

NEXTGEN TELEPHONE & CLINIC NOTE DEMONSTRATION

This demonstration reviews usage of the USA version of the Telephone Template, which we also use to record brief clinic notes & memos.

This has been prepared with EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic and functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

Introduction

- The telephone template gives us a way to document communications with patients, as well as communications between nurses & providers about patients.
- The goal is to have a central location to create such notes, & then to generate a note that displays a history of these communications.

Introduction

- Some of the usage of the telephone template has been confusing to our personnel at times, which has lead to it not being used to its full potential.
- We have made some changes to the telephone templates & associated documents to try to make them more intuitive, & at the same time expand their usage to include brief clinic notes & comments on test results.

First, you'll note that we call our version of the telephone template **USA Phone & Clinic Memos**. (It may be followed by a version number.)

Ipitania Quagmire

Address: 999 Nein Nein Nein
MOBILE, AL 36604
Contact: (251) 555-4444 (Home)

MRN: 000900044692
Insurance: AFLAC
NextMD: No

Emergency Relation:
Emergency Phone:
Pharmacy 1:

PCP: ATKINSON, TANGELA C ...
Referring:
Rendering: MORGAN, AARON M MD

Alerts Birth History Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

06/14/2014 12:21 PM : "USA Home Page 836" 06/14/2014 12:21 PM : "USA Phone & Clinic Memos 836" X

Specialty ▾ Family Practice Visit Type ▾ Patient Communication

Intake Histories SOAP Finalize Checkout Telephone Template

Care Guidelines Global Days Comments Patient Contact Info View Scheduled Appointments Telephone Call Summary PCP: TANGELA ATKINSON

Panel Control: Toggle Cycle

Important: Generate document after every entry Generate Document

Communication:

Clinic Memos / Other Notes Medication Management Test Result Request Forms/Records
Medical Question Referral Request Billing Question Outgoing Call

Communications: Display: ☐ Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason

Refresh Remove

We recommend that **USA Phone & Clinic Memos** be kept as a Preferred Template by most users.

NextGen EHR: Ipita
File Edit Default
Logout Save Clear Delete USA Family Medicine MORGAN, AARON M MD Patient History Inbox PAR ICS Templates Documents Medications Medication Allergies Orders Apps Close

Ipitania Quagmire (F) DOB: 01/03/2011 (3 years) Weight: 35.00 lb (15.88 Kg) Allergies: (1) Problems: (1) Diagnoses: (2) Medications: (1)
Address: 999 Nein Nein Nein MRN: 000900044692 Emergency Relation: PCP: ATKINSON, TANGEL C...
MOBILE, AL 36604 Insurance: AFLAC Emergency Phone: Referring:
Contact: (251) 555-4444 (Home) NextMD: No Pharmacy 1: Rendering: MORGAN, AARON M MD

Alerts Birth History Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

06/14/2014 12:21 PM: "**USA Home Page 836" x

Specialty Family Practice Visit Type Patient Communication
Intake Histories SOAP Finalize Checkout Telephone Template
Standing Orders Adult Immunizations Peds Immunizations My Plan Pr

Core Guidelines Global Days

Medical Chart Summary

HPI's Plans Problem List Medications Allergies Labs Diagnostics Vitals Physical Exams Office Procedure Procedure Orders Referrals Past Medical History Family History Tobacco History

Select Template
Medical Records Demographics
*USA Checkout 836
*USA Finalize 836
*USA Histories 836
*USA Home Page 836
*USA Intake 836
*USA SOAP 836
Order Management
USA Document Library
USA Phone & Clinic Memos 836
Show All Preferred Categories
OK Cancel

But it can also be reached quickly via the Information Bar.

Ready NGTest USA Health Services Foundation j00112602 CAP NUM SCRL 06/14/2014

Alerts Birth History Patient Lipid Clinic Data Order Admin... [Sticky Note](#) [Referring Provider](#) [HIPAA](#) [Advance Directives](#) [Screening Summary](#)

Visit Type ▼ Patient CommunicationPCP: TANGELA ATKINSON

Generate Document

Panel Control: Toggle Cycle

Outgoing Call

When you're documenting a note here, it is often helpful to start by reviewing previous notes. Click [Telephone Call Summary](#).

