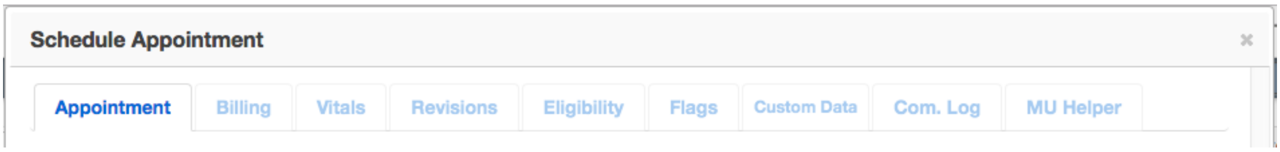
How do I log a phone call with a patient?

07/08/2024 7:59 pm EDT

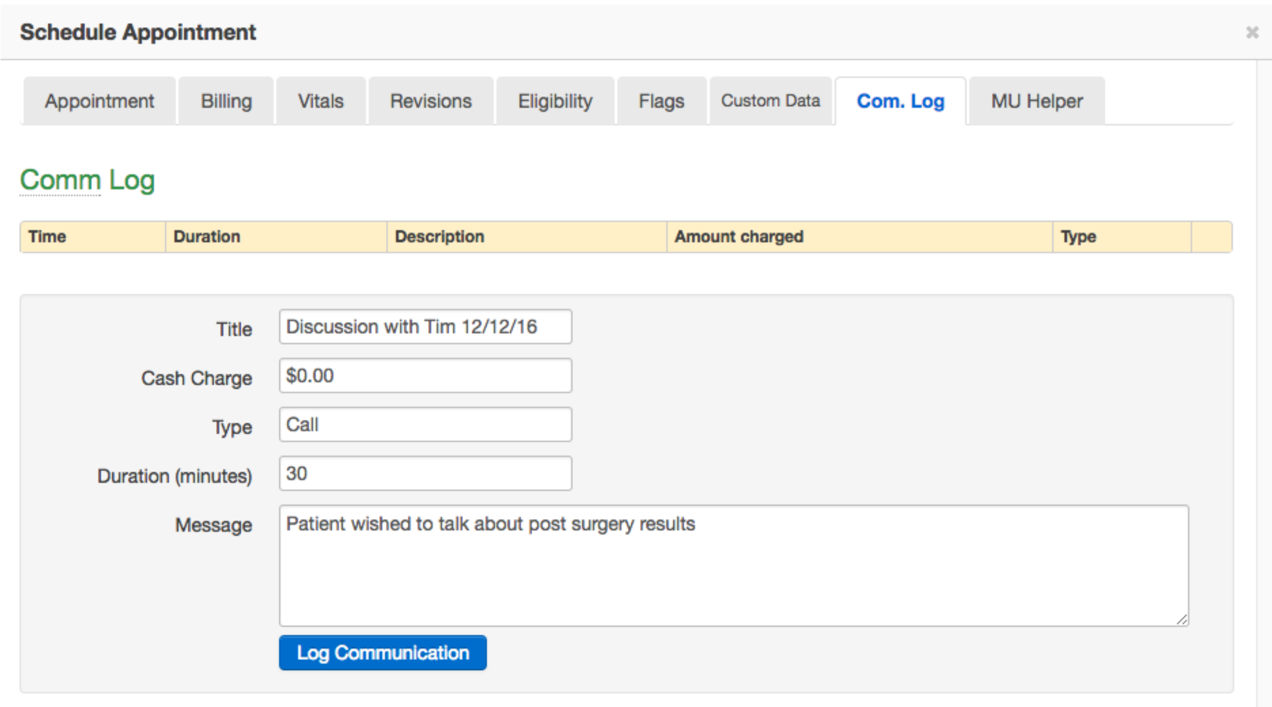
If you have a phone conversation with a patient, you may log the call to your patient's chart. There are two ways of logging phone calls: within the appointment window and directly from your patient's chart.

Logging Communications with the Appointment Window

Using the Appointment window is a convenient way of logging phone calls if you frequently visit the calendar page. In your calendar, create a new appointment or click on an existing appointment for the patient you wish to log your phone call with. The Schedule Appointment popup should open. It is a best practice that this appointment should match the time the call took place. If this appointment was not saved, you'd notice that the other tabs will not be available for you to select.

