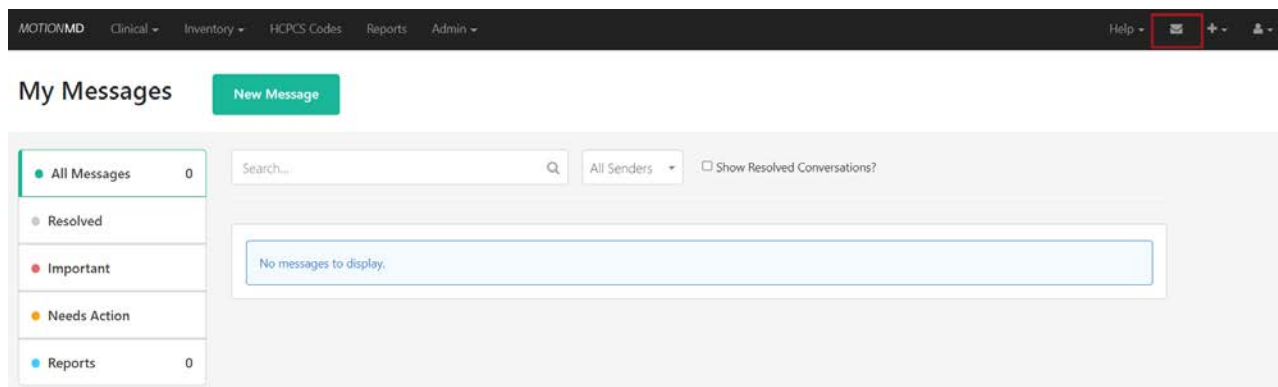


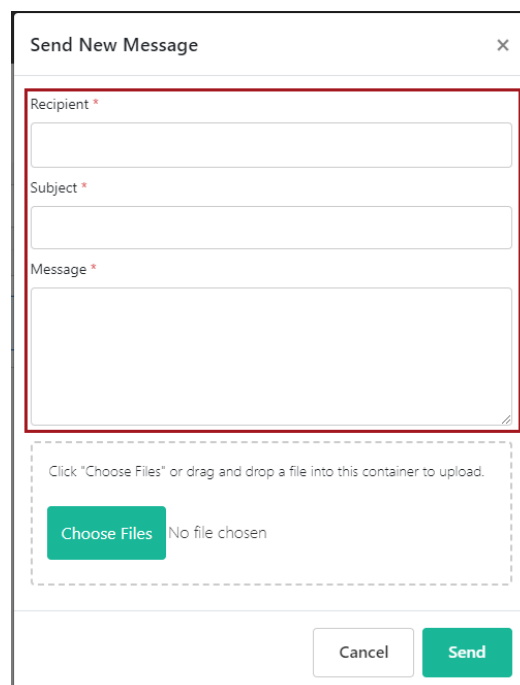
A new feature has been added to MotionMD called Messages. This feature will allow Users within an account to send each other messages and attachments. If Reports Scheduling is enabled and reports with PHI need to be scheduled, they will be sent to the Messages inbox of the user creating the scheduled PHI report. This feature is only available to Pro Tier customers.

When enabled, an envelope icon will appear in the navigation bar between Help and the + dropdowns. Clicking on the envelope icon will take you into the My Messages page.



### Sending a New Message:

Click the New Message button and a modal will open. The Recipient, Subject and Message are all mandatory fields. In the Recipient field, as you start to type User's names will start to appear. The Recipient search box is multi-select so you can add one or more Usernames to the field. Complete the form and click the **Send** button.

The 'Send New Message' modal is shown with a close button (X) in the top right. It contains three mandatory text input fields: 'Recipient \*', 'Subject \*', and 'Message \*'. Below these fields is a dashed-line container for attachments with the text 'Click "Choose Files" or drag and drop a file into this container to upload.' Inside this container is a green 'Choose Files' button and the text 'No file chosen'. At the bottom of the modal are 'Cancel' and 'Send' buttons.

## Sending a New Message continued:

The sent Message will appear on the main page and the person the message was sent to is listed alongside the date and time.

### My Messages

New Message

All Messages 2

Resolved 1

Important

Needs Action

Reports 0

Search...