Refresh Remove

This brings up a popup that you can scroll through to review previous communications. When done click **Save & Close**.

Ipitania Quagmire (F) DOB: 01/03/2011 (3 years) Weight: 35.00 lb (15.88 Kg) Allergies: (1) Problems: (1) Diagnoses: (2) Medications: (1)

Address: 999 Nein Nein Nein MRN: 000900044692 Emergency Relation: PCP: ATKINSON, TANGELA C ...
MOBILE, AL 36604 Insurance: AFLAC Emergency Phone: Referring:
Contact: (251) 555-4444 (Home) NextMD: No Pharmacy 1: Rendering: MORGAN, AARON M MD

Alerts Birth History Patient Lipid Clinic Data Order Admin... Sticky Note Referring Provider HIPAA Advance Directives Screening Summary

06/14/2014 12:21 PM : "USA Home Page 836" 06/14/2014 12:21 PM : "USA Phone & Clinic Memos 836" X

Specialty ▾ Family

Intake

Care Guidelines

Communication:

Clinic Memos / Other Notes

Medical Question

Communications: Display

Date	Contact Time	Employee	Reason	Type	Contact By	Comments
02/19/2013	3:16 PM	Robert L. Duffy	Forms/Records Request			No form in box at 15:15.
02/19/2013	1:54 PM	Robert L. Duffy	Forms/Records Request	Task response		No form in box at 13:30. Will check again later.
02/19/2013	12:27 PM	Frances Clary	Forms/Records Request	Incoming fax		Request for diabetic shoes. Form to box.
01/31/2013	4:03 PM	Robert L. Duffy	Forms/Records Request	Task response		Form was completed 1/24/13. I kept an extra copy, & I attached that copy to the repeat request 1/30/13.
01/30/2013	12:45 PM	Froncean H. Bell	Other			Pharmacy called stated that patient has been on Novolin and not Humulin. Ok given for Novolin
01/30/2013	12:33 PM	Sandra Jackson	Medication Management			PHARMACY WOULD LIKE TO VERIFY IF NEEDS THAT WAS REQUESTED CORRECT PLEASE CALL PHARMACY
01/30/2013	12:33 PM	Sandra Jackson	Medication Management			Medication request:HUMULIN 70-30 HUM INSULIN NPH/REG INSULIN HM) 100 unit/m 95 units AM, 75 units PM, or as otherwise directed
01/30/2013	12:09 PM	Frances Clary	Forms/Records Request	Incoming fax		Physician's Order Form To Box. Therapeutic shoes.
01/07/2013	8:35 AM	Ericka N. Watson	Outgoing		self	Informed patient about lab results and told her to keep appt for late Jan; patient stated she understood
10/29/2012	5:01 PM	Keona Spears	Other			numbers that was given are the wrong numbers.
10/29/2012	2:36 PM	Robert L. Duffy	Other	Task response		Diabetic shoe requests require an exam to

Save & Close Close

Refresh Remove

☐ TOB ☐ HTN ☐ DM ☐ CAD 

Visit Type ▾ Patient Communication

Telephone Template

PCP: TANGELA ATKINSON

Panel Control: Toggle Cycle

Generate Document

Communication:

Outgoing Call

Communications: Display: ☐ Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
<p>Alternately, you might prefer to begin by generating the Telephone Notes document. Click Generate Document</p>					

Alternately, you might prefer to begin by generating the Telephone Notes document. Click [Generate Document](#).

