

**SKILL SHARPENER ACTIVITY**  
CST Enterprise Clinical Informatics

# **In Between Visit Documentation- Phone calls and Emails**

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Last Update: April 25, 2022

## Learning Objectives

- To receive hands on experience with the in between visit workflow
- To understand why this workflow is potentially required to provide patient care
- To understand the steps related to the Nursing (and allied health/provider) documentation of phone calls and emails

## Scenario

This scenario involves documentation of phone calls/ emails with patients/parents or other professionals involved in care that you need to a) send to another provider or b) save to chart for visibility

## Phone Calls

1. When in patients chart open Message Centre from top tool bar
2. Click on Communicate and choose message



3. Fill out the required fields

- A) Look up patient by using the icon
- B) Look up providers or pools that you want to distribute this note too by using icon (please note you do not have to send it to anyone you can leave this blank)
- C) You can choose “include me” if you need a copy of this in your own message center inbox
- D) Save to chart as “Phone Message/Call”
- E) Change the subject to be something meaningful that is easy to search in patients chart
- F) Enter any information regarding phone call in the body of the message.
- G) You can tick off “save to chart” to have a copy of this saved. This allows the message to be saved in documentation section.

List

Display: All Advanced Filters

Service Date/Time	Subject	Type	Facility	Author/Contributor
15-May-2023 11:51:15 P...	Phone Message	Phone Message	BCH Renal PD	TestUser, NurseAmb...
15-May-2023 11:48:00 P...	Ambulatory Pediatric Care Intake	Ambulatory Pediatric Care Intake - Text	BCH Renal PD	TestAMB, WithReg/...
15-May-2023 11:47:00 P...	Ambulatory Pediatric Care Intake	Ambulatory Pediatric Care Intake - Text	BCH Renal PD	TestAMB, WithReg/...
15-May-2023 11:11:24 P...	Free Text Note	Dietitian Visit Note	BCH BC Children	TestCD, Dietitian I, R
15-May-2023 10:36:21 P...	Downtime DOT Orders Report	Downtime DOT Orders Report	BCH Renal PD	SYSTEM, SYSTEM C
09-May-2023 11:33:00 P...	Ambulatory Pediatric Care Intake	Ambulatory Pediatric Care Intake - Text	BCH Renal PD	TestAMB, WithReg/...
07-May-2023 17:23:48 P...	PD Prescription Update - Verbal Order	Nursing Narrative Note	BCH Renal PD	TestAMB, WithReg/...
05-May-2023 13:59:00 P...	Pediatric Hemodialysis	Dialysis Prescription - Text	BCH Renal PD	TESTPET, PEDIATRIK
05-May-2023 11:28:00 P...	Pediatric Peritoneal Dialysis Training Assessment	Peritoneal Dialysis Training Asmt - Text	BCH Renal PD	TestAMB, WithReg/...
05-May-2023 09:55:00 P...	Ambulatory Adult Renal Quick Assessment	Ambulatory Adult Renal QuickAssess- Text	BCH Renal PD	TestUser, NurseAmb...
05-May-2023 09:55:00 P...	Ambulatory Adult Renal Assessment	Ambulatory Adult Renal Assessment-Text	BCH Renal PD	TestUser, NurseAmb...

**\* Final Report \***

From: TestUser, NurseAmbulatory  
 To: Test, Alex; BCH Renal Chronic Kidney Care Provider; TestUser, NurseAmbulatory;  
 Sent: 15-May-2023 11:51:15 PDT  
 Subject: Phone Message

**General Message:**

Phone call with patients mother who reported weight increase by 4 kg, difficulty breathing and school.

Nurse spoke to provider and we will continue to monitor at this time.

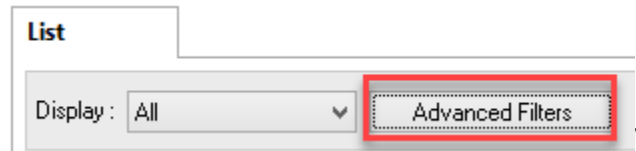
Result type: Phone Message  
 Result date: Monday, 15-May-2023 11:51 PDT  
 Result status: Auth (Verified)

- H) When ready click “send” to submit

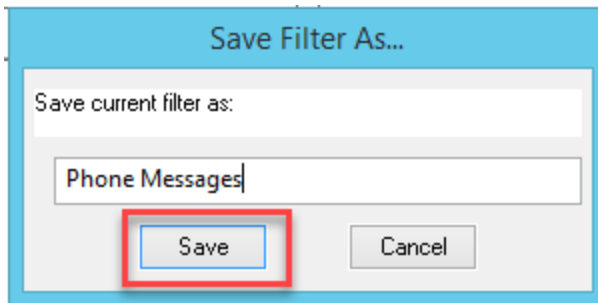
Please Note: You can create filters to search the phone messages more easily in chart

