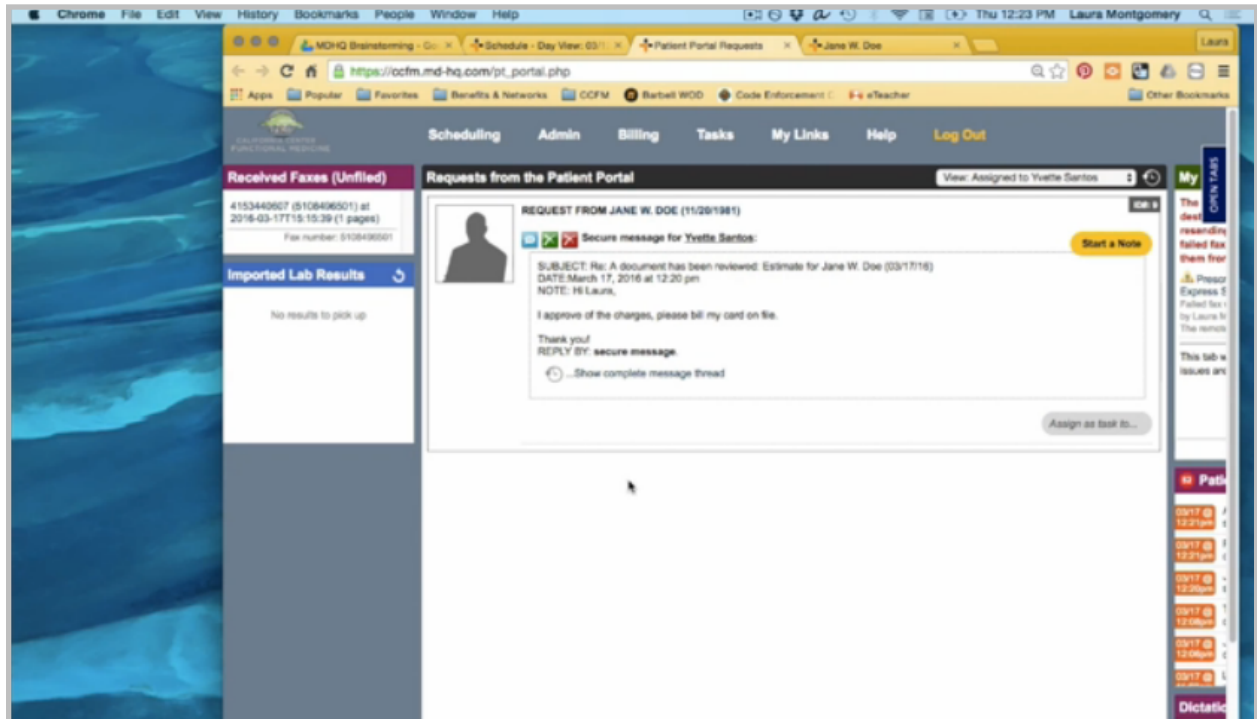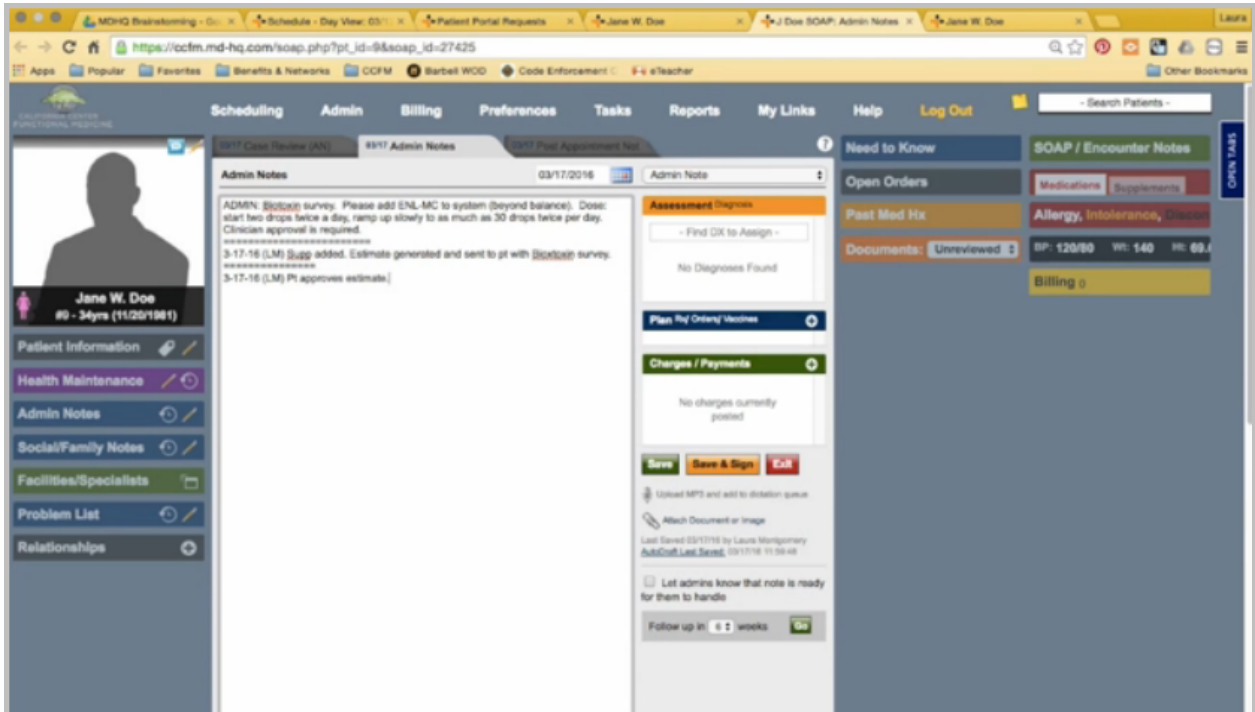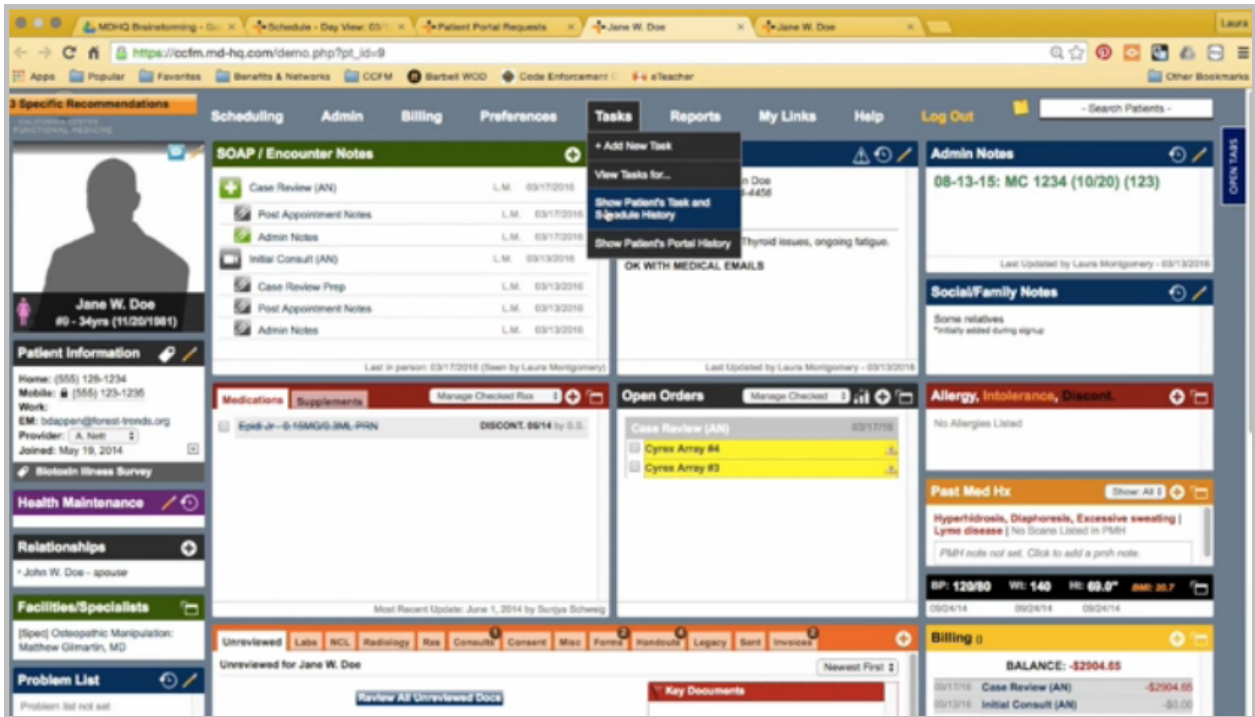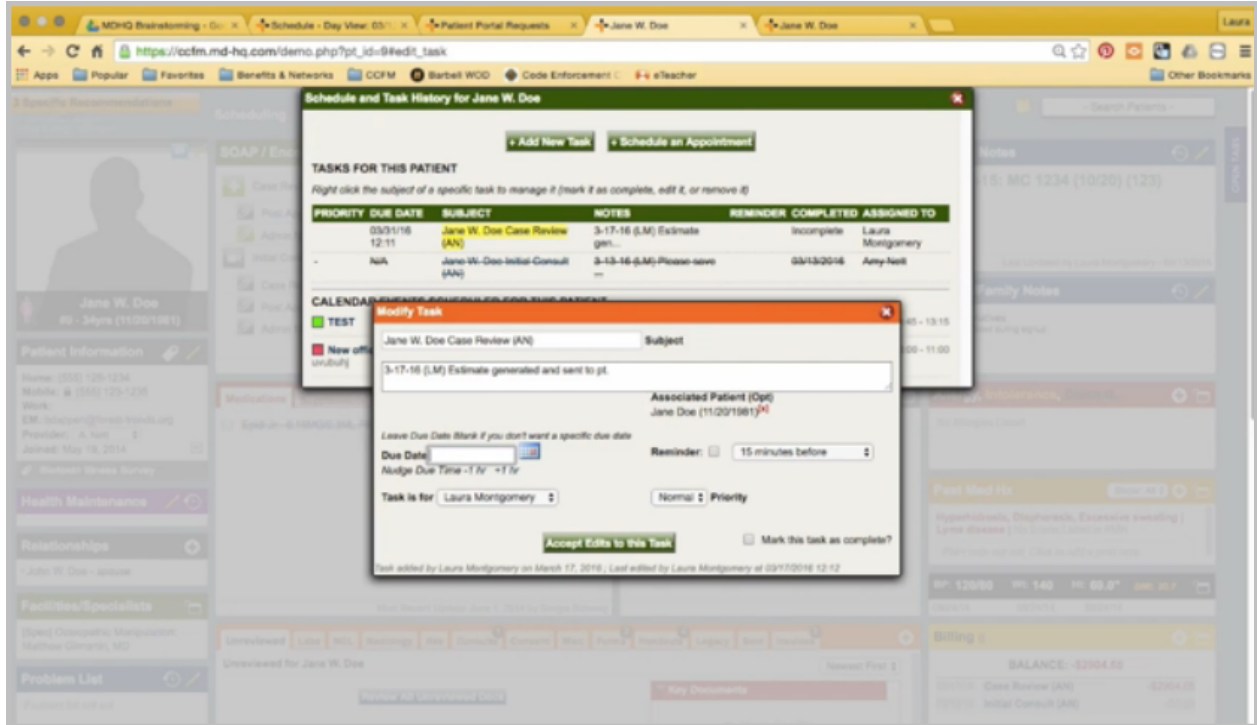# Processing