Sending Links or Data via Q Mail

Q allows any active user to send a link to a client record or specific information within a client record, such as a care plan or service units via Q Mail. This is a much better way to communicate amongst your team or any other Q user, such as an MSSP Care Manager or a user in the SNP program at the County or another provider (Yu Ai Kai, for example.) It's a secure method that doesn't involve sending personally identifiable information (PII) or health information in the clear like regular email might.

Once in the Client record, if you want to send a link to the record/data, then all you need to do is right click in the blue header area of the record and select Send To \rightarrow Mail Recipient.

| Care Plan Mass Creation | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|
| Client Statements Generate Client Bar Code Label(s) Client Demographic Report | Personal Information Phone 1 Phone 2 F | | | | | | | | |
| New Client | 408-531-1798 | | | | | | | | |
| Delete Client | Birth Date Age Race | | | | | | | | |
| Copy Client | 05/27/1933 85 Other Ra | | | | | | | | |
| Deactivate Client | Other (Race) Ethnicity | | | | | | | | |
| Calendar View | Persian Not Hispa | | | | | | | | |
| Calendar Report | Marital Status If widowe | | | | | | | | |
| Check Out Client | Married | | | | | | | | |
| Authorizations | SSN SSN (#2) Med | | | | | | | | |
| Close | Medi-Cal CIN# Medicaid (| | | | | | | | |
| Send To | Mail Recipient | | | | | | | | |
| Web Links | To Do List Veteran Reas | | | | | | | | |
| Mail Merge + | Waiting Room | | | | | | | | |

This will launch Q Mail, where you can start typing the name of a Q user and it will autocomplete or you can click the button with the three dots and select the Q user from the list.

| To: | [| |
|----------|---|--|
| CC: | | |
| Subject: | | |

Then you can type in your subject and information in the body of the message.



Notice there's a link in the Links area of the message. When the recipient receives the email, all they have to do is click on the link and Q will automatically take you to the client record, care plan, query, list – whatever the sender wanted the recipient to see.

| 🚞 New M | lessage | | | _ 🗆 × |
|----------|-------------------|------------------|--------------------------|---------|
| E 📮 | 🎒 X 🖻 🛍 U 🚦 | ↓ * | | |
| To: | Henri Villalovoz; | | | |
| cc: | | | | |
| Subject: | | | | |
| | | | | |
| | (#120006161 | | | |
| T R | (#139996161 |] | | |
| | | | <u>S</u> end <u>C</u> la | ose //. |

Below are examples of how you can use Q Mail to securely communicate with another user. All three examples use the exact same steps to include the link in Q Mail. They simply demonstrate that you can send a link from almost any screen within Q so you direct the mail recipient directly to the information you need them to see or to perform an action/task.

Example 1: Sending a pre-defined query. In this case if you type in today's date for the Start and End Dates and click Query, it will give you all active MOW clients as of the current date.

| 🔮 Clients Assigned to SSP Care | e Manager - [Query] | 🛛 🗶 🔁 Re: Query |
|---|---|--|
| manager (or care manager unit). Y | I list of all clients (active and inactive) associated with a given care 'ou may indicate whether active or closed clients should be returned. form is used to determine whether a client should be returned on | |
| Primary Care Manager <u>U</u> nit <u>P</u> rimary Care Manager | × | CC Subject Query Here's a query for all active MDW clients as of today's date. |
| Secondary Care <u>M</u> anager | | |
| Status <u>O</u> roup St <u>a</u> tuses | | Clients Assigned to SSP Care |
| Social Service Programs Social Service Program Status | | |
| Date Range | Active | Glose |
| Start Date End <u>D</u> ate | 09/27/2018 09/27/2018 | |
| | Query Clear Cancel | |

Example 2: Sending a link to a Client record. In this case, on the main client screen, you're sending a link to the client record asking for this record to be deleted because it's a duplicate.

