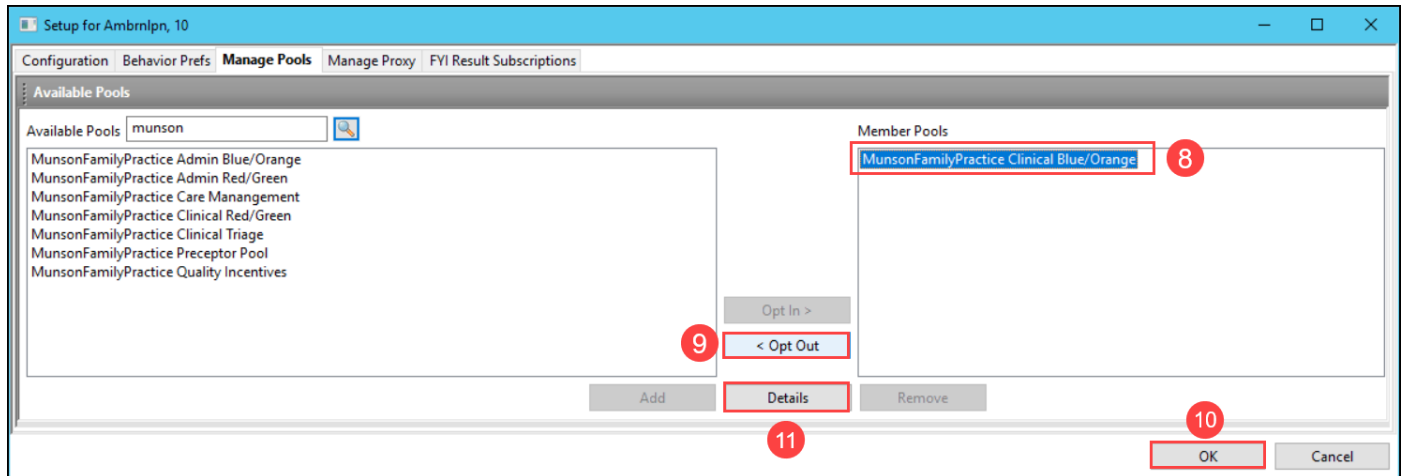


Message Center Pools for Clinical and Clerical Staff

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To remove a Pool from a Pool list:

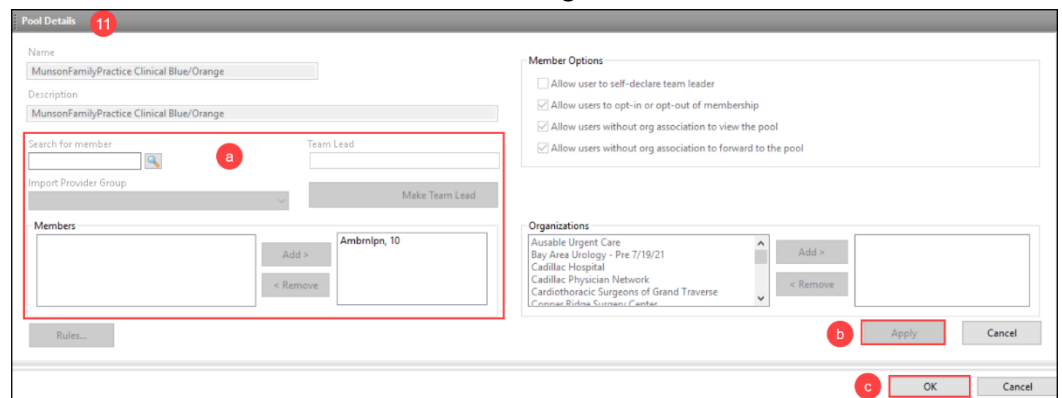
8. Select the desired Pool to Opt Out from in the Member Pools Pane.
9. Click Opt Out, to remove the Pool from Member Pools list.
10. Click OK when complete.



Note: A team leader cannot Opt Out of a Pool until another member in the Pool is defined as a team leader.

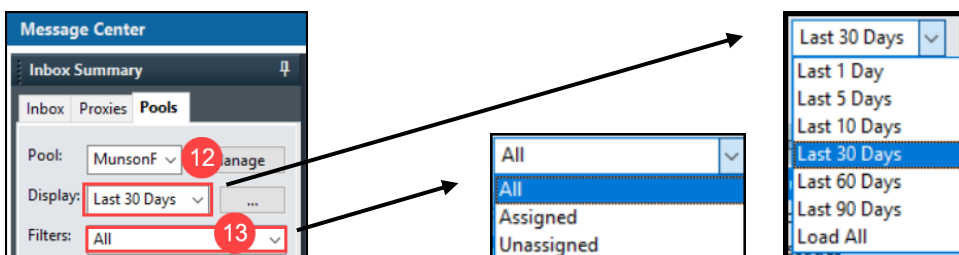
11. Certain positions may be given access to modify the membership of pools by clicking on Details.
 - a. Search for new members to add or click Remove to remove existing members.
 - b. Click Apply to save changes.
 - c. Click OK when complete.