Charts: Case Review – Part 2

Once a portal message comes in from the patient approving the estimate and approving the card on file, you need to click to open the patient's chart.
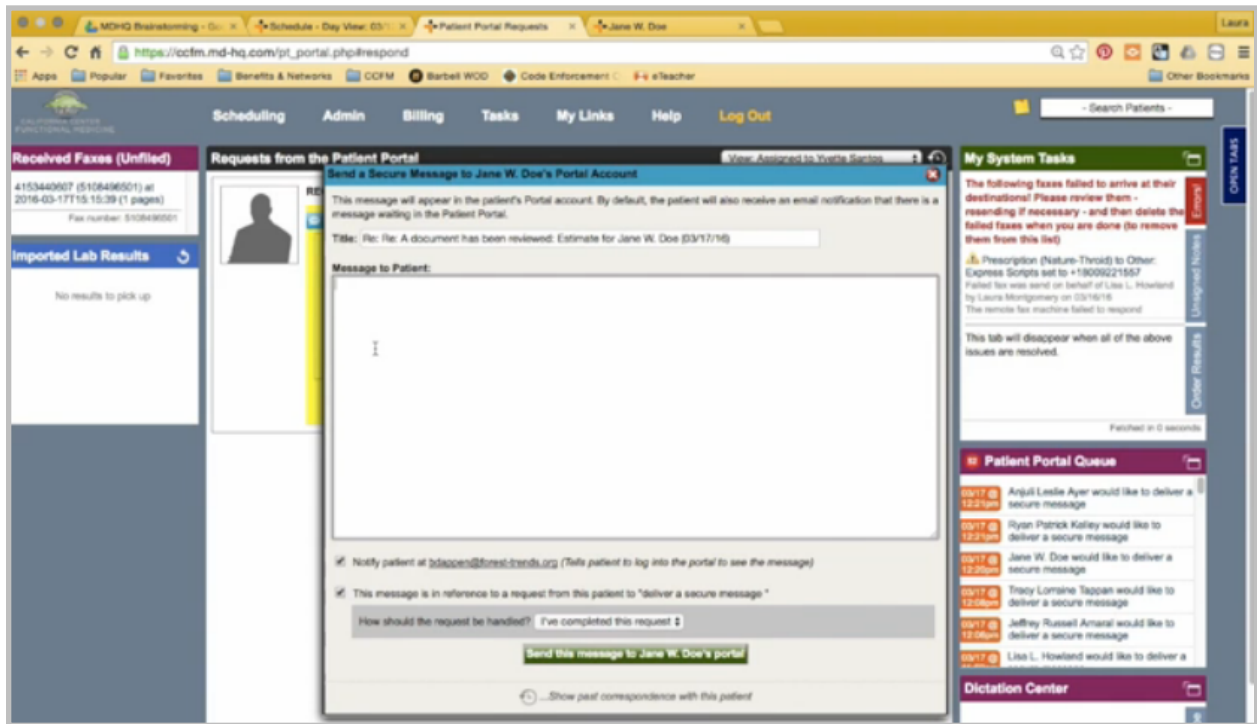
Open the admin notes, and make a note that the patient approved. Save the note.


