[Company name]

Message Processing Documentation

Prepared by: [Name]

Version control:

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# Message management work process information

## Resource management

[Identify the resources required throughout the message management process. List the name and position of the person (or persons) responsible for receiving all patient messages. List each of the personnel responsible for responding to messages.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Role | Department | Ext. | Mobile | E-mail |
|  | Receiver |  |  |  |  |
|  | Respondent |  |  |  |  |
|  |  |  |  |  |  |

## Issue and risk management process

[List the issues and risks that relate to the message management process. See the following sample process and issue/risk log.]

| Item # | Description | Assigned  to | Start  date | Due  date | Severity  (high/ medium/  low) | Progress  (R/Y/G) | Status |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |

## Message management process

### Message capturing

[Describe and illustrate the process used to capture messages sent to the medical office.]

### Message response

[Describe and illustrate the process used to capture message response information that will be forwarded to the message respondent.]

### Message documentation

[Describe and illustrate the process used to store and distribute message documentation.]

# Data management information

## Data acquisition

[Identify the method and means for acquiring message data.]

## Data query

[Identify the method and means for querying specific data to gather information as needed.]

## Data report

[Identify the method and means for defining report criteria, and identify the delivery method for each report.]

## Data storage

### Centralized folder structure

[Describe the centralized folder structure used to store all relative electronic files.]

### File-naming convention

[Identify a formal naming convention for all files stored in the centralized folder structure.]

## Data security

[Identify all security constraints applicable to the protection of patient data as identified by HIPAA (Health Insurance Portability and Accountability Act).]

# Lessons learned

[Identify ways to improve your work processes.]

|  |  |  |  |
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