# In Between Visit Documentation

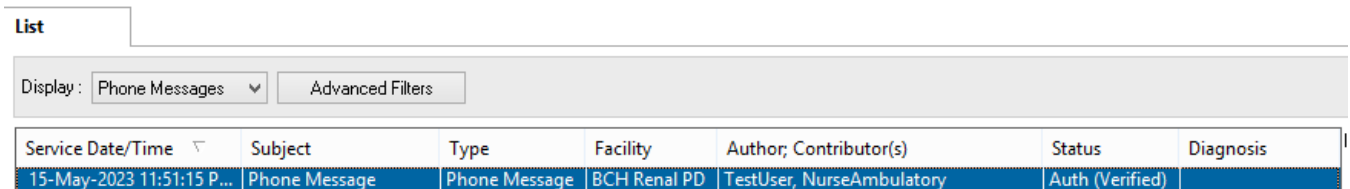
1. From Documentation page click on
2. In the “Select the document types you want to see” choose correspondence, then Phone message



3. Choose  and name it whatever you like



4. Exit advance filter page by clicking
5. You should now be able to see the filter you created



The screenshot shows the 'List' interface with the 'Display' dropdown set to 'Phone Messages' and the 'Advanced Filters' button. Below is a table with the following data:

Service Date/Time	Subject	Type	Facility	Author; Contributor(s)	Status	Diagnosis
15-May-2023 11:51:15 P...	Phone Message	Phone Message	BCH Renal PD	TestUser, NurseAmbulatory	Auth (Verified)	

# In Between Visit Documentation

## Select the Document Types you want to see

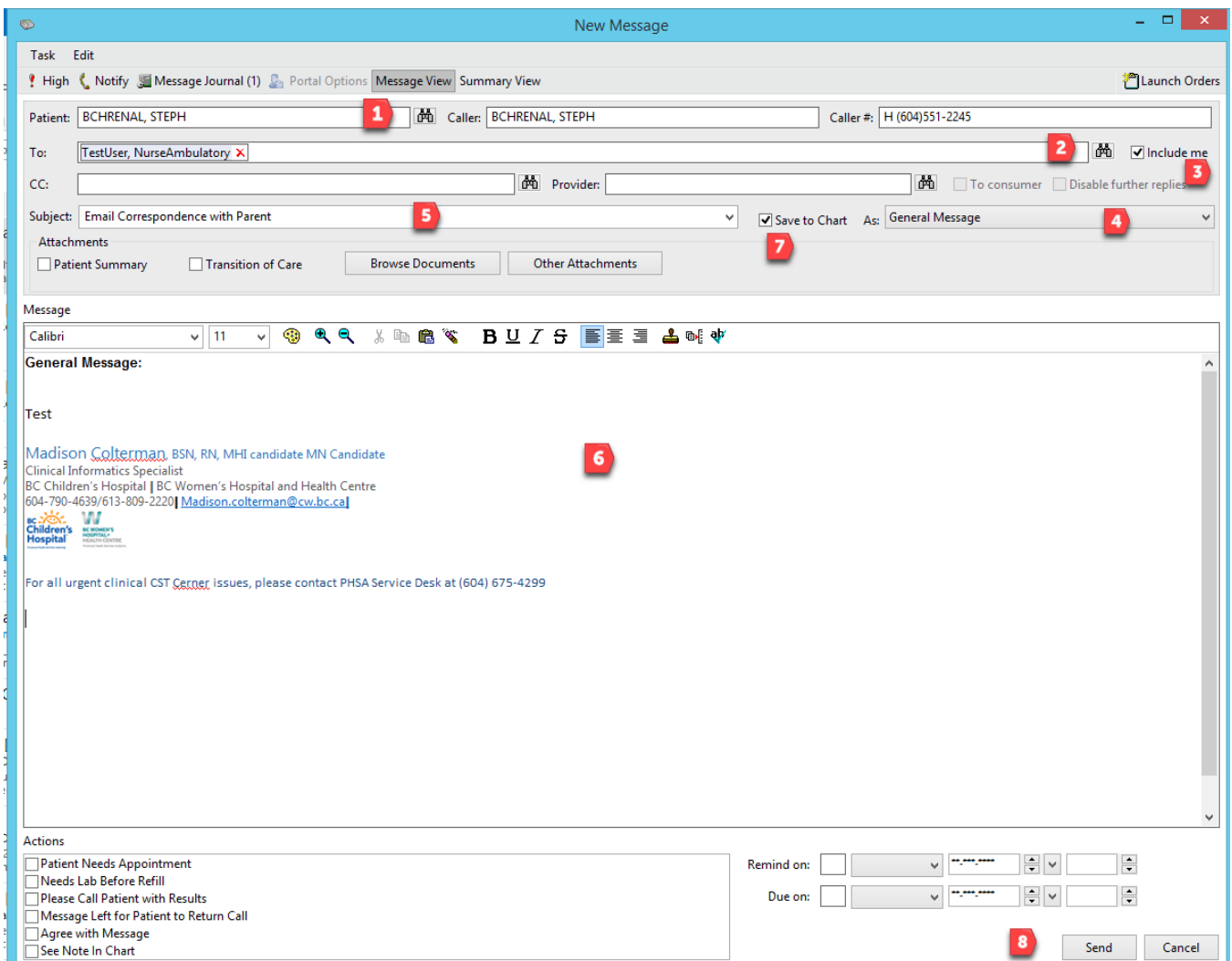
- Clinical Pharmacy Notes
- Cognitive Assessment Documentation
- Communication Notes
- Consent Forms
- Consult Notes
- Consult Notes Pediatric
- Correspondence
  - General Message w/ Patient Information
  - General Message w/o Patient Information
  - Patient Conversation
  - Phone Message
- Prescription Management
- Release/Request for Patient Information
- Reminders
- Request for Corrections to Health Record

