

Communication Log Cheat Sheet

Portal messages, phone calls, and texts · Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A communication log / portal message note documents a client contact outside a scheduled session: portal message, phone call, text, or secure email. No law mandates the format; boards require material contacts documented, and messages sit in the designated record set the client can read. Most entries are not billed; billed e-visits add initiator, decision-making, and 7-day time.

Date, time, mode, and initiator the facts that decide billability

Do: record when it happened, through what channel, and who started it; client initiation is the billing prerequisite.

Pitfall: no initiator line; a log silent on who started the exchange can never support a billed digital service.

Participants and identity who was on each end

Do: note how identity was confirmed; portal logins authenticate, phone calls do not, so say how you knew.

Pitfall: a relative's call logged as the client's own report; name collateral contacts as collateral.

Substance of the contact the thread can be the record

Do: summarize what was clinically material; point to the retained EHR thread instead of re-typing it.

Pitfall: whole threads re-transcribed, or the bare "spoke with client" that fails adequate-records standards.

Clinical assessment and risk your judgment, not just the relay

Do: show what you made of symptoms, side effects, or risk conveyed, and screen when indicated.

Pitfall: advice with no reasoning; an exchange with no decision-making cannot be billed as an e-visit.

Action taken and follow-up close the loop

Do: advice, changes, scheduling, escalation, with an owner and a date; note any resulting appointment.

Pitfall: a visit within 24 hours, or a related one 7 days prior, bundles the exchange into that visit.

Billing status, time, and consent most entries end "not billed"

Do: write "not billed" when true; when billing, carry code, time, 7-day cumulative time, and annual consent.

Pitfall: deleted codes. 99441 to 99443 ended January 1, 2025; Medicare pays 98970 to 98972 zero.

Signature and authentication who wrote it, who billed it

Do: author, credentials, date; cosign per supervision rules; staff document their own triage.

Pitfall: staff-only exchanges billed as clinician services; billed e-visits need the clinician's own reply.

Before you sign

- ☐ Date, time, mode, and initiator recorded
- ☐ Identity confirmed; collateral contacts named
- ☐ Thread pointed to or summarized, not re-typed
- ☐ Risk addressed either way, tied to last screening
- ☐ Follow-up has an owner, a date, and a booked slot
- ☐ Billing status explicit; time and consent if billed

Drafting with AI

Paste the thread or describe the call; keep the entry to what was material, your read of it, and the follow-up.

"Draft a communication log entry: client portal message about work stress and sleep, replied same day, moved sleep module up, earlier appointment booked, not billed: ..."

Never paste patient-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

50 to 200 words

most entries, not billed

2 to 5 min by hand

clinical team estimate

Any material contact

portal, phone, text, email

Client-facing contacts

providers: care coordination
note

Communication Log / Portal Message Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Client name: _____ DOB: _____ Date of contact: _____

Time and mode (portal / phone / text / email): _____ Initiated by (client / clinician / staff / other): _____

Participants and identity

Who was on each end · how identity was confirmed · collateral contacts named as such

Substance of contact

Summarize what was clinically material · point to the retained thread instead of re-typing it

Clinical assessment / risk

Your judgment on what was conveyed · risk screening whenever symptoms or risk appear

Action taken / follow-up

Advice, changes, scheduling, referral, escalation · owner and date · any resulting visit

Billing status, time, and consent

Not billed (documentation only), or: code · time this contact · cumulative 7-day time · consent date · related visit within prior 7 days / next 24 hours

Author (name / credentials): _____ Date signed: _____

Supervisor cosign (if required): _____ Date: _____