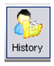
NextGen EHR How-to Guide
Charting: Telephone Template & Group Activity

This guide will help you use the Telephone Call Template and chart on a Group Activity encounter.

I. Using the Telephone Call Template

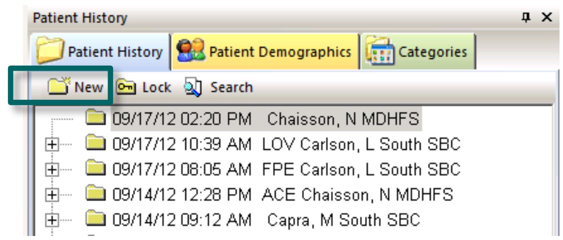
The Telephone Call Template is not just used for telephone calls. It should be used for any communication or contact outside of a clinic visit (i.e. consult with school staff, communication with a parent, condom distribution, emails, refill requests).

A. Open the Patient's chart.

B. Click on the *History* 

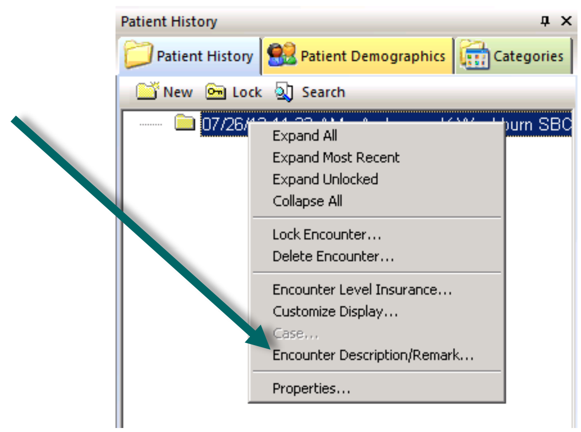
button on the EHR toolbar.

C. Click on the *New* button to create an encounter.



D. Create Remark

1. Right-click on the encounter and select *Encounter Description/Remark*



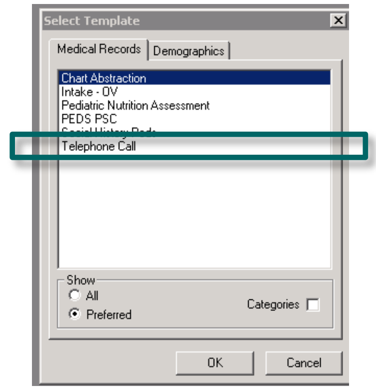
2. Depending on the type of contact, enter one of the following codes:

Type of Contact	Code	Explanation
Communication	**COM**	Any type of communication (telephone call, email, etc).
Condom Distribution	**CDM**	Condoms given without appointment.
Lab Result	**RST**	Lab results given over the phone or in person without an appointment/counsel.
Medication Refill	**MED**	Request for medication refill without an appointment.
PHI Authorizations	**PHI**	Request for PHI Authorization for Release
Referral	**REF**	Referral received for student to the SBC. Student given info/registration forms and encouraged to make an appointment.

E. Open Telephone Call Template

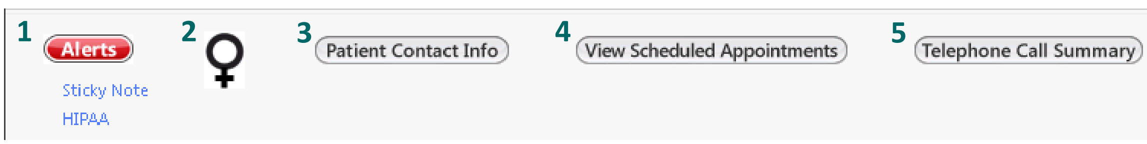
1. Click on the *Template*  button either at the bottom of the *Patient History* window or on the EHR toolbar.

2. Choose *Telephone Call* from the *Select Template* window



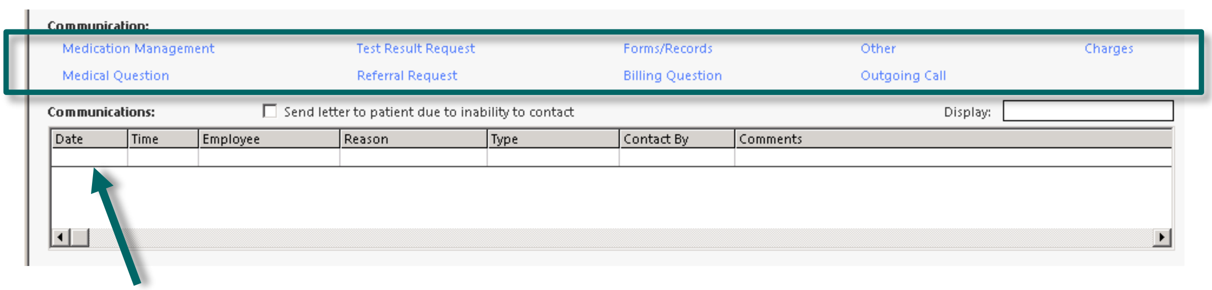
F. Review Patient Info

1. Review Patient Alerts
2. Open the OBGYN Synopsys if applicable.
3. *Patient Contact Info* button: Use if calling the patient or parent to get contact info.
4. *View Scheduled Appointments* button: To see patient's appointments
5. *Telephone Call Summary* button: View all instances where a provider has used the Telephone Call Template for the patient.



