Front Desk - Document a Phone Call

Document a phone call

When you answer a call from or regarding a patient, document the call in the patient's chart and send the record to clinicians for follow-up.

Create a telephone encounter

1. Click **Telephone Call** on the Hyperspace toolbar.
2. Search for and select the appropriate patient based on the call. Click **Accept** to move on and create the telephone encounter.
3. Enter the provider who needs to respond to the call.
4. Confirm that the department listed is correct.
5. Click **Create** to create an encounter. Or, if the patient already has an open telephone encounter, click **Accept** to open the existing encounter.

Document the caller's information

1. In the **Contacts** section, select the call type.
2. Enter the Contact name:
   - If the patient or a recorded contact is calling, click their name to pull in their information. Select the correct phone number for the patient.
   - If someone else is calling on behalf of a patient, fill in the contact's relationship to the patient as well as their name and phone number.
3. Click **Accept**.

Record call information

Record call information using Reason for Call

If the caller provides additional information, record it for clinicians to review.

1. Open the **Reason for Call** section.
2. Select symptom or purpose or search for one in the **Add a new reason** field.
3. Enter the **Onset date**, if the caller provides it.
4. Use the **Comments** field to record any other details the caller gives about the symptom or purpose.
5. If the caller provides additional reasons for the call, record them in subsequent lines.
6. Click **Close**.

Record call information in a note

If you need to record a longer message than will easily fit in the Comment field, write a note instead.

1. In the **Documentation** sidebar, record your message in the **My Note** field.
2. Click **Accept** to save your note.

Route a phone call to clinical staff

1. Open the **Routing** section of Call Intake.
2. Change the call priority if appropriate.
3. In the **Enter recipients** field, enter the person or group you're sending the message to.

    a. When you want to send a message to just one person, send a message to an individual recipient.
    b. When you want the first available user from a group to act on the message, send a pool message. To send a pool message, prefix the name of the group with **P** (example: "P Family Medicine Nurses").
    c. When you want all members of a group to act on the message, send a class message. To send a class message, prefix the name of the class with **C**.

4. If you want replies to your message to be sent to a pool rather than to you, enter that pool in the **Pool for Responses** field.
5. Enter any additional message for the recipient in the **Routing Comments** field.
6. Click **Send and Close Workspace**.

Update an existing call record

If you need to correct or expand on the documentation for a call, update the encounter.

1. Click **Telephone Call.**
2. Search for and select the patient whose call you want to view.
3. Select the **Select Phone Calls** tab to see a list of the patient's past calls.
4. Select the call you want to edit and click **Accept**.
5. Make any necessary updates.
6. Click the **Close Workspace** button in the **Routing** section.