MAYO CLINIC
LABORATORIES

Message Center User's Guide

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Introduction

The Message Center functionality on MayoClinicLabs.com lets you work with Mayo Clinic Laboratories quickly and efficiently to resolve issues and focus on the needs of the patient. It enables two-way communication between you and Mayo Lab Inquiry to resolve problems, process Test Add On and Test Cancel requests, and answer general or specific inquiries.

In Message Center **SETTINGS**, a user can set email notifications for specific account numbers. A variety of attachments can be uploaded and downloaded as supporting documentation. In addition, Message Center allows teams to work on open issues collaboratively and to view each message's history.

Registration

For instructions on how to register on MayoClinicLabs.com, please see our Frequently Asked Questions page.

To request permission to access Message Center, contact Customer Service.

Note: Acceptable browsers include Chrome, Edge, Firefox, and Safari.

Logging into Message Center

To access the Message Center functionality once you have completed registration:

1. On MayoClinicLabs.com, at top right, click **My Dashboard**.

If you have not already logged in, the login window appears.

2. Enter your **Professional Username** (email address) and **Password.**

   Notes:

   - Passwords are case sensitive.

   - To help ensure you type your password correctly, you can click the **SHOW** link at the right end of the **Password** field. Your password becomes fully visible, and the link text changes to **HIDE**.

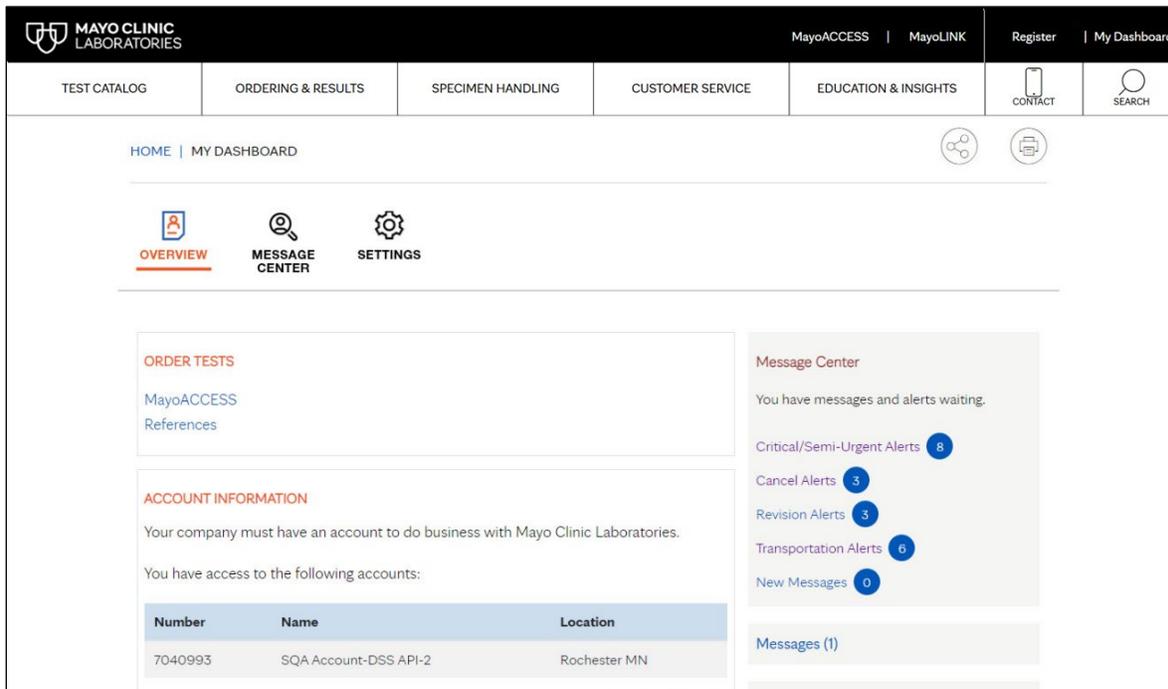
   To hide your password again, click the **HIDE** link. Your password is represented again by a series of dots, and the link text reverts to **SHOW**.


3. Click the **Log in** button.

Once you have logged in, your **Dashboard** appears.

Note: The **Message Center** section on the right side of the **Dashboard** (right) links to each category/subtab view in the application. The white numbers in the **blue** circles ⑧ indicate how many new alerts and messages you have.

4. Do one of the following:

- To be redirected to the corresponding category/subtab in Message Center, click a link in the **Message Center** section of the **Dashboard** (for example, **Cancel Alerts**).

- To open the application without choosing a category/subtab, at top left of the **Dashboard**, click the **MESSAGE CENTER** icon (right).
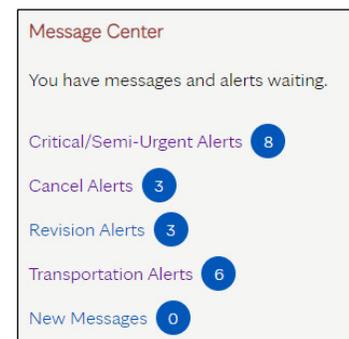
Selecting accounts

To use Message Center, you must select at least one of the Mayo Clinic Laboratories accounts you have access to in the application. The first page you will see depends on:

- How many accounts you have access to.

- Whether this is your first time logging into Message Center.

- If this is not your first time logging into the application, how many accounts were selected when you last logged out.

The example screenshots below are of a user with access to four accounts.

First login

If this is your first time logging into Message Center, you will be asked to select at least one account.
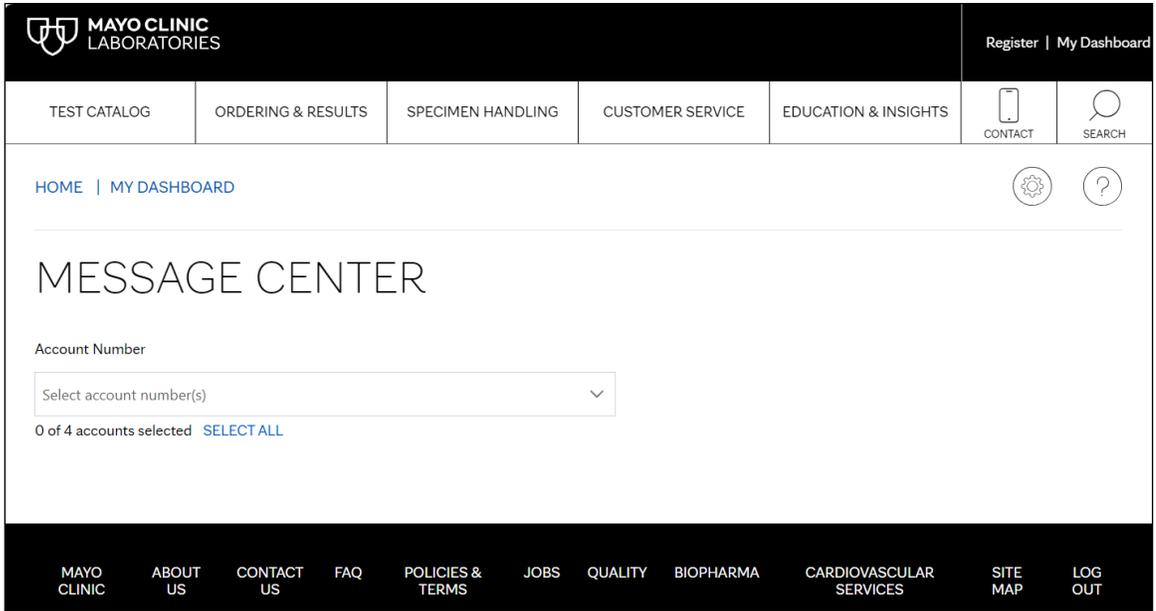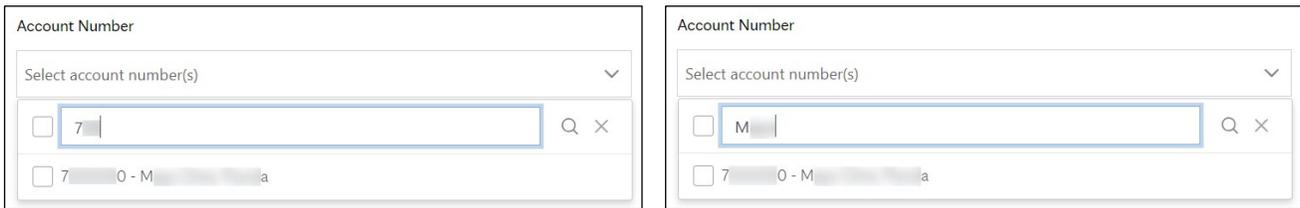

1. Do one of the following:

   - From the **Account Number** drop-down menu, check the box ☑ to the left of each account you want to select. Once an account is selected, its name and number appear in the **Account Number** field.
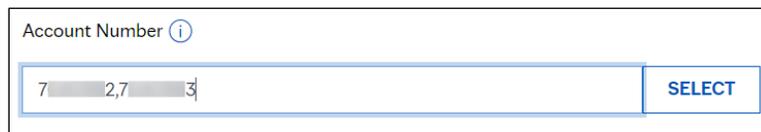
- In the **Account Number** field, begin to type either an account number or name, and then select it from the autopopulated list below.
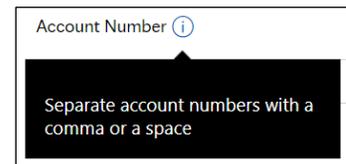

Note: You cannot select multiple accounts using this method.

- In the **Account Number** field, manually enter at least one account number. Separate multiple numbers with commas or word spaces.

💡 **Tip:** Click the **Information** icon ⓘ to the right of the words "**Account Number**" to bring up a tooltip explaining how to separate multiple numbers (right).

- To select all accounts to which you have access, below the **Account Number** field, click the **SELECT ALL** link.

2. Once you have selected the desired account(s), click on the screen anywhere outside of the **Account Number** field.

Subsequent login

If this is not your first time logging into Message Center, the application displays the account(s) that were selected when you logged out of your last session:

- If not all of your accounts are selected:

  o The **Account Number** field displays the first few names and numbers, ending with an ellipsis (…) if not all of the information can be displayed.

  o Below the field, the words "**x of y accounts selected**" appear, in which *x* is the number of accounts you have selected and *y* is your total number of accounts.

- o To the right, a rectangular tile for each selected account appears, displaying the number and as much of the name as possible, followed by an ellipsis (…) if the name is long.
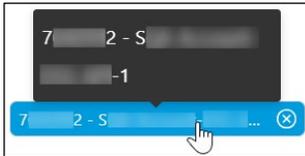
  Tip: Hover over any account tile, which will turn **blue**, to bring up a tooltip displaying the complete account name and number (left).

- If all of your accounts are selected:

  - o The **Account Number** field displays the words "***x* accounts selected**" appear, in which *x* is your total number of accounts.

  - o Below the field, the **All accounts selected** message appears.

  - o To the right, a tile for each of your accounts is displayed.

To change your account selection, do one of the following:

- Select additional accounts using one of the methods described above.

- Deselect accounts as desired by unchecking their boxes ☐ in the **Account Number** drop-down menu.

- Deselect an individual account by clicking the circled **X** at the right end of its tile (right).

When at least one account is selected, the full Message Center landing page appears.

At top right of the landing page, the **Help** icon ⓘ links to the Message Center page on MayoClinicLabs.com.

The Message List, a list of all messages for the selected account(s), appears at the bottom of the page in table form.

Filtering and finding messages and alerts

Message Center provides you with a variety of options to help you filter the Message List and find the message(s) and alert(s) you want. You can use multiple filter options at one time.

Case urgency

Urgent Mayo-created cases have visual indicators in red on the landing page under the **ALERTS** and **MESSAGES** categories, as well as on the **DETAILS** page.

Under both **ALERTS** and **MESSAGES**, urgency indicators are as follows:

Exclamation point in the
STATUS KEY

Exclamation point in the
Status column

Bold red left border
in the **Actions** column

You can also filter the **Status** column for urgent cases.

Note: For urgent cases under the **MESSAGES** category, a Message Center user in your organization should respond to Mayo as soon as possible. If there is no timely response, Mayo will send subsequent reminders in Message Center. After five (5) days have passed with no response, Mayo will call your organization to obtain the required additional information. In contrast, users are unable to respond to **ALERTS** category cases; alerts are strictly informational.

Timeframe

You can choose the timeframe within which you want to view messages or alerts. Your options are **LAST WEEK**, **LAST 30 DAYS**, **LAST 90 DAYS** (default), or a custom date range.

To select a custom date range, under **Display messages created:** at top left, click the plus sign icon (below) to expand the date picker (right).

You can manually enter a date into each of the date fields, or you can click each of the calendar icons and, from the pop-up calendar, select the start and end dates of the desired range (right).

Dates can be manually entered with or without slashes, and with the full year or only its last two digits. For example, any of `013121`, `01312021`, or `01/31/2021` will produce the date 01/31/2021.

Notes:

- The maximum range is 180 days.
- If the number of the date or month is less than 10, you must include a zero at the start.
- You cannot use hyphens instead of slashes.

For example, entering either `13121` or `01-31-2021` returns the **This field is required** error message.

You can also enter any of the following shortcuts into a date field:

- `T`: Today's date
- `T-1`: Yesterday's date
- `T-X`: *X* number of days before today

    Example: If today is 8/5/2024, and you enter `T-6` into the date field, the date picker returns a date of 7/30/2024.

ALERTS, MESSAGES, and ARCHIVED categories

You can filter and view messages and alerts by their status in the Message Center workflow. Below the date range fields, click the appropriate category.

- **ALERTS:** The default, this category is for informational alerts. The total number of new **ALERTS** is displayed in a circle or oval on the tab. As alerts are archived, this number will change.

  The **ALERTS** category has four subtabs:
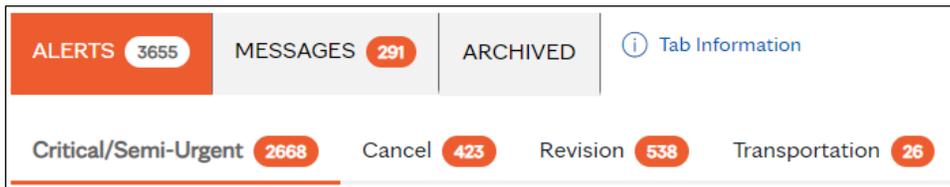
  - o **Critical/Semi-Urgent**, the default, which provides information on test results that have been defined by medical leadership as life threatening or that may have severe health consequences if not acknowledged or treated.