[Refresh](#) [Remove](#)

TX Text

Arial 12

TELEPHONE NOTES & CLINIC MEMOS

Patient Name [REDACTED]
 Date of Call 06/14/2014
 Home phone [REDACTED]
 Day phone [REDACTED]
 Alternate phone [REDACTED]

PCP: ROBERT ALLEN PERKINS MD

Telephone Note and Clinic Memo History (last 3 years)

Date	Time	Notes	Note By	Tasked To
11/26/2013	10:39:52	Forms to box from SAAD. However the certification period is from 5/29/13 - 7/27/13. Patient was last seen by you on 4/15/13.	<u>Froncean H. Bell</u>	Allen Perkins
03/28/2013	10:13:26	Records from Providence Hospital have been scanned into the patient's chart.	<u>Pamela Goubil</u>	Allen Perkins
03/27/2013	14:09:50	Called placed to [REDACTED] Per Dr. Perkins to inform them of the excessive control substance use.	<u>Froncean H. Bell</u>	Allen Perkins
03/25/2013	16:31:57	pt called back requesting pain meds, per Dr. Perkins: informed [REDACTED] Pt states understanding.	<u>Elizabeth E. Edwards</u>	Allen Perkins
03/25/2013	15:25:24	released from the hospital at providence after having 2 toes amputated (yesterday) would like to know if pain med can be [REDACTED]	<u>Elizabeth E. Edwards</u>	Allen Perkins
03/25/2013	12:12:21	Son came in [REDACTED] says that he recently had 2 toes [REDACTED]	<u>Frances Clary</u>	Allen Perkins

A document is generated summarizing phone calls & other intra-office notes. This can be a good way to get up to speed on events since the last office visit. It is also easier to refer back to compared to repeatedly opening & closing the popup.

Ipitania Quagmire (F) DOB: 01/03/2011 (3 years) Weight: 35.00 lb (15.88 Kg) Allergies: (1) Problems: (1) Diagnoses: (2) Medications: (1)

Address: 999 Nein Nein Nein MRN: 000900044692 Emergency Relation: PCP: ATKINSON, TANGELA C ...
 MOBILE, AL 36604 Insurance: AFLAC Emergency Phone: Referring:
 Contact: (251) 555-4444 (Home) NextMD: No Pharmacy 1: Rendering: MORGAN, AARON M MD

[Alerts](#) [Birth History](#) [Patient](#) [Lipid Clinic Data](#) [Order Admin...](#) [Sticky Note](#) [Referring Provider](#) [HIPAA](#) [Advance Directives](#) [Screening Summary](#)

06/14/2014 12:21 PM : "USA Home Page 836" 06/14/2014 12:21 PM : "USA Phone & Clinic Memos 836"

Specialty ▾ Family Practice Visit Type ▾ Patient Communication

[Home](#) [Intake](#) [Histories](#) [SOAP](#) [Finalize](#) [Checkout](#) [Telephone Template](#)

[Care Guidelines](#) [Global Days](#) [Comments](#) [Patient Contact Info](#) [View Scheduled Appointments](#) [Telephone Call Summary](#) PCP: TANGELA ATKINSON

Panel Control: [Toggle](#) [Cycle](#)

Important: Generate document after every entry [Generate Document](#)

Communication:

[Clinic Memos / Other Notes](#) [Medication Management](#) [Test Result Request](#) [Forms/Records](#)
[Medical Question](#) [Referral Request](#) [Billing Question](#) [Outgoing Call](#)

Communications Display: ☐ Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
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To begin documenting a telephone communication, pick one of the categories listed at the top. For this example, we'll pick **Medical Question**.

Medical Question - Telephone

Call Information:

Contact type:

Urgency:

Date of call:

06/14/2014

Time of call:

1:01 PM

☐ After hours

Communications:

Concern:

Comment:

Meds/Aller

Contact type:

- Clinic memo
- Incoming call
- Incoming email
- Incoming fax
- Incoming voicemail
- Outgoing call
- Portal communication
- Task initiation
- Task response

Close

There are several boxes you can use here, but you'll mostly use only a few of them. You'll may wish to start by clicking in the **Contact type** box & making a selection; you can also type in an entry. Here we'll select **Incoming call**. (Completing this field isn't absolutely necessary, though.)

Note that **Telephone Call Summary** is available here as well—this often comes in handy, since it gives you a way to review old entries as you're adding your new one.

Telephone Call Summary

Status: ☒ Open ☐ Complete

Save & Close

Cancel

Medical Question - Telephone



Call Information:

Contact type:

Incoming call

Urgency:

Date of call:

06/14/2014

Time of call:

1:01 PM

☐ After hours

HIPAA

* = Preferred contact

Communication:

Concern:

Duration of symptoms:

Comment:

Sort By:

Summary

Phrase

[My Phrases](#) | [Manage My Phrases](#)

Pt wants to know if should stop aspirin before going to dentist Friday.

