Sending a Letter in Communications

Ambulatory | Clinician

Sending Letters in Communications

In Epic, the **Communications** section is used to send letters to patients, providers and other clinicians as well as creating a work excuse or school excuse letter for the patient. Letters can be created within an Encounter or outside of a scheduled visit.

Send a Letter Using Communications Within an Encounter

- 1. Click the **Wrap Up** activity while in an **Encounter**.
- 2. Click **Communications** in the table of contents.
- 3. Click the **New Communication** button.

←→ Chart Review Synopsis	Results Review Episode Flowsheets Plan of Care Wrap-Up
Wrap-Up	
Patient Instructions Communica	ations After Visit Summary
Communications	↑ ↓
♣ New Communication	쯔 ₊ Send <u>A</u> ll
I≪I Restore ✓ Close	↑ Previous ↓ Next

4. Click the corresponding speed button to add a Recipient.

Communications											t,	ŧ
Search all contacts 🛉 Add	1 PCP 2 Refe	rring <u>3</u> Patient	4 Print For Patient	<u>5</u> Care Team	6 OB Providers	7 Onc Ref Prv	8 Previous	<u>9</u> Last	Free Text			
> To: Diana McQueenie, MD	(PCP) 🖳 🗙											
Copy Letter Other												

Hint: You can choose multiple speed buttons for Recipient.

- Type name in **Search all contacts** field or use **+Add** to search for **Recipients** if not a speed button.
- Use **Free Text** speed button to add a recipient or outside entity that is not found in the database. You must know the fax number, address, or phone number of the recipient.
- Any other selected recipients will be cc'd.
- 5. Select the desired **Letter template**.

Sending a Letter in Communications

Ambulatory | Clinician

Letter T	emplate Lookup	
Letter Templates ♦ Fayorites		
Match: therapy		
ID Template 50010001 THRPY TO EXTERNAL PROVIDER, PLAN OF	Notes CARE	
Default	Ma <u>k</u> e Tab Default	Add to Favorites
		Accept <u>C</u> ancel

Hint: There are speed buttons for commonly used Letter Templates.

• Use the **Other** speed button to search for a template not listed.

Hint: You can also create your own Letter template. <u>See details for creating a blank Letter</u> <u>template in steps 9 and 10 below</u>.

- Review and edit letter using the inner letter scroll bar to scroll down.
 Hint: Click F2 to follow through your Note template and complete Wildcard (***) variables.
- 7. Scroll down using the activity (outer) scroll bar.
- Click Send Now to send letter based on Recipient communication mode.
 Hint: If you are sending a letter to a patient who is enrolled in eCare (MyChart), clicking Send will send the letter via eCare (MyChart).

Preview Send Pend Send Now Send at Sign Visit Sendel	I					
		D Preview	\land Pen <u>d</u>	⊠ Se <u>n</u> d Now	Send at Sign Visit	X Cancel

Route Letter to Support Staff to Send

- 1. Click check box in front of **Route draft to**: delegate sending of letter to support staff for finalization.
- Type the name of the Support Staff Pool in the Route draft to: field.
 Hint: Check with your clinic manager to find out what pool handles outgoing mail for your clinic

	Route draft to:
3.	Click either Route at Sign Visit or Route Now .

	D Preview	n Pend	■< <u>R</u> oute Now	Route at Sign Visit	X Cancel
--	-----------	--------	----------------------	---------------------	----------

Sending a Letter in Communications

Ambulatory | Clinician

Send a Letter Using Communications Outside of a Scheduled Visit

1. Click Encounter on the **Global toolbar**.



2. The **Patient Lookup** window opens, enter key identifiers to find your patient and click **Find Patient**.

		Patient Lookup		×
Patient Search Red	cent Patients			
⑦ Search for yo	ur patient using as much information as p	oossible.		
Name/MRN:		EPI ID:		
SSN:		Sex:	9	
Birth Date:	i i	ZIP Code:		
Phone:		Email:		
Use sounds-like	My patients			
New	Eind Patient Clear		Accept Cancel	

