



## **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)

The first screenshot shows the 'Create Patient Report' form in the OptimisPT system. The patient is John 'Dig' Diggle, 30 y/o Male, with a 'Shoulder Injury - Shoulder and Arm None (04/08/19)' diagnosis. The report type is 'Initial'. The 'Initial Evaluation Date' is 04/05/2019. The 'Latest Evaluation Date' is also 04/05/2019. The 'Enter co-sign note' checkbox is checked, and the note 'visit complete, please review and sign' is entered. A red arrow labeled '1' points to the co-sign note field. Another red arrow labeled '2' points to the 'Create' button at the bottom left of the form.

The second screenshot shows the 'Document Visit' table after the report is created. The table has columns for Report Type, Report Date, Document Link, FOTO Link, and Delete Document. The first row shows 'Initial Evaluation' on '04/05/2019 05:18AM' with a document link 'Pending signature of Slade Wilson' and a note 'Note: Visit complete, please review and sign'. A red arrow points to the 'Delete Document' button, which has a red 'x' icon. Below the table, a yellow banner reads 'SECTION INCOMPLETE Visit must be documented.'

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

**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 Not Scheduled 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 1 Visits Remaining 0 Authorizations Expires 6/1/20 Primary Payer Type Medicare Primary Insurance Medicare Diagnosis Codes X54.ZXXS Date of Onset Date of Surgery Referral Source Text Test

Shoulder Injury - Shoulder and Arm Nerve (04/09/19) Visit on 04/09/2019 Provider: Oliver Queen Supervising Therapist: Slade Wilson Next Physician Visit: Choose...

Document Visit Report Type Report Date Document Link FOTO Link Delete Document Sign All Pending Documents Fax New Patient 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 Unbilled 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 No Shows Awaiting CoSign Completed Billed Cancelled Late-Cancel No-Show Hold

#### Tasks

04/05/2019 Diggle, John "Dg": Note: no treatments listed, please resolve

#### Announcements

No Announcements

#### User Resources

[Optimis University](#)