From the chart, view the task history to find the task associated with the case review.

Remove the due date. Stamp it with a note that the patient approves, and send it to billing.

You can close the chart, and back in the portal, send the patient a response thanking her for her approval and letting her know the next steps, that we'll be in touch as soon as the order is on its way, and our instructions will have detailed lab instructions and an order confirmation.
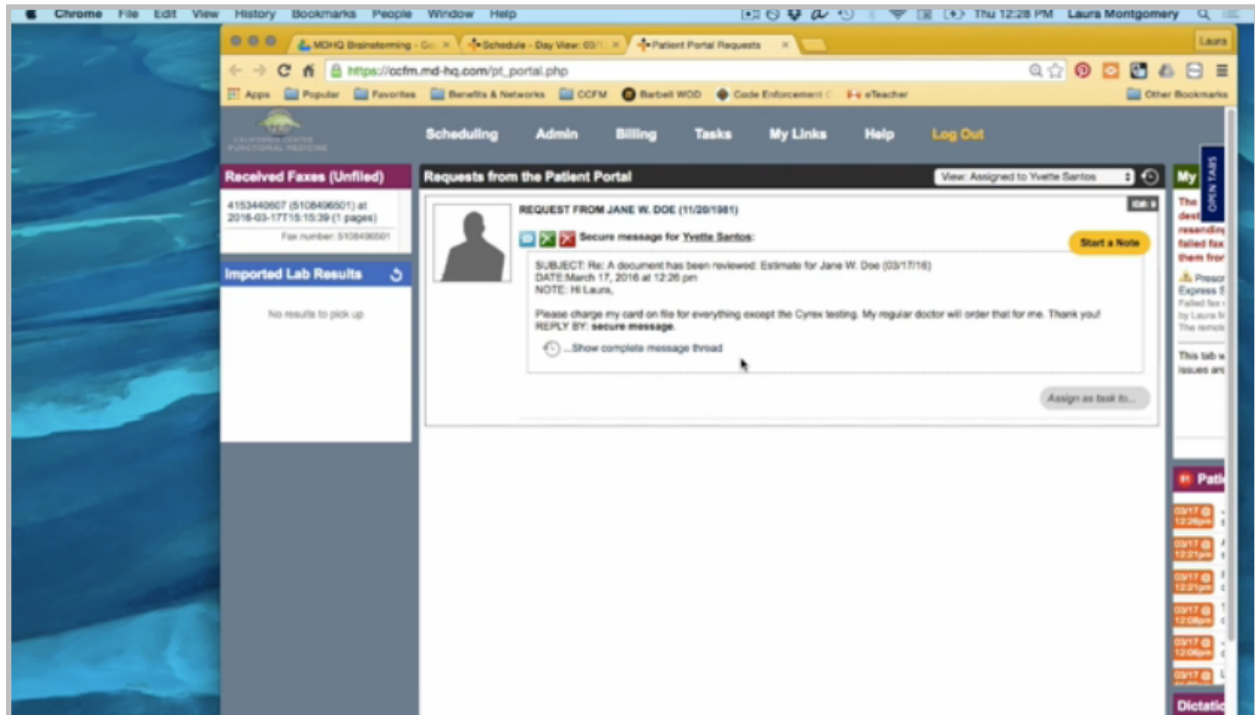
Once the patient sends an estimate response in the PPQ, you need to review the message to see if she is approving the entire estimate or just parts of it. In this case, the patient wants all of the estimate except for the Cyrex testing because her regular doctor will order it for her. I'm going to click on her name to open the chart and open the admin notes to make a note of that. I'll save the note and close it.
