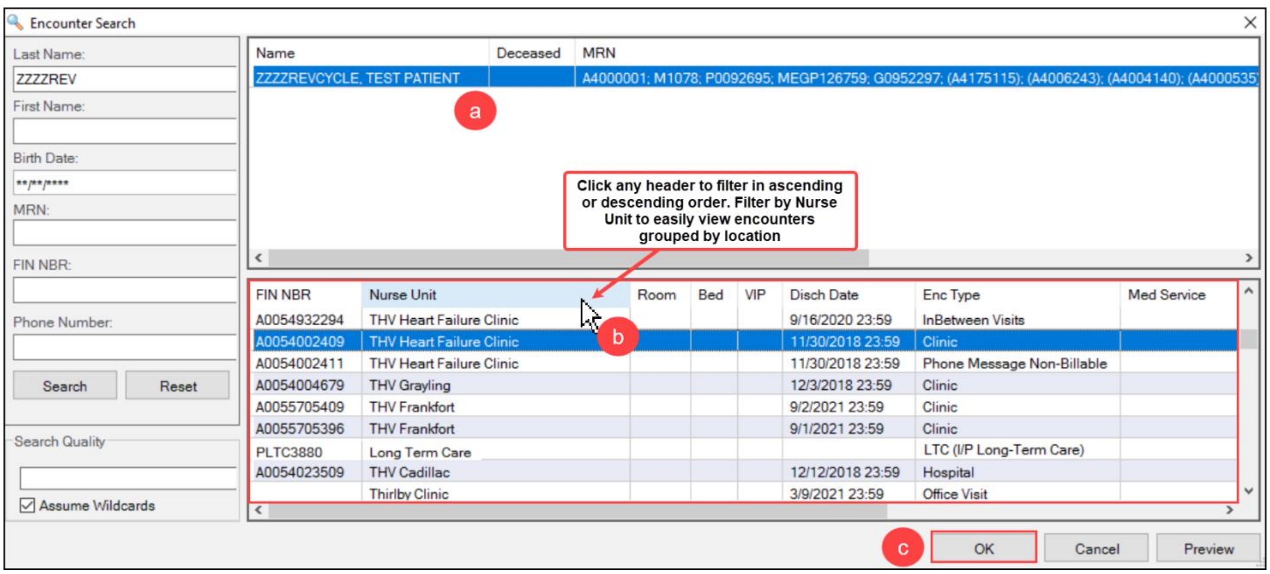
Documentation of a patient phone call (or other patient interaction) is done by creating a message within a patient's chart. Follow the steps below to correctly document a message.

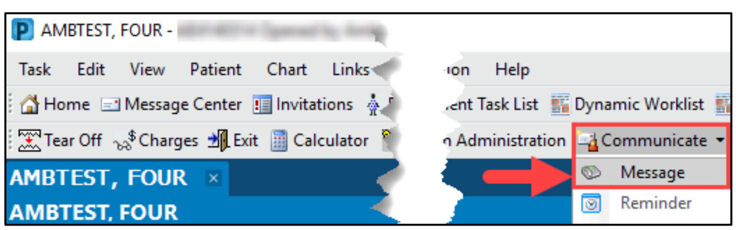
Documenting a Phone Call

1. Perform a Patient Search.

2. From Encounter Search:
   a. Select the correct patient.
   b. Select the correct encounter for documentation.
      i. Look for the correct location and encounter type.
         - Clinic: use for documentation related to a clinic visit.
         - InBetween Visits: use for documentation not related to a recent clinic visit. (A new InBetween Visit may be created for each new documentation).
   c. Click OK.



3. Within the patient's chart:
   a. Click Communicate.
   b. Select Message.



4. A New Message window opens.
   a. The Patient will pre-populate if the patient's chart was open before creating the message, otherwise search for the patient as needed.
   b. Modify the caller and caller # as needed.
   c. Fill in the remaining information as needed.

To:	Use when the message needs to be sent to someone else, such as another staff member, a group of staff members (pool), or the patient themselves (if they are enrolled in the patient portal). If the message does not need to be sent to someone else, leave the **To**: field empty to save the document to the chart without sending anywhere.
CC:	Use to send a carbon copy to someone else.
Provider:	Use to document the patient's provider on the message. Must be filled out for every message even if the provider is entered in the **To** field. **Note:** this does not send the message to that provider, the **To or CC** fields must be used for this.
Subject:	This field is pre-populated with a message subject template. Click the dropdown arrow and select appropriate type. You may delete and free text the Subject to be more specific to the message. Follow your practice guidelines.
Checkboxes:	**Include me:** adds your own name to the **To:** field. **To consumer:** adds the patient's name to the **To:** field and sends a message to the patient via the patient portal. **Disable further replies:** if selected, the patient will not be able to respond through the message that is sent to them. **Note**: To consumer and Disable further replies checkboxes are only available for patients enrolled in the patient portal. **Save to Chart** is automatically checked. This checkbox will save the message to the patient's chart when the send button is selected. All documentation related to a patient should be saved to the chart.
Message:	Document the phone call or interaction details by typing within the message area. Note the different formatting options available.  **NOTE:** Only use Munson Healthcare approved abbreviations for documentation.
Actions:	*Not Recommended for Documentation* Choose an action instead of having to type the information. *For example: If a nurse is trying to call the patient about recent results, but the patient did not answer the call. The nurse could check the box Message Left for Patient to Return Call, instead of typing that sentence.*
Remind on:	Sends a reminder to the Message Center Inbox on the selected date to the message recipient(s).
Due on:	A Due Date will appear for the message.
High:	Marks a message as high priority.
Notify:	Select to receive a notification within Notify Receipts in the Message Center Inbox when messages are opened, not opened, and/or overdue.
Message Journal:	View previous messages saved to the patient's chart.
Launch Orders:	Use to enter an order for a patient and associate the order to the message.