Create an Outlook Quick Step for Secure Email

When sending an email containing PHI or other sensitive/confidential information, it is important to remember to use a secure trigger (PHI:, ePHI:, SECURE:). Make this easier by creating a Quick Step in Outlook – it becomes a one-click process! Instructions are below.

1. In the Outlook header, click on the “Create New” button in the Quick Steps bar.


3. Click “Show Options.”
4. Type “SECURE:” or any other secure trigger (ePHI:, PHI:) in the Subject. Triggers are not case sensitive but don’t forget the colon. Then click the “Finish” button in the bottom right hand corner of the box.

5. Congratulations! You’ve created a Quick Step for secure email. Any time you want to send an email with PHI or other confidential/sensitive information, simply go to your Quick Steps bar and click on your Quick Step for Secure Email.

A new email message will automatically open with the secure trigger already typed into the email subject line.