

# Bp Comms — Contact Notes



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## 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:

- The target patient
- Who actually answered the contact attempt
- The contact reason, method (SMS/Phone/Letter), and success status
- 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

## 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 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.

**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 consent	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

**Correspondence In note - Leonard Bryant**

Reason: **Correspondence In** Method: **All**

Between: 30/09/2018 and 31/10/2018

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

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.

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'.

**Permissions**

User: **Dr Frederick Findacure** Inherit

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
<b>Send Bp Comms Messages</b>	<b>Allowed</b>
Reports	Allow access
Setup sessions	Add/Edit/Delete
Setup fees	Add/Edit/Delete
Banking	Add/Edit/Delete
Cheque details	Allow access
Resend batches	Allow access
Best Health Settings	Add/Edit/Delete

Save Cancel

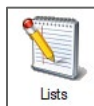
## Contact Note Reason

Appointment  
Clinical Image  
Correspondence In  
Correspondence Out  
Demographic Response

Add

Edit

Remove



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

**Setup > Configuration > Lists > Add**



Where can you view contact notes?

Who can view and edit contact notes?