OptimisPT®

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)

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