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

But it can also be reached quickly via the **Information Bar**.
When you’re documenting a note here, it is often helpful to start by reviewing previous notes. Click **Telephone Call Summary**.
This brings up a popup that you can scroll through to review previous communications. When done click **Save & Close**.
Alternately, you might prefer to begin by generating the Telephone Notes document. Click Generate Document.
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.
To begin documenting a telephone communication, pick one of the categories listed at the top. For this example, we’ll pick **Medical Question**.
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.
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.

Sometimes, as in this example, you'll need to send a task related to the question. Click **Send & Close**.
Select your recipient & send the task as you normally would. (Tasking is reviewed in another lesson.)
On the other hand, if this was a notation that didn’t require a response, you would just click **Save & Close**.
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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Notes</th>
<th>Note By</th>
<th>Tasked To</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/14/2014</td>
<td>13:12:47</td>
<td>Pt wants to know if should stop aspirin before going to dentist Friday.</td>
<td>Aaron M. Morgan</td>
<td></td>
</tr>
<tr>
<td>11/26/2013</td>
<td>10:39:52</td>
<td>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.</td>
<td>Froncean H. Bell</td>
<td>Allen Perkins</td>
</tr>
<tr>
<td>03/28/2013</td>
<td>10:13:26</td>
<td>Records from Providence Hospital have been scanned into the patient's chart.</td>
<td>Pamela Goubil</td>
<td>Allen Perkins</td>
</tr>
<tr>
<td>03/27/2013</td>
<td>14:09:50</td>
<td>Called placed to [redacted] Per Dr. Perkins to inform them of the excessive control substance use.</td>
<td>Froncean H. Bell</td>
<td>Allen Perkins</td>
</tr>
</tbody>
</table>
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.
Sometimes you just need a place to leave a clinical note, sort of like the next blank space on a paper chart, where you’d just enter the date & write a few lines. This is a good place to do that.

When done, click **Send & Close**.
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.

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.
This concludes the NextGen Telephone & Clinic Note demonstration.

Change is inevitable, except from vending machines.

R. Lamar Duffy, M.D.
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