

CREATING LETTERS IN INTELLECHARTPRO

The purpose of this training is to create and fax letters directly from IntelleChartPRO

Required Tools for This Training: IntelleChartPRO and referring provider list form your practice management software.

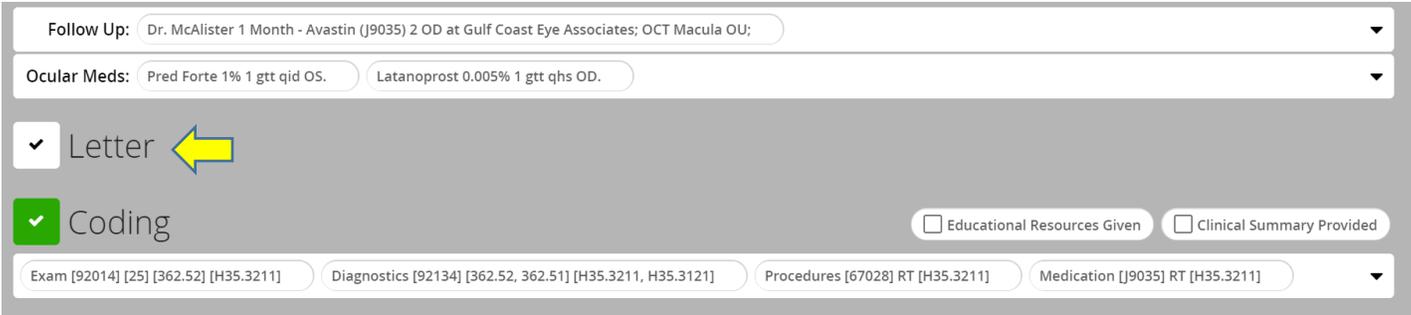
Note: Via the HL7 integration, IntelleChartPRO uses your list of referring providers/contacts in your practice management software to successfully fax a letter. If searching for a doctor results in either not being able to locate the provider or a fax number is missing please add this information into your practice management software and then search again (allowing a few seconds for the interface to refresh). While you can create a contact in IntelleChartPRO, it is recommended that you make any additions or corrections to the contact in your practice management software to avoid duplicate contacts in IntelleChartPRO. Any contacts created in IntelleChartPRO will NOT be sent to your practice management software.

Permission: Depending on the vendor, users may need permissions given to add/edit referring provider contact information in your practice management software.

Preferences: None

1. After completing all clinical data and follow up items select “Letter” to expand this section of the chart.

Remember, letters are pulling information you have already documented in the chart in the exact format entered by the user so be cautious/aware when free typing for clinical, spelling, and grammar accuracy.



The screenshot shows a software interface with several sections:

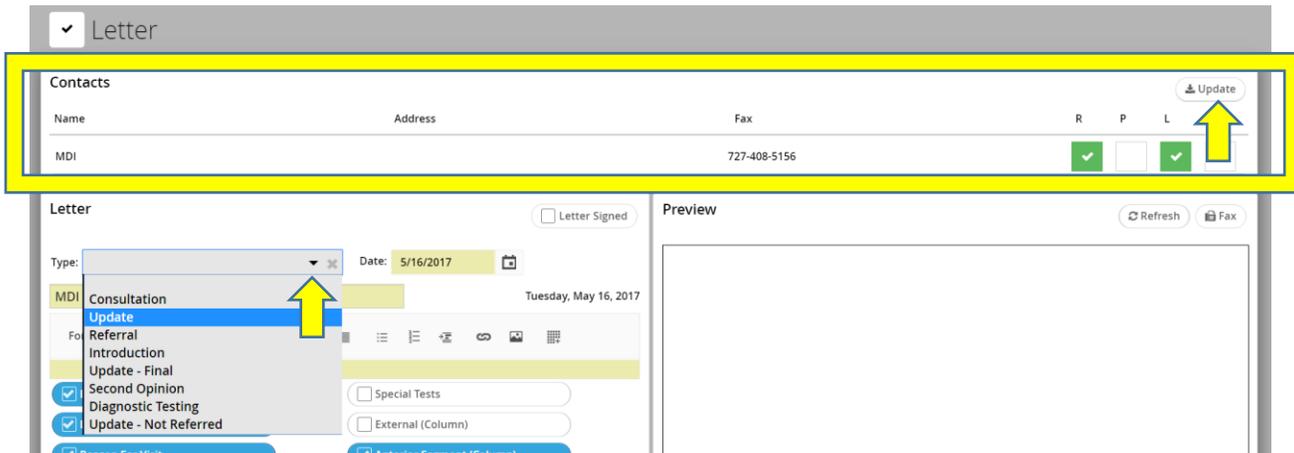
- Follow Up:** A dropdown menu containing the text "Dr. McAlister 1 Month - Avastin (J9035) 2 OD at Gulf Coast Eye Associates; OCT Macula OU;".
- Ocular Meds:** Two input fields containing "Pred Forte 1% 1 gtt qid OS." and "Latanoprost 0.005% 1 gtt qhs OD.".
- Letter:** A section with a checked checkbox and a yellow arrow pointing to it.
- Coding:** A section with a checked checkbox. To its right are two unchecked checkboxes: "Educational Resources Given" and "Clinical Summary Provided".
- Bottom Row:** Four dropdown menus containing codes: "Exam [92014] [25] [362.52] [H35.3211]", "Diagnostics [92134] [362.52, 362.51] [H35.3211, H35.3121]", "Procedures [67028] RT [H35.3211]", and "Medication [J9035] RT [H35.3211]".