[Meds/Allergies/Chronic Probs](#)

[Review of Test\(s\)](#)

Actions:

☐ Schedule appointment:

☐ Send referral:

☐ Place new medication order:

☐ Adjust medication:

☐ Send test result(s):

☐ Counsel patient:

☐ Other:

Details:

Completed:

[Admin Action](#)

[Release of Info Log \(PHI\)](#)

Tasking:

Priority:

Normal

[Send & Close](#)

Status: Open Complete

[Save & Close](#)

[Cancel](#)

Sometimes, as in this example, you'll need to send a task related to the question. Click [Send & Close](#).

Next, enter the question or other data in the **Comment** box; a basic example is shown here. You can use any other boxes as desired, but the **Comment** is the main thing you need to enter.



☒

Cancel


06/14/2014 12:41 PM : "USA Phone & Clinic Memos 836" x

Specialty ▾ Family Practice Visit Type ▾ Patient Communication

Home Intake Histories SOAP Finalize Checkout Telephone Template

Care Guidelines Global Days Comments Patient Contact Info View Scheduled Appointments Telephone Call Summary PCP: ROBERT PERKINS

Panel Control: Toggle Cycle

Important: Generate document after every entry  **Generate Document**

Communication:

Clinic Memos / Other Notes Medication Management Test Result Request Forms/Records
 Medical Question Referral Request Billing Question Outgoing Call

Communications: Display: ☐ Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
06/14/2014	1:11 PM	Pt wants to know if should stop aspirin before going to dentist Friday.	Aaron M. Morgan		

The popup closes, & you're returned to the main template. Here, the next thing to do is click the **Generate Note** button, to create a document recording this entry. This step often gets overlooked, so we've made changes to help remind you about this.

The resulting document has a chronological listing of previous notes, with the new one at the top.



TELEPHONE NOTES & CLINIC MEMOS

Patient Name [REDACTED]
Date of Call 06/14/2014
Home phone [REDACTED]
Day phone [REDACTED]
Alternate phone [REDACTED]

Date of Birth [REDACTED]

PCP: ROBERT ALLEN PERKINS MD

Telephone Note and Clinic Memo History (last 3 years)

Date	Time	Notes	Note By	Tasked To
06/14/2014	13:12:47	Pt wants to know if should stop aspirin before going to dentist Friday.	Aaron M. Morgan	
11/26/2013	10:39:52	Forms to box from SAAD. However the certification period is from 5/29/13 - 7/27/13. Patient was last seen by you on 4/15/13.	<u>Froncean H. Bell</u>	Allen Perkins
03/28/2013	10:13:26	Records from Providence Hospital have been scanned into the patient's chart.	<u>Pamela Goubil</u>	Allen Perkins
03/27/2013	14:09:50	Called placed t [REDACTED] Per Dr. Perkins to inform them of the excessive control substance use.	<u>Froncean H. Bell</u>	Allen Perkins
03/25/2013	16:31:57	pt called back requesting pain meds, per Dr. Perkins: informed [REDACTED] [REDACTED] states understanding.	Elizabeth E. Edwards	Allen Perkins

Specialty ▾ Family Practice

Visit Type ▾ Patient Communication



Intake

Histories

SOAP

Finalize

Checkout

Telephone Template

[Care Guidelines](#)[Global Days](#) [Patient Contact Info](#)[View Scheduled Appointments](#)[Telephone Call Summary](#)

PCP: ROBERT PERKINS

Panel Control:



Toggle



Cycle

**Important: Generate document after every entry** [Generate Document](#)**Communication:**[Clinic Memos / Other Notes](#)[Medication Management](#)[Test Result Request](#)[Forms/Records](#)[Medical Question](#)[Referral Request](#)[Billing Question](#)[Outgoing Call](#)

Communications:

Display:



Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
06/14/2014	1:11 PM	Pt wants to know if should stop aspirin before going to dentist Friday.	Aaron M. Morgan		

The other communication types vary in appearance, as appropriate for their content, but they all work in a similar fashion.


