Phone Note: Capturing Patient Care Outside the Hospital Based Clinics

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Abstract

Problem Statement: Informatics and Practice Administrators discovered that there was not a streamlined way to capture patient encounters /communication outside of the clinic visit. Staff uses paper documents, email, and other clinical systems (Teleresults). Non-clinical staffs were also found to handle medical issues. It became apparent that the existing processes for managing communications were not robust enough to ensure effective and efficient care of patients. **Methods** 1) Designed and implemented a phone note document on the main EHR with the functionality to save on a Pre-Visit or Discharged account. 2) Implemented new workflows that capture communications on the phone note. **Results**: 1) Increased efficiency of physicians and clinic staff issue identification and response. 2) Increased accuracy of communication. 3) Improved collaboration among physician and clinic staff. 4) Communication between patient and staff is part of the legal medical record. **Significance**: Electronic Health Record (EHR) systems are widely used tools for clinicians to manage patient care. Despite the implementation of EHRs, there are still clinical areas with disparate systems or components that are documented on paper. In these situations, clinic staff can be faced with the challenge of capturing patient communication and clearly seeing the clinical picture without negatively impacting patient safety or continuity of care. At Baylor Scott & White Health, we leveraged change management to streamline processes and placed importance in developing standard data sets (documentation template) to capture patient interaction with staff in all types of clinic setting.