G. Communication

1. Click on any of the blue links that apply to the encounter and complete the information.

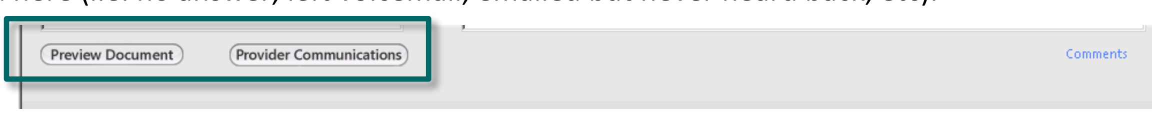


2. The communications you complete for this encounter will show in the white field.

Hint: PHI Authorization for Release is under the *Forms/Records* link.

H. Provider Communications

Click on this button to log what was communicated with whom. Failed attempts can also be logged here (i.e. no answer, left voicemail, emailed but never heard back, etc).



I. Preview Document

Click this button when you're done with the template. **This is considered your chart note.**

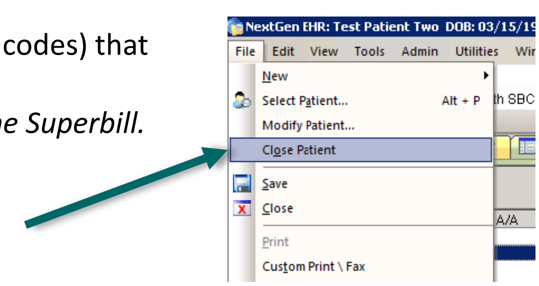
J. Superbill

Go to the Superbill and enter any Visit Codes (99999xx codes) that apply to the contact.

See EHR How-Guide 3 for help with entering codes in the Superbill.

K. Click on the *Save* button on the EHR toolbar.

L. Click on *File* and select *Close Patient*



II. Group Activity

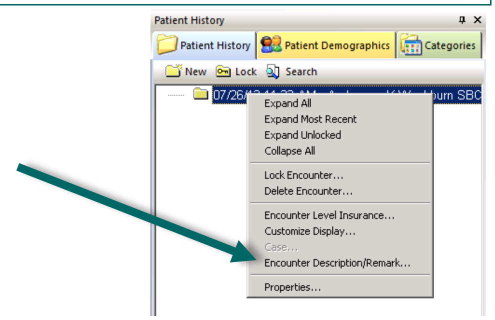
Use this procedure when you have completed a group presentation/training not related to a specific patient.

> *Note:* Make sure you have first booked a meeting appointment in the EPM for patient Group, Activity SIN: 510 and checked-in the appointment.

A. Open patient Group, Activity's chart

B. Perform the 6-Point Check *See EHR How-to Guide 2*

> *Note:* Only chart on encounters that have already been created from an appointment check-in. Do not create an encounter in the EHR for a group encounter.

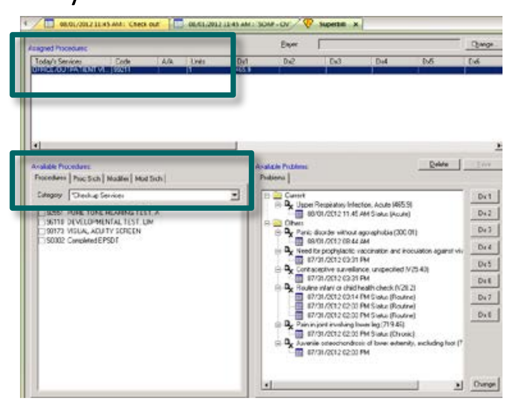


C. Create Remark

1. Right-click on the encounter and select *Encounter Description/Remark*
2. Type *GRP* for Group Activity Encounter

D. Superbill

1. Go directly to the Superbill under *File, Superbill*.
2. **Group Participant**
   a. Under *Available Procedures*, select the **Group Participant* category.
   b. Click on the box next to the type of participants you saw.
   c. In *Assigned Procedures*, click on *Units* and enter the approximate number of people you saw.



3. **Group Type**
   a. Under *Available Procedures*, select the **Group Type* category.
   b. Click on the box next to the type of group you performed.
   c. In *Assigned Procedures*, click on *Units* and enter the approximate time you spent on the group in 15 minute increments (i.e. 30 minutes = 2 units).
4. **Group Topic**
   a. Under *Available Procedures*, select the **Group Topic* category.
   b. Click on the box next to the type of group you performed.
   c. In *Assigned Procedures*, click on *Units* and enter the approximate number of people you saw.
5. Click on the *Save* button on the EHR toolbar.
6. **Click on *File* and select *Close Patient***

Congrats! You are now done with this How-to Guide.