- 3. The **Patient Select** window opens, confirm the correct patient is highlighted and click **Select**.
- 4. The Encounter Selection window opens, click New.

elected record	: Agate, Nadir-NURS	SE				
Contact Date	Contact Type	Provider	Department		Status	
03/28/2021	Appointment	Agate, Terry-Nurse, RN	HMC FAMILY MEDI	CINE CLINIC 20	Arrived	
Marrie	Search >>		More	Accent		Cancel
	Sparch 22			ACCEDE		Cancel

5. The **New Encounter** window opens, in the **Type** field, type "letter".

			And the second sec	
<u>D</u> ate:	3/28/2021	Ċ		
Type:	letter	,o		
Provider:	Letter (Out)	00,191 - 2-	<u>P</u> CP	~
D <u>e</u> partment:	HMC FAMILY MEDI	CINE CLI 🔎		
	A	ccept	<u>C</u> ancel	

Sending a Letter in Communications

Ambulatory | Clinician

- 6. Confirm the **Provider** and **Department** are correct and click **Accept**.
- 7. The **Communications Activity** opens and click **New Communication**.

	Dhart Revi	MINDs	Synopsis	Results	(0	Verify	Orders	- &
Commu	inications							?
⊠C	ommunications 🖉	7						
+ Ng	ew Communication 🖋							Send <u>A</u> ll

8. The Communications window opens, select the **Recipient** by clicking the speed buttons or search for a contact in the **Search all contacts** field.

Communications			?
Communication:	5		
Search all contacts	Add 1 PCP 2 Referring	<u>3</u> Patient <u>4</u> Print For Patient <u>5</u> Care Team	
6 OB Providers 7 Onc R	ef Prv 8 Previous 9 Las	t Free Text	
> To: No recipient set	ected		
Blank	Excuse	Release Restriction Copy Letter Other	
No Show #1	E-Care Sign Up	Referral - Prog Note Only COVID-19 Excuse	
Letter: No letter selec	cted	From: GRAEMITE, TERRY-N	
+ Attach File			
Attachments: No atta	achments		
Wait for results		Wait for transcriptions	
Route draft			
	Su .	Preview ☆ Pend ♀ Send Now ♀ Send at Sign Visit	X Cancel
K Restore		1 Previous	Next

9. Click the **Blank** speed button to open a blank **Note** template to begin creating your Letter.

Sending a Letter in Communications

Ambulatory | Clinician

	_				
Blank	Excuse	Release Restriction	Copy Letter	<u>O</u> ther	
No Show #1	E-Care Sign Up	Referral - Prog Note Only	COVID-19 Excuse	•	
🖹 Letter: Blank 🗙	Fro	om: GRAEMITE, TERRY-N	Reason:	1.5	С
🟠 🖪 🐴 🗩 🤩 🖆	1 Insert SmartTex	: Ē ⇔ ⇒ ₽ €			
Dear Nadir-NURSE A	aate.			^	`
	gate.				

Sincerely.				-	-
Electropically signed l	h				
Electronically signed I Graemite, Terry-NUR	by SE, RN				
Electronically signed I Graemite, Terry-NUR	by SE, RN			~	/
Electronically signed I Graemite, Terry-NUR	by SE, RN	111		>	/
Electronically signed I Graemite, Terry-NUR	by SE, RN	Ш		>	/
Electronically signed I Graemite, Terry-NUR Attach File Attachments: No attach	by SE, RN	Ш		>	~
Electronically signed Graemite, Terry-NUR Attach File Attach ments: No attact Wait for results	by SE, RN chments	III		>	~
Electronically signed I Graemite, Terry-NUR Attach File Attach File Attachments: No attact Wait for results Route draft	by SE, RN chments	III		>	

10. Once you have composed your letter, click **Send Now.** *Hint:* You can view your Letter in **Chart Review** under the **Letter** tab.