

Bp Comms — Contact Notes



What is a contact note?

Available in Indigo SP1, Bp Comms **Contact Notes** are a permanent record of any attempted communication with a patient from your practice, whether by letter, phone call, or SMS.

A contact note records:

1. The target patient
2. Who actually answered the contact attempt
3. The contact reason, method (SMS/Phone/Letter), and success status
4. The number of contact attempts about the same issue
5. User comments regarding the contact
6. The SMS message text, including patient reply text for appointment reminders

Appointment note - Leonard Bryant

Patient contact details

Patient name: 1 Leonard Bryant Age: 62 yrs Preferred contact via: SMS
Home phone: 02 70505050 Work phone: 0270501919 Mobile phone: 0419913102

Other contact's details

Contact type: 2 Contact reason: 3 Appointment Contact method: SMS Contact with: Patient
Home phone: Work phone: Mobile phone:

Communication details

Contact date: 16/10/2018 Contact attempt no.: 1 4
User comments: Appt booked for result follow-up. 5
Message details: Appointment Reminder: 16/10/2018 04:00:00 PM
Provider to see: Dr Frederick Findacure
Date sent: 16/10/2018 03:46:37 PM
Sent to: 0419913102
Sent by: Dr Frederick Findacure
Location: Bundaberg Clinic
3 Message status: Delivered

Add Print View appointment View SMS Save Cancel

Who creates contact notes?

Contact notes can be recorded manually by staff during workflows with patient contact, such as result recalls and clinically significant reminder appointments.

Click **Record note** or **Contact Notes > Add** anywhere you see those buttons in Bp Premier.

Add View Delete Print Record Note Values

Filter: Mark result as given Atomised values

Contact notes are also generated automatically when SMS messages are sent to patients from Bp Premier, like scheduled appointment reminders or an SMS from staff when following up results.

Send all 3 Reminders Send Reminder Refresh list

Unused messages 965 SMS Close

Follow up inbox

File Utilities View Help

Reports checked since: 31/10/2014 Filter by action: All unactioned Filter by s

Mark as contacted Mark result as given Record note Send Message Make appointment

Date checked	Patient	Phone	Report name
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This means **all** patient contact attempts are recorded without staff needing to double-up on automated or one-off SMS messages.

If a patient has been sent two mail merge reminder letters and a contact note manually recorded for a follow up phone call, all of these contact attempts will be seen in the patient's note history.

Contact notes are an auditable history of attempts to follow up clinically significant issues with patients.

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Where can you view contact notes?

To view **all** contact notes that have been sent from the practice, select **View > Contact Notes** from the main menu. Use the filters along the top to limit the records shown.

Contact notes

Reason: All

Method: All

Message status: All

Refresh message statuses

Between: 30/09/2018

and

31/10/2018

Location: All

Show only contact notes with replies

Date	Patient	Reason	Method	Recorded by	Comments	Note no	Replies	Message status	Location
31/10/2018	Leonard Bryant	Patient Record	SMS	Practice		1	0	Sent/Pending Delivery	Victoria practice
19/10/2018	Leonard Bryant	Correspondence	Phone	Practice	Duplicate X-ray received	1	0	Successful	Bundaberg Clinic
19/10/2018	Leonard Bryant	Correspondence	Letter	Practice	Received signed conse	1	0	Sent	Bundaberg Clinic
19/10/2018	Leonard Bryant	Patient Record	SMS	Practice		1	0	Sent/Pending Delivery	Bundaberg Clinic
17/10/2018	Christopher Ashley	Reminder	Letter	Practice		1	0	Returned to Sender	Bundaberg Clinic
17/10/2018	Raymond Bartholomew	Reminder	Letter	Practice		1	0	Sent	Bundaberg Clinic
17/10/2018	Janelle Allen	Reminder	Letter	Practice		1	0	Sent	Bundaberg Clinic

To view contact notes for a single patient, press F10 to open the Patient list and click **Contact notes** in the bottom right.

If you click **Contact Notes** anywhere else in Bp Premier, only the notes relevant to the selected patient and context will be shown.

For example, if you view the notes for a document from the patient record, only notes associated with the patient and document will be displayed.

The contact **reason** is normally defaulted by Bp Premier and cannot be changed.

Correspondence In note - Leonard Bryant

Reason: Correspondence In

Method: All

Me

Between: 30/09/2018

and

31/10/2018

Lo

Date	Reason	Method	Recorded by	Comments
19/10/2018	Correspondence In	Phone	Practice	Duplicate X-ray
16/10/2018	Correspondence In	Letter	Practice	Original image

Show deleted

Add

Filtered to show contact attempts for the current Document

Who can view and edit contact notes?

Permissions

User: Dr Frederick Findacure

Section	Permission
Patient education material	Add/Edit/Delete
Download data	Allowed
HealthLink	Allow access
Bulk Document Import	Allow access
Double book appointments	Allowed
Override 'On the day' appointments	Allowed
Waiting room	Allow access
Strata SSO	Deny access
Appointments	Add/Edit/Delete
Accounts	Add/Edit/Delete
Payments	Add/Edit/Delete
Direct Billing	Add/Edit/Delete
Send Bp Comms Messages	Allowed
Reports	Allow access
Setup sessions	Add/Edit/Delete
Setup fees	Add/Edit/Delete

Administrators with **Configuration** access can add new Contact Reasons:


Setup > Configuration > Lists > Add.

Any user with the permission **Send Bp Comms Messages** can add and view 'General' contact notes from the patient list.

However, to view or edit contact notes elsewhere in Bp Premier, the user **also** needs the corresponding permission for that function.

For example, to view contact notes for an investigation result, **Investigation Reports** permission must be set to 'View only' or higher.

To delete a contact note associated with a care plan, **EPC Items** must be set to 'Add/Edit/Delete'.



Lists

Contact Note Reason

- Appointment
- Clinical Image
- Correspondence In
- Correspondence Out
- Demographic Response
- EPC

Add

Edit

Remove