Forward Notes for Providers

Overview

A completed dynamic documentation office note can be forwarded directly to the Message Center of another provider and to a Distribution group. Staff will then manage the distribution using a standard provider letter. The user can also create a custom provider letter and attach the office note.

Forwarding Notes

To forward a note upon signing a dynamic documentation note in the Provider View:

1. Select the desired note Type.
2. Ensure that the Title matches the Type.
3. Search for the name of the provider.
4. Click the star next to the provider or practice to add to favorites, if needed.
5. Click the check mark next to the provider or practice to set as a default, if needed. Consultative Specialists who always forward their notes can select default and the Distribution group will be chosen automatically for each note.
6. Indicate if the provider receiving the note needs to review or sign the note.
7. Select the appropriate contact list if desired:
   a. Favorites – lists providers or practices set of favorites (using step 4).
   b. Recent – lists providers or practices that have been set as recipients recently.
   c. Relationship – lists providers or practices associated with the patient.
8. Click the star or check to set a provider or practice as a favorite or default for this specific patient for this visit.
9. Click the star or check to set a provider or practice as a favorite or default for this specific patient for all future visits.
10. The comment field can be used to alert staff who should receive a copy of the office note if sending the note to a Distribution Group.
11. Click Sign.

Creating a Custom Provider Letter

To create a custom provider letter and attach the office note:

1. Click Create provider letter.
2. Click Sign.
3. Select a recipient.
   a. PCP and/or Consulting Physician can be selected if properly maintained by office registration.
   b. Use the Internal tab to search for a provider using the binocular's icon.
   c. Once a provider is selected, the name will display in the Recipient section.
   d. Mark the recipient as a favorite for quick use in the future, if needed.
   e. Mode will be automatically selected and usually should not be changed.
      i. To forward to staff, Mode must be changed to Mail.
4. Click OK to create the letter.
5. Select a Subject line using the drop-down list. Subject will label the letter and can provide a template to begin the letter.
6. Click Browse Documents to select one or multiple office notes to attach.
7. Click Add Results to include results from Results Review.
8. Click Preview to preview the letter.
9. Click on OK to send.
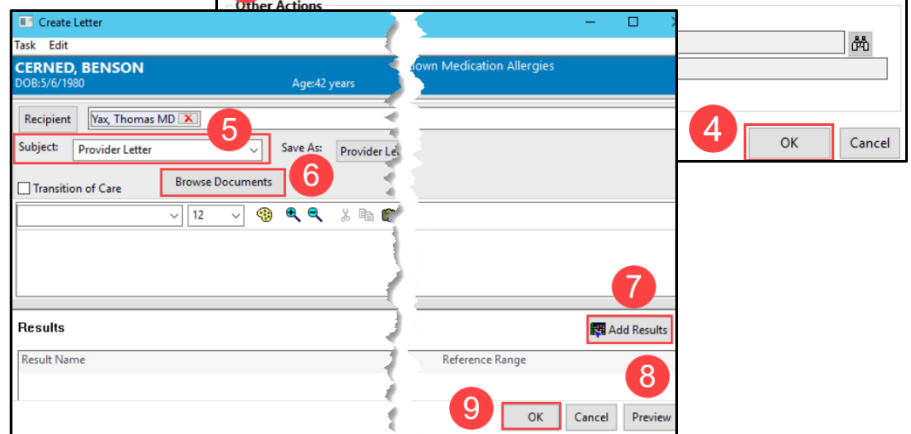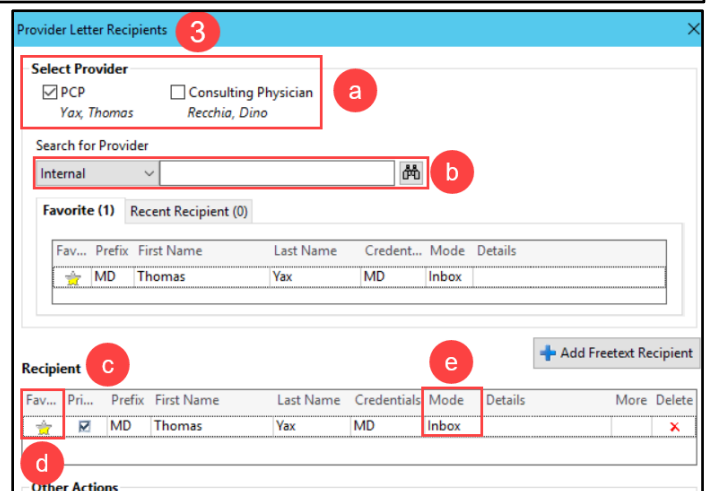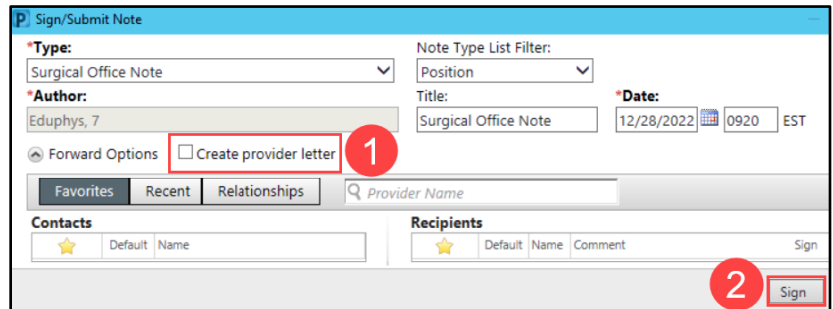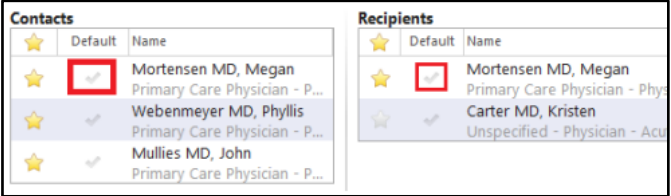
Forwarding a Historical Note