  - o **Cancel**, which provides information on tests that have been cancelled.

  - o **Revision**, which provides information on tests that have been revised.

  - o **Transportation**, which provides information on transit-related topics such as weather impacts, courier updates, and holiday schedules.

  Note: Critical/Semi-Urgent and **Transportation** alerts may display urgency indicators.

- **MESSAGES:** This category shows all non-archived messages. The total number of new **MESSAGES** is displayed in a circle or oval on the tab. There are four subtabs:
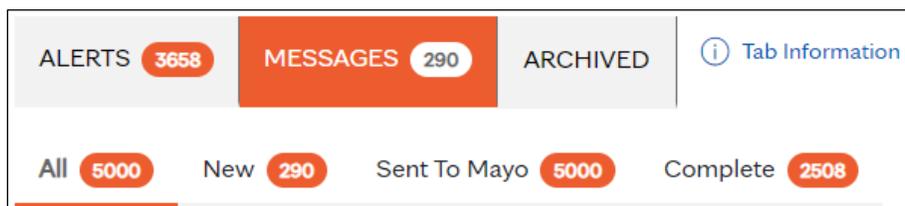
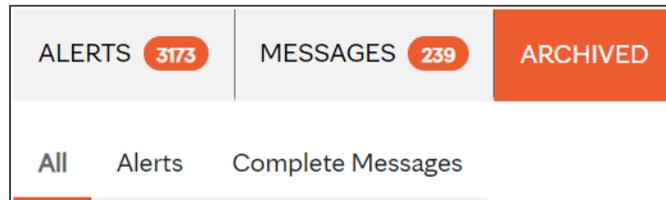 - o **All:** This subtab shows all non-archived messages, regardless of status.

  - o **New:** This subtab shows active messages awaiting responses from your organization.

  - o **Sent To Mayo:** This subtab shows active messages to which your organization has responded.

o **Complete:** Messages shown on this subtab have been closed by Mayo Clinic Laboratories and are no longer active.

**Note:** The selected subtab is underscored in orange (right).

- **ARCHIVED:** Alerts and messages shown under this category have been archived by your organization. There are three subtabs:

o **All:** This subtab shows all archived messages, regardless of status.

o **Alerts:** This subtab shows archived alerts only.

o **Complete Messages:** Messages shown on this subtab have been closed by Mayo Clinic Laboratories prior to archival.

Note: The **ARCHIVED** tab and its subtabs do not display the number of cases.
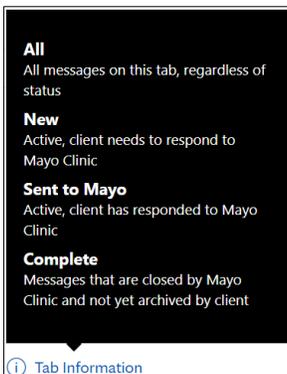
To the right of the tabs, you can click **Tab Information** ⓘ Tab Information to bring up a tooltip (left) explaining the selected category/its subtabs further.

Click the **Open in New Browser Window** icon 🔗 at the bottom of the **ALERTS** tooltip (right) to be taken to the **CRITICAL VALUES AND RESULTS** page on MayoClinicLabs.com, where you can:
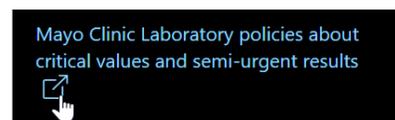
- Find documents that describe Mayo Clinic Laboratories policies for reporting different types of results and list the tests classified under each policy.

- Use the form on this page to submit or update contact information for Critical or Semi-Urgent results.

To set Message Center to open to a particular category and, if applicable, subtab when you first log in, see the discussion of the **LAYOUT** setting under Notification settings for users.
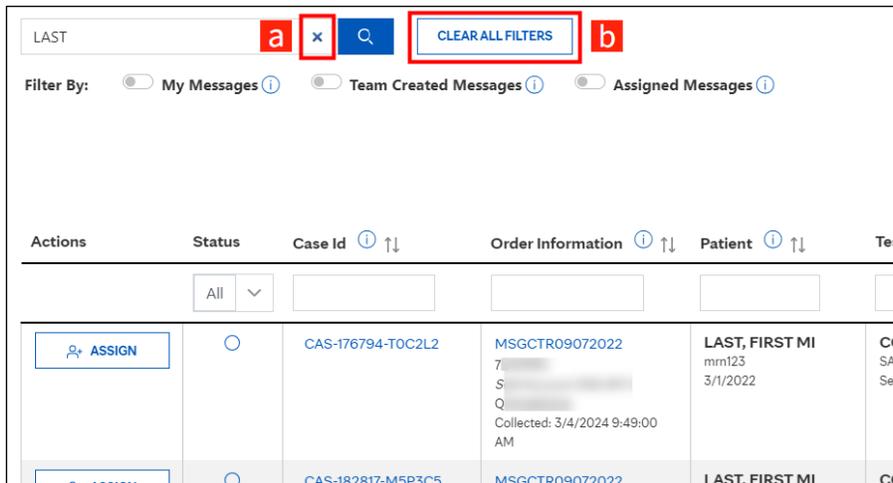
Search all columns

To search all Message List columns on keywords, below the **ALERTS**, **MESSAGES**, and **ARCHIVED** categories, enter the term into the **Search all columns…** text field (right).

To clear any filters applied to your search, clear the **Search all columns…** text field by doing one of the following:

a. Click the **X** at its right end.

b. Click the **CLEAR ALL FILTERS** button.

Filtering messages and alerts by creator or assignment

You can filter the Message List in several ways by using the **Filter By:** options below the **Search all columns…** text field (right).

To activate the desired filter, move the corresponding slider to the right:

My Messages ⓘ	**My Messages**		Search for messages that you yourself initiated or have updated.
Team Created Messages ⓘ	**Team Created Messages**	**MESSAGES** tab	Search for messages your team has created.
Assigned Messages ⓘ	**Assigned Messages**		Search for messages that are assigned to users.
Assigned Alerts ⓘ	**Assigned Alerts**	**ALERTS** tab	Search for alerts that are assigned to users.

When you click the **Information** icon ⓘ to the right of a slider, a tooltip with a brief description of the slider option appears.

Message List column headers

The Message List displays information about each message or alert in nine columns.

For more information about each column, click its **Information** ⓘ icon.

The columns are as follows:

a. **Actions** that can be taken.

b. The **Status** column (see Status below).

c. The Mayo Clinic Laboratories–assigned **Case Id** number. When applicable, this column also displays the name of the user to whom the message or alert is currently assigned, or the name of the user who most recently archived or unarchived the message.

d. The relevant **Order Information**: the client order number, client account number, client account name in *italics*, Mayo Clinic Laboratories accession number, and (on the **ALERTS** and **MESSAGES** subtabs) the specimen's collection date and time.

Note: If you click the client order number link, a window with the order details appears.

e. The **Patient**'s name, Medical Record Number (MRN), and date of birth (DOB).

Note: Message Center permits **Patient** names of up to 255 characters. The **Patient** column displays up to 35 characters by default, 40 when the column is expanded. For longer names, those 35 or 40 characters are followed by an ellipsis […]. If you click the abbreviated name or the ellipsis, a tooltip appears above (right), displaying the full name.

f. **Tests** information: if applicable, the test code and the test name. In the case of a Cancel Test, this column also shows the **Cancellation Reason** (right).

Message Center displays only the first 25 characters of a **Cancellation Reason**, and then an ellipse (…). Click the line to bring up a tooltip providing the entire reason (right).

g. **Type**. This column indicates how the message or alert was initiated and what type it is.

- **Client Initiated:** A user in your organization created the message. For **Client Initiated** messages, the **Type** column further indicates in regular text whether the message is a Test Add On, Inquiry, or Test Cancel.

- When Mayo Clinic Laboratories has initiated the message, the **Type** column provides a basic description of it in **bold** text, followed by the means of initiation in regular text. If the basic description is **Test Add On**, one of the following appears below:

  o "Client Initiated – Phone Request": A user in your organization requested the Test Add On by phone.

  o "Client Initiated – Web Form": A user in your organization requested the Test Add On using the **Test Add On** form on MayoClinicLabs.com.

  o "Fax": A user in your organization requested the Test Add On via facsimile machine.

  o "Initiated by MCL": The performing laboratory requested a Test Add On for a specimen received.

  o "MayoLINK": A user in your organization requested the Test Add On via MayoLINK.

  Other primary reasons with further explanations you may see in the **Type** column:

  o **Verification/Info Needed**, followed by the type of verification or information needed, such as "Reason for Referral," "Source," "DOB," or "Collection Date & Time."

  o **Specimen Pending Arrival**, followed by, for example, "Specimen not received in lab."

  o **Additional Specimen**, followed by, for example, "Unable to share."

  o **Forms**, followed by, for example, "General."

  o **Possible Cancel Test**, followed by the reason, such as "Specimen Stability."

  You may see other primary reasons as well.

h. When the message or alert was first **Created**.

i. When the message or alert was last **Updated**.

Sorting by columns

To sort messages or alert by any column except **Actions** or **Status**, click the **bold** column header or, if applicable, the double-arrow icon ⇅ to the right of the column title. This icon appears in the headers of all columns except **Actions**, **Status**, and **Tests**.

The entire header turns **blue** to indicate that the Message List has been sorted by that column, and the double arrows are replaced by the **Descending Order** ⬇ or **Ascending Order** ⬆ icon (right).

The default sort order is ascending. Clicking the header again toggles the order to descending.

To filter messages or alerts by **Case Id**, **Order Information**, **Patient**, **Tests**, and/or **Type**, enter keyword text into the text field(s) at the top (left). The column is filtered based on the entered text. As soon as three characters are entered, Message Center begins a predictive search and generates a list of results from which you can choose.

In addition, you can enter any part of a user's first, last, or full name into the **Case Id** column…

…to show only cases that have been assigned to that user…

…or, under the **ARCHIVED** category, to show only cases that have been archived by that user.

Hide/Show Columns

At top right of the Message List below the **REFRESH** and **NEW MESSAGE** buttons is the **Hide/Show Columns** drop-down menu, which displays check boxes for most columns in the Message List (right). Check or uncheck boxes depending on which columns you want to view. The columns appear or disappear automatically.
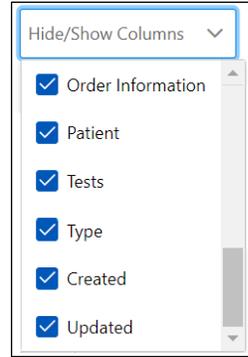
Notes:

- The **Case Id**, **Actions**, and **Status** columns cannot be hidden.

- Column preferences are saved when you leave the **MESSAGE CENTER** landing page or click on a different category.

Resizing a column

To expand or contract the width of a column:

1. Hover over the right edge of the column header.

   Your cursor changes to the column-resizing icon (right).

2. Drag the edge of the column rightward to expand or leftward to contract.
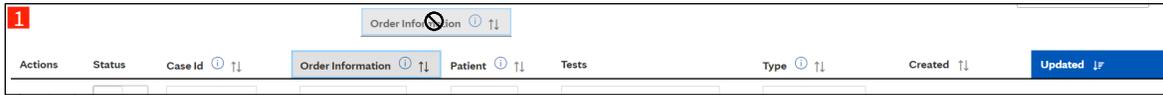

The arrow cursor reappears, and a blue vertical line appears under it and moves with it as you shift the right boundary of the column (left).

3. Release the mouse button when the column is the desired width (right).

Changing Message List column order

To change column order in the Message List, hover over the header of the column you want to move, then begin to drag it.

At first, as shown above, your cursor changes to a "no" symbol ⃠. However, as you position the column header over its desired location, a plus sign icon ⊞ appears, and small arrows appear above and below the header to indicate where it will be placed (below).
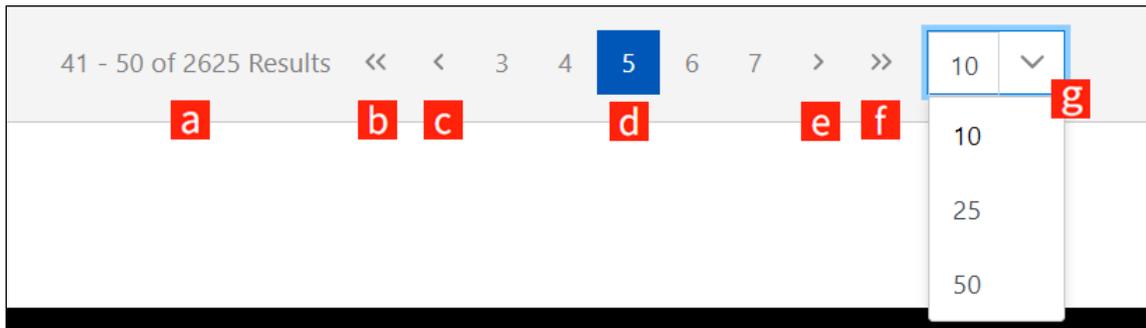

The screenshot below shows the moved column in its new location.

Message List page controls

At the bottom of the Message List, you can:

a.   See the total number of messages or alerts for this account, and which range of pages you are viewing.

   Note: The numbers of messages/alerts and pages you see depend on your filtering selections.

b.   Go to the first page of messages or alerts in the list.

c.   Go to the previous page of messages or alerts.

d.   See which page of messages or alerts you are on.

e.   Go to the next page of messages or alerts.

f.   Go to the last page of messages or alerts.

g.   Select the number of messages or alerts per page you want to view. Message Center remembers and saves your selection.

Actions

The first column of the Message List indicates the assignment and archival statuses of the message in question.

Button	Action	Description	Categories
⌨ ASSIGN	**ASSIGN**	Assign this message or alert to a user.	All categories
⌨ UNASSIGN	**UNASSIGN**	Remove the assignment from this message or alert altogether.	All categories
🗄 ARCHIVE	**ARCHIVE**	Archive this message or alert, which moves it from the **Complete** subtab of the **MESSAGES** category to the **ARCHIVED** category.	**ALERTS, MESSAGES**
⬆ UNARCHIVE	**UNARCHIVE**	Unarchive this message or alert, which moves it from the **ARCHIVED** category to the **Complete** subtab of the **MESSAGES** category.	All categories

For all messages that have been **Sent To Mayo**, the **Actions** column is blank.

If a message or alert has been assigned, archived, or unarchived, the name of the assignee or of the person who performed the archival or unarchival can be found in the **Case Id** column (right).

