Patient Specific Group Communication
Winter 2019 Release

(Updated for Spring 2019 Release)

Contents

Introduction

IntelleChartPRO now supports sending patient specific messages to predefined groups of staff and/or to multiple individual users. Once the message is received, any recipient may assign themselves to the message allowing them to take ownership of the action item requested in the message.

This document describes the Winter 2019 Release of this feature and represents the first release of this feature.

Feedback from this release will be incorporated with other enhancements for the next update.

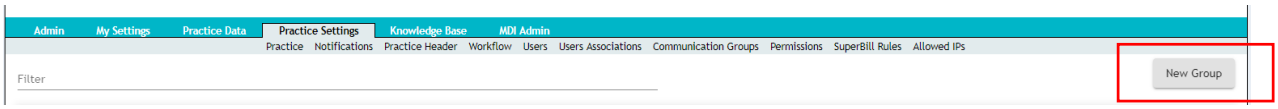
As more enhancements are made, this user guide will be updated.

Practice Admin Setup

Group Definition

To utilize the Group Communication feature of patient messaging, you must define the required groups in the Practice Admin tool. There is a new screen in Practice Admin within the “Practice Settings” menu called “Communication Groups”.

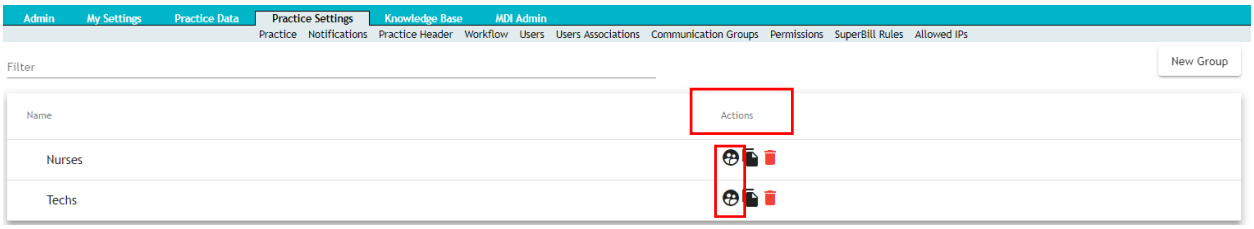
To create a new group, Click the “New Group” command button on the upper right.



You can give the group any name you wish and click “Create” to save the group. The next step will be to assign members to this group.

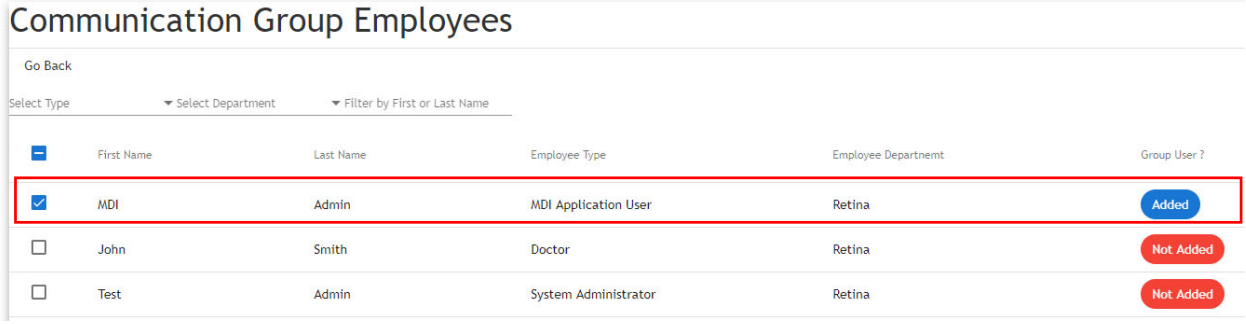
Group Membership

Once you have named your group, you can now assign staff members to this group. From the main Group listing page, access the Action bar within the row of the group you wish to modify. The first icon lets you define the membership to the group. Click that icon to begin the assignment.

