

There are situations that occur within the Urgent Care setting in which the patient may call the facility and not end up being seen. During these situations it is important to document these phone conversations for both medical and legal reasons. Please note that NO medical advice would be given over the phone by Urgent Care practices. The following is an education on how to create a Phone Note for a patient calling into Urgent Care.

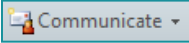

If the patient has been seen at the Urgent Care facility in the past, select the most recent "WIC" encounter.

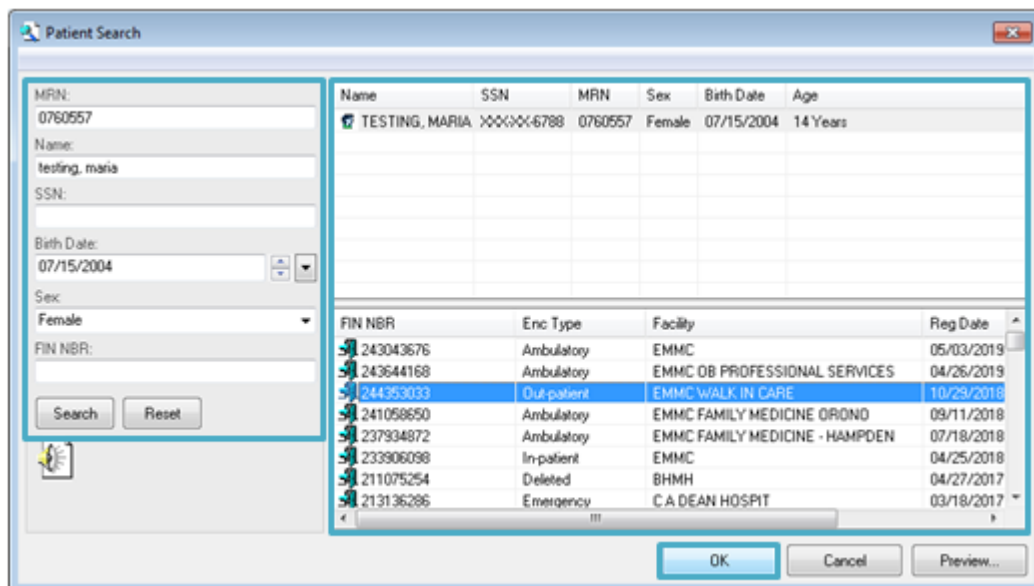
If the patient has not been seen at the Urgent care facility in the past, select the most recent encounter available from the list, regardless of facility.

If the patient is unavailable from the chart (does not have a MRN), use the paper process in place at your facility for documenting this conversation.

Creating a Phone Note

➤ From Message Center

- Click the **Communicate** button in the toolbar. 
- Use the binoculars  in the Caller field to search for the patient using demographic details, such as name, DOB, SSN, etc.
- In the patient search window, select the patient's name in the upper pane, using at least two patient identifiers to ensure correct patient selection.
- Select the appropriate encounter.



The screenshot shows the 'Patient Search' window with the following search criteria:

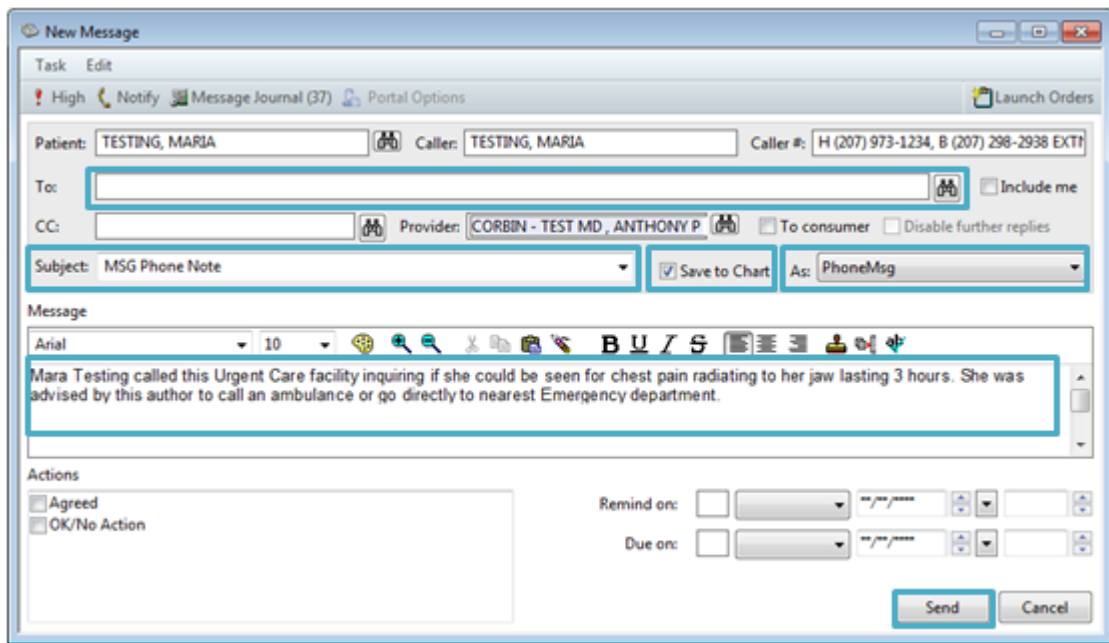
- MRN: 0760557
- Name: testing, maria
- SSN: [redacted]
- Birth Date: 07/15/2004
- Sex: Female
- FIN NBR: [redacted]