CAS-56883-B2Q7H9

Assigned to ndtestrules admin

Status

The second column of the Message List indicates the status of the message or alert in question.

Icon	Action	Description
○	**New (from Mayo)**	This is a new message from Mayo Clinic Laboratories.
↩	**Sent To Mayo**	Your organization has sent this message to Mayo Clinic Laboratories.
⊙	**Urgent, Response needed**	This is an urgent message or alert from Mayo Clinic Laboratories that requires a response from your organization within 24 hours.
✎	**Draft**	The message was initiated by a user in your organization and saved as a draft without having been sent to Mayo Clinic Laboratories.
⊗	**Complete, Request Not Fulfilled**	Mayo Clinic Laboratories has processed this message but was unable to fulfill your organization's request.

Icon	Action	Description
☑	**Complete, Request Fulfilled**	Mayo Clinic Laboratories has processed this message and has fulfilled your organization's request.

For quick explanations of these statuses, see the **STATUS KEY** at top center of the landing page when the **MESSAGES** category is selected (left).

Use the drop-down menu at the top of the **Status** column to filter the column by status (right).

Age of a message or alert

In the **Created** column of the Message List on most tabs and subtabs, message/alert age is indicated by colored symbols with specific numbers of white dots.

Symbol	Color	Dots	Message Age
🟩	Green	1	Less than 2 days (age displayed in hours if less than 24 hours)
🟨	Yellow	2	2–3 days
🟥	Red	3	4+ days

Clicking the **Information** icon ⓘ in the **Created** column header brings up the **Days in Message Center** tooltip, which lists the above information (right).

The icons also appear on the **DETAILS** page, to the right of the creator's name and creation date and time (left).

Notes:

- Message/alert age is calculated from when the message or alert was initially made available in Message Center, not from the most recent response.

- On the **Complete subtab** of the **MESSAGES** tab, the **Information** icon does not appear in the **Created** column header, and the **Days in Message Center** tooltip is unavailable.

Refresh

At top right of the Message List is the **REFRESH** button (right), just to the left of the **NEW MESSAGE** button. Beneath it, Message Center indicates the date and time the list was last updated. Click the **REFRESH** button to view new messages/alerts and to update the statuses of existing messages.

Notes:

- Refresh time reflects the time zone set for your operating system.

- Because multiple people in your organization may be working in the same discussion thread, it is best practice to refresh often.

Alert and message details and history

To view the **DETAILS** and history of an alert or message:

1. In the Message List, find the message or alert using the tools described in Filtering and finding messages and alerts.

2. Click the **Case Id** link.

The **DETAILS** page for the alert or message appears in a new browser tab. It displays all information associated with the alert or message **Case Id**.

General DETAILS page functions

At top right of all **DETAILS** pages, from left to right, are the following three icons (right):

- The **Settings** icon. ⚙ See Notification settings.

- The **Print** icon 🖨, which opens your device's print dialog window so that you can print the page.

When you click the **Print** icon, the **Internal Instructions** dialog box appears.
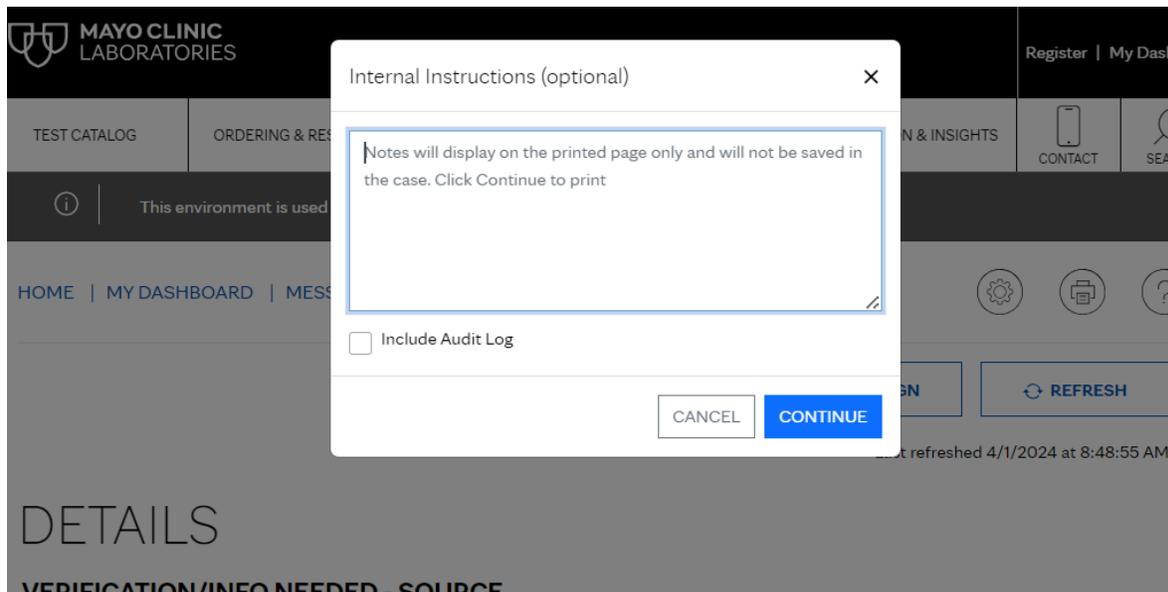
If desired, you can enter case information, including internal notes, into the text field for such purposes as handing the notes off to a colleague before a response message is sent. Mayo Clinic Laboratories cannot view these notes.

Notes:

- This text field has a 2,000-character limit. The character counter at bottom left of the dialog box (right) indicates how many characters you have left.

- If you do not wish to add internal-only information, you can leave the field blank.

- If you want to print the Audit Log as well, at bottom left of the text field, check the **Include Audit Log** check box (right).
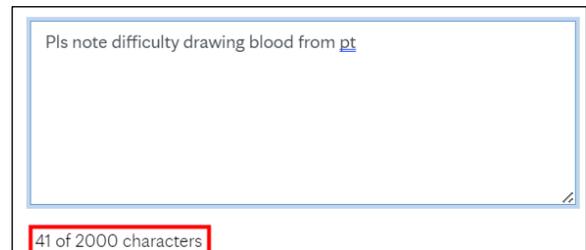
To print the page with or without notes, click the **CONTINUE** button.

If you completed the **Internal Instructions** dialog box, your notes appear on the printout in a blue box.

If you completed the **Internal Instructions** dialog box and checked the **Include Audit Log** check box, the log appears at the end of the printout.

If you click the **CONTINUE** button without having added notes, the page prints without the blue box.

To return to the **DETAILS** page without printing it, in the **Internal Instructions** dialog box, click either the **X** at top right or the **CANCEL** button.

- The **Help** icon, which links to the Message Center page on MayoClinicLabs.com.

Below these icons (right) are:

- Depending on case type and what actions have been taken on the message or alert:
    - The **PRINT BATCH** [🖶 PRINT BATCH] button.
    - The **ASSIGN** [👤 ASSIGN] or **UNASSIGN** [👤 UNASSIGN] button.
    - The **ARCHIVE** [ARCHIVE] or **UNARCHIVE** [🗑 UNARCHIVE] button.
- The **REFRESH** [↻ REFRESH] button.
- The date and time this **DETAILS** page was last refreshed.

Click the **PRINT BATCH** button to print a batch sheet. When Mayo requests you send an additional specimen for testing, you can include this sheet along with the specimen.
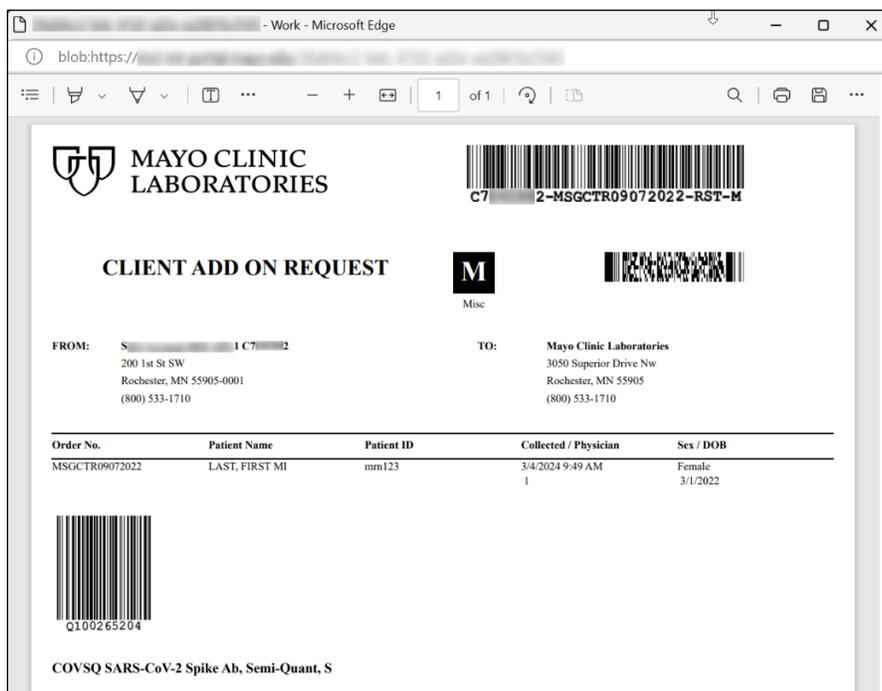
Click the **REFRESH** button to update the information on the page.

Notes:

- Refresh time reflects the time zone set for your operating system.
- Because multiple people in your organization may be working in the same discussion thread, it is best practice to refresh often.

DETAILS pages for alerts

An example of a **DETAILS** page for an alert is shown below.

At top left, the alert type, name of who created the alert, date and time of creation, and case age appear (right).

All alerts display a red exclamation point in a red circle as a visual urgency indicator at top left, to the left of the message type.

ALERT - CANCEL
Created by DSS-1 TEST on 4/3/2024 10:17:46 AM | ● Closed
✓ Archived by Orders Primary on 4/3/2024 3:36:07 PM

Below, if applicable, is the name of the person who archived or unarchived the message, along with the corresponding date and time stamp and the blue dot ● representing a **Closed** case (left).

The next section displays information from the **Case Id, Order Information, and Patient columns** for the alert on the landing page.

Account Number	7___2-S___1	**Client Order Number**	
Patient Name	PATIENT NAME	**Mayo Accession Number**	Q___
Date of Birth	10/12/2020	**Mayo Case Number**	CAS-165238-V2H0C9
Medical Record Number	11	**Collection Date**	8/14/2023 8:20:00 PM
Ordering Physician	John,Doe	**Order Date**	11/7/2023 3:08:00 PM

For any alert type, the **Affected Tests** section may appear next (right). It lists all tests associated with the alert.

Affected Tests
PTOX - Toxoplasma gondii, Molecular Detection, PCR ⧉

The **Open in New Browser Window** icon ⧉ to the right of each test name opens the Mayo Clinic Laboratories Test Catalog page for that test in a new window.

TEST CANCELLATION REASON(S)

COVSQ - SARS-CoV-2 Spike Ab, Semi-Quant, S

Test cannot be performed on the specimen/source received

For Cancel test messages, the **TEST CANCELLATION REASON(S)** (left) appear under **Existing Tests** or **Affected Tests**.

For any alert except a **Transportation** alert, the **RESULT REPORT** button [RESULT REPORT] may appear next. When clicked, it opens a PDF of the report explaining the reason(s) for the alert.

Transportation alerts are displayed in full on the **DETAILS** page.

If you click the **Print** icon, and then the **Continue** button in the **Internal Instructions** dialog box, Message Center opens the alert as a PDF for printing.

If you scan the QR code at bottom left of the printed alert using a mobile device, you are directed to the **Operational Updates** page on MayoClinicLabs.com.

The **DETAILS** page for an alert provides an **INTERNAL COMMENTS** section where notes for other Message Center users in your organization can be entered. Mayo Clinic Laboratories cannot view these comments.

Notes:

- This text field has a 2,000-character limit.

- If you hover over the icon at the bottom-right corner of the text field, your cursor changes to a double arrow (right). You can then expand the text field if needed by dragging that corner downward.

- Use the **CLEAR** function to delete all added text.
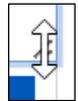
Once you have entered an internal comment, click the **SAVE** button.

The comment is now saved and appears above the text field, along with your name plus the date and time stamp.

If a thread contains multiple internal comments, all but the latest appear below the text field in the **MORE INTERNAL COMMENTS** section. The **blue** bar is collapsed by default; the **blue** number in the white circle ①　indicates how many previous internal comments have been left.

If the bar appears, click its down-arrow ❯ to view comments that are hidden by default. Click again to toggle back and forth between expanding and collapsing these comments.
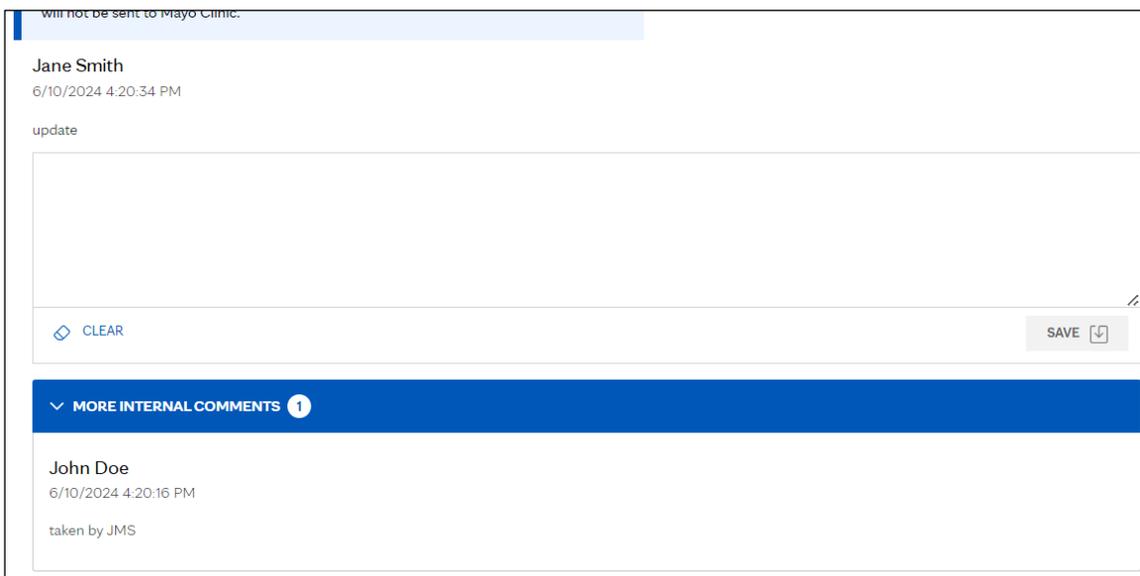
Note: Once an internal comment is saved, it cannot be removed.

