Telephone Encounters in ECW 11e

Telephone encounters are used to address patient issues outside of an appointment: prescription refills, phone calls with patients, some communications with other providers, documentation of attempts to contact the patient for some reason (often used by GI when trying to book a follow-up colonoscopy) – and whatever else makes sense to you to document outside of a face-to-face visit.

You can start a new telephone encounter (TE) from the “T” jellybean or from the Hub. When started by clicking ON the “T”, no patient is selected, and you must search to find the patient to associate with the TE.

If started from the Hub, the patient data is automatically associated with the new telephone encounter.

Please always add a reason.

Otherwise, future users will have no idea what this telephone encounter was addressing.
Some other components of a telephone encounter include:

- the navigation bar (surrounded by the purple box)
- a spot to enter the name of the caller (if appropriate)
- the two arrows at the top right (surrounded by red) that will hide/show the right panel (right/left facing arrows) and top panel (up/down facing arrows)
- the various navigation tabs within the TE (surrounded by the yellow box)
- the “Message” and “Action Taken” boxes for text
- the ellipsis (surrounded by a red box) next to the “Assigned To” box – to search for users to whom you want to assign this telephone encounter (the green arrow next to the ellipsis provides names of other users who have accessed this telephone encounter)
- the option to make this a “High Priority” telephone encounter (surrounded in red under the “Reason” box) – this will turn the recipients “T” jellybean red

A common reason for a TE is to refill a prescription. Click on the “Rx” tab, and then refill from either the right panel or by clicking on “Current Rx” and choosing the refill as you would from a progress note.
One problem that can arise when covering other providers: Since I was not selected in the “Provider” box (Sam Willis was the original provider in this TE), I was not able to send this prescription – I had to change the provider to myself.

In this example, I refilled allopurinol for Six Pcaretest while Dr. Willis was on vacation. I assigned the telephone encounter to him – he can review this and address it upon his return.
Another common reason for a telephone encounter is to order a lab test or diagnostic image. Clicking on the “Virtual Visit” tab opens a typical progress note – and anything that can be done in a progress note can be done in a virtual visit, such as choosing assessments and ordering labs/DI.

Please refer to other documents and videos about ordering labs and diagnostic images if you are not familiar with this workflow in a progress note.

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August 26, 2019