The search results table is as follows:

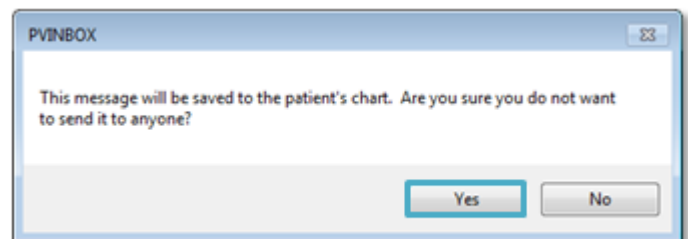
Name	SSN	MRN	Sex	Birth Date	Age
TESTING, MARIA	XXXXXXXX-6788	0760557	Female	07/15/2004	14 Years

FIN NBR	Enc Type	Facility	Reg Date
243043676	Ambulatory	EMMC	05/03/2019
243644168	Ambulatory	EMMC OB PROFESSIONAL SERVICES	04/26/2019
244353033	Out-patient	EMMC WALK IN CARE	10/23/2018
241058650	Ambulatory	EMMC FAMILY MEDICINE OROND	09/11/2018
237934872	Ambulatory	EMMC FAMILY MEDICINE - HAMPDEN	07/18/2018
233906098	In-patient	EMMC	04/25/2018
211075254	Deleted	BHMH	04/27/2017
213136286	Emergency	C.A DEAN HOSPIT	03/18/2017

- Once the correct patient and encounter have been selected, click **OK** in the search window.
- The patient's name now populates the **Patient** and **Caller** boxes of the New Message window.
- Be sure that the **Save to Chart** option is selected in the phone note message window.
- Search for the appropriate pool or person to send the request to in the **To:** field.
 - If it is not necessary to send this documentation to another user, leave the **To:** field blank
- Select the appropriate subject options from the **Subject** dropdown.
- Be sure that the note is being **Saved As PhoneMsg**.
- Add documentation of the phone conversation in the body of the phone note as appropriate.



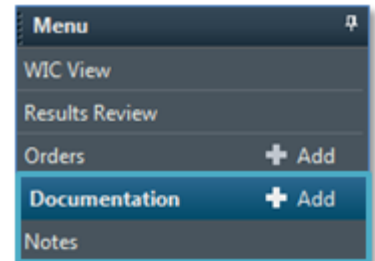
- When complete, click **Send**.
 - If the Phone message has no one in the **To:** field, a message will display stating “This message will be saved to the patient’s chart. Are you sure you do not want to send it to anyone?”
- Click **Yes**.
- The Phone Note will now be saved in the patient’s chart.



Locating Phone Message Documentation

➤ From Documentation:

- Navigate to the **Documentation** section of the patient's chart.
- The documents listed can be filtered by type to group together all messages saved as **PhoneMsg**.
- A **Personal Note Types List filter** can also be created by clicking the ellipsis button.
- Click a phone note to preview in the right pane.



➤ From Notes:

- Navigate to the **Notes** section of the patient's chart.
- Filter notes by type and select the folder for **Other Documents>PhoneMsg**.
- Double-click a phone note to preview in the right pane.