At the bottom of the page, the **AUDIT LOG** appears. This section is collapsed by default.

Click the right-arrow ❯ to expand the **AUDIT LOG**. It lists in descending chronological order all actions performed on the case to date.

Date	Name	Company	Action
12/18/2023 2:43:08 AM	Orders, ReadMessages	Mayo Clinic	Unassigned
12/18/2023 2:43:05 AM	Orders, ReadMessages	Mayo Clinic	Assigned
12/18/2023 2:42:55 AM	Orders, ReadMessages	Mayo Clinic	Unassigned
12/18/2023 2:42:53 AM	Orders, ReadMessages	Mayo Clinic	Assigned
12/18/2023 2:42:21 AM	Orders, ReadMessages	Mayo Clinic	Details Page Viewed

DETAILS pages for messages

An example of a **DETAILS** page for a message is shown below.

HOME | MY DASHBOARD | MESSAGE CENTER

PRINT BATCH   REFRESH

Last refreshed 3/19/2025 at 9:26:30 AM

DETAILS

Print this page and include it with the specimen in the transport bag.

CLIENT INITIATED - TEST ADD ON

Created by INTEGRATION DATAVERSE-DEV on 6/21/2024 9:26:20 AM 10 seconds

Account Number	7____2-S____-1	**Client Order Number**	____
Patient Name	PATIENT NAME	**Mayo Accession Number**	Q____
Date of Birth	5/26/1966	**Mayo Case Number**	CAS-165401-D2Z5G7
Medical Record Number	11111	**Collection Date**	3/14/2025 8:20:00 PM
Ordering Physician	____	**Order Date**	8/15/2023 7:19:00 AM

Affected Tests

COVSQ - SARS-CoV-2 Spike Ab, Semi-Quant, S ⬀

Case Information

Separate Specimen being sent	Yes
Add tests to a new order	No

DISCUSSION

First_Name DV_Integration_DEV | Mayo Clinic

6/21/2024 9:26:21 AM

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

⬇ VALID.TXT (0.03 KB)

SAVE DRAFT   SEND ⬀

◇ CLEAR   📎 ATTACH   💬 STANDARD REPLIES

For Test Add On messages, at top left under the word **DETAILS**, you may see a message instructing the creator of the Test Add On to print the page and include it with the specimen in the transport bag.

Print this page and include it with the specimen in the transport bag.

Generally, the first items that appear at top left are the message type, name of who created the message, date and time of creation, and case age (right).

Below, if applicable, is the name of the current assignee or the person who archived or unarchived the message, along with the corresponding date and time stamp.

DETAILS

CLIENT INITIATED - TEST ADD ON

Created by First_Name MC_Integration_int on 4/23/2024 5:39:01 AM ••• 59 days

Assigned to Orders AccountPreferences on 6/21/2024 12:07:49 PM ✕

An urgent Mayo-created case requiring a response within 24 hours displays a red exclamation point in a red circle as a visual indicator at top left, to the left of the message type.

The next section displays information from the **Case Id**, **Order Information**, and **Patient** columns for the alert on the landing page.

Account Number	7____2-S_____-1	**Client Order Number**	_____
Patient Name	PATIENT NAME	**Mayo Accession Number**	Q_____
Date of Birth	5/26/1966	**Mayo Case Number**	CAS-165401-D2Z5G7
Medical Record Number	11111	**Collection Date**	3/14/2025 8:20:00 PM
Ordering Physician		**Order Date**	8/15/2023 7:19:00 AM

Under **Existing Tests** or **Affected Tests**, all tests associated with the message are listed (right). The **Open in New Browser Window** icon ⬈ to the right of each test name opens the Mayo Clinic Laboratories Test Catalog page for that test in a new window.

Existing Tests

PATHC - Pathology Consultation ⬈

TEST CANCELLATION REASON(S)

ACE - Angiotensin Converting Enzyme, Serum
Patient Deceased

For Cancel test messages, the **TEST CANCELLATION REASON(S)** (left) appear under **Existing Tests** or **Affected Tests**.

If a message has a Test Add On, the **Case Information** section appears (right). It shows the answers to questions that you were asked when requesting the Test Add On.

Case Information

Separate Specimen being sent   No

Add tests to a new order   No

Depending on the test(s), the **ASK AT ORDER ENTRY (AOE) QUESTIONS** section may appear next. AOE questions are required to ensure accurate test results.

ASK AT ORDER ENTRY (AOE) QUESTIONS

⌄ CYCL - CYCLOSPORA STAIN

Specimen Source:

NASAL

For Inquiries, the **REQUEST TO CLOSE** message appears above the **DISCUSSION** section (right).

REQUEST TO CLOSE
☐ Thank you, I have no more questions. Inquiry can be closed.

If we do not hear from you in seven days, your inquiry will be closed.

For urgent cases, the **DISCUSSION** section at the bottom of the page displays the **Response requested within 24 hours** warning message.

DISCUSSION

⚠ Response requested within 24 hours

Mayo Clinic
3/14/2025 5:53:18 AM

SAVE DRAFT   SEND ◁

◇ CLEAR   📎 ATTACH   💬 STANDARD REPLIES

Under the **DISCUSSION** field, you may see downloadable ⬇ attachments.

SAVE DRAFT   SEND ◁

◇ CLEAR   📎 ATTACH   💬 STANDARD REPLIES

22 of 2000 characters

📄 Report_20250221142817.pdf ×

Also under **DISCUSSION** is the history of the discussion thread. Each individual message is stamped with the sender's name and the time and date the message was sent.

The **DISCUSSION** text field also offers an **ATTACH** function 📎 ATTACH for uploading documents.

Notes:

- Accepted file types are .doc, .docx, .pdf, .xls, .xlsx, .gif, .jpg, .jpeg, .png, .tiff, and .txt.

- Due to file size limitations, video files are not accepted. Maximum file size is 32.768 MB, except for JPGs, which cannot exceed 20 MB.

- In the case of PDF attachments, you can use the **Tools** in Adobe Acrobat to add a signature or other information to the form before uploading it.

When a thread contains more than one message, all but the latest appear below in the **MORE MESSAGES** section. The bar is collapsed by default; the **blue** number in the white circle ① indicates the total number of messages in the thread.
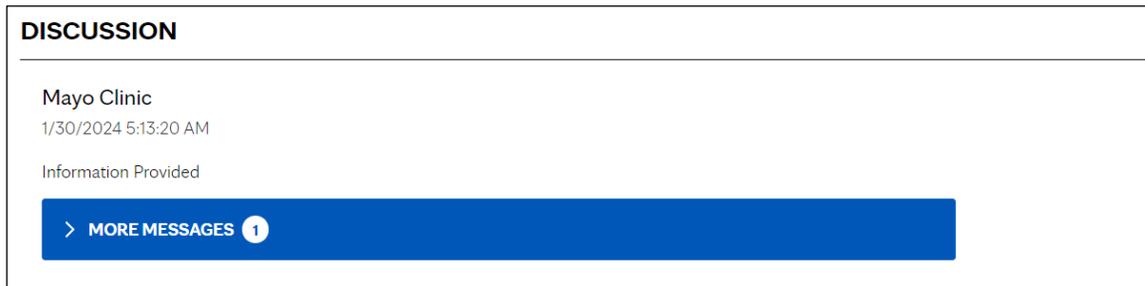
If the bar appears, click its arrow ▶ to view messages that are hidden by default. Click again to toggle back and forth between expanding and collapsing these messages.

The last item on the DETAILS page for a message is the **AUDIT LOG**.

Creating a new message

To create a new message:

1. To the top and right of the Message List, click the **NEW MESSAGE** button NEW MESSAGE (right).

    The **CREATE MESSAGE** page appears.

    Note: A message can be created for only one account at a time.

- If a single account is selected on the landing page, the **CREATE MESSAGE** page reflects that number in the **Account Number** text field and in the account tile to its right. In addition, the **Message Type** drop-down menu appears below by default.

If needed, you can click into the text field and enter a different account number (below), or use the drop-down menu to select a different account (next page).

- If multiple accounts are selected on the landing page, the **Account Number** text field on the **CREATE MESSAGE** is blank, and the **Message Type** drop-down menu does not appear. You must either manually enter an account number in that field or select one from the drop-down menu.

- Once an account has been selected, the **Message Type** drop-down menu appears below the **Account Number** field.
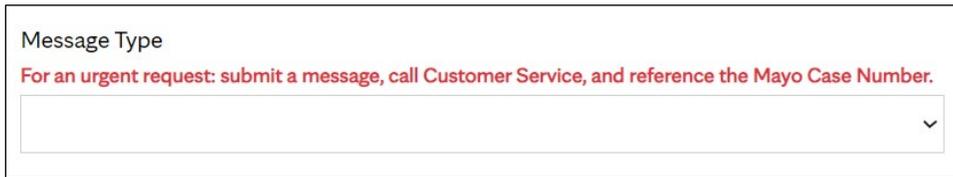
Note: Per the warning message, if your request is urgent, please submit a message, call Customer Service, and reference the Mayo Case Number.

2. From the menu, select one of the three message types: **Test Add On**, **Inquiry**, or **Cancel Test**.
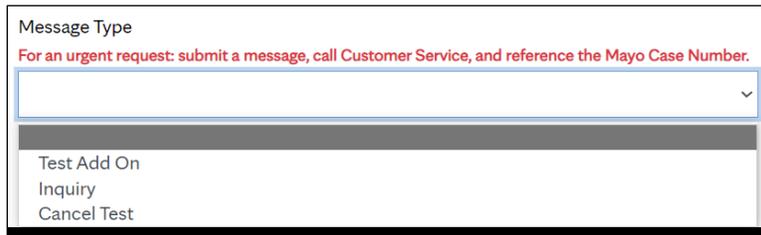
Test Add On

You can request a Test Add On for three different combinations of order and specimen: existing order and existing specimen, new order and existing specimen, or existing order and new specimen.

Note: If you are sending a new specimen with a new order number, you do not need to create a message in Message Center. Follow your normal send-out procedure.

When you select **Test Add On** as the message type, a check box and the following statement appear below the **Message Type** drop-down menu:

By clicking the box, I agree that I am authorized to request additional testing on this specimen on behalf of the ordering provider. I understand that additional charges will be applied, and provider signature(s) and related documentation shall be made available to Mayo Clinic Laboratories upon request.

a. Check the check box to confirm this statement and proceed with the Test Add On.

Note: If you do not check the authorization check box, you cannot proceed.

Once this box is checked, additional sections and options appear below it.

b. Using the **Yes** or **No** radio button, answer the question, *"Is a separate specimen being sent for this request?"* (right).

- If you are sending a new specimen for the Test Add On, select **Yes**.

- If the existing specimen should be used for the Test Add On, select **No** (default).

c. In the **PATIENT INFORMATION** section, use one or more of the following fields to narrow down the results: **Medical Record Number**, **Client Order Number**, **Mayo Accession Number**, patient **Last Name**, patient **First Name**, and/or **Date of Birth**.

As soon as any characters are entered into one of the first five fields, or the **Date of Birth** field is completed, Message Center begins a predictive search and returns a list of results. You do not need to click the magnifying glass icon.

In the example below, the characters "Smi" have been entered into the **Last Name** field. Patients whose last names begin with those characters appear in the returned results below the **PATIENT INFORMATION** fields.

Note: Message Center can display only 10 search results. If your search generates more than 10 results, you are prompted to refine it by entering additional information.

   d. Select an order from the list.

Note: To clear the **PATIENT INFORMATION** fields, at bottom left, click the **CLEAR** button. CLEAR

The **PATIENT INFORMATION** fields autopopulate with the correct information for the selected order, and further sections and options appear further down on the **CREATE MESSAGE** page:

- The *"Was a new order created for this test?"* option.
- The **TEST TO ADD-ON** section, which shows the existing tests on the order.
- The **DISCUSSION** text field.

e. Using the **Yes** or **No** radio button, answer the question, *"Was a new order created for this test?"* (right).

If you select **Yes**, the **New Order Number (Client Order or Mayo Order Number)** text field appears (right). This field is optional.

> Was a new order created for this test?
>
> ● Yes ○ No
>
> New Order Number (Client Order or Mayo Order Number)
>
> [   ] 🔍

If you have created a new order number, you can enter it into the **New Order Number (Client Order or Mayo Order Number)** field and press the search icon 🔍 (right). See below for additional details on this option.

> New Order Number (Client Order or Mayo Order Number)
>
> M█████████2 🔍

In this field you can also search for an order by either the Mayo Accession Number or the Client Order Number. If you cannot find the order using either of these numbers, you can continue to enter the order number manually.

f. To add on a test, search for it by entering the first several characters of its name into the **Test ID or Test Name** field. As soon as three characters are entered, Message Center begins a predictive search and generates a list of results from which you can choose.

> **TEST TO ADD-ON**
>
> **Existing tests on this order:**
> COVSQ - Severe Acute Respiratory Syndrome Coronavirus 2 (SARS-CoV-2), Spike Antibody, Semi-Quantitative, Serum ⧉
> ACE - Angiotensin Converting Enzyme, Serum ⧉
>
> Test ID or Test Name   Selected Tests
> [   ] 🔍

A list of matching tests appears below.

> Test ID or Test Name
>
> lead   🔍
>
> PBU - Lead, 24 Hr, U ⧉   +
>
> HMDB - Heavy Metals Scrn with Demographics ⧉   +
>
> HMHA - Heavy Metals, Hair ⧉   +
>
> HMNA - Heavy Metals, Nails ⧉   +
>
> PBDC - Lead, Capillary, w/Demographics, B ⧉   +

g. To view more information on any test in the Mayo Clinic Laboratories Test Catalog, click the test name or the **Open in New Browser Window** icon ⧉ to its right.

