



CHANGE IDEA: Establish a secure process for communicating with external specialists and community-based organizations to improve care continuity and follow-up documentation.

STEP 1: GET READY (TASKS)

- A. Identify gaps in the current communication process with external partners.
- B. Choose a secure communication method, ideally with a feature already within your electronic health record (EHR). This example uses Epic's secure chat feature.
- C. Train clinical and care coordination staff on [Epic's Direct Messaging functionality](#).
- D. Create a contact list of partner specialists and community organizations (e.g., health centers, behavioral health providers, social services).
- E. Develop communication [protocols and message templates](#) for common referral scenarios.
- F. Confirm technical readiness, including message delivery validation and security configurations.
- G. Ensure information-sharing agreements are in place and follow HIPAA guidelines.

STEP 2: PLAN AND PRACTICE

Pilot Epic Direct Messaging for a specific use case, such as behavioral health referrals. Assign a care manager or medical assistant to send and track messages for a specific patient group.

SAMPLE PROCESS:

- A. The family is referred to a behavioral health provider.
- B. The care manager sends a Direct Message with the referral summary and contact information.
- C. The receiving provider acknowledges receipt and confirms appointment scheduling or next steps.
- D. Document the status in the EHR for care team visibility.

STEP 3: REVIEW AND REFINE

Review how many messages were successfully sent and received. Gather staff and partner feedback to refine the process. Identify workflow or technical challenges. See a [sample data collection template](#).

STEP 4: EXPAND

Broaden the pilot to additional referral scenarios (e.g., specialist follow-up, early intervention). Add more external partners to the approved messaging network.

STEP 5: SUSTAIN

Formalize the use of Direct Messaging in care workflows and staff onboarding. Keep partner lists updated and conduct routine audits of messaging success and referral completion.

Continue reviewing care coordination metrics (e.g., referral completion, follow-up rates, documentation time) and gathering staff and partner feedback.