

The following quick text is available to produce a Chart Summary to a patient or another provider caring for the patient using the patient or provider letters. The patient specific information that will be included in the auto text are Patient Demographics, Active Problems, Procedure History, Home Medications, Allergies with Reactions, and Immunizations.

### Patient Letter

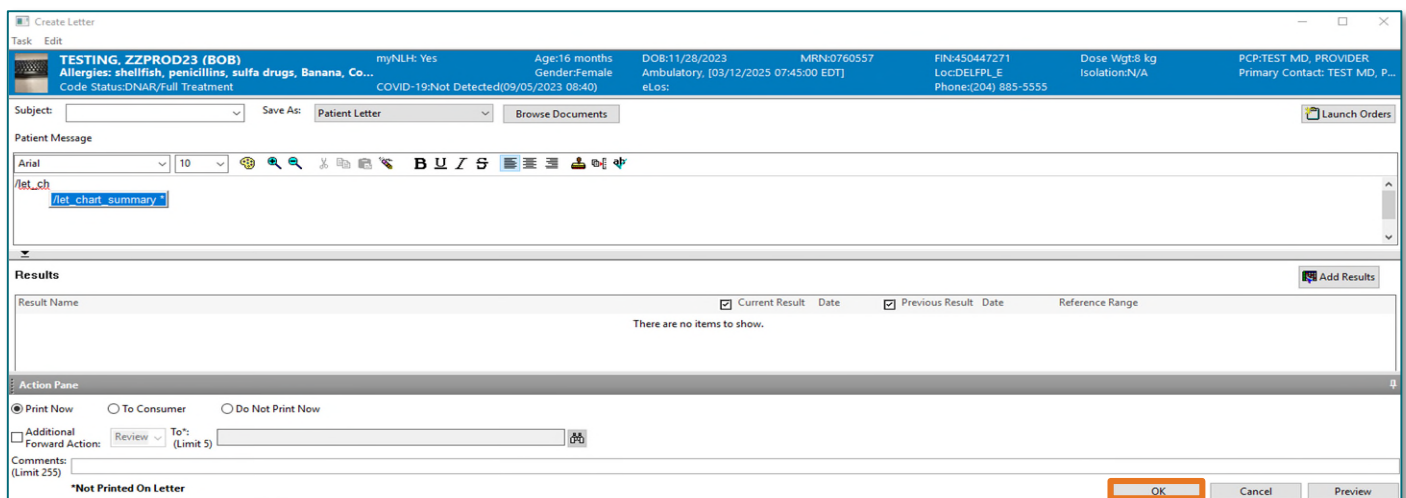
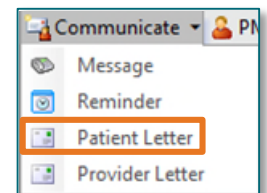
The following steps outline how to provide a chart summary to a patient.

**STEP 1:** Select dropdown arrow next to **Communicate** and select **Patient Letter**.

**STEP 2:** Within the body of the message, begin typing `/let_chart_summary*` for the auto text to populate.

- Double-click or select enter to populate the auto text in the body of the message.

**STEP 3:** If no other information needs to be added to the letter, select **OK** for this letter to be printed now.

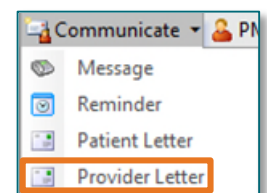


### Provider Letter

The following steps outline how to provide a chart summary to a Provider that is caring for a patient.

**STEP 1:** Select dropdown arrow next to **Communicate** and select **Provider Letter**.

**STEP 2:** Select the Provider Letter recipients.



- Within the **Recipient** field, check to ensure that the mode is correct for how the letter should be sent, i.e., **Fax**, **Secure Mail**, **Inbox**, or **Mail** (printing and mailing), select **OK**.

The screenshot shows the 'Provider Letter Recipients' dialog box. It has a 'Select Provider' section with a checked 'PCP' box and the name 'TEST, PROVIDER'. Below is a search field for providers. The 'Recipient' table contains one entry: 'PROVIDER' with 'TEST' as the last name. The 'Mode' dropdown menu is open, showing 'Inbox' selected. At the bottom, there is an 'Other Actions' section with a 'Forward for Print' checkbox and a 'To:' field containing 'WEYMOUTH, WENDY'. The 'OK' button is highlighted.

- STEP 3:** Within the body of the message, begin typing `/let_chart_summary*` for the auto text to populate.
- Double-click or select enter to populate the auto text in the body of the message.

The screenshot shows the 'Create Letter' window. The patient information bar at the top includes details for 'TESTING, ZZPROD23 (BOB)'. The 'Patient Message' field contains the text '/let\_chart\_summary\*'. The 'Results' section is empty. The 'Action Pane' at the bottom has 'Print Now' selected. The 'OK' button is highlighted.

- STEP 4:** If no other information needs to be added to the letter, select **OK** for the letter to route to the option chosen within the Provider Letter Recipients window.

For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please [place a ticket](#) to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.