Bp Comms — Contact Notes

Bp Learning

1 What is a contact note? | 2 Manual and generated notes | 3 Patient and context | 4 Permission to view and add

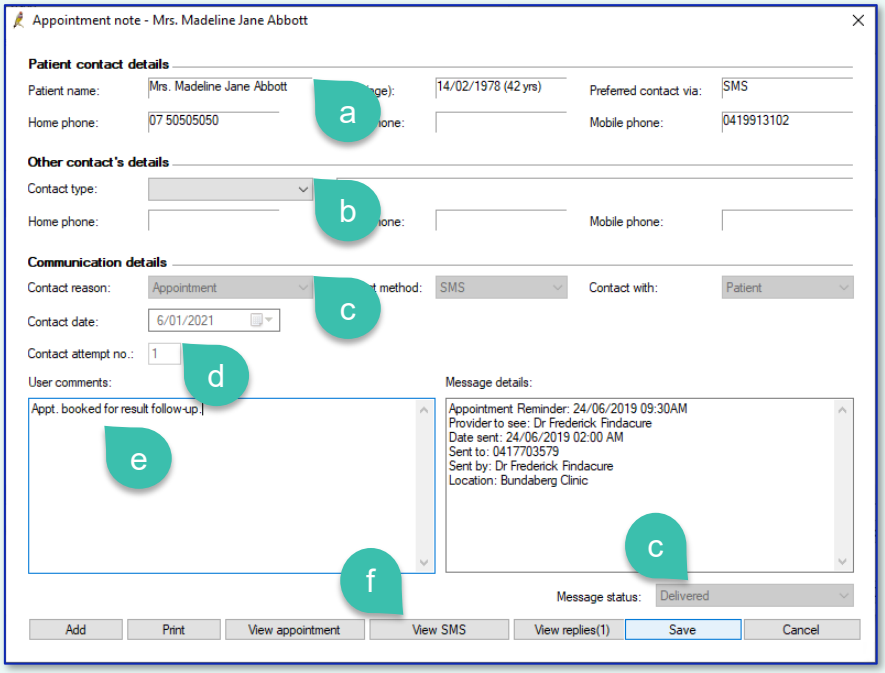
What is a contact note?

What is a Contact Note?

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

A contact note records:

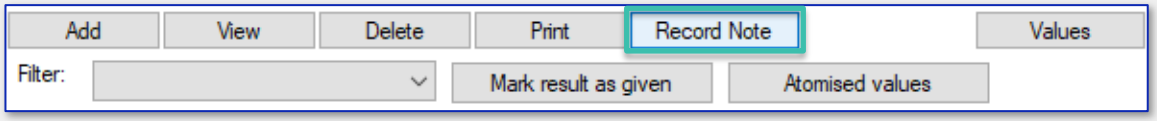
a) The target patient
b) Who actually answered the contact attempt
c) The contact reason, method (SMS/Phone/Letter), and success status
d) The number of contact attempts about the same issue
e) User comments regarding the contact
f) The SMS message text, including patient reply text for appointment reminders



Who creates Contact Notes?

Who can create Contact Notes?

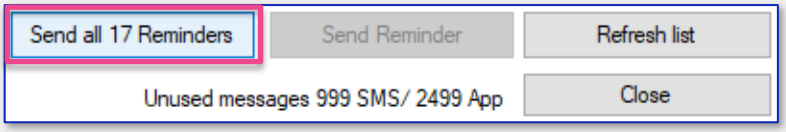
- Contact notes can be recorded manually by staff during workflows with patient contact, such as result recalls and clinically significant reminder appointments.
- Contact notes are also generated automatically when SMS messages are sent to patients from Bp Premier, like scheduled appointment reminders or an SMS from staff when following up results.
- Click **Record note** or **Contact Notes** > **Add** anywhere you see those buttons in Bp Premier.



This means that **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 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.