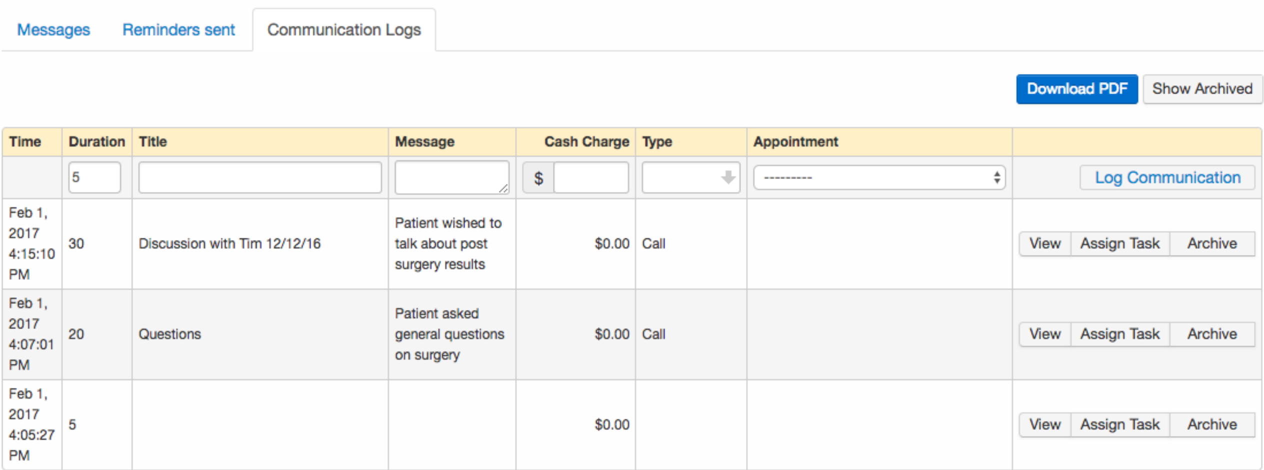


Once you click **Save**, all the appointment tabs will be available for selection. Select the **Com. Log** tab in the Schedule Appointment popup. Here you can document your phone call as well as add a cash charge to the patient. Once you select **Log Communication** the call will be logged to your patient's chart and the charge added to the patient balance.

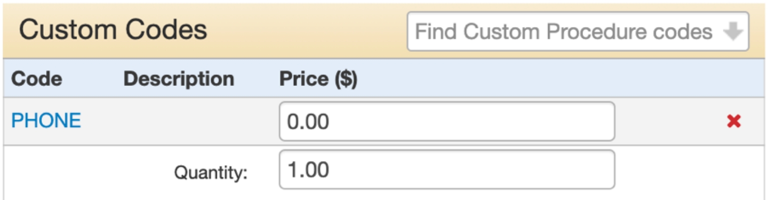


Logging Communications in Your Patient Chart

You can also log a phone call from within the patient's chart. Open up a patient and navigate to the **Communication** page on the left side of the screen:



Note: Logging communication in the appointment window or associating an appointment with a communication log in the patient's chart will add a custom code called **PHONE** to the billing section of the appointment. This will also appear in the code section on the clinical note. You can click the **X** next to the code to remove it from the billing.

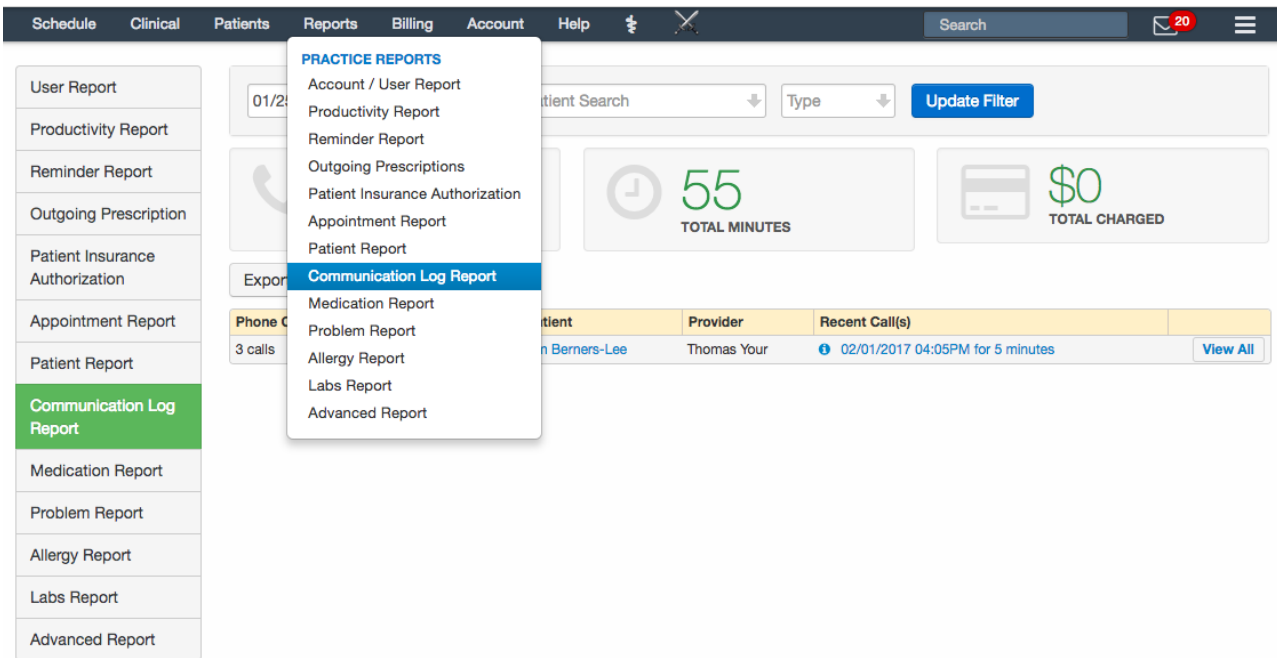


Plan:

Type	Code	Modifiers	Quantity	Description
CUSTOM	PHONE		1.00 UN	

Viewing Your Communication Logs

You can view a history of phone calls for a specific patient from within their chart, and to do more analytical reporting you can go to **Reports** > **Communication Log Report**.



If you wish to edit an existing communication, you need to access the appointment the communication log refers to, access the appointment the log is associated with, and select **Com. Log**, then click the **Edit** button next to the log.