

Tips & Tricks

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How to Document a Telephone Encounter

Friday, April 8, 2022

- If you get a patient call that you want to document after the SOC is scheduled, you want to document that with a Telephone Encounter.
- To do so, from Chart Search, search "telephone" and click Jump To telephone Encounter

ID	Name	Service Area	Active Count	Active	WQ Status	WQ Status Reason	WQ Status Comment	Supervisor	Owning Area	Description
2473	HHF - CNS INCOMING REFERRALS	WELLFORCE SERVICE...	0	Yes						This workqueue catches all ref...
955	HHF - CNS INITIAL EVAL SCHEDULING	WELLFORCE SERVICE...	0	Yes						Finds all referrals to the interna
2475	HHF - CNS INTAKE INCOMPLETE	WELLFORCE SERVICE...	0	Yes						This workqueue catches all ref...
5301	HHF - HH - RESUMPTION OF CARE/REASSE...	WELLFORCE SERVICE...	0	Yes					Home Health/Hospice...	Finds all resumption of care ref...
5299	HHF - HH - START OF CARE/INITIAL EVAL/C...	WELLFORCE SERVICE...	293	Yes					Home Health/Hospice...	Finds all referrals to the interna
1871	HHF - HH REFERRALS CLINICAL REVIEW C...	WELLFORCE SERVICE...	0	Yes						This workqueue catches all ref...
1870	HHF - HH REFERRALS NEEDING CLINICAL...	WELLFORCE SERVICE...	86	Yes						This workqueue catches all ref...
5000	HHF - HIT - START OF CARE/INITIAL EVAL S...	WELLFORCE SERVICE...	0	Yes						Finds all referrals to the interna
5247	HHF - HSPC - CONSULT AND ADMISSION S...	WELLFORCE SERVICE...	11	Yes					Home Health/Hospice...	Finds all referrals to the interna
426	HHF - HSPC - INCOMING REFERRALS	WELLFORCE SERVICE...	24	Yes				HOMEHEALTH, SUPERVI...	Home Health/Hospice...	Finds all referrals to the interna
427	HHF - HSPC - INTAKE INCOMPLETE	WELLFORCE SERVICE...	0	Yes				HOMEHEALTH, SUPERVI...	Home Health/Hospice...	Finds all referrals to the interna
1779	HHF - INFUSION INCOMING REFERRALS	WELLFORCE SERVICE...	0	Yes						This workqueue catches all ref...
1891	HHF - INFUSION INTAKE INCOMPLETE	WELLFORCE SERVICE...	0	Yes						This workqueue catches all ref...

- Search for your patient by name and DOB, and click Accept
- Enter TMCAH for department and yourself for the provider, and click Accept
 - If you cannot enter yourself as the provider, use the team's manager for now

Automatic Selection for Abbazaba, Alex-Hhi

Provider: Gerard-Hhmgr Abbazaba, RN PCP

Department: TMCAH SCHEDULING

New

View Calls Accept Cancel

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- In the Contacts section, choose the appropriate type of contact and document in the form that appears

The screenshot shows the 'Contacts' section in Epic Edge. At the top, there are three buttons: '+ Incoming Call', '+ Outgoing Call', and '+ Other'. The 'Incoming Call' button is highlighted with a red box. Below these buttons is a form titled 'Telephone (Incoming)'. The form contains the following fields: 'Type' (set to 'Telephone (Incoming)'), 'Time' (12:58 PM EDT), 'Date' (4/8/2022), 'Relationship' (with a search icon and tags for 'Self: Abbazaba, Alex-Hhi', 'Spouse, Mary', 'Child, Susan', and 'Pharmacy'), 'Contact name' (with a red error icon), 'Phone' (with a search icon), and 'Contact comments' (a text area). At the bottom right of the form are 'Accept' and 'Cancel' buttons.

- When complete, click Accept.
- If you need specific providers to see the note of the call, enter them in the Routing section. This will send your note to these individuals when you sign the encounter
 - You may frequently send these to the case manager and clinical supervisor

The screenshot shows the 'Routing' section in Epic Edge. At the top, it says 'Route as: Patient Call'. Below this are three buttons: '+ My List', '+ PCP', and '+ Other', along with a 'Remove All' button. These buttons are highlighted with a red box. Below the buttons is a search bar labeled 'Enter recipients'. Below the search bar is a 'Pool for Replies' section with an 'Add a pool' search bar. Below that is a 'Routing Comments' section with a text area labeled 'Enter non-clinical routing comments'. At the bottom left, there is a link for 'Edit Fax Recipients' and a link for 'View Routing History'. At the bottom right, there is a 'Close Workspace' button.

- When finished, click Sign Encounter