

Sending a Note to your Preceptor to Review

You can send a note to your preceptor to review using 2 different methods.

1. If you want your preceptor to review the document or ask questions but you aren't ready to send for signature, Save & Close the note and send a task.

The screenshot shows a medical software interface for a patient named 'Boggs, Teresa'. The 'Assessment' section is expanded, displaying a table of conditions. The table has columns for 'Name', 'ICD-10', 'Managed By', and 'Last Assessed'. The 'Assessed' section contains one entry: 'Mixed disorder of emotional...' with ICD-10 code 'F80.2', last assessed on '07Jun2019' by 'ALLSCRIPTS'. The 'Unassessed' section contains multiple entries, including 'Absence of parathyroid hormone' (E20.9), 'Behavior problem at school', 'Cough' (R05), 'Dysuria' (R30.0), 'Encounter for immunization' (Z23), 'Extreme immaturity of newborn,...' (P07.22), 'Family stress' (Z63.9), 'Good dental hygiene', 'Hospital discharge follow-up' (Z09), 'Impetigo' (L01.00), and 'Ingrowing toenail' (L60.0). At the bottom right of the interface, a red arrow points to the 'Save & Close' button.

Name	ICD-10	Managed By	Last Assessed
Assessed			
Mixed disorder of emotional...	F80.2		07Jun2019 ALLSCRIPTS
Unassessed			
Absence of parathyroid hormone	E20.9		13Mar2019 Garland, Bridge
Behavior problem at school			18Mar2019 Briggs, Monac
Cough	R05		18Oct2018 Olive, Kenneth
Dysuria	R30.0		07Feb2019 Livingston, Am
Encounter for immunization	Z23		06Dec2018 Sibbitt, Laura
Extreme immaturity of newborn,...	P07.22		17Oct2018 Livingston, Am
Family stress	Z63.9		28Aug2018 Livingston, Am
Good dental hygiene			26Jun2018 Deimundo Ro
Hospital discharge follow-up	Z09		
Impetigo	L01.00		26Jun2018 Deimundo Ro
Ingrowing toenail	L60.0		24Apr2019 Sells, Melissa

2. Go to the Task List tab. Then open a New Task and send a task asking your preceptor to review the note with you.

The screenshot shows the 'Task Details' dialog box in the EHR system. The patient is identified as TEST, BOBBY. The task is assigned to Boggs, Teresa and is categorized as 'Miscellaneous' with a 'Routine' priority. The due date is 14 Jun 2019 3:10 PM. The comment field contains the text: 'Hello Dr. Boggs: Please review the Treatment Note from 6/7. I have a question about this patient and our session.' The dialog box has buttons for 'Reactivate', 'OK', and 'Cancel'. A 'New...' button is visible in the bottom right corner of the main interface.

3. When you are ready to finish your Note, go back to the patient's Clinical Desktop and open the Note in Edit mode.

The screenshot shows the 'Clinical Desktop' for patient TEST, BOBBY. The 'Notes' tab is selected, and a list of notes is displayed. A red arrow points to the 'Office Notes' section, and another red arrow points to the 'Treatment Note (Treatment Note) - Boggs, Teresa, Enc: 07-Jun-2019' entry. The list includes various notes such as 'Medical Student Note', 'Pediatric Audiology Visit', 'Rheumatology Education Office Visit', 'Established Patient-Nurse Practitioner', 'Office Notes', 'sPREP Contract', 'Office Visit', 'Transition of Care', 'Follow-Up', 'Transition of Care', 'BlueCare Notes', 'Pediatric Social Work', 'Established (Established)', 'HM 5-6 Years - Peds', 'Annual Wellness Note', 'Pediatric Social Work', 'Medical Student Note', 'New Patient', 'ADHD Initial Visit', 'HM 5-6 Years - Peds', 'Pediatric Social Work', and 'DXA Scan Note'.

4. When you are ready to Sign your note, send it to the preceptor. Click Sign at the bottom left. Enter your password if required.

The screenshot shows a medical software interface with a 'Note Signature' dialog box open. The dialog box contains the following fields and options:

- User Name: lvrresident
- Password: Password not required.
- Sig Type: Author
- Make Final
- Carbon Copy Recipients: A table with columns for Recipient Name, Role, and Note Output. The table is currently empty with the text 'There are n'.

The background shows a patient history note for 'Boggs, Teresa' with sections for History, Active Problems, Social History, Family History, Subjective, Objective, Assessment, and Plan. A red arrow points to the 'Sign' button at the bottom of the note editor.

5. Send Co-Sign Note task to preceptor. Click Ok.

The screenshot shows the same medical software interface as above, but with the 'Note Signature' dialog box still open. The 'User Name' field is now 'lvrresident', 'Password' is 'Password not required.', and 'Sig Type' is 'Author'. The 'Carbon Copy Recipients' table is still empty. The background shows the same patient history note for 'Boggs, Teresa'. A red arrow points to the 'Ok' button in the dialog box.

P.S. Be sure to assess a problem (Pick a diagnosis code)

Assessment

Assessed Rec: 28Jan2019 Lock

Name	ICD-10	Managed By	Last Assessed
Unassessed			
Absence of parathyroid hormone	E20.9		13Mar2019 Garland, Bridge
Aluminum bone disease	M83.4		23Apr2019 Garland, Bridge
Behavior problem at school			18Mar2019 Briggs, Monac
BMI 22.0-22.9, adult	Z68.22		05Feb2019 Campbell, Mis
Cough	R05		18Oct2018 Olive, Kenneth
Dysuria	R30.0		07Feb2019 Livingston, Am
Encounter for immunization	Z23		06Dec2018 Sibbitt, Laura
Extreme immaturity of newborn,...	P07.22		17Oct2018 Livingston, Am
Family stress	Z63.9		28Aug2018 Livingston, Am
Good dental hygiene			26Jun2018 Deimundo Ro
Hospital discharge follow-up	Z09		
Impetigo	L01.00		26Jun2018 Deimundo Ro
Ingrowing toenail	L60.0		24Apr2019 Sells, Melissa

New Edit CareGuide Resolve Hide Impression

Green check box on paper means it is assessment for today

History Builder Orders

Chief Complaint

Active PMH PSH Fam Hx Social Hx Allergies Med Hx Immun Hx

f80.2 My Favorites OFF

All	ICD-10
Acquired impairment of language comprehension	F80.2
Acquired language comprehension impairment	F80.2
Combined aphasia	F80.2
Communication disorder with mixed disorder of emotional expr...	F80.2
Mixed disorder of emotional expressiveness, communication d...	F80.2
Developmental aphasia	F80.2
Developmental language disorder with impairment of receptive ...	F80.2
Developmental receptive language disorder	F80.2
Impaired receptive language skills	F80.2
Language disorder with mixed disorder of emotional expressiv...	F80.2
Mixed disorder of emotional expressiveness, language disorder	F80.2
Mild receptive language delay	F80.2
Mixed receptive-expressive language disorder	F80.2
Language disorder involving understanding and expression of l...	F80.2
Receptive expressive language disorder	F80.2
Moderate receptive language delay	F80.2
Receptive language delay	F80.2
Receptive language disease	F80.2

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Mixed disorder of emotional...	F80.2		07Jun2019 ALLSCRIPTS
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