# Message Center
## Quick Reference Guide

MAYO CLINIC LABORATORIES

**Note:** BioPharma MCBD clients will see different column headers and/or field labels on the landing, **DETAILS**, and **CREATE MESSAGE** pages. See the User Guide for details.

## Log in to Message Center

1. Log in to MayoClinicLabs.com.
2. Navigate to **My Dashboard** > **Message Center**.

   **Note:** For access, contact Customer Service.
3. If you have access to more than one account, select the desired one(s) from the **Account Number** drop-down menu.

## Filter and find messages/alerts

On the **MESSAGE CENTER** landing page:

- Under **MESSAGES**, urgent Mayo-created cases needing responses have exclamation points in the **STATUS KEY** and **Status** column plus a bold red left border in the **Actions** column.
- Select a timeframe: **LAST WEEK**, **LAST 30 DAYS**, **LAST 90 DAYS** (default), or a custom date range.
- Categories: **ALERTS**, **MESSAGES**, or **ARCHIVED**.
  - **ALERTS** has four subtabs: **Critical/Semi-Urgent**, **Cancel**, **Revision**, and **Transportation**.
  - **MESSAGES** has four subtabs: **All**, **New**, **Sent To Mayo**, and **Complete**.
  - **ARCHIVED** has three subtabs: **All**, **Alerts**, and **Closed Messages**.

  **ALERTS** and **MESSAGES** tabs and subtabs display total number of new cases.
- Enter a search term into the **Search all columns…** field. To undo the search, click either the **X** at the right end of the field or **CLEAR ALL FILTERS**.
- Move slider to the right for **My Messages** to find messages you initiated, for **Team Created Messages** to find those your team initiated, or for **Assigned Messages** or **Assigned Alerts** to find those assigned to users.
- To sort messages/alerts by any column but **Actions** and **Status**, click its header.
- To filter messages/alerts by **Case Id**, **Order** [or **Specimen**] **Information**, **Patient** [or **Subject**] **Information**, **Tests**, and/or **Type**, enter ≥3 characters of keyword text into the text box above the column. To find all messages/alerts assigned to or archived by a user, on the appropriate tab, enter their first, last, or full name into the **Case Id** text box.
- Check or uncheck check boxes in the **Hide/Show Columns** drop-down menu (except for **Case Id**, **Actions**, and **Status**, which cannot be hidden).
- To change column order, hover over the header of the column you want to move, then drag and drop it to the desired location.
- To filter messages/alerts by status, use **Status** drop-down menu in the second column. Refer to **STATUS KEY** near top of page.
- On most tabs and subtabs, the **Created** column of the Message List shows message/alert age with colored symbols. ▪ is less than 2 days, ▪▪ is 2–3 days, ▪▪▪ is 4+ days.

## View message/alert details and history

To view a message or alert's **DETAILS** page, click its **Case Id**.

- Any alerts/urgency indicators appear at top of page.
- If the **blue INTERNAL COMMENTS** and/or **MORE MESSAGES** bar is available, click to view internal comments and/or messages that are hidden by default.
- The **Print** icon at top right opens both the Windows print function and the **Internal Instructions** dialog box.

  **Note:** Scan the QR code at bottom left of a printed alert to be taken to the **Operational Updates** page on MayoClinicLabs.com.
- The **AUDIT LOG**, when expanded, lists all actions performed on the case to date.

## Create a new message

1. On the **MESSAGE CENTER** landing page, click **NEW MESSAGE**.
2. If multiple accounts are selected on landing page, enter at least one **Account Number** on **CREATE MESSAGE** page.

*Test Add On*

a. From **Message Type** drop-down menu, select **Test Add On**.

b. Confirm the authorization statement by checking the box.

c. Answer "*Is a separate specimen being sent for this request?*" **Yes** or **No**.

If **Yes**: To print a PDF with barcodes for inclusion in the transport bag, click either the **Print** hyperlink in the confirmation message or the **Print** icon at top right of the **DETAILS** page.

d. Use the **PATIENT** [or **SUBJECT**] **INFORMATION** fields to search for/select an order. If the search generates >10 results, refine it by entering additional information.

e. Answer *"Was a new order created for this test?"* **Yes** or **No**.

If **Yes**, you have the option to enter a previously created new order number into the **New Order Number (Client Order or Mayo Order Number)** text field and click the search icon.

f. In the **Test ID or Test Name** field, enter a search term.

g. To select a test from the autocomplete list, click its **+** sign.

**Note:** If the Test ID is obsolete, clicking the plus sign brings up the **Test code is Obsolete** warning message, which links to the relevant Test Catalog page and also to the **TEST UPDATES** page for the test on MayoClinicLabs.com.

h. Answer any **ASK AT ORDER ENTRY (AOE) QUESTIONS**.

**Notes:**
- You can drag and drop the answer to any **AOE QUESTION** asked on the previous order into the corresponding **AOE** field for the new Test Add On.
- If you answered **Yes** to *"Was a new order created for this test?"* and completed the **New Order Number (Client Order or Mayo Order Number)** field, all tests from the existing order are duplicated into the new one, and the answers to any **AOE** questions autopopulate in their respective fields.
- Clearing the **New Order Number (Client Order or Mayo Order Number)** field also clears all AOE answers and Selected Tests.