The relevant Test Catalog page appears in a new browser window.
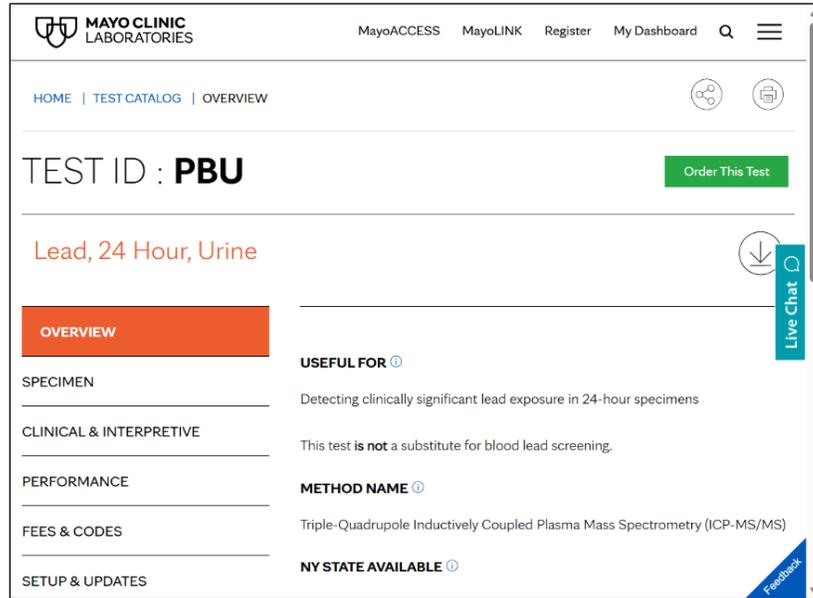
h. To select a test from the autocomplete list, click the plus sign (**+**) to its right.

The test moves from the search results list to the **Selected Tests** section at right.

Note: If a Test ID or Test Name is not valid, when you click the plus sign, a warning message appears.

- If the test is obsolete, the warning text is **Test code is Obsolete** (right).

- If the test code is invalid or is an old test code that is no longer used, the warning text is **Test code not found** or **Test code not available to order**.

The message includes two links:

- The top link displays the **Open in New Browser Window** icon 🔗 and brings you to the relevant Test Catalog page.

- The bottom link brings you to the **TEST UPDATES** page on MayoClinicLabs.com, which displays only that test.

At the right end of the table at the bottom of the page, click the **Notice** link (left).

An attachment opens that contains more information, including any recommendations on alternative tests for the obsolete Test ID, if appropriate.

i. Repeat the above steps until you have selected all desired additional tests.

Note: To remove a test from the **Selected Tests** section, click the red **X** to its right.

j. Below, answer any **ASK AT ORDER ENTRY (AOE) QUESTIONS** for the additional tests. AOE questions are required to ensure accurate test results.

Notes:

- If **AOE QUESTIONS** were asked on the previous order, the same answers will autocomplete the corresponding **AOE** fields for the new Test Add On.
- You can clear all answers to any **AOE** questions and all Selected Tests by clearing the **New Order Number (Client Order or Mayo Order Number) field**.

The **Remove Associated Test(s)** pop-up appears, asking you if you would like to continue.

At bottom right of the pop up, click the **Yes** button.

k. In the **DISCUSSION** text field, enter any additional information.
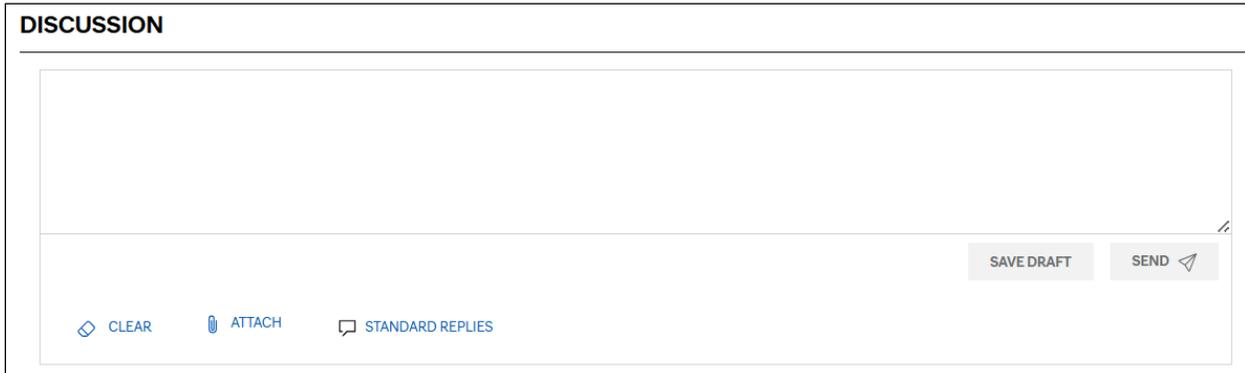
Notes:

- This text field has a 2,000-character limit.

- Click **STANDARD REPLIES** to bring up and choose from a list of common replies, for a quicker response. You can add to or change any of these responses as needed.

- If you hover over the icon at the bottom-right corner of the text field, your cursor changes to a double arrow (right). You can then expand the text field if needed by dragging that corner downward.

- Use the **ATTACH** function to attach any documents (see here for allowed file types and file size limits).

Creating a new message
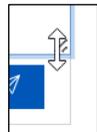
- To remove an attachment, click the **x** to the right of its filename.

- Use the **CLEAR** function to delete all added text and attachments.

Note: If you add an attachment and then try to navigate to the Message Center landing page without either saving the draft or sending the message, the **Confirm** pop-up asks you to verify that you want to leave the **CREATE MESSAGE** page without saving (right).
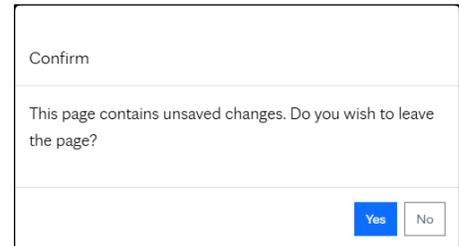
To discard the draft and return to the landing page, click the **Yes** button.
To remain on the **CREATE MESSAGE** page, click the **No** button.

I. At the bottom of the **CREATE MESSAGE** page, click the **SUBMIT** button (right). (To cancel your new message, click the **CANCEL** button.)

Upon submission, the newly created **DETAILS** page for the message appears, displaying a confirmation message with additional information and/or instructions. An example is below.

Note: If you answered **Yes** to *"Is a separate specimen being sent for this request?"* (see sub-step b above), the confirmation message (below) informs you that you may print a PDF with barcodes (next page) and include it with the specimen in the transport bag.

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To open your device's print dialog window, you can click either the hyperlinked word "Print" Print in the message or the **Print** icon at top right of the **DETAILS** page.

m. To create another new message, on the **DETAILS** page, click the **CREATE ANOTHER MESSAGE** button. CREATE ANOTHER MESSAGE

To return to the Message Center landing page, at the top of the **DETAILS** page, click the **MESSAGE CENTER** breadcrumb link (right).

HOME | MY DASHBOARD | MESSAGE CENTER

Once Mayo Clinic Laboratories has reviewed the request and taken action, the message is closed. For more information on a particular message, click its **Case Id** to view its **DETAILS** page.

Mayo-initiated Test Add On request

Mayo Clinic Laboratories may recommend that additional testing be performed. In such cases, your approval is required. The additional testing is described in the **DISCUSSION** text field on the **DETAILS** page. Above it, the **Attestation Required** section appears. In this section, based on the patient's needs, select either the **Accept** or the **Deny** radio button to move forward with the request.

- If you select the **Accept** radio button, then, at the bottom of the **Attestation Required** section, indicate whether the test should be added to a separate order (right). The **Same** radio button is selected by default.

  o If you want to keep the added test on the same order, simply click the **SAVE** button.

o If you want to create a new order, select the **New** radio button. You then have the option of completing the **New Client Order Number** field before clicking the **SAVE** button (right).

> **Would you like the test to be added to a separate order?**
>
> ○ Same   ● New
>
> New Client Order Number
>
> | 98765432 |
>
> [SAVE]

The **Attestation Required** section then indicates your acceptance of the additional testing, with your name and the date and time of acceptance at bottom.

If you selected **Accept**, then to the right of the question "*Is a new order number being created for this request?*", the word **No** or **Yes** appears, depending on whether you selected **Same** or **New**, respectively.

> **Attestation Required**
>
> To facilitate the finalization of testing, we are requesting your decision to either accept or deny this request. By clicking accept, I agree that I am authorized to request additional testing on this specimen on behalf of the ordering provider.
>
> Accept - by selecting this option I agree that I am authorized to request additional testing on this specimen on behalf of the ordering provider. I understand that additional charges will be applied, and provider signature(s) and related documentation shall be made available to Mayo Clinic Laboratories upon request.
>
> Is a new order number being created for this request?   Yes
>
> New Client Order Number (optional)
>
> Accepted by ▒▒▒▒▒▒ on 11/17/2023 11:17:51 AM

• If you select the **Deny** radio button, next, click the **SAVE** button.

The **Attestation Required** section then indicates your denial of the additional testing, with your name and the date and time of denial at bottom.

> **Attestation Required**
>
> To facilitate the finalization of testing, we are requesting your decision to either accept or deny this request. By clicking accept, I agree that I am authorized to request additional testing on this specimen on behalf of the ordering provider.
>
> Deny - by selecting this option I am denying Mayo Clinic Laboratories request to add on the additional testing described below.
>
> Denied by ▒▒▒▒▒▒ on 11/17/2023 10:47:10 AM

Note: If you have questions about the test that Mayo Clinic Laboratories is requesting, you can ask them in the **DISCUSSION** text field. For details about this field, see sub-step k above.

However, please be aware that a decision should be made promptly to ensure that testing can be completed.

Inquiry

You can submit a general Inquiry, or an Inquiry for a specific order.

a. **Optional:** In the **Subject** text field, enter a subject line of 50 or fewer characters for your Inquiry.

A subject line can facilitate searching for cases on the landing page, referring back to specific messages later, and quickly determining the content of an Inquiry at a glance.

Once your Inquiry is saved, the subject line appears in the **Type** column on the landing page.

b. Using the **Yes** or **No** radio button, answer the question, *"Is this inquiry about a specific patient order?"* (right).

- If you select **Yes**, the **PATIENT INFORMATION** appears below.

i. Find and select the desired order by following sub-steps c and d under Test Add On.

Note: To clear the **PATIENT INFORMATION** fields, at bottom left, click the **CLEAR** button.

- If you select **No** (default answer), the next field down is the **DISCUSSION** text field.

Note: If you answered **Yes** to the question *"Is this inquiry about a specific patient order?"* (see sub-step b above), the **Existing tests on this order** section appears below the **PATIENT INFORMATION** section (right). The code for each existing test is hyperlinked to the test's page in the Test Catalog on MayoClinicLabs.com.

Existing tests on this order:
CMM
HODGE

c. In the **DISCUSSION** text field, enter any additional information. For details about this field, see sub-step k in the Test Add On subsection.

d. At the bottom of the **CREATE MESSAGE** page, click the **SUBMIT** button (right). (To cancel your new message, click the **CANCEL** button.)
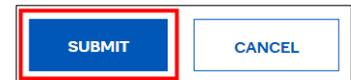
Upon submission, the newly created **DETAILS** page for the message appears, displaying a confirmation message with additional information. An example is below.

e. To create another new message, on the **DETAILS** page, click the **CREATE ANOTHER MESSAGE** button.

To return to the Message Center landing page, at the top of the **DETAILS** page, click the **MESSAGE CENTER** breadcrumb link (right).

Cancel Test

Note: If a test has progressed beyond a certain point, it may not be cancellable. Mayo Clinic Laboratories checks for this before cancelling any test.

When you select **Cancel Test** as the message type, additional sections and options appear below on the **CREATE MESSAGE** page.

a. Find and select the desired order by following sub-steps c and d under Test Add On.

   Note: To clear the **PATIENT INFORMATION** fields, at bottom left, click the **CLEAR** button. CLEAR

   Further down, the **TESTS TO CANCEL** section appears, displaying all available tests on this order.

b. To cancel a test, check its check box in the **Cancel** column, and then select a **Cancellation Reason** from the drop-down menu at right.

   Cancellation Reasons include:

   • **Duplicate Test**

- **Improper Specimen/Collection**

- **Incorrect Patient**

- **Incorrect Test Ordered**

- **No Specimen Available**

- **Patient Deceased**

- **Quantity Not Sufficient For Testing**

- **Test Cancelled Per Client/Healthcare Provider**

c. To cancel all tests, check the check box above the list and choose a **Cancellation Reason**.

TESTS TO CANCEL

Select tests on the order to cancel	Cancel	Cancellation Reason
	☑	Improper Specimen/Collection ▼
COVSQ - Severe Acute Respiratory Syndrome Coronavirus 2 (SARS-CoV-2), Spike Antibody, Semi-Quantitative, Serum ⧉	☑	Improper Specimen/Collection ▼
FSUGR - NOT FOUND ⧉	☑	Improper Specimen/Collection ▼
ACE - Angiotensin Converting Enzyme, Serum ⧉	☑	Improper Specimen/Collection ▼

All check boxes will be checked, and the same **Cancellation Reason** will populate in the drop-down menu of each test.

Note: When using **Check/Uncheck All**, you can change the **Cancellation Reasons** for individual tests independently.

d. In the **DISCUSSION** text field, enter any additional information. For details about this field, see sub-step k in the Test Add On subsection.

DISCUSSION

SAVE DRAFT   SEND ◁

◇ CLEAR   ⫶ ATTACH   ⬭ STANDARD REPLIES

e. At the bottom of the **CREATE MESSAGE** page, click the **SUBMIT** button (right). (To cancel your new message, click the **CANCEL** button.)

SUBMIT   CANCEL

Upon submission, the newly created **CONFIRMATION** page for the message appears, displaying a confirmation message and additional information. The **TEST**

CANCELLATION REASON(S) section provides the reason for each test cancellation. An example is shown below.

f. To create another new message, on the **CONFIRMATION** page, click the **CREATE ANOTHER MESSAGE** button.

To return to the Message Center landing page, at the top of the **DETAILS** page, click the **MESSAGE CENTER** breadcrumb link (right).

Note: When an order is revised to **Canceled**, two messages are created: one for **Revised** and one for **Canceled**. If users have subscribed to both these notification categories, they receive two different notification emails for the change in order status.

Editing a message

You can edit an existing open message if it is on the **Sent To Mayo** subtab of the **MESSAGES** category. To do so:

1. In the Message List, find the message using the tools described in Filtering and finding messages and alerts. In the row for the message, click the **Case Id** link.

The **DETAILS** page appears.

2. Edit the message in the **DISCUSSION** field. For details about this field, see sub-step k in the Test Add On subsection of Creating a new message.

3. At bottom right of the field, click one of the following:

   - The **SAVE DRAFT** button [SAVE DRAFT] to save a draft of your response for later editing.