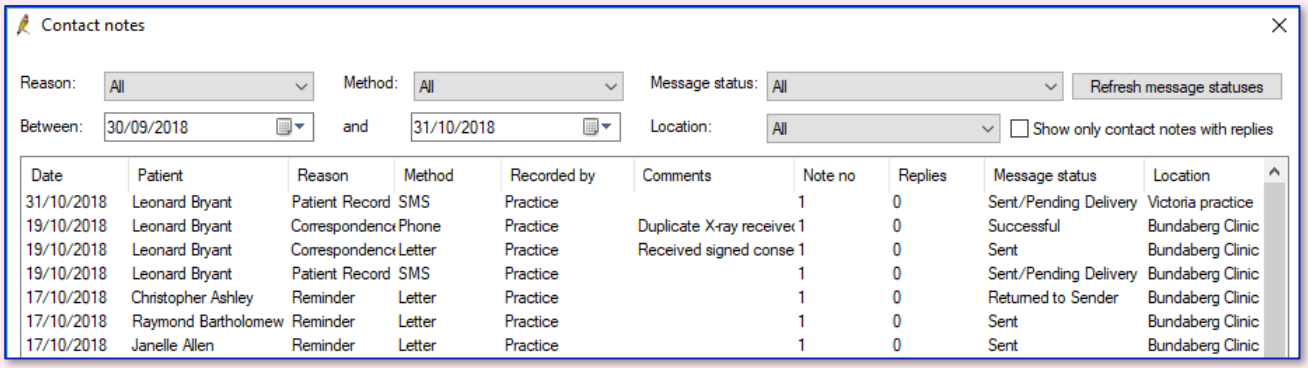
Bp Premier

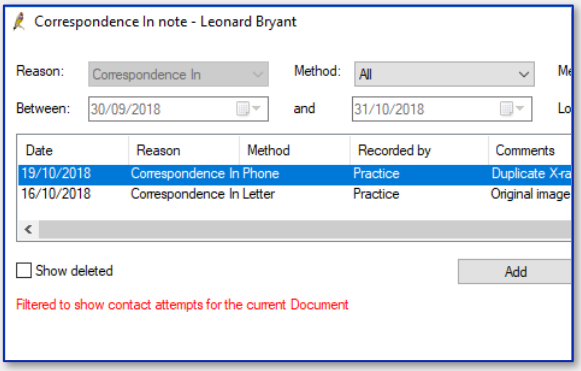
Bp Comms — Contact Notes

Bp Learning

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.





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.

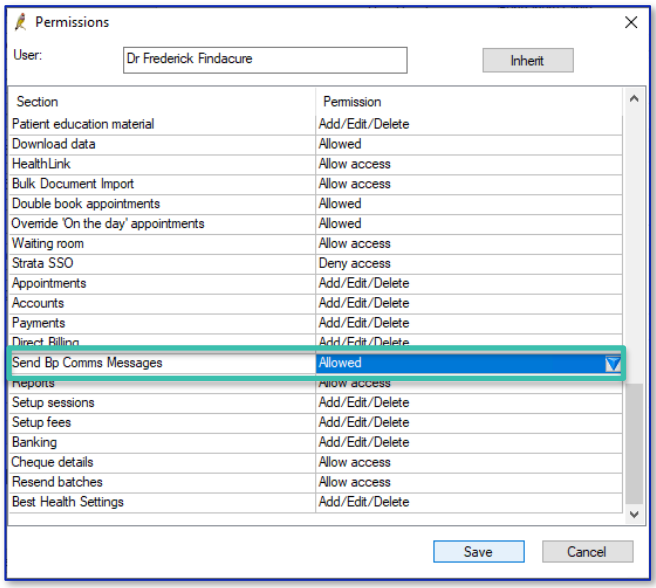
Who can view and edit contact notes?

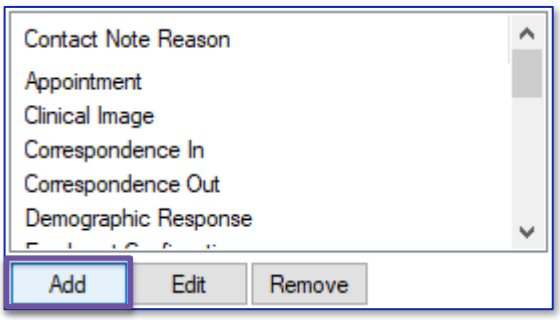
Any user with the permission **Send Bp Comms Messages** can add and view 'General' contact notes from the patient list.

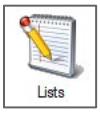
However, to view or edit contact notes elsewhere in Bp Premier, the user **also** needs the corresponding permission for that function.

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'.







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

Setup > **Configuration** > **Lists** > **Add**

Bp Premier