

D2D 4.0 Phone Encounters: process for capturing phone encounter data in Telus PS using custom forms and custom queries

1. [Review the introductory video posted on Trello](#) about using custom forms and associated queries for tracking phone encounters in PS.
2. **Have a look at the screenshots below of 2 custom forms** (and a special toolbar) that can be used to document phone encounters with patients: one form is for IHPs and one is for Doctors. Discuss these tools with your clinicians, addressing any training and/or work flow changes that might need to take place to implement and use these tools.
3. **Download the custom forms** (.cfm files) from the AFHTO website or [from Trello](#) to your desktop and import into your EMR.
4. The data from the forms can be easily accessed using the [custom queries](#) that have been promoted through the [Telus PS CoP](#). Have a look at the query text posted on Trello. If you don't have these queries installed, please let us know and we will arrange a time with Telus to help you get them installed.

These tools have been developed and shared by East Wellington FHT. They have had good uptake and positive feedback from the docs and IHPs and they are pleased that the data is demonstrating that they are indeed dedicating a significant and previously undocumented amount of time providing care to patients by phone.

For more information or to get connected to Trello – please contact [Marg Leyland](#)

Custom Form for IHPS

User Hope Latam
Patient Encounter Tracker - EWFHT v5.4
Reset Form

Inter-Professional Health Provider (IHP)

<input type="checkbox"/> Chiropracist/Podiatrist	<input type="checkbox"/> Kinesiologist	<input type="checkbox"/> Outreach Worker	<input type="checkbox"/> Physician Assistant	<input type="checkbox"/> RPN
<input checked="" type="checkbox"/> Dietitian	<input type="checkbox"/> NP	<input type="checkbox"/> Pharmacist	<input type="checkbox"/> SMHW	<input type="checkbox"/> Other IHP
<input type="checkbox"/> Health Promoter	<input type="checkbox"/> Occupational Therapist	<input type="checkbox"/> Psychologist	<input type="checkbox"/> RN	

Type of Contact

Email/Internet
 Home visit
 Lab
 Office visit
 OTN
 Telephone
 Other

Telephone Status

Spoke to patient
 Spoke to caregiver
 Spoke to 3rd party
 Left a message
 Other

Initial/Follow-up Encounter

Initial
 Follow-up
 Not applicable

Post Discharge

Yes
 No

Clinic Specific Program /Service

Hypertension ▼

Primary Presenting Health Concern

 ▼

Procedure(s)

Follow-up Plan

Discharge
 Returning for follow-up
 Not applicable

Direct Patient Care Time

Encounter Time (min)	20		0	5	10	15	20	30	45	60
	+									
Non-Encounter Time (min)	0		0	5	10	15	20	30	45	60

Comments

4:17PM

Custom Form for Physicians

Completing the form only involves a few extra clicks for the docs and it has a few specially coded features:

- The form responds to user input by only displaying information that is relevant to the selections that are made.
- The 'Validate and Add Clinical Note to Chart' button checks that all required entries have been made and gives the user specific feedback if not. It also creates a new chart note containing the text that is typed into the 'Clinical Notes' box so that the doc doesn't have to enter anything twice.

Doctor Phone Call Tracker - DPT

File

User Kevin Samson Doctor's Phone Call Tracker

Communication with

Patient Pharmacy CCAC Hospital/Institution
 Patient Advocate Public Health Specialist Other

Comments

No Answer Message Left

Main Reason for Phone Call

Acute Care Medication Information Preventive Care
 Appointment Notes/Forms Referrals
 Chronic Disease Management Palliative Care Results/Reports
 Follow-Up Prescription Other

Initial Post Discharge Contact

Yes No

Reason for Admission

Stroke COPD Pneumonia CHF Diabetes Cardiac Gastrointestinal
 Other

Days Since Discharge 4 1 2 3 4 5 6 7 8 9 10 11 12 13 14

Clinical Notes

Time Spent (min) 10 1 2 3 4 5 10 15 20 30 45 60

8:50PM ***Please click the button to validate the form before finishing:** **Validate & Add Clinical Note to Chart**

Discard Add to Notes

Toolbar

A special toolbar application has been created as well - so that all the doc has to do to pull up the form is click the 'Phone' button that's already on the patient chart screen as shown below:

The screenshot displays a patient chart interface with a menu bar at the top containing 'File', 'Edit', 'Style', 'Settings', 'Patient', 'View', 'Data', 'Letter', and 'OLIS'. Below the menu bar is the 'Explorer, Dora' section, which lists medical history items: 'Alzheimer's disease father', 'Chicken pox (or Varicella immune)', 'obesi', and 'Alcohol abuse'. A large light blue area follows, containing a search bar with the text '? Food: Tree Nuts' and a dropdown menu showing 'Fluviral' and 'Quadracel (PF)'. Below this is a section with red text reminders: 'Due for FOBT', 'Flu shot reminder - general population', 'Lifestyle Counseling High BMI', 'HPV vaccine Gardasil recommended', 'Immunizations need to be checked manually due to data import issues', and 'Men-C-C reminder'. An 'Email Consent' status bar shows 'Granted - Sep 28, 2015'. At the bottom, a toolbar contains buttons for 'EWFHT Tools', 'Workshops', 'In-house Referrals', 'PROB', 'HPH', 'FH', 'Opioid Calculator', 'Email', and 'Phone'. The 'Phone' button is highlighted with a red rectangle. Below the toolbar is a 'HealthLink' section with a 'View Coordinated Care Plan' link. The footer shows the date 'Sep 20, 2015', the text 'Reminder Response', and the location 'KS'.