InteliChart Contacts

Last Modified on 07/29/2021 2:59 pm EDT

> ⚠️ OP sets **all defaults to share all information** Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

InteliChart: OP Notify Reminder Notifications

How Family Contact records are created in OP will determine who receives reminder notifications. This also includes the Method of Delivery. Below you will find information to assist you and the practice.

OP Contact Field	InteliChart Field	Delivery Method in InteliChart
Cell phone	Mobile Phone	Text
Primary phone	Home Phone	Call
Home email	Email Address	Email

Primary Phone Caveats

- **Contact Record**: If Home Phone was selected as the Preferred Contact Method for reminders and there is no Primary phone, the Work phone will be sent to InteliChart.
- **Patient**: If Home Phone was selected as the Preferred Contact Method for reminders and there is no Primary phone, the Day phone will be sent to InteliChart.
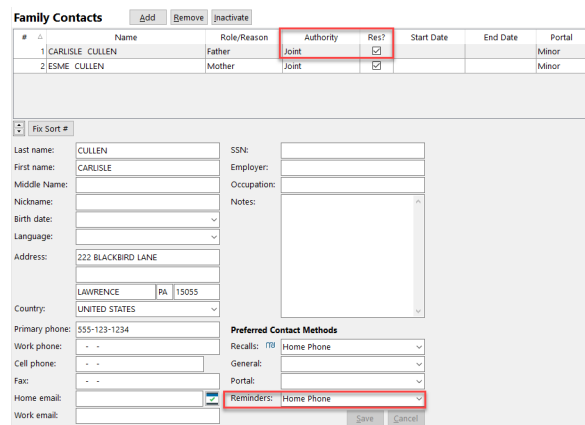
Home Email Caveats

- **Contact Record**: If Home email was selected as the Preferred Contact Method for reminders and there is no Home email, the Work email will be sent to InteliChart.

Other Caveats

- **Role/Reason**: In order for a contact to receive reminder notifications, that contact must have a Role/Reason of Mother, Father, or Legal Guardian.

Algorithm Summary:

1. To populate InteliChart, OP will first look at the Family Contacts in priority order, meaning we will start at Contact 1. If Contact 1 meets the criteria listed below, OP will send information to InteliChart.

   - The **Res?** checkbox must be selected **or** the **Authority** must be selected as Joint or Exclusive.
   - **Reminders** in **Preferred Contact Methods** must not be blank or have No Contact selected.

2. If any of the above fields are blank, OP will look for the information on Contact 2 and proceed through the contact list until all criteria are met or the contact list has been exhausted.
3. In support of the bi-lingual feature available in InteliChart, language for the contact will be sent when Home Phone is selected as the preferred contact method.

> 📌 **Note**: The Language field can be blank if the preferred contact method for reminders is not Home Phone and the contact's primary language is not Spanish.

4. If no Family Contact record meets the criteria, OP will look at the patient record for information.
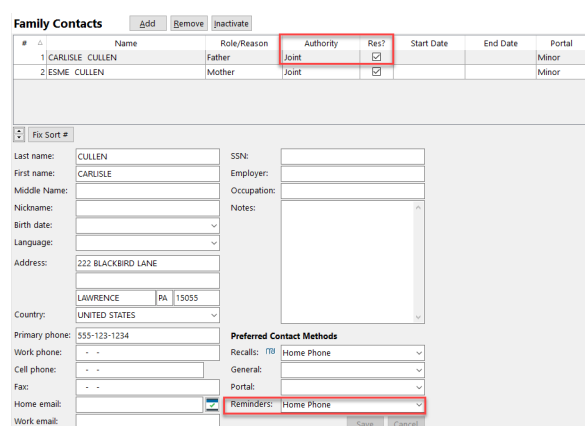
> 💡 **Tip:** It is recommended that when a patient is 18 years of age or older, that the practice add the patient as a contact with **Self** selected as the Role/Reason.

InteliChart: OP Patient Portal Family Contact

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1. To populate InteliChart, OP will first look at the Family Contacts in priority order, meaning we will start at Contact 1. If Contact 1 meets the criteria listed below, OP will send information to InteliChart.

   - The **Res?** checkbox must be selected **or** the **Authority** must be selected as Joint or Exclusive.
   - **Reminders** in **Preferred Contact Methods** must not be blank or have No Contact selected.

2. If any of the above fields are blank, OP will look for the information on Contact 2 and proceed through the contact list until all criteria are met or the contact list has been exhausted.
3. In support of the bi-lingual feature available in InteliChart, language for the contact will be sent when Home Phone is

selected as the preferred contact method.

> **Note**: The Language field can be blank if the preferred contact method for reminders is not Home Phone and the contact's primary language is not Spanish.

4. If no Family Contact record meets the criteria, OP will look at the patient record for information.

> **Tip:** It is recommended that when a patient is 18 years of age or older, that the practice add the patient as a contact with **Self** selected as the Role/Reason.