   - The **SEND** button [SEND] to send your response to Mayo Clinic Laboratories.

When you save a message as a draft, your name plus the date and time you saved the draft appear to the left of the **SAVE DRAFT** and **SEND** buttons.

Notes:

- The time a draft was last updated always reflects the time zone set for your operating system.

- If you open a specific case while another user is in it, and the first user has taken an action such as sending a message to Mayo Clinic Laboratories or closing the case, this will prevent you from taking a subsequent action such as assigning or unassigning the case. A pop-up appears (example, right), informing you that your action cannot be completed.

On the **MESSAGE CENTER** landing page, in the Message List, the draft status icon 🖉 appears in the first column of the row for this message. When the **DETAILS** page is next accessed, the draft will be available to all users in your organization who have access to Message Center.

Responding to a message

To respond to an existing message:

1. In the Message List, find the message using the tools described in Filtering and finding messages and alerts.

2. In the row for the message, click the **Case Id** link.

The **DETAILS** page appears.

3. In the **DISCUSSION** field, enter the text of your response to the preceding message. For details about this field, see sub-step k of Test Add On under Creating a new message.

4. Either send the message or save the draft as described under Editing a message.

5. If the message is an Inquiry that you wish to close, then, in the **REQUEST TO CLOSE** section, check the *"Thank you, I have no more questions. Inquiry can be closed."* check box.

The **Closed** icon ⬤ Closed appears near the top of the screen, and the **REQUEST TO CLOSE** and **DISCUSSION** sections disappear.

Notes:

- If Mayo Clinic Laboratories does not receive a response within 7 days, the inquiry will be closed.

- If you open a specific case while another user is in it, and the first user has taken an action such as sending a message to Mayo Clinic Laboratories or closing the case, this will prevent you from taking a subsequent action such as assigning or unassigning the case. A pop-up appears (example, right), informing you that your action cannot be completed.

Message and alert assignment

You can assign, unassign, or reassign a message or alert to or from any other user who has access to Message Center and to the relevant account, including yourself.

Note: Once your organization sends the message or alert to Mayo Clinic Laboratories, the assignment is removed.

Assigning a message or alert to a user

To assign a message or alert to a user:

1. Click the **ASSIGN** button ⌐ASSIGN⌐ in one of the following places:

- In the Message List, in the **Actions** column for the message or alert in question.

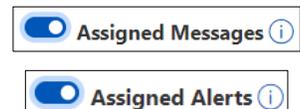- At top right of the **DETAILS** page for the message or alert.

The **Assign** dialog box appears.
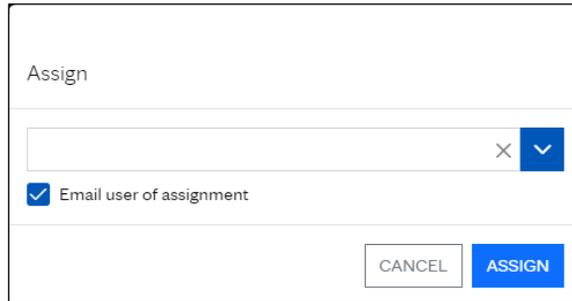
2. Do one of the following:

- Begin entering the name of the desired assignee into the **Assign** text field, then select it from the autocomplete list below.
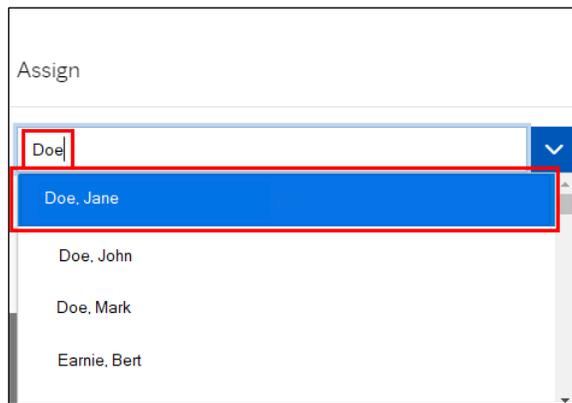
- To the right of the field, click the down-arrow ⌄, then select a user from the drop-down menu.
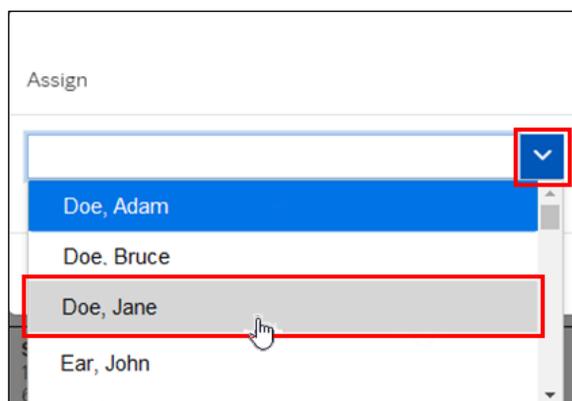
3. The **Email user of assignment** check box is checked by default. You can uncheck it if you do not want to send the assignee an email notification.

4. At bottom right, click the **ASSIGN** button.

In the Message List, the **ASSIGN** button has changed to the **UNASSIGN** button in the **Actions** column, and the assignee's name appears under the **Case Id**.

On the **DETAILS** page, the assignee's name appears under the name of the user who created the message or alert, preceded by the **Assigned** icon and followed by the date and time of assignment.

If you selected the **Email user of assignment** check box, the assignee receives an email notification similar to that in the screenshot below.
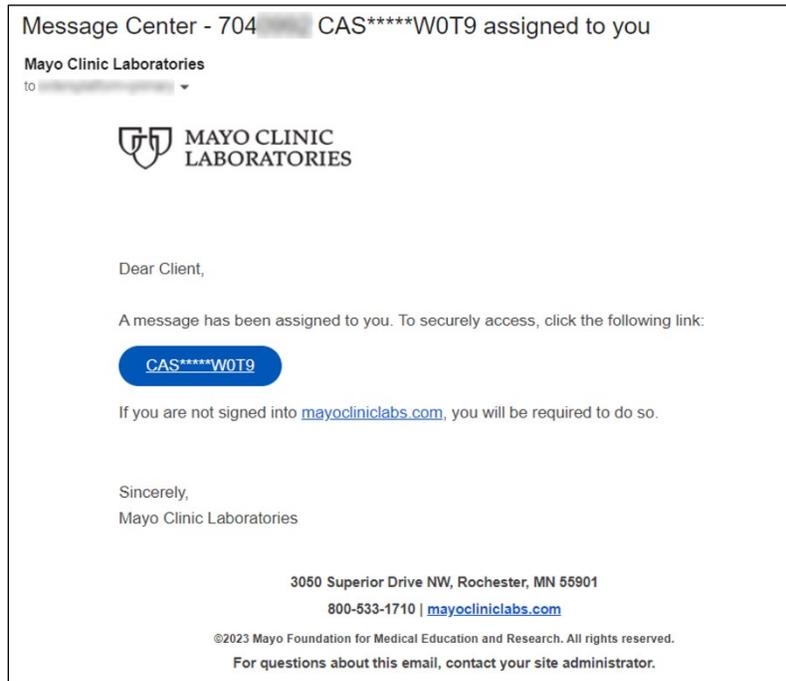
Unassigning a message or alert

To remove the assignment from a message or alert, do one of the following:

- In the **Actions** column of the Message List, click the **UNASSIGN** button.

- On the **DETAILS** page, do one of the following:

  o At top left, click the red **X** to the right of the date and time of assignment.

o At top right, click the **UNASSIGN** button.
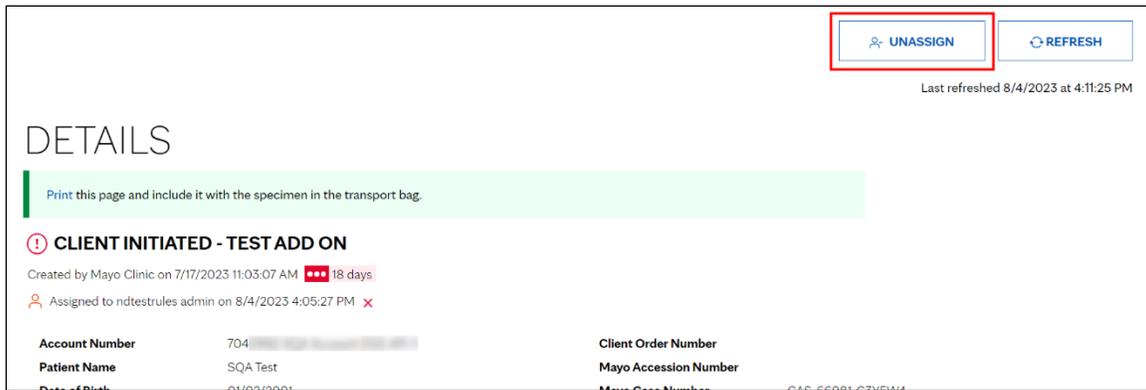
The **ASSIGN** button reappears both in the **Actions** column of the Message List and on the **DETAILS** page. The assignee information disappears from both the **Case Id** column and the top of the **DETAILS** page.

Reassigning a message or alert to another user

To reassign a message or alert from one user to another:

1. Click the **UNASSIGN** button and then the **ASSIGN** button in one of the following places:

   - In the Message List, in the **Actions** column for the message or alert in question,

   - On the **DETAILS** page for the message or alert, at top right.

   The **Assign** dialog box appears.
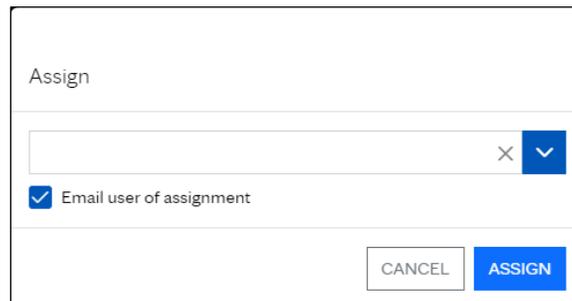
2. Follow the steps under Assigning a message or alert to a user above, starting with step 2.

Searching for assigned messages

As discussed under Filtering messages or alerts by creator or assignment, you can view all assigned messages and alerts by moving the **Assigned Messages** or **Assigned Alerts** slider, respectively, to the right (right).

You can search for messages or alerts assigned to a specific user by starting to enter their name into the **Case Id** search field (left). As soon as three characters are entered, Message Center begins a predictive search.

Note: Because **Global Search** will also return patient names, it is recommended you search for assignees using the **Case Id** search field instead.

Archiving and unarchiving messages and alerts

Archiving a message or alert

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

- In the **Actions** column of the Message List:
  - On any subtab of the **ALERTS** category.
  - On the **Complete** subtab of the **MESSAGES** category (right).
  - For some cases on the **All** subtab of the **MESSAGES** category.
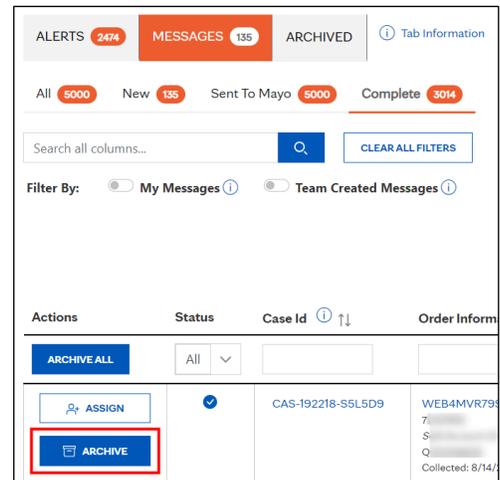
- On the **DETAILS** page at top right (right).
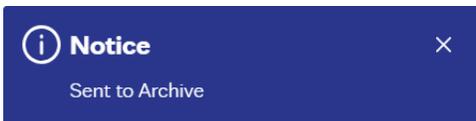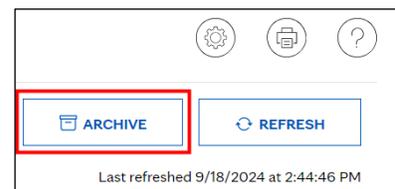
On either page, once the **ARCHIVE** button has been clicked, a **Notice: Sent to Archive** pop-up (left) appears at top right for three seconds.

The message or alert disappears from its original subtab and reappears on the corresponding subtab of the **ARCHIVED** category.

In the **Actions** column of the Message List, the **ARCHIVE** button has changed to the **UNARCHIVE** button , and the name of the user who archived the message or alert appears under the **Case Id** (right).
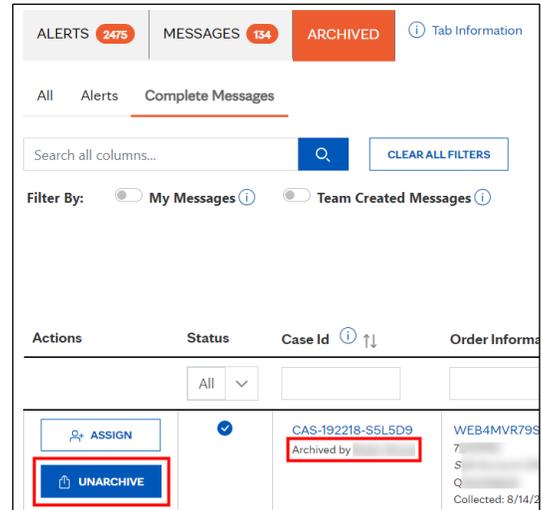
On the **DETAILS** page, the **ARCHIVE** button at top right has likewise changed to the **UNARCHIVE** button. The name of the user who archived the message or alert and the date and time of unarchival appear below the name of the user who created it.
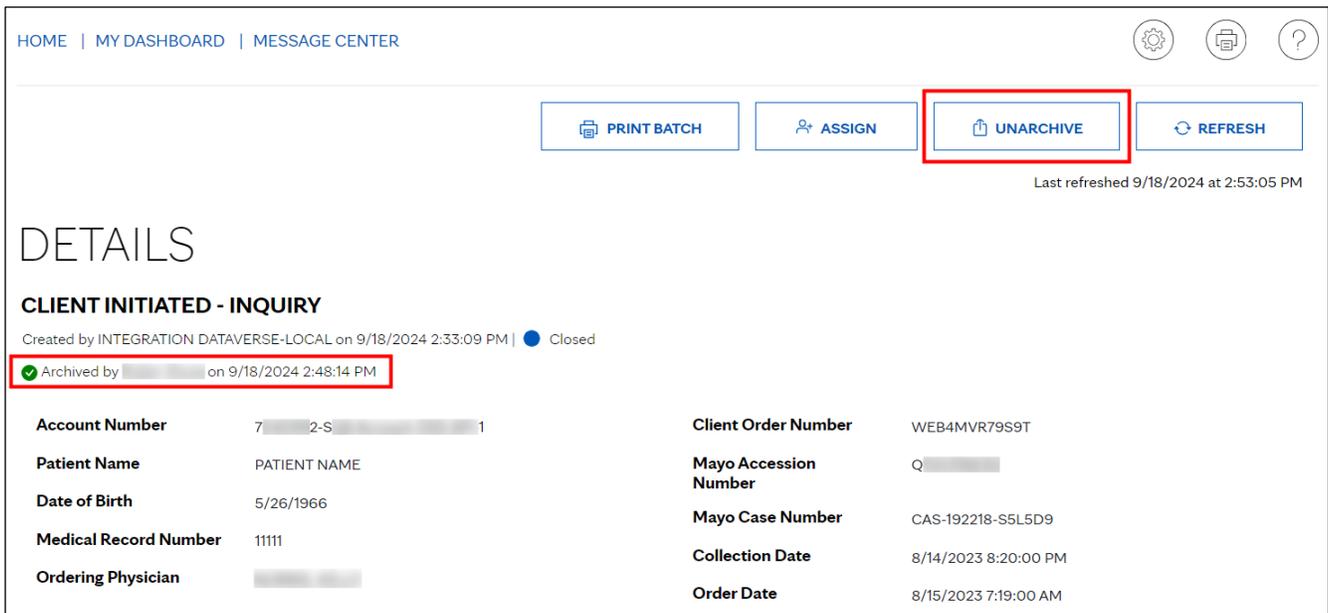
Archiving all alerts or messages

On the **Complete** subtab of the **MESSAGES** category, or on any subtab of the **ALERTS** category, you can archive all messages currently displayed on the first page of the Message List by clicking the **ARCHIVE ALL** button [ARCHIVE ALL] at the top of the **Actions** column.