| 🔮 Test, John (#139997 | Care Plan Mass Creation | | | | | | × | 1 | 🚞 Re: D | uplicate client |
|---|---|---------------------------|----------------------|------------|---------------------|--|---|---|----------|--|
| Client Data Confidential Client Information | Client Statements Generate Client Bar Code Label(s) Client Demographic Report | llaneous | Persor Phone 1 | nal Infor | mation – Phone 2 | Facility Phone | | | From | D ₩ ∰ ♥ X Edith Gong Sent 9/27/2018 at 02:34 PM |
| Test A.K.A.: First Name | New Client Delete Client | 008 ved Date | 877-262 Birth Dat | | Age | Race | | | To CC | Edith Gong |
| Facility Name | Copy Client Deactivate Client | | 09/02/1 Other (R | | | White Ethnicity | | | Subject | Duplicate client |
| Street/Address | Calendar View Calendar Report | | Marital S | | | Not Hispanic / Latino If widowed, since when? | | | Links | |
| 2115 the Alameda | Check Out Client Authorizations | - | Married SSN | | SSN (#2) | Medicare | | | - | John (#139979436) (Clie |
| Directions / Identifiers | Close | nce | 122-12- Medi-Cal | | | 1234 Medicaid County of Origin | | | | |
| | Send To | Mail Recipi To Do List | | 6 Birth | Vetera | Santa Clara n Reassessment Date | | | | |
| | Mail Merge | Waiting Ro | pom | n, ca | Yes | | | | | |
| Sexual Orientation and Gender Identification Sex at Birth Gender (Gender) Sexual Orientation Other (Sexual Orientation) | | | | | | <u>Q</u> lose // | | | | |
| Caregivers Assessments | Caregivers Assessments Care Plan Clinic Yisits | | | | | | | | | |
| Medical Authorizations | HHA Case Notes Earnily His | tory | | Į | Edit | <u>N</u> ew <u>C</u> lose | 1 | | | |

Example 3: Sending link to the Care Plan screen. In this case, MSSP closed the care plan and noticed Deceased was the reason in the SSP (Social Service Program under Programs tab).

| 💩 Care Plan - B | Open | 1970081) - [Yiew Only] | | | 🚞 Re: Cli | ient passed away |
|--------------------------------|---------------------------|--|------------|-----------------|------------|---|
| Service Plan C | • | Needs | | | S4 😪 | 🐙 🚭 🔻 🗙 |
| D 🖉 X 🖹 | New Care Plan Service | 1 | | | | Edith Coord Sent Or 9/2018 at 06:11 PM |
| | New Problem | | 1 | | From | Edith Gong Sent 9/19/2018 at 06:11 PM |
| Agency _ | New Problem | _be | Start Date | End Date | То | Mary Orozco |
| L Discovellard | Authorizations | | | | cc | |
| Disenrolled _ Santa Clara (| Close | - Delivered Meals | 7/7/2010 | 9/26/2018 | Outline at | |
| Sourcewise = | Close | Listrativa Evpanada | 12/12/2016 | 9/17/2018 | Subject | Client passed away |
| Sourcewise | Send To 🔶 🕨 | Mail Recipient | 12/12/2016 | 9/17/2018 | Hi Marv. | |
| Sourcewise | | To Do List | 12/12/2016 | 2/28/2017 | | SSP care plan, this client died on 9/10/18. You should end the MOW care plan. 🛛 📆 |
| | Mail Merge | Ula Na a Da ara | 4/1/2017 | 4/30/2017 | | <u>×</u> |
| | | Waiting Room | 4/1/2017 | 4/30/2017 | Links | |
| Shield California | a Health Care Center FOO | D - Shield | | | Care P | lan - Bi |
| Shield California | a Health Care Center FOO | D - Shield | 6/1/2017 | 6/30/2017 | Г | |
| Shield California | a Health Care Center FOO | D - Shield | 7/1/2017 | 9/17/2018 | | |
| Shield Californi | a Health Care Center FOO | D - Shield | 8/1/2017 | 8/31/2017 | | |
| | | Medical Home Equipment | 8/1/2017 | 8/31/2017 | | |
| | | D - Shield | 9/1/2017 | 9/30/2017 | | |
| | | <u>D - Shield</u> | 10/1/2017 | 10/31/2017 | | |
| | | D - Shield | 11/1/2017 | 11/30/2017 | | |
| Shield California | a Health Care Center FOO | D - Shield | 12/1/2017 | 12/31/2017 | , | |
| | 0-111 D11 - 01 | | D-1- | | | Close |
| JRecord: 1 of 25 | Selected Records: 1 Sorte | d by: Status Group (Descending), Start | Date | | | |
| Initial Care Plan Dat | e | Client's Copay Clier | nt's Cost | \$0.00 Servi | | |
| | , | , | | | | |
| • | | | | • | | |
| History | | | Edit 🤇 | <u>lose //.</u> | | |

If you've received Q Mail, in the tool bar, you will see a red dot with a yellow "i" and the number of new messages



you have. You can click on the red button to get to the Inbox. If you don't see the Status Bar, go to the View menu and select **Status Bar**.

You can also access the Inbox by going to **Tools** menu and select **Messages** or hitting F8 on your keyboard.