

Factor 5: Documenting after-hours clinical advice in the medical record

The practice would need to document their process for documenting after-hours clinical advice in the medical record.

Here is an example of where after-hours phone advice would be documented in PCC EHR:

The screenshot shows a 'Phone Notes' form for a patient named Mickey Mouse, aged 10 years, 4 months, on 4/24/03. The form is divided into several sections:

- Recent and Upcoming Appointments:** Last Visit: none, Last Physical: none, Next Physical Due: none, Scheduled Appointments: none.
- Contact:** Call Taken By: Tim Proctor; Call Taken At: 09/19/13 10:25am; Caller's Name: unknown; Relationship: select relationship to ...; Return Phone: [empty]; Needs To Be Signed By: select a provider.
- Subject:** [empty text field]
- Phone Note:** [empty text area]

If the after-hours phone call is being documented the morning after the call actually happened, the “Call Taken At” date and time can be adjusted to reflect the date and time of the actual call. The detailed advice would be documented in the “Phone Note” text field and a summary or subject of the note would go in the “Subject” field.

Here is a screenshot showing how clinical advice by secure electronic message would be documented in PCC EHR:

PCC EHR

Portal Message **Dino Flintstone** **4 yrs, 3 mos** **6/29/09** **M**

Portal Messages

Subject: Acetaminophen or Tylenol? TO: enter user name

Date: 09/30/13 2:33pm
From: Wilma Flintstone
Phone: 8024974671

Fred gave Dino children's acetaminophen instead of children's tylenol. Is that okay?

Reply

Hi Wilma,
Tylenol's active ingredient is acetaminophen, so you should be all set. Please call the office if you'd like to ask about dosage or the doctor's instructions. Have a great week!

Tasks

TASK: enter task name TO: enter user name

NOTE: [text area]

Task Completed AT: mm/dd/yy 12:00am BY: enter user name

Previous **Next** **Close** **Save** **Save + Exit**

Read and
reply, or click
"No Reply"

**Optionally,
create tasks
for other users**

The date and time of the response would be documented once the reply was sent or saved.

A history of after-hours phone encounters and messages are stored in a "Visit history index" within the patient chart. The screenshot below shows this visit history index filtered to show only phone encounters and electronic messages. Once an entry in the index is selected, the detail for the entry is displayed above including the documented advice given for the phone encounter and/or messages.

For some practices, clinical advice may be provided by phone from an after-hours call service. The practice should request that the call service send any documented clinical advice or protocol followed during the after-hours phone call. These documents should be scanned and attached to the after-hours phone call as is shown in the screen shot below:

PCC EHR
[Search Box] FIND

- Pebbles Flintst... PCC# 3336
- Medical Summary
- Demographics
- History
- Visit History**
- Immunization History
- Flowsheets
- Growth Charts
- Documents

Visit History

Pebbles Flintstone 10 yrs, 1 mo 9/24/03 F

11/12/13 - Phone Notes

Phone Notes

Call Taken By

PCC PCC 11/12/13 01:36PM

Contact

Caller Name: Tim (Father)

Visit History Index

Display: Phone Notes, Portal Messages

Date	Age	Protocols	Details	Provider	Docs
11/12/13	10y 1m	Portal Message	Subject: Acetaminophen or tylenol?	n/a	
11/12/13	10y 1m	Phone Notes	Subject: none	n/a	1 item

Documents (notes from an after-hours call service for example) can be scanned and attached to phone encounters

Create Visit

- Print
- Edit
- View Documents
- Add Phone Note
- Close
- Save
- Save + Exit

Logged In: pcc