For example, if your page controls are set to show 10 messages per page as in the above screenshot, but there are a total of 50 messages on the **Complete** subtab of the **MESSAGES** category, the **ARCHIVE ALL** functionality archives the 10 messages that are currently viewable.

When you click the **ARCHIVE ALL** button, all visible messages disappear from the original subtab and reappear on the **Complete Messages** subtab of the **ARCHIVED** category.

On the **Complete** subtab of the **MESSAGES** category, the next 10 completed messages are now visible and can also be archived.
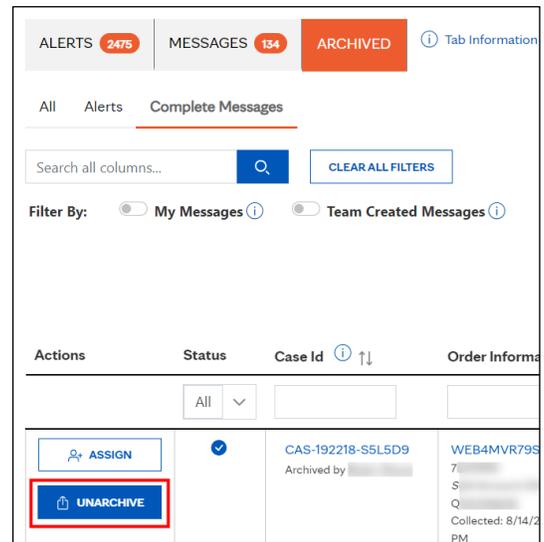
Unarchiving a message or alert

You can unarchive a message or alert from either the **ARCHIVED** category or the **DETAILS** page, which sends the message or alert back to the appropriate subtab of the **ALERTS** category or the

Complete and **All** subtabs of the **MESSAGES** category. This is helpful if you have unintentionally archived a message or alert, or if you learn that there is additional work to do on the archived message or alert.

To unarchive a message or alert, do one of the following:

- In the **Actions** column on the **Complete Messages** subtab of the **ARCHIVED** category, click the **UNARCHIVE** button [⤴ UNARCHIVE] for that message or alert (right).

- On the **DETAILS** page, click the **UNARCHIVE** button [⤴UNARCHIVE] at top right (right).
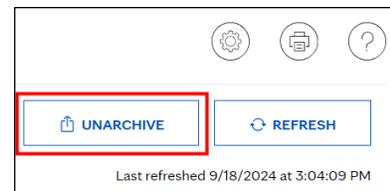
On either page, once the **UNARCHIVE** button has been clicked, a **Notice: Sent to Complete** pop-up (left) appears at top right for three seconds.

The message or alert disappears from the **ARCHIVED** category. An unarchived message reappears on the **Complete** subtab of the **MESSAGES** category, while an unarchived alert reappears on the appropriate subtab of the **ALERTS** category.

In the **Actions** column of the Message List, the **UNARCHIVE** button changes to the **ARCHIVE** button [🗄 ARCHIVE], meaning that the message or alert can be archived again. In the **Case Id** column, the name of the user who unarchived the message or alert appears (right).
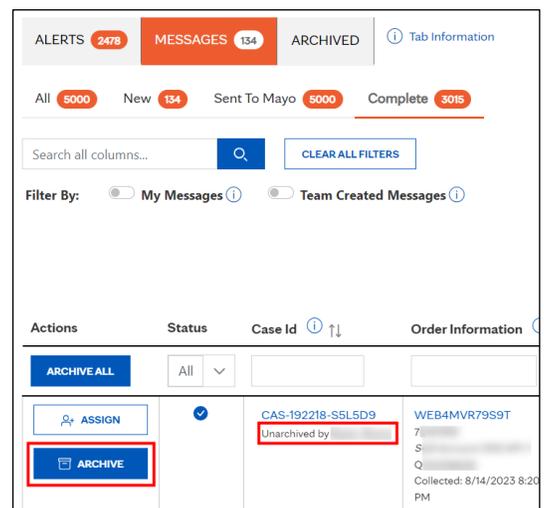
The name of the user who unarchived the message or alert appear at top left of the **DETAILS** page under the name of the user who created the message or alert (left).

On the **DETAILS** page, the **UNARCHIVE** button at top right has likewise changed to the **ARCHIVE** button. [ARCHIVE] The name of the user who unarchived the message or alert and the date and time of unarchival appear below the name of the user who created it.

Notification settings

Notification settings for users

To set your preferences for email notifications:

1. At top right of the Message Center landing page, click the gear icon. ⚙
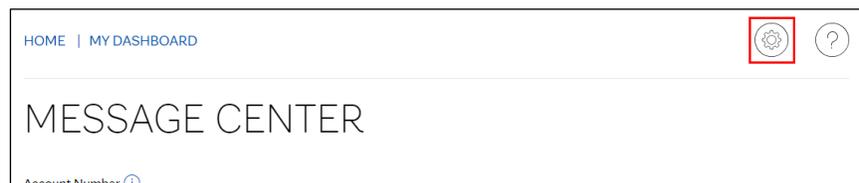
The **SETTINGS** page appears.

Note: Settings can be changed for only one account at a time.

- If multiple accounts are selected on the landing page, the **Account Number** text field on the **SETTINGS** page is blank, and you must enter an account number in the field.

Once an account has been selected, the full **SETTINGS** page appears (see next page).

- If only one account is selected on the landing page, the **SETTINGS** page reflects it in the **Account Number** text field and the account tile to its right, with the **USER** tab selected by default and the full page shown below.

HOME | MY DASHBOARD

SETTINGS

| USER | ACCOUNT |

Account Number

| 7_____2 - S_____-1 | **SELECT** | 7_____2 - S_____A...

GENERAL

LAYOUT

What tab do you want to see when opening Message Center? ⓘ

| **Alerts:** Critical/Semi-Urgent | ⌄ |

Selected Alert Subtabs will be displayed

☑ Critical/Semi-Urgent

☑ Cancel

☑ Revision

EMAILS

SUBSCRIPTIONS

Choose emails that you want to receive

Messages

☐ New or updated messages

☑ Requests that cannot be fulfilled

☑ Urgent Messages

Alerts

☐ Canceled tests

☐ Critical results

☐ Revised results

☐ Semi-Urgent results

☑ Transportation information

☐ Daily summary of messages and alerts

| UPDATE |

2. Under **LAYOUT**, select which category and, if applicable, subtab that you would like Message Center to open to when you first log in.
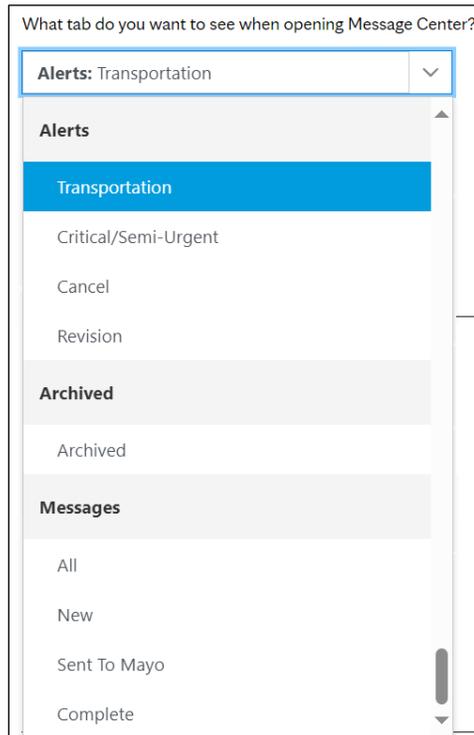
When you click the **Information** icon ⓘ at the right of the **LAYOUT** section, a tooltip appears, explaining the rules that Message Center applies based on your selected account settings.

Notes:

- The default setting is the **ALERTS** category and **Critical/Semi Urgent** subtab.

- If you have different accounts set to open to different categories or subtabs and you select more than one account when logging in, Message Center applies rules, as explained in the following examples:

    o If you have three accounts but have not applied a **LAYOUT** setting to any of them, Message Center opens to the default (**ALERTS** category and **Critical/Semi Urgent** subtab).

    o If you have three accounts but have applied a **LAYOUT** setting to only one of them, that setting is applied to all three accounts.

    o If you have three accounts, with one set to open to the **MESSAGES** category and **New** subtab and the other two set to open to the **ALERTS** category and **Transportation** subtab, Message Center opens to the default **ALERTS** category and **Critical/Semi Urgent** subtab for all three accounts.

    o If you currently have three accounts, but you had only one account the last time you used Message Center, the application opens to whatever **LAYOUT** setting you designated for the oldest account.

3. Under **Selected Alert Subtabs will be displayed**, you can check ☑ or uncheck ☐ the boxes corresponding to the **ALERTS** subtabs that you want shown or hidden, respectively, on the landing page: **Critical/Semi-Urgent**, **Cancel**, and/or **Revision**. If you hide a subtab, you will also no longer receive immediate email notifications for the corresponding alert type.

    Notes:

    - All boxes are checked by default.

    - The **Transportation** subtab cannot be hidden.

When you uncheck a box to hide the corresponding subtab, a notice briefly appears at top right of the **SETTINGS** page (right).
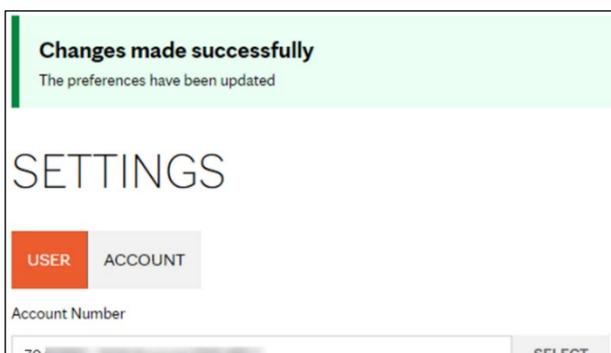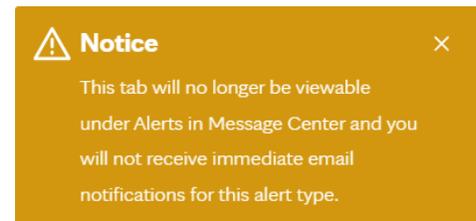

When you change any **Selected Alert Subtabs will be displayed** option and click the **UPDATE** button at the bottom of the **SETTINGS** page, a banner appears at the top, indicating that your changes have been made successfully (left).

Notes:

- If you select an **ALERTS** subtab under **LAYOUT** for Message Center to default to upon opening but you previously unchecked that same subtab under **Selected Alert Subtabs will be displayed**, the next time you log into Message Center, the landing page will default to the **New** subtab of the **MESSAGES** category. This also happens if you first select the subtab as your default opening subtab but then hide it.

- You can resubscribe to email notifications for a specific type of alert after hiding the corresponding **ALERTS** subtab on the landing page. For example, if you resubscribe to **Revised** email notifications after hiding the **Revision** subtab under the **ALERTS** category, you will still receive those notifications.

  In the above example, when you click the link in a **Revised** notification email, the landing page opens with a warning banner at the top that provides a quick link to the **SETTINGS** page, in case you want to change your **ALERTS** subtab display settings.
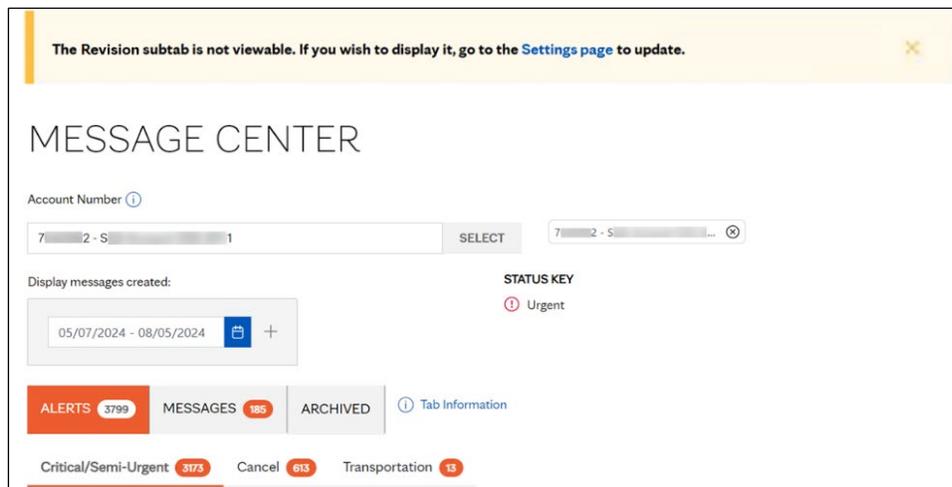
  Note: Resubscribing to certain email notifications after hiding the corresponding **ALERTS** subtab(s) is not recommended.