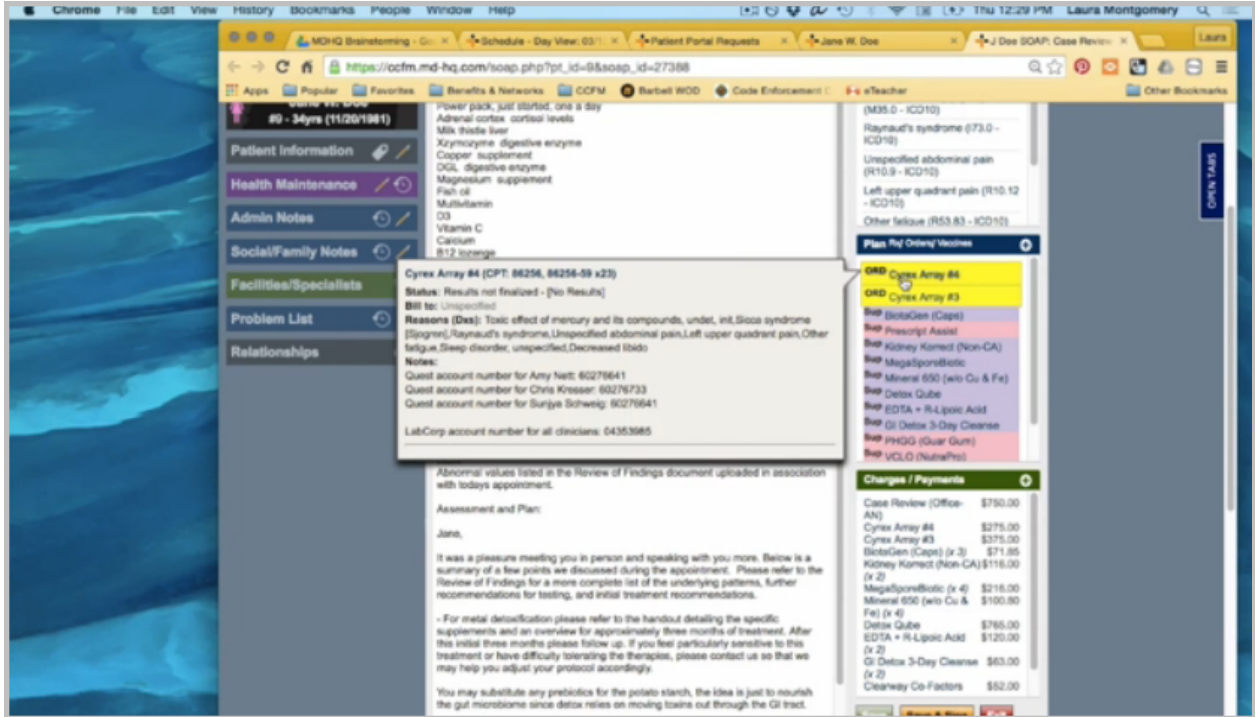
I need to open the encounter. In this case, I'm not going to abandon the test orders by right-clicking on them. I'm simply going to gray them out in the charge box to show that the patient does not want them.
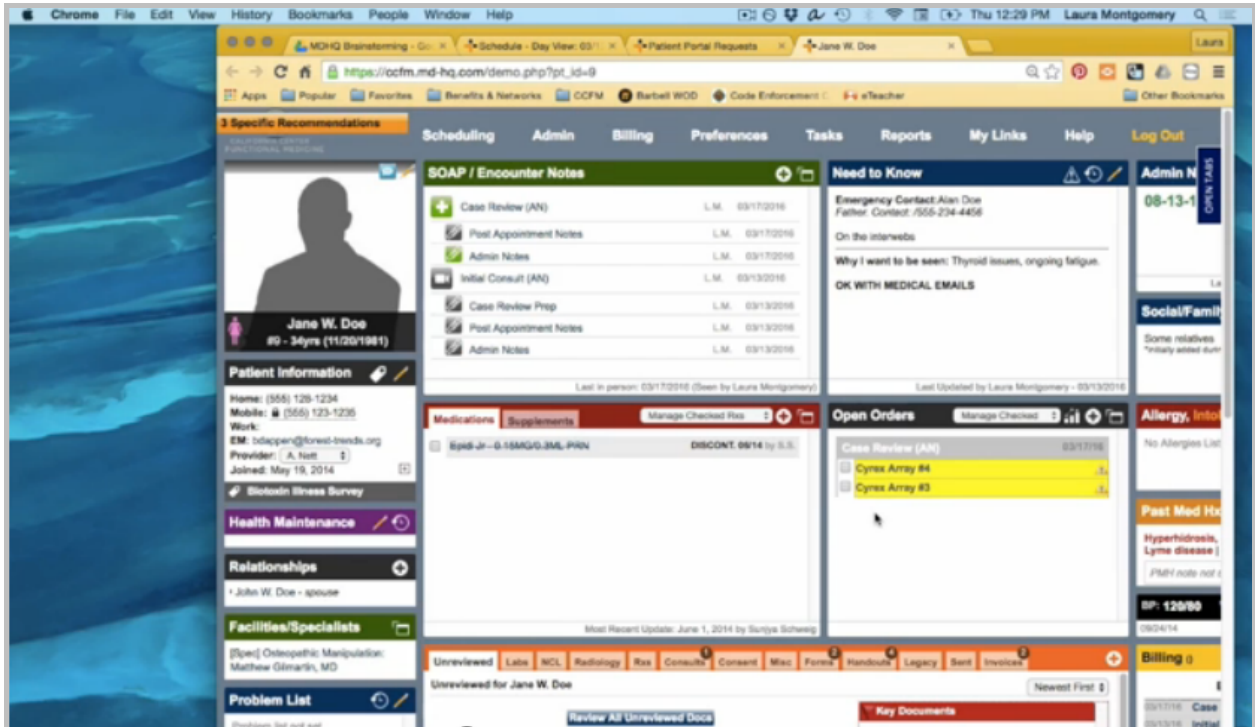
I want the orders to remain here. That way we know that the patient still