

Manage Provider Message Categories

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You can assign provider messages to specific categories, if needed. Setting up and assigning categories to your messages allows you to review messages by category in the future. While this isn't a necessary step, it helps you manage data if you record a large amount of provider messages. For example, when you use the Message List Export File, you can filter to messages related to a certain category.

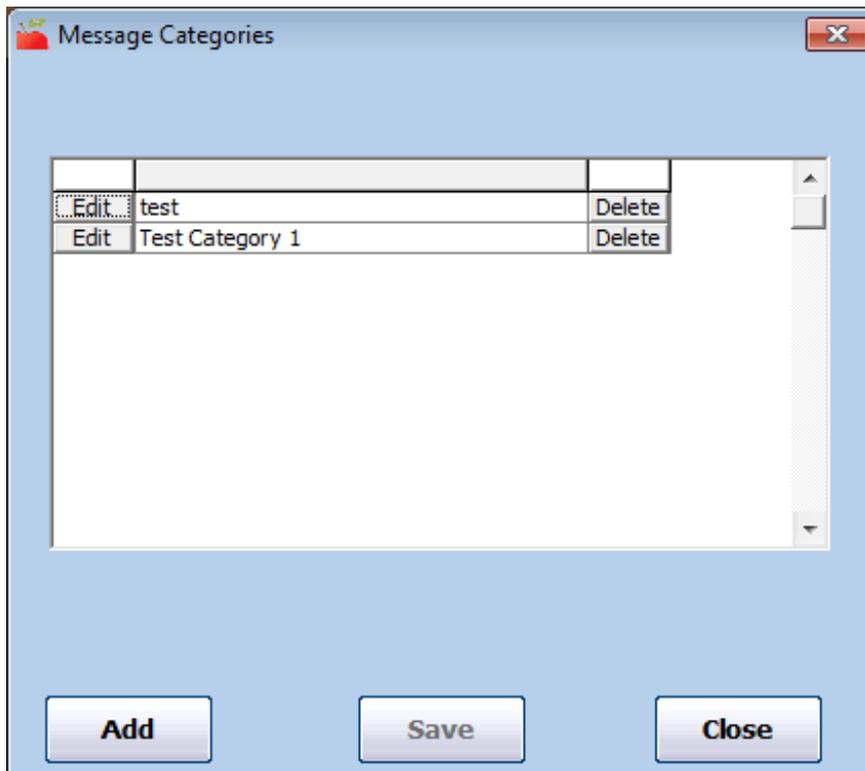
Examples of categories you could create include:

- Paperwork Requests
- Claim Questions
- Payment Questions
- Nutrition Questions
- Complaints

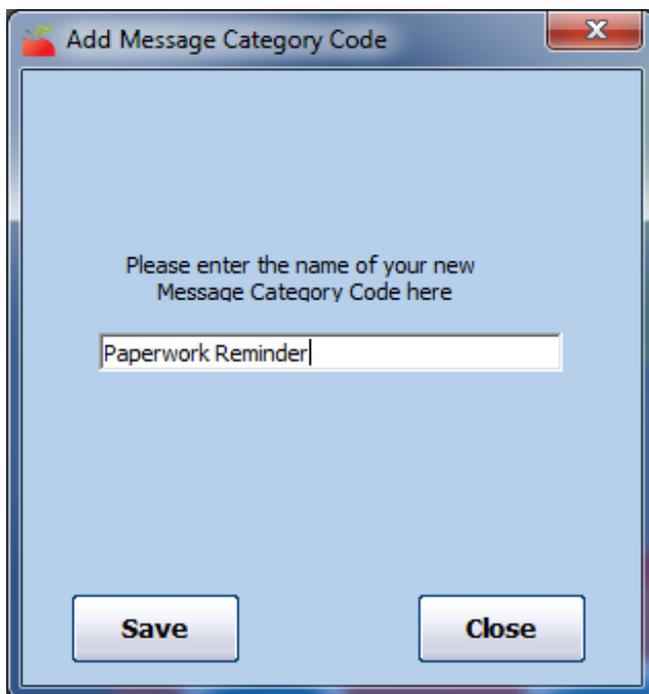
Adding Message Categories

To set up message categories:

1. Click the **Tools** menu, select **Messages**, and click **Message Categories**. The Message categories dialog box opens.



2. Click **Add**. The **Add Message Category Code** dialog box opens.
3. Click the box and enter the category name.

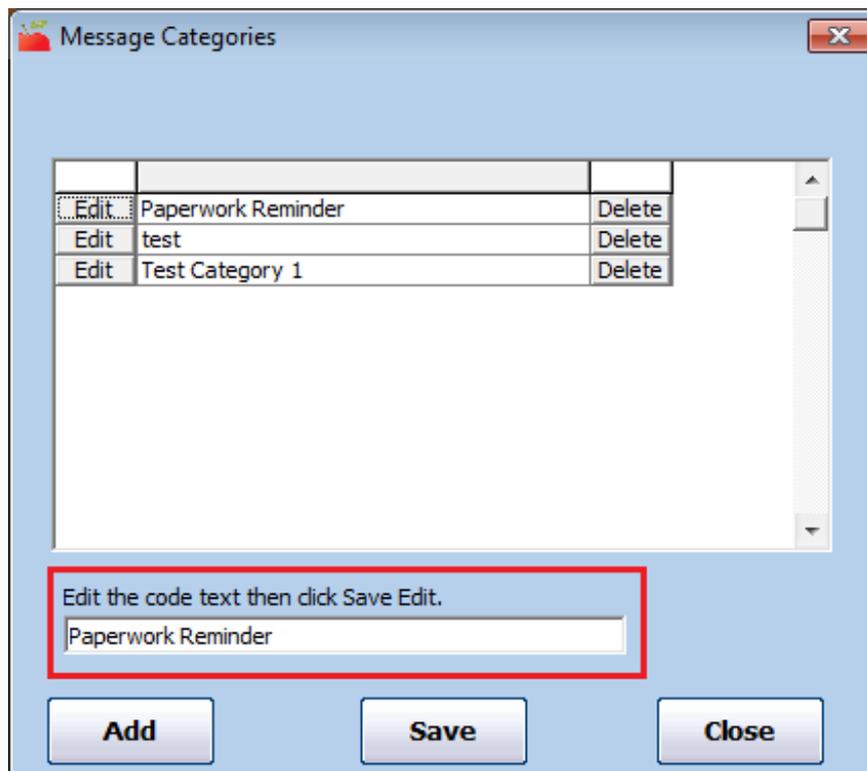


4. Click **Save**.

Editing Message Categories

1. Click the **Tools** menu, select **Messages**, and click **Message Categories**. The Message categories dialog box opens.

2. Click **Edit** next to the category to change.
3. Click the **Edit Code** box and update the category text.



4. Click **Save**.

Deleting Message Categories

Note: We strongly recommend that you do not delete categories to which you have previously assigned messages.

1. Click the **Tools** menu, select **Messages**, and click **Message Categories**. The Message categories dialog box opens.
2. Click **Delete** next to the category to delete.
3. Click **Yes** at the Are You Sure prompt.