Note: Members not authorized for this task will not have the Details option enabled.



Pool Display in Message Center

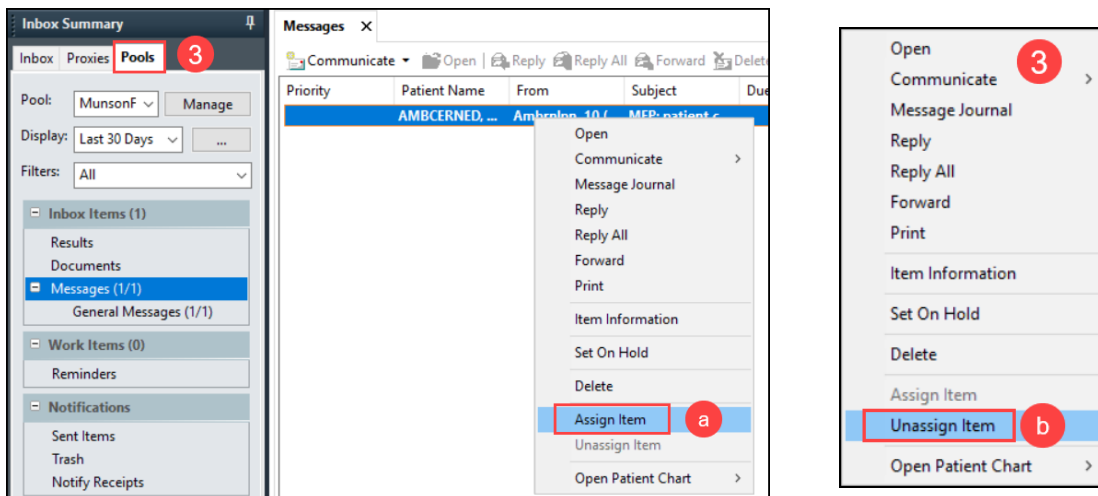
12. Click the Display drop-down to select a date range option to narrow the number of messages displayed.
13. Click the Filter drop-down to select an option to change what type of messages will be displayed.



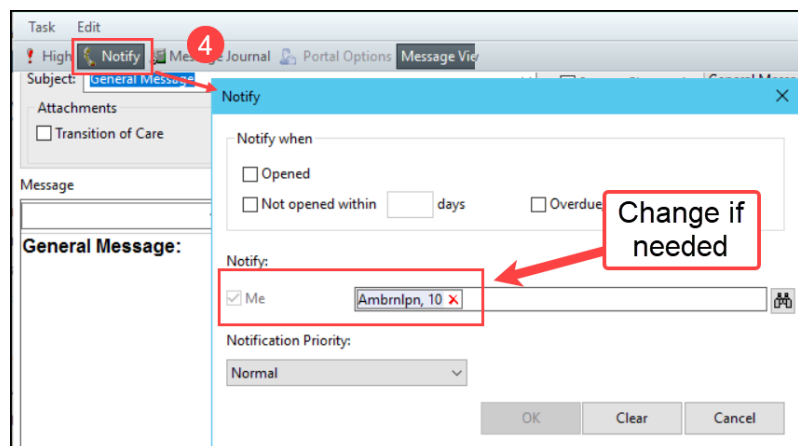
Managing a Pool Inbox in Message Center

The Pool inbox functions the same as an individual's personal inbox in Message Center. Follow practice guidelines for managing messages in a Pool Inbox.

1. Click an item once to preview.
2. Double click the item or select the item and click Open to view.
 - a. Once opened, the message will no longer be bold, indicating that it has been read.
 - b. Mark the message as unread if needed. All message center functions are available.
 - c. Messages in the Pool Inbox may be forwarded to an individual's inbox.
 - d. If a message is sent from a pool, the reply will return to the pool.
3. Messages may be assigned to indicate the care team member working on that message.
 - a. Assign a message by right clicking on the message in the Pool Inbox and selecting Assign Item. (You may only assign an item to yourself).
 - b. Unassign a message by right clicking on an assigned message and selecting Unassign Item.



4. Selecting Notify when sending or responding to a message in the Pool Inbox, the Notify Receipts recipient will default to the care team member's name selecting Notify. Change the recipient's name to the Pool, if needed.



Note: Detailed instructions on the Message Center can be found on the Clinical EHR Education website in the Message Center Guide.