plans on doing the testing and can still follow up on results with the patient or the lab.
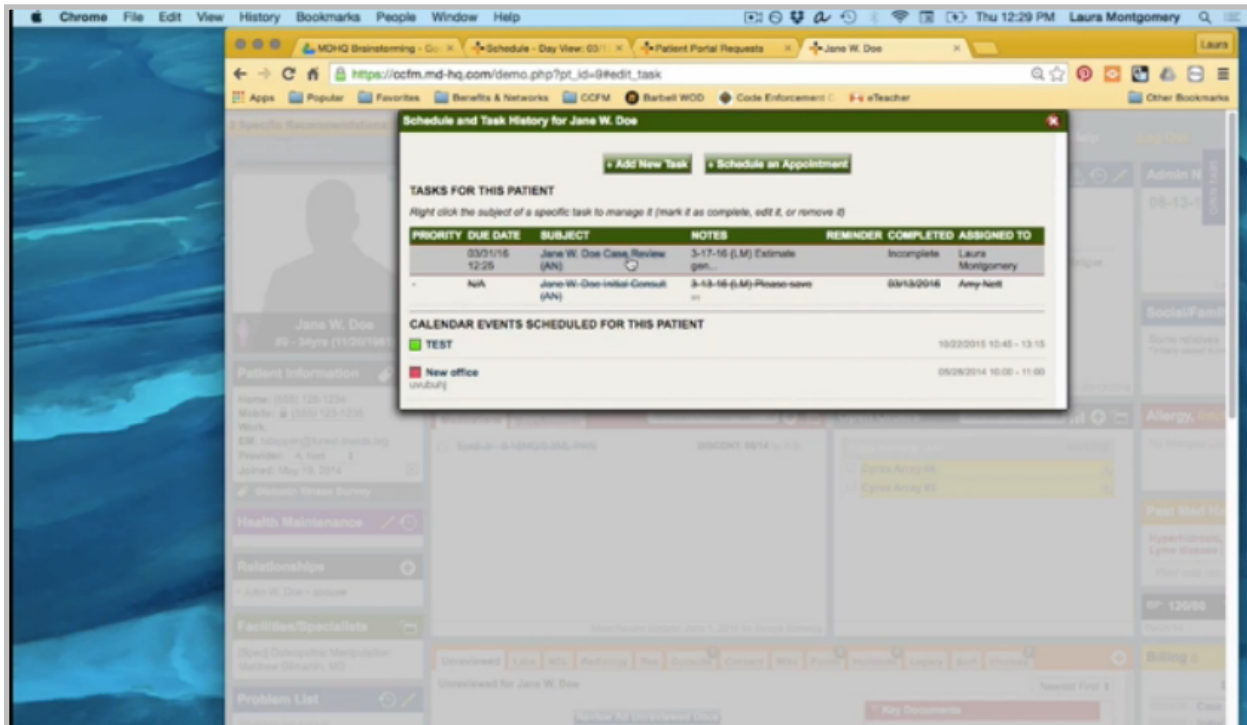

At the top, hovering on Tasks brings up the Show Patient's Task History. I'll find the task associated with the case review, and I'm going to make a note here with my stamp that they are approving the estimate with modifications.