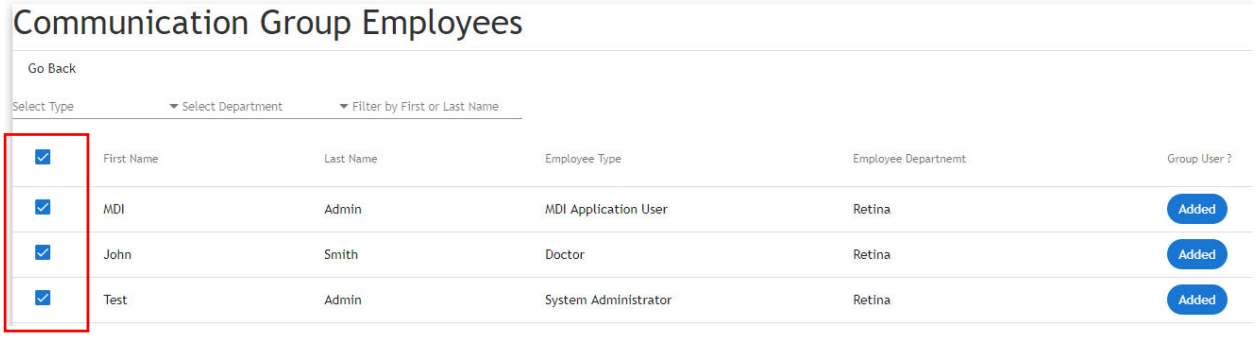


From the Communication Group Employees screen, you can assign members to this group in several ways.

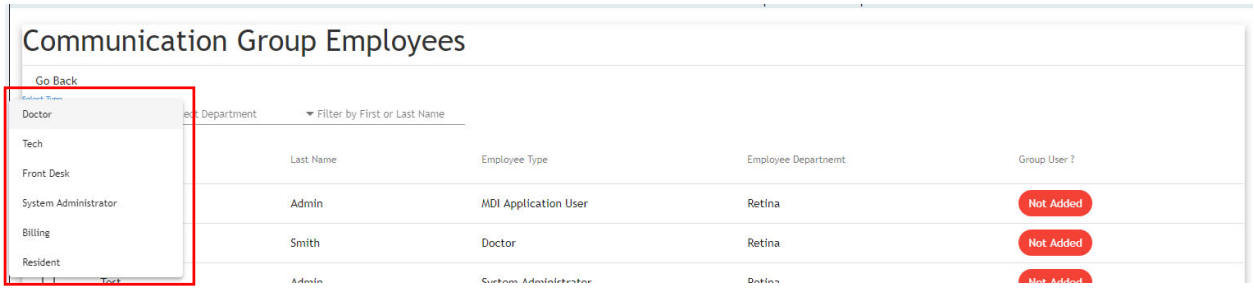
1. To assign individual employees to this group, simply check off the individual check box next to the name of the employee you wish to assign. You will then see the status change from "Not Added" to "Added."

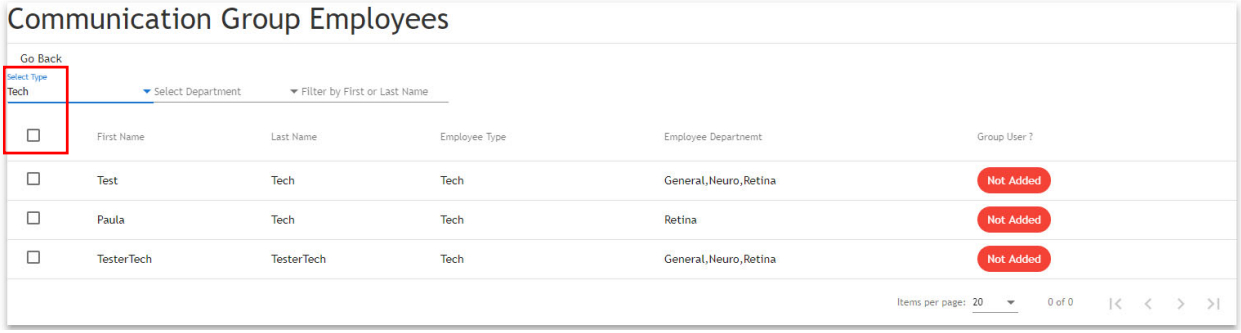


2. To assign all listed employees to this group, check off the first check box within the header row. This will automatically check off every individual check box below.