*Mayo-initiated Test Add On request*

a. In **Attestation Required** section of **DETAILS** page, do one of the following:
- Click **Accept**, then do one of the following:
  - Click **Same**.
  - Click **New**, and (optional) enter a **New Client Order Number**.
- • Click Deny.

b. Click **SAVE**.

You can also ask and send questions in the **DISCUSSION** text field before making a decision.

*Inquiry*

a. From the **Message Type** drop-down menu, select **Inquiry**.

b. **Optional:** Enter a **Subject** line of ≤50 characters.

c. Answer *"Is this inquiry about a specific patient order?"* **Yes** or **No**.

- If **Yes**, the **PATIENT** [or **SUBJECT**] **INFORMATION** section appears. Search for/select the order following sub-step d under *Test Add On* above.
- If **No**, proceed to step 3 below.

*Test Cancel*

a. From **Message Type** drop-down menu, select **Cancel Test**.

b. Use the **PATIENT** [or **SUBJECT**] **INFORMATION** fields to search for/select an order following sub-step d under *Test Add On* above.

c. In the **TESTS TO CANCEL** section, check off tests you wish to cancel, or **Check/Uncheck All**.

d. From the drop-down menu for each canceled test, select a **Cancellation Reason**.

**Notes:**

- **Check/Uncheck All** populates all drop-down menus with the same reason, but you can change it individually for each test.
- Revising an order to **Canceled** creates two messages: one for **Revised** and one for **Canceled**. Users subscribed to both these notification categories receive two different emails for the change in order status.

3. In the **DISCUSSION** field, enter any additional information.
4. Upload any attachments via the **ATTACH** function. ATTACH
5. **SUBMIT** the message.

## Respond to a message/alert

1. To view a message or alert's **DETAILS** page, click its **Case Id**.
2. In the **DISCUSSION** field, enter any additional information.
3. Upload any attachments via the **ATTACH** function. ATTACH
4. To save a draft of your message to be sent later, click **SAVE DRAFT**. To send the message immediately, click **SEND**.

## Message/alert assignment

To assign a message/alert to a user:

1. Click **ASSIGN** either in the **Actions** column of the Message List or on the **DETAILS** page at top right.
2. In the **Assign** dialog box, either start to enter a name and choose from the autocomplete list or click the down-arrow to select from the drop-down menu.
3. At bottom right, click **ASSIGN**.

To unassign a message/alert, do one of the following:

- In the **Actions** column, click **UNASSIGN**.
- On the **DETAILS** page, do one of the following:
  - At top left, click the red **X** to the right of the date and time of assignment.
  - At top right, click **UNASSIGN**.

To search for:

- All assigned messages/alert: Move the **Assigned Messages** or **Assigned Alerts** slider to the right.
- Messages/alert assigned to a specific user: Start to enter the assignee's name into the **Case Id** search field.

## Message/alert archival and unarchival

To archive a message/alert, click **ARCHIVE** in one of the following places:

- On the **Complete** or **All** subtab of the **MESSAGES** category, in the **Actions** column.
- On any subtab of the **ALERTS** category, in the **Actions** column.
- On the **DETAILS** page at top right.

To archive all messages on the **Complete** subtab or any **ALERTS** subtab, click **ARCHIVE ALL** at the top of the **Actions** column.

To unarchive a message/alert, click **UNARCHIVE** in one of the following places:

- Under the **ARCHIVED** category, in the **Actions** column.
- On the **DETAILS** page at top right.

## Notification settings

*For users:*

1. At top right of landing page, click the gear icon.
2. Under **LAYOUT**, select which category/subtab you want Message Center to open to when you first log in. See User Guide for more details.
3. Under **Selected Alert Subtabs will be displayed**, check or uncheck boxes to hide **ALERTS** subtabs on the landing page and stop receiving email notifications for those alert types.

**Notes:**

- All boxes are checked by default.
- The **Transportation** subtab cannot be hidden.
- You can resubscribe to email notifications for a specific alert type after hiding the relevant **ALERTS** subtab. Clicking the link in a notification email for that alert type brings up the landing page with a warning banner at top that provides a quick link to the **SETTINGS** page.

**Note:** The above is not recommended.

4. Under **EMAIL**, check or uncheck boxes to turn email notifications on or off.
5. If you select **Daily summary of messages and alerts**, use the clock icon and up and down arrows to choose the time of day you want the summary sent.
6. Click **UPDATE**.

*For accounts (admins only):*

1. At top right of the landing page, click the gear icon.
2. On the **SETTINGS** page, click the **ACCOUNT** tab.
3. From **Account Number** drop-down menu, select the account.
4. Under **MESSAGE ASSIGNMENT**, choose whether to keep or remove user assigned to message after that user responds to it.
5. Under **SUBSCRIPTIONS**, enter distribution list email addresses and/or email addresses not registered on MayoClinicLabs.com, and then click **ADD**.

**Note:** Distribution lists must be created in another application, such as Outlook. You cannot create them in Message Center.

6. Under **NOTIFY SUBSCRIBERS ABOUT**, set preferences for email notifications by following steps 2–4 under "*For users*" above.