2. Under the contacts section you will see a list of patient specific contacts. Users have the capability to change the letter/copy doctors within this screen directly from the contact choices already displayed. To change this information simply check/uncheck the green box indicating the type of contact (P- Primay, R – Referring, L – Letter (who the letter is addressed to); C- Copy).

For “how to” information on adding referring provider/building a contacts list refer to the training documents for “Patient Demographics”.

Choose the type of letter you are creating from the drop-down list.

Reminder: If you have changed the contact section of the demographic tab after already opening the letter, don’t forget to click on “Update” to show the changes to the patient’s contacts.



3. Once the letter type has been selected, a letter will be generated using practice specific report settings. To change what elements are default to be included in your letters please refer to the how to guides for report settings.

Letter

Letter Signed

Type: Update Date: 5/16/2017

MDI Tuesday, May 16, 2017

Format B I U [font settings icons]

Dear Dr. MDI: This is an update on Mdi Doe1234 (02/02/1929). The following is a summary of my findings on 05/16/2017.

- Letter Greeting/Encounter Doctor
- Letter Introduction
- Reason For Visit
- Secondary
- HPI
- Extended HPI
- Ocular Meds (Initial)
- HxSource
- Medical Hx
- Systemic Meds
- Allergies
- Family Hx
- ROS
- VA/IOP
- Refractions

- Special Tests
- External (Column)
- Anterior Segment (Column)
- Gonio (Column)
- Posterior Segment (Column)
- Diagnostic Tests
- Imp/Plan
- Other Discussions
- Procedures (Short)
- Ocular Meds (Plan)
- Study Referrals
- Disposition (Long)
- Letter Closing
- Encounter Images

Format B I U [font settings icons]

Thank you for allowing me to assist in the care of Mdi Doe1234. Please do not hesitate to call me if I may provide any additional information.

Sincerely,
Demo Provider, MD

Preview

Deo P. Monda, M.D.
Jason M. Henda, D.O.
Oren Pines, M.D.
Main: 727-862-3090
Fax: 727-862-3023

Gulf Coast
Retina Center
www.gulfcoastr retina.com

11831 US 19, Suite 106
Port Richey, FL 34668
3001 Eastland Blvd, Suite 1
Clearwater, FL 33761

Demo Provider, MD

Dear Dr. MDI: This is an update on Mdi Doe1234 (02/02/1929). The following is a summary of my findings on 05/16/2017.

Reason For Visit: Follow Up -Neovascular AMD with Active CNV OD.
Secondary: Dry AMD, Early Dry Stage OS. Nuclear Sclerosis OU.

HPI: CC: Blurred Vision OD. Severity: moderate OD. Since Last Visit: worsening OD. Associated Symptoms: distortion OD. Modifying Factors: . Activity Affected: reading OD.
Ocular Meds (Initial): Pred Forte 1% 1 gtt qid OS. Latanoprost 0.005% 1 gtt qhs OD.