4. Under **EMAILS**, turn email notifications on by checking the appropriate check box. ☑ To turn them off again, uncheck the box. ☐

   **Notes:**

   - Defaults are as follows:
     - **New or updated messages**: off
     - **Requests that cannot be fulfilled**: on
     - **Urgent Messages:** off
     - **Alerts**:
       - **Canceled tests**: off
       - **Critical results**: off

- **Revised results**: off

- **Semi-Urgent results**: off

- **Transportation information**: on

  - **Daily summary of messages and alerts**: off

- In the subject headers of email notifications, the "From" field will specify "Mayo Clinic Laboratories noreply@notify.mayocliniclabs.com".

- While email notification subscription preferences are set by the user, email notifications are generated for the account. This means that:

  - When you have **New or updated messages** on, you will receive an email notification for any updated or new message for the account, regardless of whether you contributed to the discussion thread in question.

  - When you have **Requests that cannot be fulfilled** on, you will receive an email notification each time Mayo Clinic Laboratories cannot perform a Test Add On or Test Cancel, regardless of whether you contributed to the discussion thread in question.

  - Subscription preferences are set for one account at a time. When you are setting preferences for one of multiple accounts, make sure you adjust your preferences and click the **UPDATE** button before you select the next account.

- If you have checked the **Urgent Messages** box, clicking the link in an email notification for an urgent message will bring you to the to the **MESSAGES** category and **New** subtab.

5. If you turn on **Daily summary of messages and alerts**, a field for selecting the time of day you want the summary sent appears (right). Click the clock icon 🕐, then use the up ⌃ and down ⌄ arrows to set the hour and minute.

   Note: All times reflect the time zone set for your operating system.

6. When done, at bottom left of the screen, click the **UPDATE** button. UPDATE

   At the top of the screen, a message will confirm that your preferences have been updated (right).
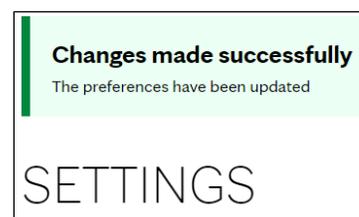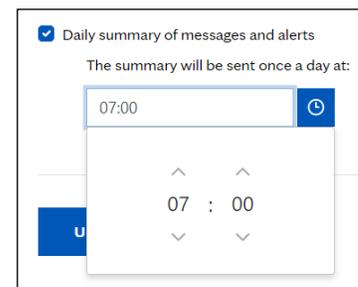
Notification settings for accounts

If you have Client Administrator permissions, you will see two tabs on the **SETTINGS** page: **USER** and **ACCOUNT**.

On the **USER** tab, you can set preferences for how you want to view <u>your own</u> account, as discussed in the [previous section](). The **ACCOUNT** tab allows you to set preferences for <u>all</u> users for a specific account.

MESSAGE ASSIGNMENT

In the **MESSAGE ASSIGNMENT** subsection of the **ACCOUNT** tab, which is under **GENERAL**, you can choose the radio button corresponding to what should happen when an assigned user replies to a message: **Remove user assignment from the message** (default), or **Keep user assigned to the message**.

SUBSCRIPTIONS

In the **SUBSCRIPTIONS** subsection of the **ACCOUNT** tab, which is under **EMAILS**, you can enter distribution list email addresses, as well as email addresses that are not registered on MayoClinicLabs.com, to which you want email notifications sent.

Notes:

- Any email address may be entered on the **ACCOUNT** tab. Message Center uses standard validation to confirm only that the entry is formatted as an email address, with an @ sign, a domain name, and a top-level domain such as ".com".

- While registered email addresses may be entered on this tab, it is recommended that registered users set their preferences on the **USER** tab.

- When there are no summary messages/alerts on any given day, no email will be sent that day.

- You cannot create distribution lists in Message Center. You must create them in another application, such as Microsoft Outlook, and then add the distribution list address on the **ACCOUNT** tab.

- You cannot vary email notification settings for different distribution lists. For example, **Enable notifications for new or updated messages from Mayo Clinic** must be either active or inactive for <u>all</u> distribution lists.

- Instructions for opting out differ between user- and account-level summary emails:

<table>
<tr><td>

3050 Superior Drive NW, Rochester, MN 55901

800-533-1710 | **mayocliniclabs.com**

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To update your email subscriptions, go to **Preferences**.
</td><td>

3050 Superior Drive NW, Rochester, MN 55901

800-533-1710 | **mayocliniclabs.com**

©2023 Mayo Foundation for Medical Education and Research. All rights reserved.

For questions about this email, contact your site administrator.
</td></tr>
<tr><td>Users at the user level are instructed to edit their **USER** preferences.</td><td>Site administrators can edit the email options on the **ACCOUNT** tab.</td></tr>
</table>

To add an email address on the **ACCOUNT** tab:

1. Enter the address in the text field.

Add distribution lists or unregistered user email addresses to receive emails for messages

test.email.240112@gmail.com   ADD

✕   D_____@mayo.edu

2. At the right of the text field, click the **ADD** button. [ADD]

   The email address appears below the text field. If there is already a list of other email addresses there, the new address appears at the bottom of the list.

Add distribution lists or unregistered user email addresses to receive emails for messages

    ADD

✕   D_____@mayo.edu

✕   test.email.240112@gmail.com

3. To remove an email address from the list, click the red **X** to its left.

NOTIFY SUBSCRIBERS ABOUT

This subsection, also under **EMAILS**, provides the same options as the **USER** tab, except that they are at the account level instead of the user level.

Note: All notifications on the **ACCOUNT** tab are set to off by default.

Sample email notifications

New message:

Message Center - New Message for 704___ FAK*****82b2

Mayo Clinic Laboratories

MAYO CLINIC LABORATORIES

Dear Client,

A new message is awaiting a response. Testing will proceed when we receive a response. Click the following link to respond in Message Center:

FAK*****82b2

If you are not signed into mayocliniclabs.com, you will be required to do so.

Sincerely,
Mayo Clinic Laboratories

3050 Superior Drive NW, Rochester, MN 55901

800-533-1710 | mayocliniclabs.com

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To update your email subscriptions, go to Preferences.

Updated message:

Message Center - Updated Message for 704___ MSG*****2022

Mayo Clinic Laboratories

MAYO CLINIC LABORATORIES

Dear Client,

An update has been made and is awaiting a response. Testing will proceed when we have a resolution. Click the following link to respond in Message Center:

MSG*****2022

If you are not signed into mayocliniclabs.com, you will be required to do so.

Sincerely,
Mayo Clinic Laboratories

3050 Superior Drive NW, Rochester, MN 55901

800-533-1710 | mayocliniclabs.com

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To update your email subscriptions, go to Preferences.

Urgent message:

Message Center - Urgent Updated Message for 7040992 MSG*****2022

MAYO CLINIC LABORATORIES

Dear Client,

An urgent message is awaiting a response.

Testing will proceed when we receive a response.

Click the following link to respond in Message Center:

MSG*****2022

If you are not signed into mayocliniclabs.com, you will be required to do so.

Sincerely,
Mayo Clinic Laboratories

3050 Superior Drive NW, Rochester, MN 55905

800-533-1710 | mayocliniclabs.com

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For questions about this email, contact your site administrator.

Daily summary:

Message Center - Daily Summary for 704___

MAYO CLINIC LABORATORIES

Dear Client,

You have messages that are awaiting a response in Message Center. Testing will proceed when we have the resolution. Click the following button to view these messages:

Awaiting response (6)

In the last 24 hours, Mayo created the following information messages. Click any of the buttons to view these messages:

Canceled tests (0)   Critical/Semi-Urgent results (0)

Revised results (0)   Transportation alerts (0)

Unfulfilled requests (0)

You must be logged in to mayocliniclabs.com to view these messages.

Sincerely,
Mayo Clinic Laboratories

3050 Superior Drive NW, Rochester, MN 55901
800-533-1710 | mayocliniclabs.com
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To update your email subscriptions, go to Preferences.

Request that could not be fulfilled:

Canceled test:

Critical Result:

Revised Result:

Semi-Urgent Result:

Message Center - Semi-Urgent Result for 704___ 001*****00

MAYO CLINIC LABORATORIES

Dear Client,

You have a semi-urgent result alert in Message Center. Click the following button for details:

001***00b1**

You must be logged in to mayocliniclabs.com to view alerts.

Sincerely,
Mayo Clinic Laboratories

3050 Superior Drive NW, Rochester, MN 55901
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To update your email subscriptions, go to Preferences.

Transportation Alert:

Message Center - Transportation Alert for 7___

MAYO CLINIC LABORATORIES

Dear Client,

The following transportation alert applies to your account:

For the Thanksgiving holiday, Mayo Clinic Laboratories' specimen pickup and delivery schedules will be altered. To ensure specimen viability and avoid turnaround time delays, follow the guidelines below.

Delays are possible. Shipments sent Wednesday, 11/22/23 may not arrive until Saturday, 11/25/23, when using FedEx or UPS. To help minimize sample impact, shipping carriers have been adjusted for the best possible outcome.

Self-shippers: If you choose to ship via UPS or FedEx add additional frozen cool packs to refrigerate shipments and use sufficient dry ice to cover the extended transit time and warm weather conditions.

For questions, please contact Customer Service at 800-533-1710 and ask to be forwarded to the Global Logistics specialist.

To access the alert in Message Center, click the following link:

CAS***M4D1**

If you are not signed into mayocliniclabs.com, you will be required to do so.

Sincerely,
Mayo Clinic Laboratories

3050 Superior Drive NW, Rochester, MN 55901
800-533-1710 | mayocliniclabs.com
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Appendix: BioPharma MCBD clients

For BioPharma MCBD users of Message Center, the interface looks slightly different, offers different functionalities, and has different requirements.

Selecting accounts

The landing page appears as soon as you click the **MESSAGE CENTER** icon on the **Dashboard**.

At the very top left, under the words **BIOPHARMA MESSAGE CENTER**, the **Show Biopharma Message Center** slider appears (right). This toggle allows clients with both regular and BioPharma MCBD accounts to switch back and forth between the two types of accounts. The slider defaults to on.

All BioPharma MCBD accounts to which you have access are represented in the Message List, the list of all messages for these accounts that appears at the bottom of the page in table form.

Notes:

- You can view messages for one account at a time by entering the account number into the text field above the **Specimen Information** column.

- Viewing regular and BioPharma MCBD client accounts in the same Message Center session is not recommended. If you have access to both types of accounts and you attempt to enter a BioPharma MCBD account number while the slider is toggled off, a warning message appears.

Message List column headers

The column that is labeled **Order Information** for regular users is instead labeled **Specimen Information**, and the **Patient Information** column will instead be labeled **Subject Information**.

For more information about Message List column headers, see the relevant section in the main guide.

DETAILS pages

For BioPharma MCBD users, some fields in the main section of the **DETAILS** page are labeled differently for both **ALERTS** and **MESSAGES**.

Client Account Number	7_____9-MCBD/_____ (_____)	**Client Order Number**	WEB_____
Subject Name	PATIENT NAME	**Tube Accession Number**	Q_____
Date of Birth	5/26/1966	**Mayo Case Number**	CAS-_____
Subject ID Number	11111	**Collection Date**	8/14/2023 8:20:00 PM

The differences are as follows:

Regular accounts	BioPharma MCBD accounts
Account Number	**Client Account Number**
Patient Name	**Subject Name**
Medical Record Number (MRN)	**Subject ID Number**
Ordering physician	N/A
Mayo Accession Number	**Tube Accession Number**
Order Date	N/A

For more information about **DETAILS** pages, see the relevant sections in the main guide on **ALERTS** and **MESSAGES**.

Creating a new message

On the **CREATE MESSAGE** page, you will be unable to view the **Message Type** drop-down menu or create a message until you select an Account Number from the drop-down menu (right).

CREATE MESSAGE

MESSAGE INFORMATION

Account Number

Select an account number	⌄

	🔍

7_____0 - M_____ a

7_____2 - S_____ 1

7_____3 - S_____ 2

7_____0 - S_____ t

The section on this page that is titled **PATIENT INFORMATION** for regular users is instead titled **SUBJECT INFORMATION**.

SUBJECT INFORMATION

Select an order by searching on any one field or a combination of any of the fields below.

Subject ID Number	Client Order Number	Tube Accession Number

Subject Last Name	Subject First Name	Date of Birth
		mm/dd/yyyy

CLEAR

The differences are as follows:

Regular accounts	BioPharma MCBD accounts
Medical Record Number	**Subject ID Number**
Mayo Accession Number	**Tube Accession Number**
Last Name	**Subject Last Name**
First Name	**Subject First Name**

For more information about creating a new message, see the relevant section in the main guide.

Submit your feedback

Hearing from you helps us serve you better. If you would like, please tell us what you think of Message Center.

1. At bottom left of the **MESSAGE CENTER** landing page, answer the question, *"Were you able to complete everything you needed in the Message Center?"* by clicking either the **Yes** or **No** radio button.

   The request *"Please share additional feedback below. For urgent issues, contact Customer Service"* (or, if you selected **No**, the request *"Please let us know how we can improve Message Center"*) appears, along with a text field.

2. Enter your feedback, if any, into the text field.

3. Further down, select one of the three radio buttons to indicate how/whether you would prefer additional follow-up from Mayo Clinic Laboratories.
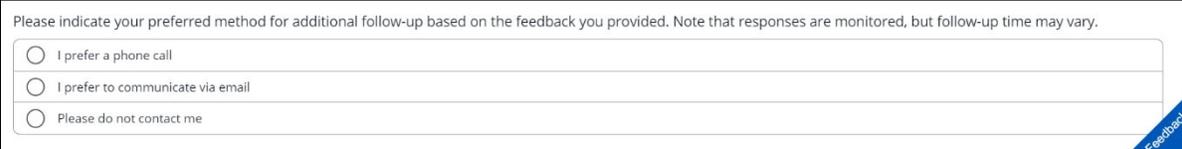
a. If you select **I prefer a phone call**, the **Name** and **Phone Number** fields appear below.

Complete these two fields and, at the bottom of the page, click the **Submit** button.

b. If you select **I prefer to communicate via email**, the **Name** and **Email** fields appear below.

Complete these two fields and, at the bottom of the page, click the **Submit** button.

c. If you select **Please do not contact me**, no additional text fields appear below.

At the bottom of the page, click the **Submit** button.

The feedback section disappears.