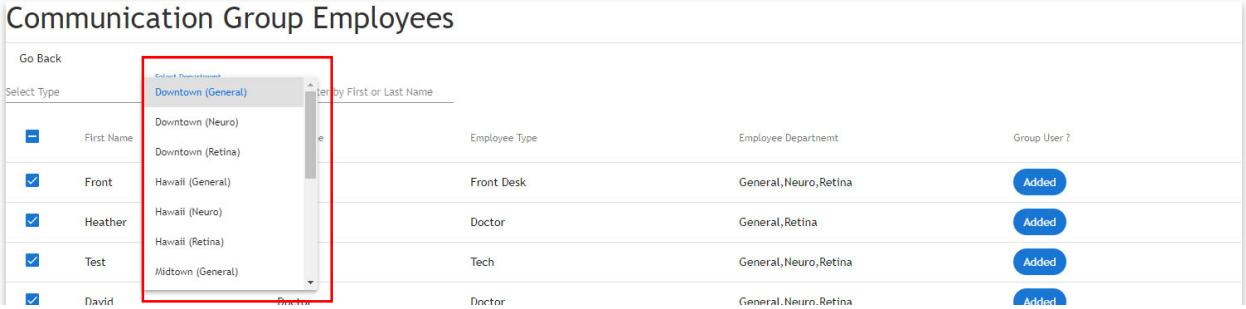


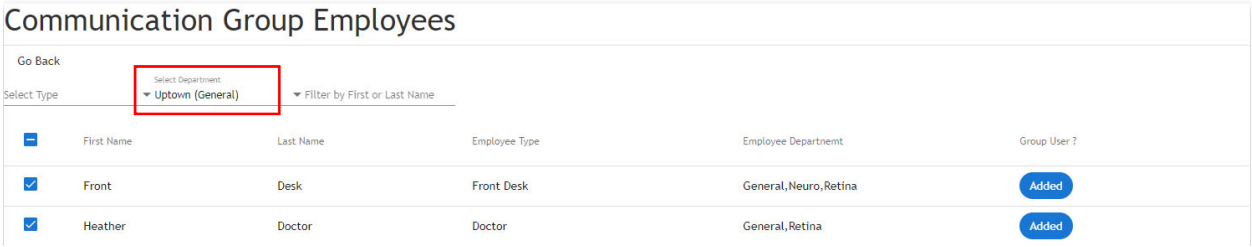
3. To assign employees based on Employee type, use the first drop down menu at the top for "Type" and select the desired Employee type. Once the type is selected the system will display all employees associated with that type. You can then select individual employees or select the main check box on the header row to choose all employees of that type.



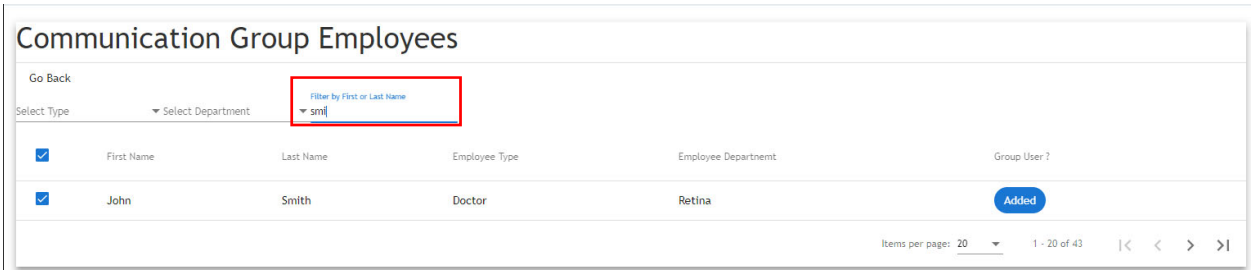


4. If your practice uses departments, to assign employees based on department, use the second drop down menu at the top for "Department" and select the desired Department. Once the department is selected, the system will display all employees associated with that department. You can then select individual employees or select the main check box on the header row to choose all employees in that department.





5. If you only wish to add an individual employee to a group and you know the specific name of that person, you can type the first or last name to filter on that employee and check off their individual check box. Use the "Filter by First or Last Name" text box to perform this step.



