



New!! Document Signing Workflow

Changes for all perspectives

- Cannot change listed provider from visit, must change from schedule
- Cannot change supervising PT after document has been created
- Note will appear in line with pending document to indicate who the document is awaiting signature for
- Document no longer appears on therapist of record task list

PTA/Provider Permission Perspective

The normal workflow for the visit is the same, the main changes are while creating the actual visit note. After you click “New Patient Document” inside the “Document Visit” section, you will see a screen where you can choose your document types. The addition to this screen is the cosign note. This is utilized to send a note to the supervising PT after you have signed. This note will appear on their task list.

If the supervising therapist finds a mistake in the document, they will delete the pending document and have the ability to send a note back to you explaining what needs to be fixed. This will then appear on your task list and the process starts over.

PT/Therapist/Supervising Therapist Perspective

The normal workflow for the visit is the same, the main changes are while creating the actual visit note. After the PTA/Provider permission has signed a document and has sent it to you for cosign, you will see the document on your task list with a note from the PTA/Provider. This link will take you right into the document where you can review. If you find any mistakes, you will want to click back into the “Document Visit” section, and delete the pending documents using

the red **x**. You will be prompted to enter a deletion note, where you can specify what needs to be resolved from the PTA/Provider. This note will then appear on their task list where they can see what needs to be fixed and the process starts over at that point.

Screenshots (Oliver Queen is PTA, Slade Wilson is PT)

OptimisPT® Home Patients Scheduling Billing Reports Support Hawaii Oliver Q. Logout

John "Digg" Diggle 30 yo Male Visits Used 10 Visits Remaining 0 Authorization Expires N/A Primary Payer Type Medicare Primary Insurance Medicare Diagnosis Codes X94.ZXXS Date of Onset Test1_Test Referral Source Test1_Test

Shoulder Injury - Shoulder and Arm None (04/08/19) Visit on 04/05/2019

Evaluation Reason for Referral Type: Initial Clinic: Hawaii Provider: Oliver Queen Supervising Therapist: Slade Wilson Next Physician Visit: Choose...

Medical History

Examination

Clinical Findings

Measures

Add'l Eval Findings

Assessment

Diagnoses

Plan of Care

Goals 2.0

Planned Interventions 2.0

Recommendations

Treatment 2.0

Home Exercises 2.0

Plan

MIPS

Document Visit

Unbilled Time min.

Direct Contact Untimed 0

Direct Contact Timed 0

Supervised Minutes 0

Total Treatment Time 0

Billing Record

Create Patient Report

Choose Report Type

Note: The content of the "Consultation" report matches that of the "Initial Evaluation Report" but has a different title.

Initial Evaluation

Consultation

Plan of Care Certification

Treatment Note

Progress Report

Re-evaluation

Discharge Report

Summary Initial Evaluation

Summary Progress Report

Initial Evaluation Date (Start Date/Measures)
04/05/2019 - Initial

Latest Evaluation Date (Tests/Measures/Reason for Referral)
04/05/2019 - Initial

Include Physician Signature Box

Show All Home Exercises

Show Time In 06:19 AM Out 00:00 AM

Enter co-sign note visit complete, please review and sign

Update (to be included on report)

Create

John "Digg" Diggle 30 yo Male Visits Used 11 Visits Remaining 0 Authorization Expires N/A Primary Payer Type Medicare Primary Insurance Medicare Diagnosis Codes X94.ZXXS Date of Onset Test1_Test Referral Source Test1_Test

Shoulder Injury - Shoulder and Arm None (04/08/19) Visit on 04/05/2019

Evaluation Reason for Referral Type: Initial Clinic: Hawaii Provider: Oliver Queen Supervising Therapist: Slade Wilson Next Physician Visit: Choose...

Medical History

Examination

Clinical Findings

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Add'l Eval Findings

Assessment

Diagnoses

Plan of Care

Goals 2.0

Planned Interventions 2.0

Recommendations

Treatment 2.0

Home Exercises 2.0

Plan

MIPS

Document Visit

Unbilled Time min.

Direct Contact Untimed 0

Direct Contact Timed 0

Supervised Minutes 0

Total Treatment Time 0

Billing Record

Document Visit

Report Type	Report Date	Document Link	FOTO Link	Delete Document
Initial Evaluation	04/09/2019 05:18AM	Pending signature of Slade Wilson Note: Visit complete, please review and sign		<input checked="" type="checkbox"/>

SECTION INCOMPLETE Visit must be documented.

Slade Wilson [My Custom Patterns](#) [My Favorite Diagnoses](#)
Today April 9th

0 Scheduled Visits 0 Completed Visits --- Completed

◀ 04/09/2019 ▶ Print No Cancels Late Cancels All Cancels Just Mine Mine - Others All My Resources

Time	Patient	Visit Type	Provider	Authorizations	Actions
There are no appointments scheduled on 04/09/2019.					

Pending In Progress Awaiting CoSign Complete Billed Cancelled Late-Cancel No Show Hold

Tasks
📄 04/09/2019 Diggle, John "Dig" (1 document) Note: visit complete, please review and sign

Announcements
No Announcements

User Resources
[Optimis University](#)

John "Dig" Diggle 39 y/o Male Visits Used 13 Visits Remaining 0 Authorizations Expires 1/1/21 Primary Payer Type Medicare Primary Insurance Medicare Diagnosis Codes X24.Z0X.S Date of Onset Date of Surgery Referral Source Text, Test **IN PROGRESS**

Shoulder Injury - Shoulder and Arm None (04/09/19) Visit on 04/09/2019 **FINISHED** Treatment Program

Reason for Referral Type: Initial Clinc: Hawaii Provider: Oliver Queen Supervising Therapist: Slade Wilson Next Physician Visit: Choose...

Document Visit Sign All Pending Documents Fax New Patient Document

Report Type	Report Date	Document Link	FOTO Link	Delete Document
Initial Evaluation	04/09/2019 05:18AM	Pending signature of Slade Wilson Note: Visit complete, please review and sign Sign		

SECTION INCOMPLETE Visit must be documented.

Unbilled Time min. Direct Contact Un timed 0 Direct Contact Timed 0 Supervised Minutes 0 Total Treatment Time 0 [Billing Record](#)

Delete document
Are you sure?
Send note to Oliver Queen: (no treatments listed, please resolve)

Cancel Delete



Oliver Queen [My Custom Patterns](#) [My Favorite Diagnoses](#)

Today April 9th

0 Scheduled Visits 0 Completed Visits — Completed

◀ 04/09/2019 ▶

Print No Cancels Late Cancels All Cancels Just Mine Mine - Others All My Resources

Time	Patient	Visit Type	Provider	Authorizations	Actions
There are no appointments scheduled on 04/09/2019.					

Pending In Progress Awaiting CoSign Complete Billed Cancelled Late-Cancel No-Show Hold

Tasks

📧 04/05/2019 Diggle, John, Dtg; Note: no treatments listed, please resolve

Announcements

No Announcements

User Resources

[Optimis University](#)