VA OD: Dec20/70. PHNI. **OS:** Dec20/30. PH20/25. **IOP:** App **OD:** 15 **OS:** 15 **OS:** 15 **OS:** 15 8:56 PM

Posterior

Right Eye	Left Eye	
• General	No Disc Edema. No Disc Pallor. CDR 0.3.	No Disc Edema. No Disc Pallor. CDR 0.3.
• Nerve	Clear.	Vitreous Syneresis.
• Vitreous	Normal Caliber.	Normal Caliber.
• Retinal Vessels	Drusen. RPE Changes. No Edema. No Subretinal Fluid. No Lipid. Recurrent Subretinal Hemorrhage.	Drusen. RPE Changes. No Edema. No Subretinal Fluid. No Lipid. No Subretinal Hemorrhage.
• Macula	No Holes or Tears. Attached 360 Degrees.	No Holes or Tears. Attached 360 Degrees.
• Periphery		

Imp/Plan:

1. Neovascular AMD with Active CNV OD. Recommended Avastin injection.
2. Dry AMD, Early Dry Stage OS. Advised regular use of Amsler grid. Discussed AREDS supplements, BP Control, and dark leafy green vegetables.
3. Nuclear Sclerosis OU. No cataract surgery recommended at this time.

Other Discussion: Patient understands condition, prognosis and need for follow up care.

Procedures: Avastin (J9035) #1 OD.

Ocular Meds (Final): Pred Forte 1% 1 gtt qid OS. Latanoprost 0.005% 1 gtt qhs OD.

Follow Up: Dr. McAlister 1 Month - Avastin (J9035) 2 OD at Gulf Coast Eye Associates; OCT Macula OU;

Thank you for allowing me to assist in the care of Mdi Doe1234. Please do not hesitate to call me if I may provide any additional information.

Sincerely,

Electronically signed by Demo Provider, MD

Page 1 of 1
Patient: Mdi Doe1234 (DOB 2/2/1929)
Tuesday, May 16, 2017

When a letter is created a visual is placed in the header for future reference showing you the last time a letter was created. In the example below it is showing “U” for update letter created on 5/16/17.

Doe1234, Mdi (Somewhere, AL)		DOB	Referring MDI		PCP	Insurance	
		02/02/1929 (88 y.o.)					⬆ ⚙
Date	VA-OD	VA-OS	OD	OS	L	Procedures/Diagnostics RT	Procedures/Diagnostics LT
5/16/17 DR/15/ Follow Up	Dec20/70 PHNI	Dec20/30 PH20/25	15	15	U	Gonio. Avastin (J9035) #1. OCT Macula.	Gonio. OCT Macula.
5/1/17 DPM/18/ Prepped Chart						Pachy(12). OCT Macula.	Pachy(34). OCT Macula.

Notes Treatment (0) + | Encounter: _____

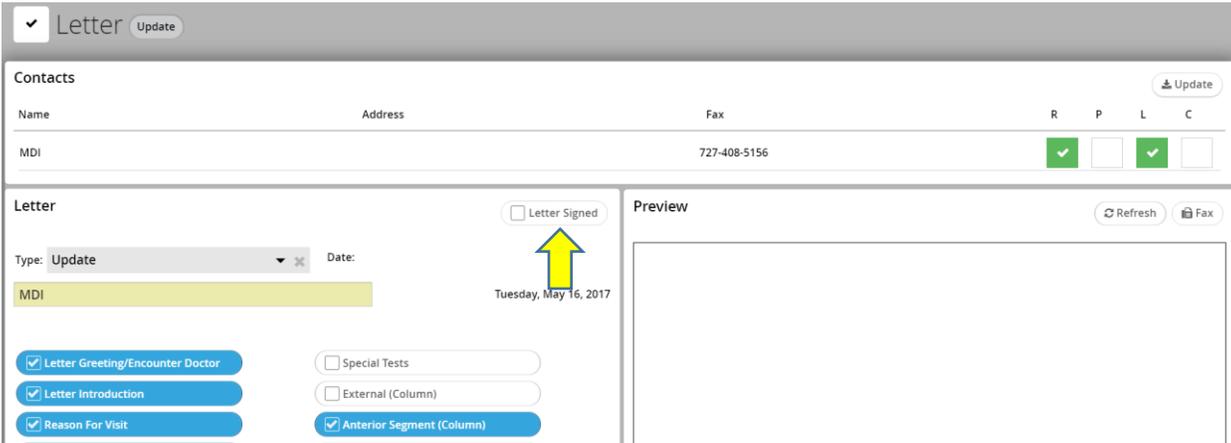
4. To manually change the items included in the letter select the box next to the element. This will turn the element **BLUE** and then click “Refresh” to see the changes. In the example below “Anterior Segment” was not part of the defaults and was manually selected to be included in the letter.