## Emails


1. When in patients chart open Message Centre from top tool bar
2. Click on Communicate and choose message



3. Fill out the required fields



- 1) Look up patient by using the icon

- J) Look up providers or pools that you want to distribute this note too by using  icon (please note you do not have to send it to anyone you can leave this blank)
- K) You can choose “include me” if you need a copy of this in your own message center inbox
- L) Save to chart as “General Message”
- M) Change the subject to be something meaningful that is easy to search in patients chart
- N) Enter any information regarding email in the body of the message. Please note you can copy paste entire email into the body of the message.
- O) You can tick off “save to chart” to have a copy of this saved. This allows the message to be saved in documentation section.

The screenshot shows a 'List' view of messages. The table below is a representation of the data shown in the screenshot:

Service Date/Time	Subject	Type	Facility	Author/Contributor
15-May-2023 11:51:15 P...	Phone Message	Phone Message	BCH Renal PD	TestUser, NurseAmbulatory
15-May-2023 11:48:00 P...	Ambulatory Pediatric Care Intake	Ambulatory Pediatric Care Intake - Text	BCH Renal PD	TestAMB, WithReg/
15-May-2023 11:47:00 P...	Ambulatory Pediatric Care Intake	Ambulatory Pediatric Care Intake - Text	BCH Renal PD	TestAMB, WithReg/
15-May-2023 11:11:24 P...	Free Text Note	Dietitian Visit Note	BCH BC Children	TestCD, Dietitian1, R
15-May-2023 10:36:21 P...	Downtime DOT Orders Report	Downtime DOT Orders Report	BCH Renal PD	SYSTEM, SYSTEM C
09-May-2023 11:33:00 P...	Ambulatory Pediatric Care Intake	Ambulatory Pediatric Care Intake - Text	BCH Renal PD	TestAMB, WithReg/
07-May-2023 17:23:48 P...	PD Prescription Update - Verbal Order	Nursing Narrative Note	BCH Renal PD	TestAMB, WithReg/
05-May-2023 13:59:00 P...	Pediatric Hemodialysis	Dialysis Prescription - Text	BCH Renal PD	TESTPET, PEDIATRI
05-May-2023 11:28:00 P...	Pediatric Peritoneal Dialysis Training Assessment	Peritoneal Dialysis Training Assmt - Text	BCH Renal PD	TestAMB, WithReg/
05-May-2023 09:55:00 P...	Ambulatory Adult Renal Quick Assessment	Ambulatory Adult Renal QuickAsses- Text	BCH Renal PD	TestUser, NurseAmb
05-May-2023 09:55:00 P...	Ambulatory Adult Renal Assessment	Ambulatory Adult Renal Assessment-Text	BCH Renal PD	TestUser, NurseAmb

The detailed view on the right shows a 'Phone Message' with the following content:

**\* Final Report \***

From: TestUser, NurseAmbulatory  
 To: Test, Alex; BCH Renal Chronic Kidney Care Provider; TestUser, NurseAmbulatory;  
 Sent: 15-May-2023 11:51:15 PDT  
 Subject: Phone Message

**General Message:**

Phone call with patients mother who reported weight increase by 4 kg, difficulty breathing and school.

Nurse spoke to provider and we will continue to monitor at this time.

Result type: Phone Message  
 Result date: Monday, 15-May-2023 11:51 PDT  
 Result status: Auth (Verified)

- P) When ready click “send” to submit

Please Note: You can create filters to search the phone messages more easily in chart

The screenshot shows the 'List' view interface. The 'Display' dropdown is set to 'All'. The 'Advanced Filters' button is highlighted with a red box.

- 4. From Documentation page click on
- 5. In the “Select the document types you want to see” choose correspondence, then “General Message W/ Patient information”

## Select the Document Types you want to see

- Clinical Pharmacy Notes
- Cognitive Assessment Documentation
- Communication Notes
- Consent Forms
- Consult Notes
- Consult Notes Pediatric
- Correspondence
  - General Message w/ Patient Information
  - General Message w/o Patient Information
  - Patient Conversation
  - Phone Message
  - Prescription Management
  - Release/Request for Patient Information
  - Reminders
  - Request for Corrections to Health Record

6. Choose  and name it whatever you like

### Save Filter As...

Save current filter as:

Email Correspondence

7. Exit advance filter page by clicking

8. You should now be able to see the filter you created

**List**

Display:

Service Date/Time	Subject	Type	Facility	Author; Contributor(s)
15-May-2023 12:09:15 P...	Email Correspondence with Parent	General Message w/ Patient Information	BCH Renal PD	TestUser, NurseAmbulatory