**Purpose:** This guide will help you use the SBC Communication & Pickup Template.

Goal: Provide a quick way to document an encounter that is not a traditional visit/appointment.

I. Using the Template

This template 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, lab results).

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.
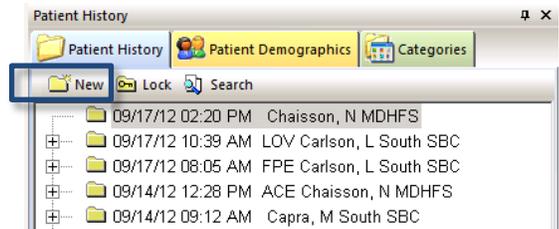
D. **Create Remark**

1. Right-click on the encounter and select *Encounter Description/Remark*
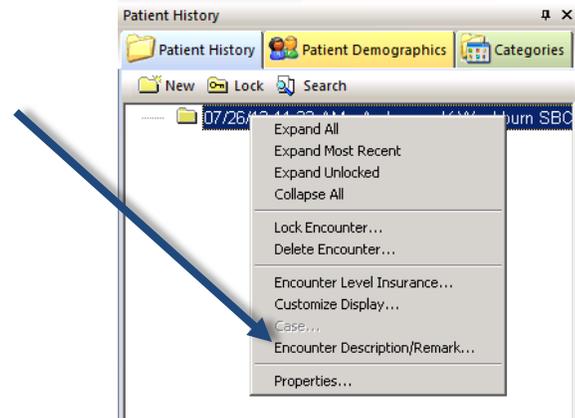
2. Depending on the type of contact, enter one of the following codes:

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 the SBC Communication & Pickup Template

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

2. Choose *SBC Communication & Pickup* 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 template for the patient (not just telephone calls).

G. Communication

1. Click on any of the blue links that apply to the encounter and complete the information.
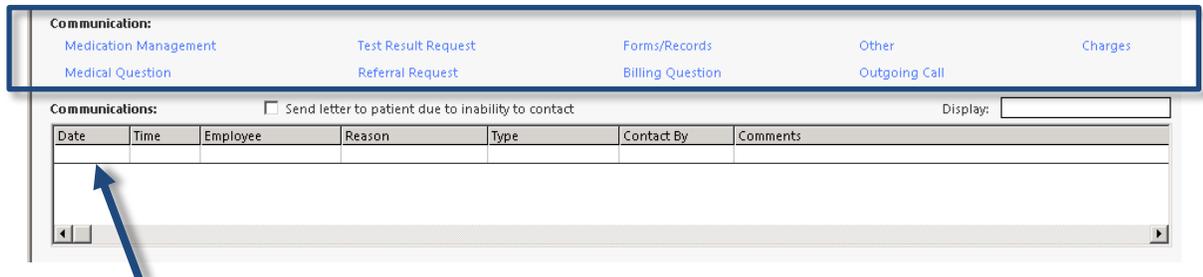
2. The communications you complete for this encounter will show in the white field.

> *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. Go to the *Superbill* and enter the CPT codes that apply to the contact. *See EHR How-Guide 3*

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

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

Congrats! You are now done with this How-to Quickie!