The screenshot shows the 'Letter' configuration panel on the left and the 'Preview' of the letter on the right. In the 'Letter' panel, the 'Anterior Segment (Column)' checkbox is checked and highlighted in blue. A yellow arrow points to this checkbox. In the 'Preview' panel, a yellow arrow points to the 'Refresh' button in the top right corner.

5. To fax a completed letter click on “Fax”. A window will display informing you that his action will not only queue the fax but also sign the chart note. Click “OK”.

The screenshot shows a confirmation dialog box in the center of the screen. The dialog text reads: "Faxing the letter will sign both the encounter and the letter. Do you want to proceed?". There are 'OK' and 'Cancel' buttons. A yellow arrow points to the 'OK' button. Below the dialog, the 'Letter' and 'Preview' panels are visible. A yellow arrow points to the 'Fax' button in the 'Preview' panel.

Note: Selecting “Letter Signed” will only sign the letter/chart note. It will **NOT** put the letter in the fax queue. You will see if selecting this option that in the pending letter notification the status for that letter will be “Not Scheduled”. To fax the letter from the pending letters screen select “Send Fax” and you will notice the status will turn to “Scheduled”.



Letter Update

Contacts Update

Name	Address	Fax	R	P	L	C
MDI		727-408-5156	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

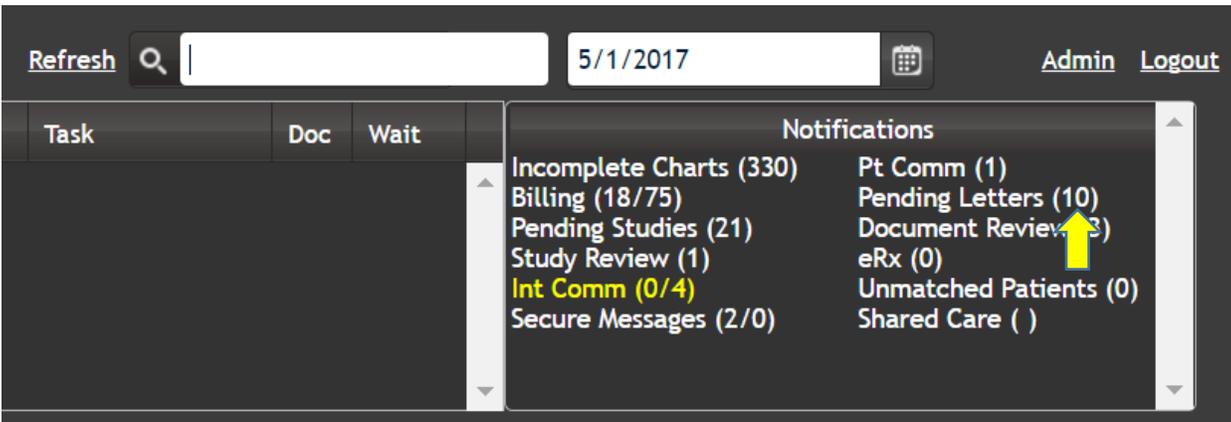
Letter

Type: Update ✕ Date: MDI

Letter Signed Tuesday, May 16, 2017

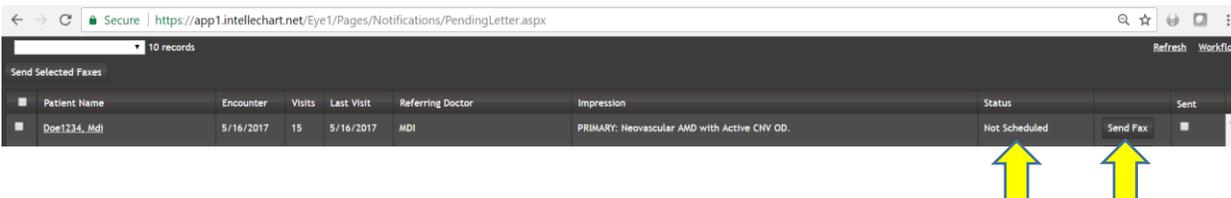
Letter Greeting/Encounter Doctor Special Tests
 Letter Introduction External (Column)
 Reason For Visit Anterior Segment (Column)

Preview Refresh Fax



Refresh 5/1/2017 Admin Logout

Task	Doc	Wait
Incomplete Charts (330) Billing (18/75) Pending Studies (21) Study Review (1) Int Comm (0/4) Secure Messages (2/0)		
Notifications Pt Comm (1) Pending Letters (10) Document Review (3) eRx (0) Unmatched Patients (0) Shared Care ()		