Copy Group

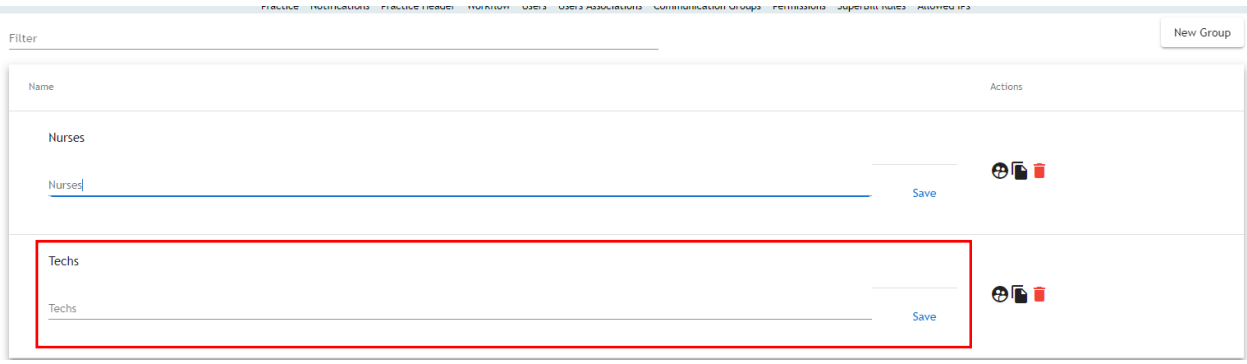
If you wish to create a new group based off an existing group, use the Copy command from the Action toolbar. Once you identify the group you wish to copy from, click the "Copy Communication Group" button in the middle. Once you choose a new name and copy the group, a new group with the chosen name will be created containing all the members of the copied group. You can then add or remove members as necessary within this new group.

Delete Group

To delete an existing group, click the red trash can icon on the Action toolbar for the group you wish to delete. Please note this will remove the group so that you can not send new messages to this group, but any existing messages will still exist as being sent to this group.

Change Group Name

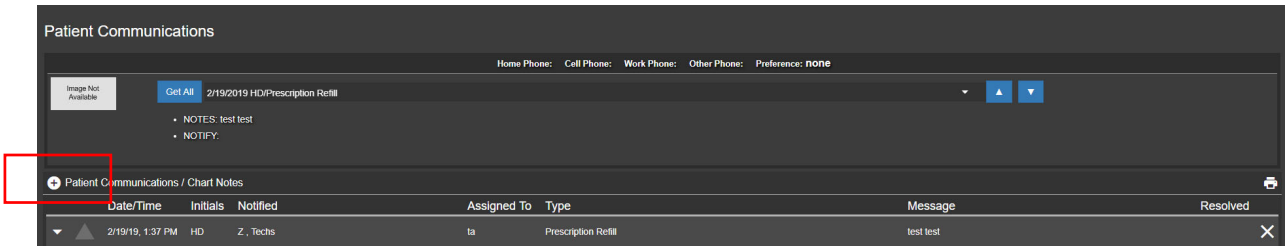
To edit the name of an existing group, simply click on the name of the group you wish to edit. An edit field will appear below allowing you to edit the name. When finished editing, click the Save button.



Messaging in Patient Chart

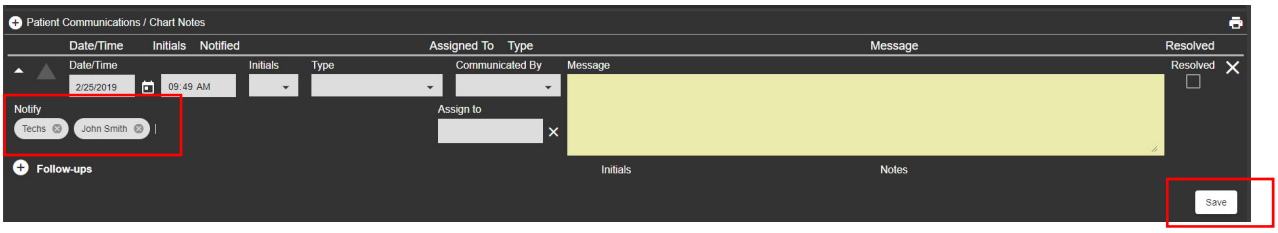
Message Initiation

To initiate a new message from the patient's chart, access the Patient Communication menu and click the plus sign at the top left to open a blank message screen.



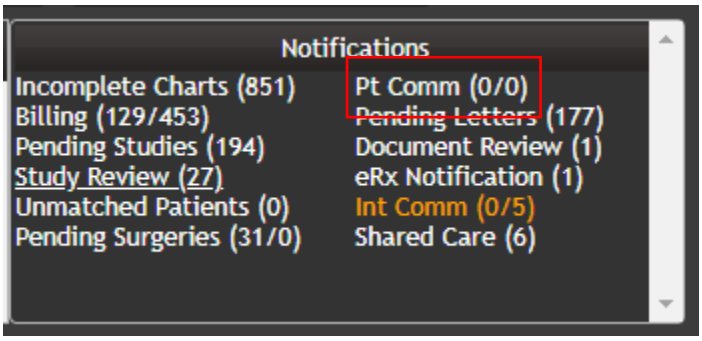
Once you have initiated a new message, enter the usual data, such as Initials, Type, Communicated By and Message. You will now notice the Notify drop-down menu has changed to allow multiple selections. This means you can now choose multiple individual staff from this menu. Any groups previously defined in the Practice Admin will also appear in this drop-down menu. You can choose any combination of groups and/or individuals to notify.