All Senders

Show Resolved Conversations?

Displaying 1 conversation

| Subject   | Date       |  |  | Actions |
|---|------------|--|--|---------|
| <a href="#">Inventory Count</a><br>To Kristen Test at 3:59PM 01/04/2023 | 01/04/2023 |  |  | Actions |

## Received Messages:

If a new Message has been sent to you, the envelope icon in the navigation bar will turn red. Click on the envelope and the new Message will be at the top of the list and outlined in blue. Clicking into the message will mark it as read and the blue border will disappear.

### My Messages

New Message

All Messages 2

Resolved

Important

Needs Action

Reports 0

Search...

All Senders

Show Resolved Conversations?

Displaying all 2 conversations

| Subject   | Date       |  |  | Actions |
|---|------------|--|--|---------|
| <a href="#">PA Review</a><br>To Cindy Sever at 4:06PM 01/04/2023        | 01/04/2023 |  |  | Actions |
| <a href="#">Inventory Count</a><br>To Kristen Test at 3:59PM 01/04/2023 | 01/04/2023 |  |  | Actions |

## Reading and Replying to a Message:

Click onto the green message Subject link to view the Message.

Important

Needs Action

Reports 0

| Subject   | Date       |  |  | Actions |
|---|------------|--|--|---------|
| <a href="#">PA Review</a><br>To Cindy Sever at 4:06PM 01/04/2023        | 01/04/2023 |  |  | Actions |
| <a href="#">Inventory Count</a><br>To Kristen Test at 3:59PM 01/04/2023 | 01/04/2023 |  |  | Actions |

## Reading and Replying to a Message continued:

To reply, start typing in the text box which will enable the Reply button. Attachments in accepted formatting of PDF, CSV or JPG can be attached to the Message. When completed, click the **Reply** button to send the Message.

My Messages / PA Review

Conversation with Nicole Valentin  
Started on 01/04/2023 at 04:06 PM

Actions Forward

Nicole Valentin  
PA Review  
I reviewed PA ID 52365 and it can be submitted to billing.  
01/04/2023 at 04:06 PM

Thank you, Nicole. I'll submit it today.

Attach Files

Reply

Your response will show below the original Message. There are options under the Actions menu to Mark the Message as needed, or the Message can be forwarded to another individual by clicking the **Forward** button. Clicking the **Forward** button opens a modal like the New Message modal. One or more recipients can be selected if the Message needs to be sent to more than one individual.

Conversation with Nicole Valentin  
Started on 01/04/2023 at 04:06 PM

Actions Forward

Nicole Valentin  
PA Review  
I reviewed PA ID 52365 and it can be submitted to billing.  
01/04/2023 at 04:06 PM