Secure | <https://app1.intellicart.net/Eye1/Pages/Notifications/PendingLetter.aspx>

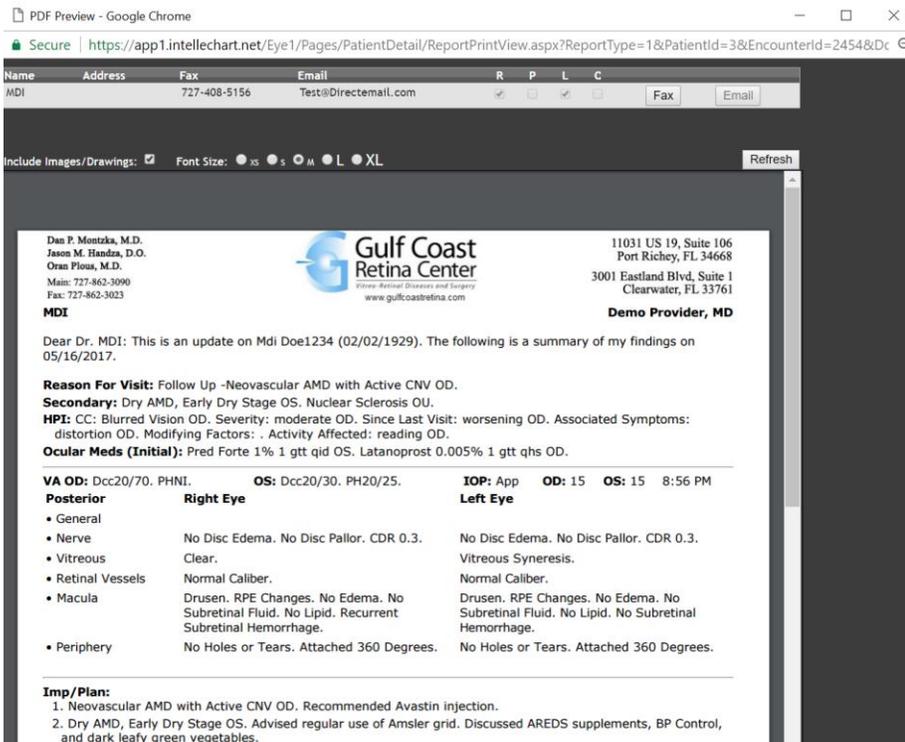
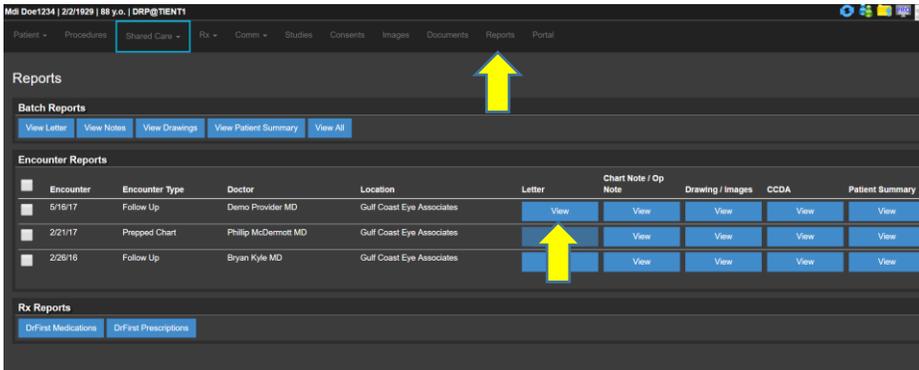
10 records Refresh Workflow

Send Selected Faxes

Patient Name	Encounter	Visits	Last Visit	Referring Doctor	Impression	Status	Sent
Doe1234_Mdi	5/16/2017	15	5/16/2017	MDI	PRIMARY: Neovascular AMD with Active CNV OD.	Not Scheduled	<input type="checkbox"/> Send Fax

Additional Information:

When a letter has been created and signed a copy of the letter can be found in the “Reports” tab on the patient summary page. To view a copy of the letter select “Letter” and a PDF copy of the letter will be displayed. From this window the letter can either be downloaded, printed, or refaxed.



For information on viewing the fax log in the administrative section of MDI please refer to the how to guide on “Managing Faxes”.

For additional questions please contact support at 1-813-435-9200, option 1 then 2