Each selection will appear as a bubble. To remove a selection, click the X associated with the bubble you wish to remove. When you are finished composing your message, click Save at the bottom right of the message.



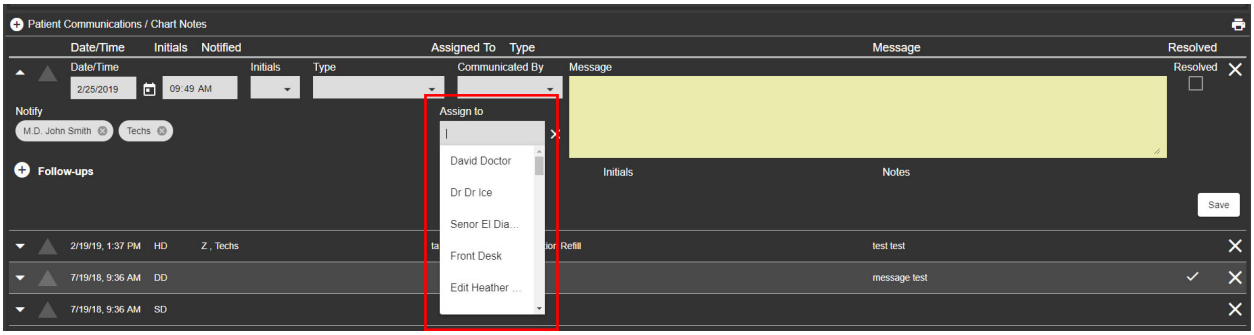
Message Distribution

Once the message is successfully saved, every member of each group selected, along with any individual staff selected, will receive notification of this message in the Pt Comm folder of the workflow. In the Notification pane of the workflow screen, you will now see 2 numbers associated with Pt Comm messages. The first number indicates the number of messages specifically sent to, or assigned to, the individual logged in user. The second number indicates the number of messages sent to groups for which this logged in user is a member.



Message Assignment

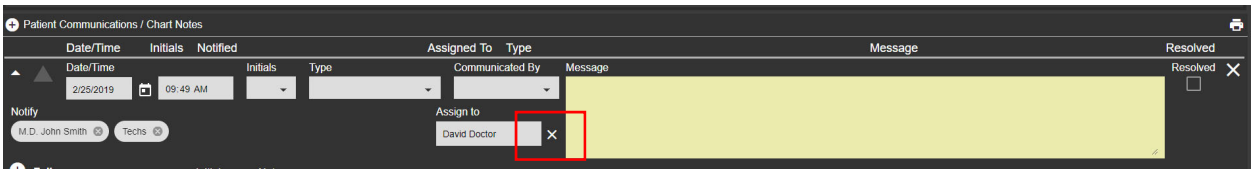
Once all staff are notified of the message, any individual staff member can enter the patient chart and assign themselves as owner of the message. This will inform other members of the group that this individual person is working on the action item requested in the message. To assign yourself to a message, enter the patient chart and go back to the Patient Communication screen. Open the desired message and choose the correct entry from the "Assign To" drop down menu. Once selected, click the Save button on the lower right corner of the message.



You can also repeat these steps to reassign the message to another staff, if necessary.

Message Cancel Assignment

If a previously assigned staff is unable to continue working on the action item, this user can cancel their assignment and place the message back to the group for further assignment. The current assignee can enter the patient chart, go to the Patient Communication screen and open the desired message. Next to the selected individual in the "Assign To" drop down menu is an X. Clicking this X will remove the assignment from this message.



Message Resolution, Follow Up, etc.

All other features of Patient Communication remain unchanged with Group Communication. The resolution of a message remains the same and adding and removing Follow Ups also remain the same. Click the white plus sign to add a new Follow Up and click the white X to delete the message or any Follow Up items. This white X replaces the previous red "Delete" command button. If any Follow Up items are edited, removed or added, you still must click the Save button on the lower right corner to save your changes.

If you accidentally delete a Follow Up item, you can still recover it, if you do not click the Save command button on the lower right corner of the message. Simply exit the patient chart and re-enter without saving to recover the removed Follow Up item.