Cindy Sever  
Thank you, Nicole. I'll submit it today.  
01/06/2023 at 10:12 AM

Type your reply to Cindy Sever

Attach Files

Reply

Mark as Resolved

Mark as Unread

Mark as Important

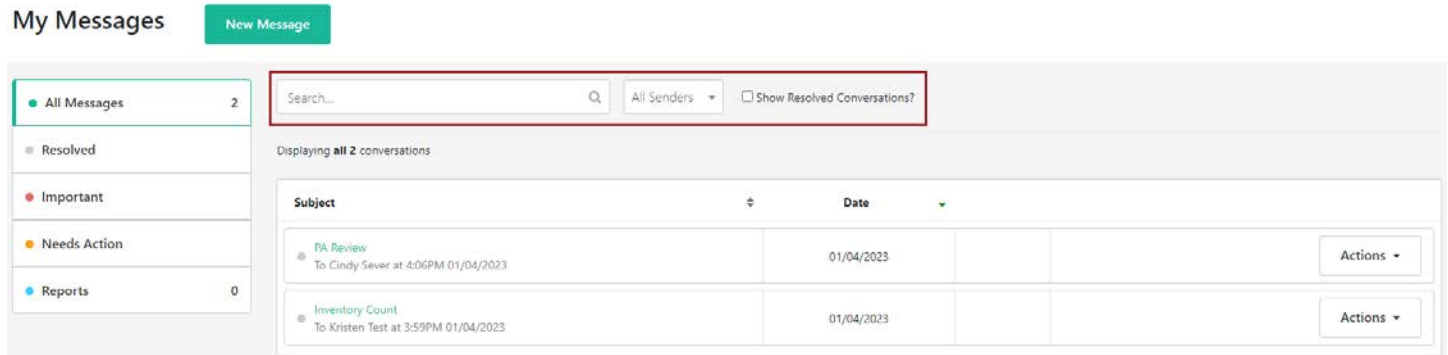
Mark as Needs Action

## Searching for Messages:

**Search** bar can be used to search for Messages by the Subject of the message.

**All Senders** filter will show the names of anyone who has sent a Message to you.

**Show Message Resolved** checkbox can be used so show any Resolved Message that matches a search or filter.



The screenshot shows the 'My Messages' page. On the left, there's a sidebar with filters: 'All Messages' (2), 'Resolved', 'Important', 'Needs Action', and 'Reports' (0). At the top right of the main area is a 'New Message' button. Below the sidebar, there's a search bar with a magnifying glass icon, a dropdown for 'All Senders', and a checkbox for 'Show Resolved Conversations?'. The main area displays 'Displaying all 2 conversations' and a table with two rows. The first row is 'PA Review' with subject 'To Cindy Sever at 4:06PM 01/04/2023' and date '01/04/2023'. The second row is 'Inventory Count' with subject 'To Kristen Test at 3:59PM 01/04/2023' and date '01/04/2023'. Each row has an 'Actions' dropdown menu.

## Filters and Actions:

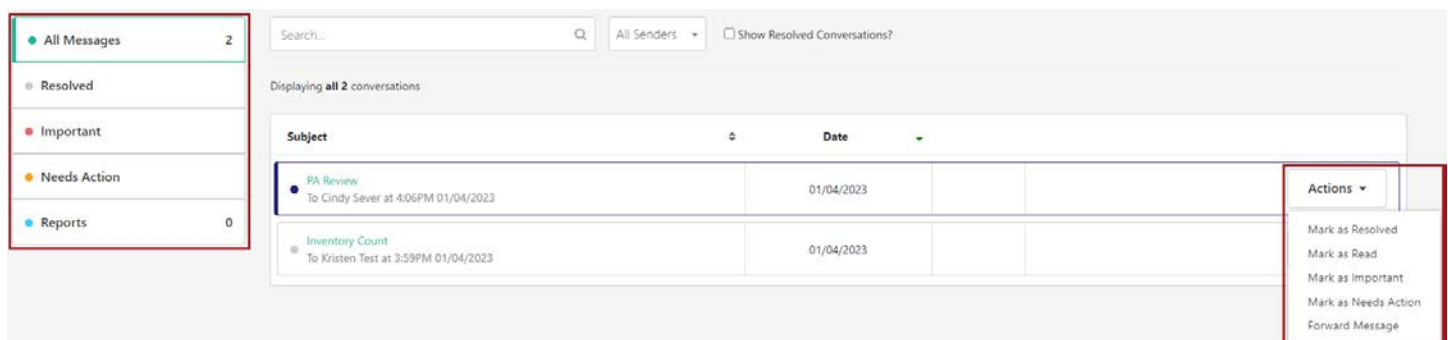
On the main page listing Messages, the Filters along the left can be used to filter down the list of Messages. The Actions menu on each Message allows you to categorize, forward or resolve a Message.

**Resolved:** Once a message is no longer needed, it can be Marked as Resolved, to see any Resolved message, click the Resolved filter and only Resolved messages will show.

**Important:** Messages Marked as Important will be outlined in Red

**Needs Action:** Messages Marked as Needs Action will be outlined in Orange

**Reports:** If the feature to Schedule Reports is enabled in the account, any Scheduled Report with PHI (Protected Health Information) will be emailed to the Users Messages page. Use the Reports filter to filter down the list of Messages to view these messages



This screenshot is similar to the previous one, but with a red box highlighting the 'All Messages' filter in the sidebar and the 'Actions' dropdown menu for the first message. The 'Actions' menu is open, showing options: 'Mark as Resolved', 'Mark as Read', 'Mark as Important', 'Mark as Needs Action', and 'Forward Message'.