

From the Office of Health Informatics Oracle Health (Cerner) Millennium Creating a Between Visit Encounter April 10, 2025

Communicate

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Save to Chart As: PhoneMsg

binoculars

Between Visit Encounters are created to document contact with a patient, send communication messages regarding patient to other staff in the practice, as well as systemwide, and to place orders for a patient outside of an office visit.

Creating Between Visit Encounters

- From Message Center
- **<u>STEP 1</u>**: Click the **Communicate** button to open a new message.
- **<u>STEP 2</u>**: Type the patient's name in the **Patient** field and click the to search.
- **<u>STEP 3</u>**: When the search window opens, select the correct patient in the top field.
- <u>NOTE</u>: Do not select an encounter in the bottom field. By selecting the patient's name in the top field, and clicking OK, this will create a Between Visit Encounter.
 - When the Between Visit Encounter is created, a FIN number will generate. Look for the Between Visit location in the banner bar and encounter selection pane.
 - The patient's name populates in the **Patient** and **Caller** boxes and their phone number populates the **Caller #** box.
- **<u>STEP 4</u>**: Save to chart by clicking the box in front of **Save to Chart** as **PhoneMsg**.
- **<u>STEP 5</u>**: Add a **Subject** (i.e., the reason for the patient contact).
- **<u>STEP 6</u>**: Use the body of the message to document the detail of patient contact.
- <u>NOTE</u>: If a patient calls on the same day of a visit, create a phone note using the FIN number of that day's visit.
- From a Patient Chart Request from Another Internal Location
- **<u>STEP 1</u>**: From the patient chart click the dropdown arrow on the **Communicate** button to open a new message.
- **<u>STEP 2</u>**: Click the **binoculars** at end of patient field.
- **<u>STEP 3</u>**: The **Patient Search** will pop up. Once you have the patient's name highlighted click **OK**. This ensures the orders will be associated with the correct location. Do **NOT** click an encounter.

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<u>NOTE</u>: This process can be used when someone from outside sends a message requesting an order. Orders cannot be launched from the message received as it will not populate in the multipatient task list and will be associated with the location the message was sent on.

• Back on the message, click the Launch Orders button, this opens the orders window. Place and sign orders as appropriate.

<u>NOTE</u>: Following this workflow will save from putting in the order again and prevent the order from getting lost.

Entering Orders

- <u>NOTE</u>: Dahl-Chase orders <u>cannot</u> be created from an in-between visit encounter. Place those orders from an established FIN associated with the practice.
- **<u>STEP 1</u>**: Use the **Launch Orders** button in the upper-right corner of the window.



- **<u>STEP 2</u>**: Add orders using the normal workflow.
- **<u>STEP 3</u>**: After **Signing** orders, the **New Message** window will display again with the new order information displayed in the body of the message.
 - Additional information can be entered into the body of the message if context is needed for entering orders.
- STEP 4: Click Send.
- NOTE: If the message does not need to be sent to a message pool or staff member and only needs to be saved to the chart, click Yes in the pop-up window.

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This message will be saved to the pat not want to send it to anyone?	ient's chart. Are you sure yo	ou do
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> The Between Visit Encounter is now added to the patient chart.

Sending a Request to Another Internal Provider Outside of Current Location

Within the new message window.

- **<u>STEP 1</u>**: Search for the appropriate pool or person to send the request in the **To**: field.
- **<u>STEP 1</u>**: Click the **Subject** dropdown and select **Inter-office Communication**.
- Task
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- **<u>STEP 2</u>:** Send message.
- NOTE: The provider will see this communication and know to create a new in between note.

Creating a Phone Note

Within the new message window.

- **<u>STEP 1</u>**: Search for the appropriate pool or person to send the request in the **To:** field.
- STEP 2: Click the Subject dropdown and select MSG Phone Note.

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- The body of the message updates to reflect information about the patient's concerns, their provider, and best time to call the patient back.
- Complete the fields in the message as appropriate and type additional information if necessary.
- **STEP 3:** Send message.
 - Message will populate to the appropriate person's or pool's message center for further action.

<u>NOTE</u>: Several other subject dropdowns are available.