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Bp Comms — Contact Notes



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Manual and generated notes



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Permission to view and add

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
- The contact reason, method (SMS/Phone/Letter), and success status
- 4. The number of contact attempts about the same issue
- User comments regarding the contact
- The SMS message text, including patient reply text for appointment reminders

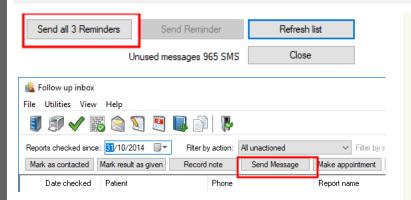
| Home phone: | 00 70505050 | | | | | |
|--------------------|------------------------|-----------------|---|------------------------|------------|--|
| | 02 70505050 | Work phone: | 0270501919 | Mobile phone: | 0419913102 | |
| Other contact's | details | | | | | |
| Contact type: 2 | | ~ | | | | |
| Home phone: | | Work phone: | | Mobile phone: | | |
| Communication | details | | | | | |
| Contact reason: 🤇 | Appointment | Contact method: | SMS | Contact with: | Patient | |
| Contact date: | 16/10/2018 | | | | | |
| Contact attempt no | .: 1 4 | | | | | |
| Jser comments: | | | Message details: | | | |
| Appt booked for re | sult follow-up. 5 | , | Appointment Reminder: Provider to see: Dr Fred Date sent: 16/10/2018 Sent to: 0419913102 Sent by: Dr Frederick Fir Location: Bundaberg Cli | 03:46:37 PM ndacure | | |

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.



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.



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.

Bp Premier

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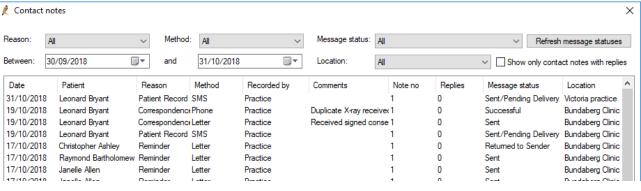
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Bp Comms — Contact Notes

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.



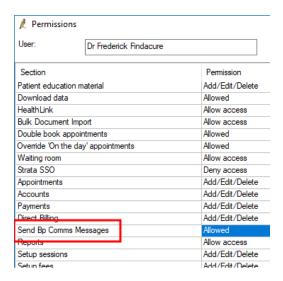
To view contact notes for a single patient, press F10 to open the Patient list and click **Contact notes** in the bottom right.

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.

| Reason: | Correspondence In | ~ | Method: | All | ~ | M |
|----------|-------------------|--------------|---------|-------------|-------------|------|
| Between: | 30/09/2018 | ■ ▼ | and | 31/10/2018 | | Lo |
| Date | Reason | Metho | od | Recorded by | Commer | nts |
| 19/10/20 | 18 Corresponden | ce In Phone | | Practice | Duplicate | Хта |
| 16/10/20 | 18 Corresponden | ce In Letter | | Practice | Original in | nage |
| < | | | | | | |
| Show d | Add | | | | | |



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'.

