

Phone Messages from the Clinical Notes section

Creating a Phone Message

1. Open the desired patient's chart in PowerChart to the **Clinical Notes** section of the menu.
2. Click on the **Add Document** icon (1st icon – paper w/yellow asterisk)
3. In the *Type* field, select **Phone Msg** from the drop-down menu.
4. Verify the correct *Date* and *Time* that the phone conversation occurred.
5. *Author* field defaults to your name
6. Type in the *Subject* field, if needed.
7. Type *<a description of the telephone conversation>* in the large text area.
8. Click **Sign**.

Following the above steps **ONLY CREATE** the message and posts to the patient record.

Note: Clicking the **Save** button will post the message to the patient chart as a *Preliminary Report*. **ONLY THE AUTHOR WILL BE ABLE TO VIEW THIS MESSAGE**. The message must then be retrieved and **Signed** by the original author to make it *Final* and visible to all users.

Forwarding a Phone Message from the Clinical Notes Tab

1. Open the desired message in **Clinical Notes** under the Messages Folder.
2. Click the **Forward** icon on the toolbar (Person's head-2nd left) **OR** Right Click directly on the document itself. The *Action Pane* dialog box will appear.
3. The *Action* section defaults to the **Forward only** radio button.
4. In the *Forward* section, the **Review** radio button should default.
5. **Type** *<last name>* of the recipient into the *To:* field and push **Enter**.
Note: only active *Inbox* users can receive messages forwarded from *Clinical Notes*.
6. Type in the *Comments:* field if desired.
7. Click **OK** to forward the message.

Note: Forwarding a message from **Clinical Notes** will create a new line in the history of the document recording the action.

Inserting a Template into Clinical Notes Phone Message

There are phone templates that insert a block of headings designed to help you gather important data from the caller. Insert them into the body of the message by doing the following:

1. Open the desired patient's chart in PowerChart to the **Clinical Notes** section of the menu.
2. Click on the **Add Document** icon (1st icon – paper w/yellow asterisk)
3. In the *Type* field, select **Phone Msg** from the drop-down menu.
4. Verify the correct *Date* and *Time* that the phone conversation occurred.
5. *Author* field defaults to your name
6. Type in the *Subject* field, if needed.
7. Click on the **Template** icon (looks like a stamp -- 4th from the right)
8. *Template Selection* window opens
9. Select the appropriate phone template from the top window – Associated Windows
10. Click the **Insert** button
11. All the *Headings* are now inserted into the body of the message
12. Click next to each *Heading* to type your information

Note: This template information is not locked so you must click next to each *Heading*, you can **not** use the *Tab* key to move from one heading to another.

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Finding Clinical Notes Phone Message in the Inbox

Phone messages forwarded from *Clinical Notes* show up in the **Sign and Review** section of the *Inbox*. These type of phone messages will be under the folder *Forwarded Documents to Review* if **Review** was selected when forwarded OR under the folder *Forwarded Documents to Sign* if **Sign** was selected when forwarded. Users must have an activated *Inbox* AND ACTIVE DOCUMENT FOLDERS (Documents to Sign, Documents to Review) to receive messages forwarded from **Clinical Notes**.

Responding to a Clinical Notes Phone Message

1. Open the document in your **Documents to Review/Sign** folder by double clicking on it.
2. Click the **Modify Document** icon on the toolbar (pencil eraser on paper)
3. Type <your message> below the **Insert Addendum Here:* line
4. Click the **Sign** button to return to the document window.
5. The *Action* section defaults to the **Forward only** radio button.
6. In the *Forward* section, select **Review** radio button to activate the *To:* field:.
7. Type <lastname> of the recipient in the *To:* field and push **Enter**
Note: only active *Inbox* users can receive messages forwarded from *Clinical Notes*.
8. Type in the *Comments:* field if desired.
9. Click **OK & Next** to forward the message.