How To Guide for Communications

To add communication preferences:

- Select **Other options** within the **Home** tab.

- Select **Manage Communication Recipients**.

- Type in **First Name and Last name** within text boxes and the select **Search**. **Note:** Many times it is sufficient to only type First name and then select search.)
- Select **Email** if available. Note: All Provider Portal users are available to be a communication recipient. If the desired recipient is not available then Select **Add**. If the desired recipient is not available then Communication will NOT be posted to Provider Portal.
• Select Modify.

Initial Preference will be marked (Not Set). Select Email, Fax, Text (Notification), and Export and Upload to EMR. Then Select Ok. Note: Only Preference selections changes are allowed for IC user recipients. It is important to set the preferences prior to publishing a Communication because the Communication will be automatically posted to Provider Portal. If the preference is set as Email then an email notification will be sent to recipient once Publish is selected.
• If Communication Recipient is **not** an IC User, then you will need to Select **Add**.

![Search for a communication recipient](image1)

• **First Name, Last Name, Organization, Preference, Email, and Phone** are **required fields** as denoted by the asterisk symbol. Then Select Ok.

![Add Communication Recipient](image2)
Creating Templates:

- To create a Template select New Template within the Communications tab.

- Name the New Communication Template. Select setting as Hospital, Long-Term Care, Community, or Clinic. Enter Title and specific details within description to describe Template. Select OK.
• Place the cursor into the appropriate area within the **Communication Text (Header)** and **Communication Text (Footer)** then begin typing the content or text for your Communication document. To add patient details select the desired **Patient Details** (includes date, demographic information for Patient, Practice, Network Pharmacist, Care Manager, and Visit History information) to insert them into the document.

• Additional formatting options are available (cut, copy, paste, paste plain text, paste from Word, delete, undo, and redo). **Note:** You may paste your current template into the Communication window and then modify it as desired. To add patient details to the template place the cursor in the area you wish to insert the patient details then click the specific detail you wish to insert.
- Select (+) beside Drafts to open Options for currently displayed template. Select Publish. Publishing will add Template into your Favorites. **Note:** Template view options include Favorites or All and are categorized by Setting (Clinic, Community, Hospital, and LT Care).

- Users can search for templates prepared by others by selecting Search within Templates pane.
• User can search by selecting **ANY Setting** or entering words contained within **Title**, words contained within **Description**, **Owners First Name** or **Last Name**, or **Date Range**. Select **Search**.

• **Select Title** to highlight row and then select **Add to Favorites**.
• “Communication template added to Favorites” will display at bottom of Search for a Communication Template pop up window. Select X to close pop up window.
To Create Communication:

- To Create Communication from template select (+) beside of appropriate Template Setting to open options. Select Open.

- Select New Communication.
- Select **Setting** and if **Transition**. Enter **Communication Name** with date, **Site**, **Priority**, and **Expected on date**. **Expected on date** will be used in dashboard. Select **Ok**.

- Select **Show DTPs Section**. **Note**: The Communication list is currently showing at bottom of page and this is how the DTP section and Communication list are interchanged.
- Select Date within **DTPs** section to highlight row of Drug therapy Problem that is to be added to Communication. Select Add within **Communication DTPs**. Continue selecting **Date to Add** until all drug therapy problems have been added to **Communication**.
• Select underlined number under Notes within Communication DTPs to include in Communications.

• Select Added on date to highlight DTP and then select include in this Communication. Check mark indicates that DTP note is included in this Communication. Note: Text Color of Notes indicates the following: Orange: If DTP note is included in Summaries. Maroon: If DTP Note is included in Communications. Blue: If DTP note not in summary or communication.
Select hide DTPs section in order to view the Communication list option to Publish Communication.
• Select Publish.

• Enter desired recipient into First and Last name fields and select search.
• Select Email and Modify if Preference for Communication has not been set.

• Select Preference and then select ok. **Note:** Only Preference selections changes are allowed for IC user recipients. It is important to set the preferences prior to publishing a Communication because the Communication will be automatically posted to Provider Portal. If the preference is set as Email then an email notification will be sent to recipient once Publish is selected.
• Select OK.

• If Communication Recipient is not an IC User, then you will need to Select Add.
• First Name, Last Name, Organization, Preference, Email, and Phone are required fields as denoted by the asterisk symbol. Then Select Ok.

![Add Communication Recipient](image)

**Communication list Options:**

• **Options for Drafts** include Delete, Publish, Task, Rename, and Save as.

![Communication List](image)

• **Options for Active (Published Communications)** include Deactivate, Enter (Entered in Error), Task, Rename, Save As, Email, Phone.
Email option is only enabled when preference is set. User can select Email to resend notification and if preference was set after Communication was published. Note: The Recipient will be able to click on link within email body to access Provider Portal.

If user chooses to call Provider then select Phone under Options to document method of communication. Types of Communication Phone Responses include: left message, reached Provider, unable to reach Provider. Make appropriate selection and then select OK.
Communication list view options:

- **Active, All, Response, Tasks, Failed, Unread, Message, and Drafts.** Active will show all published communications. All will show all published communications and draft communications. Response will show all communications that have an outstanding response. Tasks will show all communications that are linked to tasks. Failed will show all communications in which text notification or fax notification failed (currently disabled). Unread will show all communications in which have not been read on Provider Portal. Message will show all communications in which user has left a phone message for Provider. Drafts will show all communications that have not been published.

Communication list column headers:

- **Date, Communication, Sent On, From, To, Setting, Method, Status, Response, Priority, and Task** are the current column headers for the communication list. User can sort communication list by selecting any column header. Date is communication is published. Select date to open communication. Communication is name of communication. Sent on is date that communication was emailed. From is name of person that sent communication. To is name of the recipient of the communication. Setting is hospital, clinic, community, or Long Term Care. Method is type of communication. Status will currently display for email and phone (Fax and text are currently disabled). Responses will display Yes if response has been received from a Communication and No if response has not been received. Priority is high, medium, or low. Task will display flag if communication is linked.
How to manage Dashboard for Provider Communications:

- Categories for Provider Communications include: **Published, Resp. Outstanding, Left Msg (Phone), Unread, Failed (Fax, Text), Drafts.** Published will contain all active communications inclusive of responses completed so that user can review response and make appropriate follow up if warranted. This may require user to manually remove from dashboard. Resp. Outstanding will contain communications in which a response has not been received. This will be removed from dashboard once communication is received or if user manually removes. Left msg (Phone) will contain active communications that user is waiting for response via Phone. Once status is changed to Reached Provider then communication will be removed from the dashboard. May also be removed manually. Unread will contain active communications that have not been read on Provider Portal by recipient. Once recipient reads communication this will be removed from dashboard. May also be removed manually. Failed (Fax, Text) is currently disabled. This will eventually contain active communications that have failed to go through via fax or text. Drafts will contain draft communications to show user that these need to be published.
Select underlined number in any category within **Provider Communications** and more information will display in **Dashboard details**. Select underline **Patient** to bring up patient on Pharmacy Profile page. Select **Created on** date to open corresponding communication. This feature will enable user to view response with note from recipient if available by selecting **Response** within the **Communication DTPs** field.
Comments at bottom of DTP response is new enhancement.

- Once user has reviewed response then they may manually remove the communication from the dashboard. Select check box under **In Dashboard** to remove from dashboard. User has options to change view from **In Dashboard** to **Removed from Dashboard**.