1. View the desired historical note and click the Forward icon.
2. Click down arrow and select Sign or Review.
3. Search for the desired provider or practice.
4. Click OK to send.
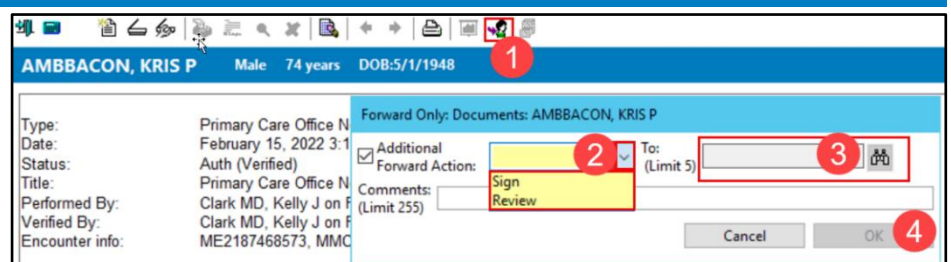
Managing Recipients and Contacts Lists

See the table below for more information on the icons displayed and how to use them to manage a Contacts or Recipients List when forwarding notes.

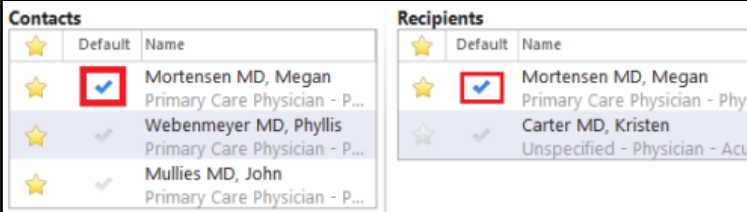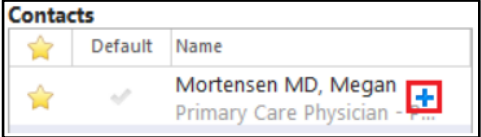| Button	Description	Action	
⭐	The Provider is marked as a favorite.	To add a provider as a favorite, from the Contacts list or Recipients list, click the gray star next to a provider's name. The provider is added to the Favorites tab.	
☆	The provider is not marked as a favorite.	To remove a provider as a favorite, from the Contacts list or Recipients list click the yellow star next to a provider's name. The provider is removed from the Favorites tab.	
✔	The provider is a default recipient and automatically populates to the Recipients list.	To add a provider as a default recipient, from the Contacts list or Recipients list, click the gray checkmark next to a provider's name.	
✓	The provider is not a default recipient.	To remove a provider as a default recipient, from the Contacts list or Recipients list click the gray checkmark next to a provider's name. The provider no longer automatically populates to the Recipients list.	
✚	Adds the provider to the Recipients list.	To add the provider to the Recipients list position the mouse over a provider's name and click the +.	
⊗	Removes the provider from the Recipients list.	To remove the provider to the Recipients list, position the mouse over a provider's name and click the X.	