Note in particular [Clinic Notes / Other Memos](#).

Cancel

We've devised several ways to do this in the past, often involving creating documents like **FreeText** to leave notes like these. While that works, & is still available to you, it can sometimes be a little hard to find those documents, especially when you're in a hurry, so subsequent users were overlooking them.

Care Guidelines | Global Days ✦ Comments | Patient Contact Info | View Scheduled Appointments | Telephone Call Summary | PCP: ROBERT PERKINS

Panel Control: Toggle Cycle

Important: Generate document after every entry  **Generate Document**

Communication:

Clinic Memos / Other Notes | Medication Management | Test Result Request | Forms/Records
Medical Question | Referral Request | Billing Question | Outgoing Call

Communications: Display: ☐ Send letter to patient due to inability to contact

Date	Contact Time	Comments	Note By	Tasked To	Reason
06/14/2014	1:29 PM	Use this space for other entries when you just need "A place to type." Maybe you saw the patient in the ER & just need to leave a brief note on the chart. Maybe you want to leave a "note to self."	Aaron M. Morgan		Other
06/14/2014	1:11 PM	Pt wants to know if should stop aspirin before going to dentist Friday.	Aaron M. Morgan		

But if you leave notes this way, when you click **Generate Note**, you'll have a chronological display of these notes, inline with telephone notes, which makes the conversation or train of thought quicker to find & easier to follow.

As mentioned earlier, you may wish to begin an encounter or telephone call by generating this document, so you can reference it during the encounter/call. If you need to make a new entry, you'll just generate it again to add the additional comments.

06/02/2013 03:29 PM : "USA Phone Notes And Clinic Memos" 06/02/2013 03:29 PM : Document "TelephoneNotesAndClinicMemos" x Patient History

TX Text

Arial 11 B I U 100% L

TELEPHONE NOTES & CLINIC MEMOS

Patient Name [REDACTED] Date of Birth [REDACTED]

Date of Call 06/02/2013

Home phone (2[REDACTED])

Day phone (251[REDACTED])

Alternate phone

PCP: FM-Duffy
GYN: USA GYN Bodie

Telephone Note and Clinic Memo History

Date	Time	Notes	Employee	Regarding
06/02/2013	17:18:08	Use this space for other entries when you just need "A place to type." Maybe you saw the patient in the ER & just need to leave a brief note on the chart. Maybe you want to leave a "note to self."	Robert L. Duffy	Clinic Notes/Other
06/02/2013	16:47:57	Pt wants to know if she should stop her aspirin before going to dentist Friday.	Robert L. Duffy	Medical Question
06/02/2013	15:27:31	Sample note.	Robert L. Duffy	Clinic Notes/Other
06/01/2013	18:11:04	Now let's see if this displays as "Clinic Notes/Other"	Robert L. Duffy	Clinic Notes/Other
05/16/2013	17:05:24	More stuff typed.	Robert L. Duffy	Other
05/16/2013	17:03:33	Sample clinic memo	Robert L. Duffy	Other
05/16/2013	16:00:38	Sample Clinic Memo.	Robert L. Duffy	Other

Patient History Patient Demographics Categories

New Lock Search

- 06/02/2013 03:29 PM DUFFY, RL
 - *USA Summary
 - USA Phone Notes And Clinic Memos
 - TelephoneNotesAndClinicMemos
- 05/15/2013 04:09 PM OSBORN, K
 - *USA Finalize
 - *USA Histories
 - *USA Intake
 - *USA SOAP
 - *USA Summary
 - USAPreceptor
 - preceptor_note
- 05/14/2013 06:09 PM MCFADEN, TG
 - Cognitive Assessment
 - Documents and Letters
 - *Finalize
 - Custom Lab Letter
 - Histories - OV
 - PEDS PSC
 - Preceptor Note
 - Procedures
 - Telephone Call
 - USA Cognitive Assessment
 - USA Controlled Substance Agreement
 - USA Document Library
 - *USA Finalize
 - *USA Histories

This concludes the NextGen Telephone & Clinic Note demonstration.

Change is inevitable, except from vending machines.