Sample shortcuts for telephone and refill encounters

*One way to work more efficiently is to create standard messaging, also known as SmartPhrases, in your electronic health record (EHR) to help the team quickly categorize inbasket messages. The shortcut examples provided here are specific to two of the most common types of messages received: telephone calls and refill requests. These messages can initially be fielded by the patient services representatives on your team. Team members may find it useful to have a copy of this on hand at their desk as a guide.*

*Note that the practice that provided this example, Bellin Health, uses EPIC.\* You may be able to modify your system to use similar SmartPhrases. Work with your EHR vendor to explore options and implement changes.*

*Not all phone encounters in the example fit into these categories. Those that don’t will have to be documented with free text.*

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**Patient services representative: Telephone encounter workflow**

1. Identify patient correctly in EHR and open a Telephone Encounter.
2. Identify provider & department.
3. Obtain patient call back information.
4. Identify specific reason for call (e.g., “abdominal pain,” not “pain”). Writing “question” as a reason for call is not sufficient. Please be as specific as possible to help your team members answer calls promptly.
5. Enter the correct SmartPhrase in the **Documentation** tab. The SmartPhrase is based on the reason for call.
6. **Symptom call**
7. .tesymptom
8. Complete **ALL** (\*) information or SmartPhrases using F2 to toggle from question to question

**Example of SmartPhrase for symptom call:**

**SYMPTOM:**

Primary symptom: \*\*\*

Length of time symptom present: \*\*\*

**Please schedule appointment if length of symptom is greater than one week.**

Previously seen in the last two weeks for this symptom: {YES NO:22853}

Okay to leave message: {YES NO:22853}

**Please confirm and update pharmacy.**

1. Use Routing tab to select the appropriate team pool or individual
2. Click “X” on Patient tab to send message
3. **DO NOT USE “CLOSE ENCOUNTER” TAB**
4. **Orders call** (lab, mammo, bone density, physical/occupational therapy, imaging, etc.)
	1. .teorders
	2. Complete **ALL** (\*) information or SmartPhrases using F2 to toggle from question to question

**Example of SmartPhrase for order call:**

**ORDERS:**

Type of order (e.g., lab, imaging): \*\*\*

Reason for order: \*\*\*

Scheduling preference: {YES NO:22853}

Location preference: {YES NO:22853}

Okay to leave message: {YES NO:22853}

Non-clinic address and fax number: {NA/WILDCARD:27363}

* 1. Use Routing tab to select the appropriate team pool or individual
	2. Click “X” on Patient tab to send message
	3. **DO NOT USE “CLOSE ENCOUNTER” TAB**
1. **Referral call**
2. .tereferral
3. Complete **ALL** (\*) information or SmartPhrases using F2 to toggle from questions to question

**Example of SmartPhrase for referral call**

**REFERRAL:**

Type of referral requested: \*\*\*

Reason for referral: \*\*\*

Previously seen by care team provider for this reason: {YES NO:22853}

Scheduling preference: {YES NO:22853}

Specific Provider preference: {YES NO:22853}

Okay to leave message: {YES NO:22853}

Non-clinic address and fax number: {NA/WILDCARD:27363}

1. Use Routing tab to select the appropriate team pool or individual
2. Click “X” on Patient tab to send message
3. **DO NOT USE “CLOSE ENCOUNTER” TAB**
4. **Medication question**
5. .temedicationquestion
6. Complete **ALL** (\*) information or SmartPhrases using F2 to toggle from questions to question

**Example of SmartPhrase for medication question**

**MEDICATION QUESTION:**

Medication name and dose: \*\*\*

Patient question or concern: \*\*\*

Okay to leave message: {YES NO:33537}

**Please confirm and update pharmacy preference.**

1. Use Routing tab to select the appropriate team pool or individual
2. Click “X” on Patient tab to send message
3. **DO NOT USE “CLOSE ENCOUNTER” TAB**
4. **Prior authorization call**
5. .tepriorauth
6. Complete **ALL** (\*) information or SmartPhrases using F2 to toggle from question to question

**Example of SmartPhrase for prior authorization call**

Type of prior authorization: {bln prior auth choices:35769}

Reason for prior authorization: \*\*\*

Requestor and contact number: \*\*\*

Insurance company phone number: \*\*\*

Patient ID number: \*\*\*

Additional comment: \*\*\*

1. Use Routing tab to select the appropriate team pool or individual
2. Click “X” on Patient tab to send message
3. **DO NOT USE “CLOSE ENCOUNTER” TAB**
4. **Forms dropped off by a patient**
5. .teforms
6. Complete **ALL** (\*) information or SmartPhrases using F2 to toggle from question to question

**Example of SmartPhrase for forms**

Type of form requested: {Type of Form Requested: 37753}

Requested date for completion: \*\*\*

Special instructions: \*\*\*

Upon completion: {Mail, Fax, Pick Up: 37756}

Okay to leave a message {YES NO:33537}

1. Use Routing tab to select the appropriate team pool or individual
2. Click “X” on Patient tab to send message
3. **DO NOT USE “CLOSE ENCOUNTER” TAB**
4. **Results**
5. .teresults
6. Complete **ALL** (\*) information or SmartPhrases using F2 to toggle from question to question

**Example of SmartPhrase for Results call:**

Type of result (e.g., lab, imaging): \*\*\*

Location/facility where test was performed: \*\*\*

Date test was performed: \*\*\*

Okay to leave message: {YES NO:26005}

1. Use Routing tab to select the appropriate team pool or individual
2. Click “X” on patient tab to send message
3. **DO NOT USE “CLOSE ENCOUNTER” TAB**

**Patient service representative: Refill encounter workflow**

1. Identify patient correctly in EHR and open a Refill Encounter.
2. Identify provider & department.
3. Obtain patient call back information.
4. Select Medication to be refilled from the **Meds & Orders** tab.
5. Click **Reorder** behind the requested medications.
6. Click **Pend all**.
7. Click **Documentation**.Enter any additional information that would be helpful to the team. For example, note if the medication the patient is requesting is not listed in the Meds & Orders tab. Keep in mind anything entered here can appear on the patient’s record.
8. Select/confirm correct pharmacy.
9. Use Routing tab to select the appropriate team pool or individual.
10. Click “X” on Patient tab to send message
11. **DO NOT USE “CLOSE ENCOUNTER” TAB**

Example provided courtesy of Bellin Health.

Source: *AMA. Practice transformation series: Inbasket management. 2017.*