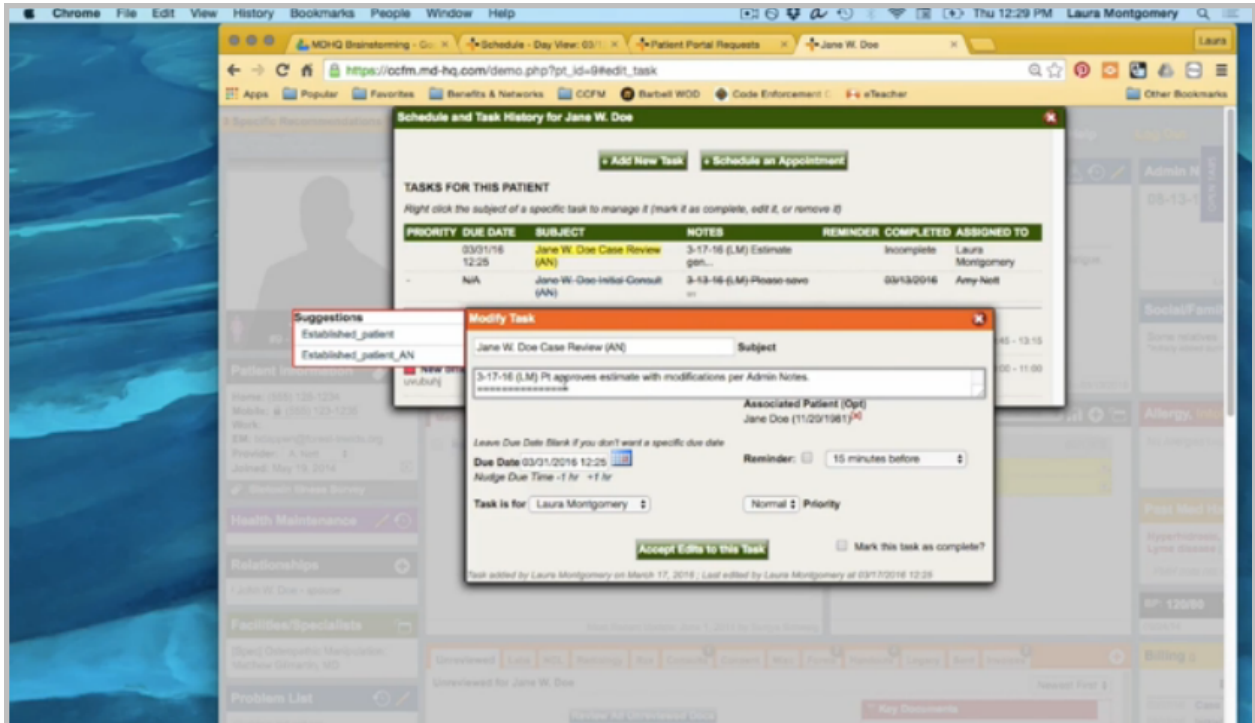
I'm going to take off the due date and send this to billing.
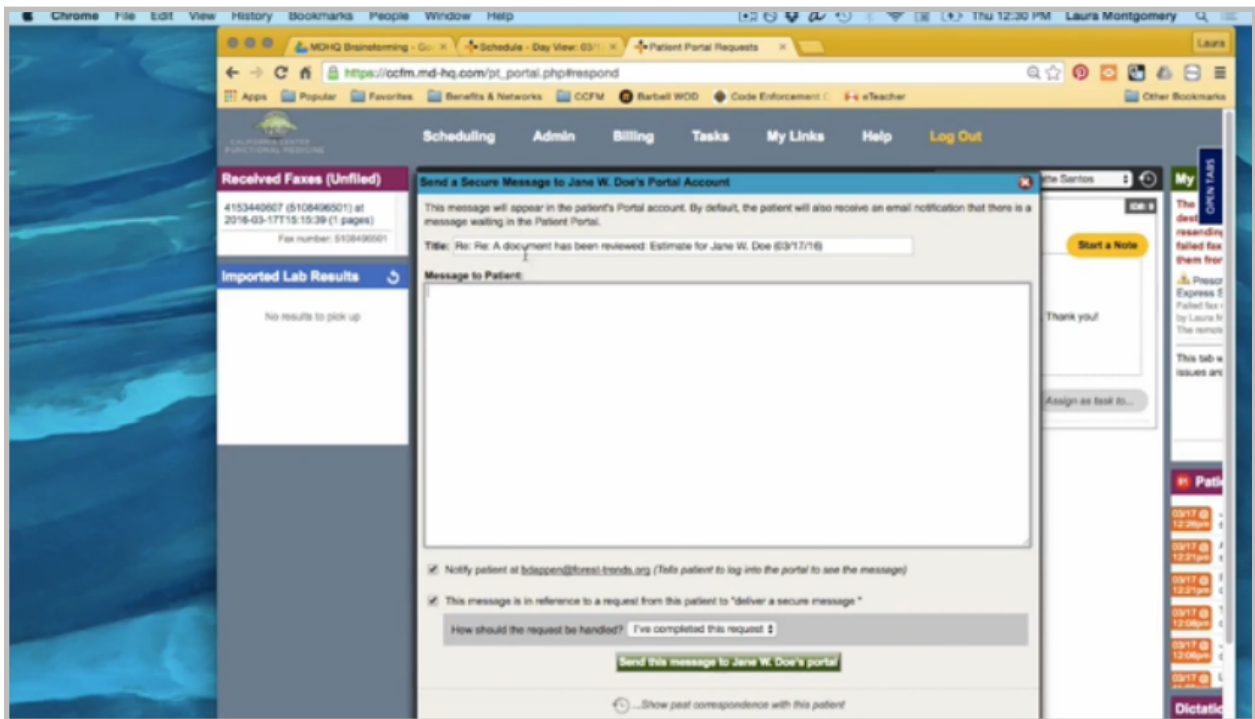
I can close her chart. Back in the portal, I'll reply to the patient, let her know we got her modified estimate approval, and we'll be in touch soon with further instructions and the order confirmation.
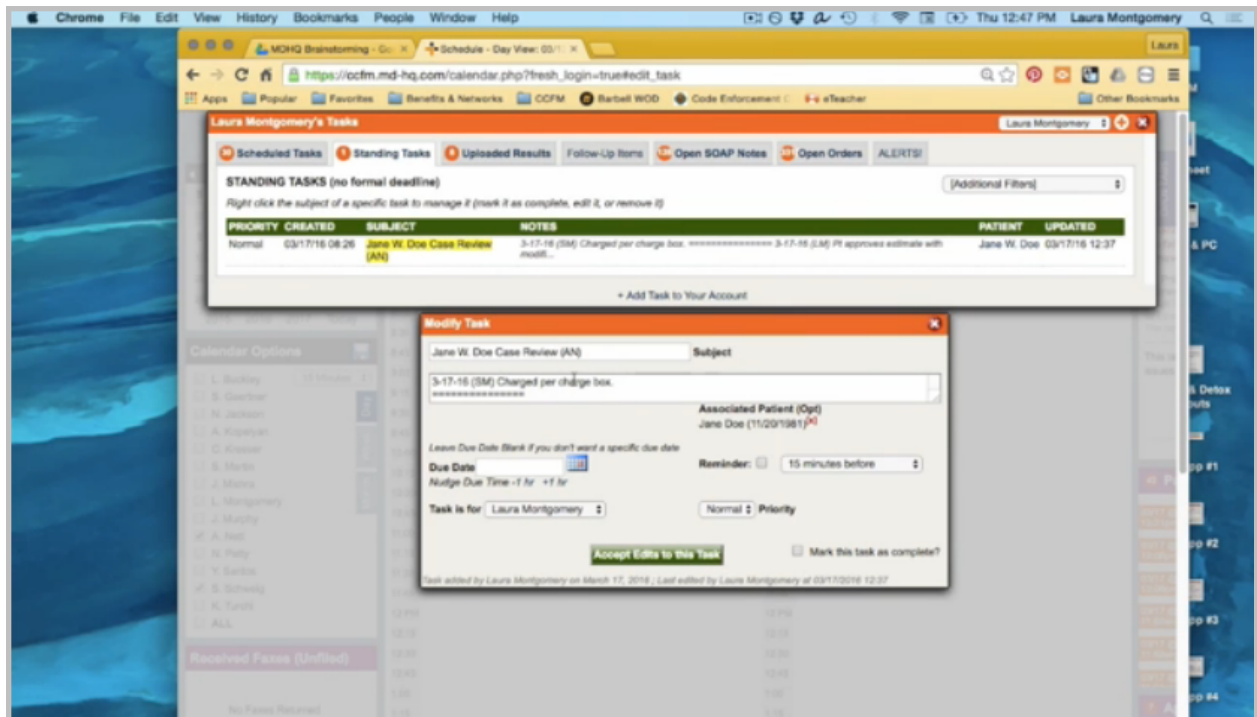
Once admin staff receives the task back from billing, there will be a note that everything was charged per the charge box in the encounter. Click on the patient's name to open the chart. I want to click to open the admin notes. In this case, the patient has declined the testing, but if she had wanted to order it, I would use the Lab Ordering Procedures Google doc to go through and order all the testing.
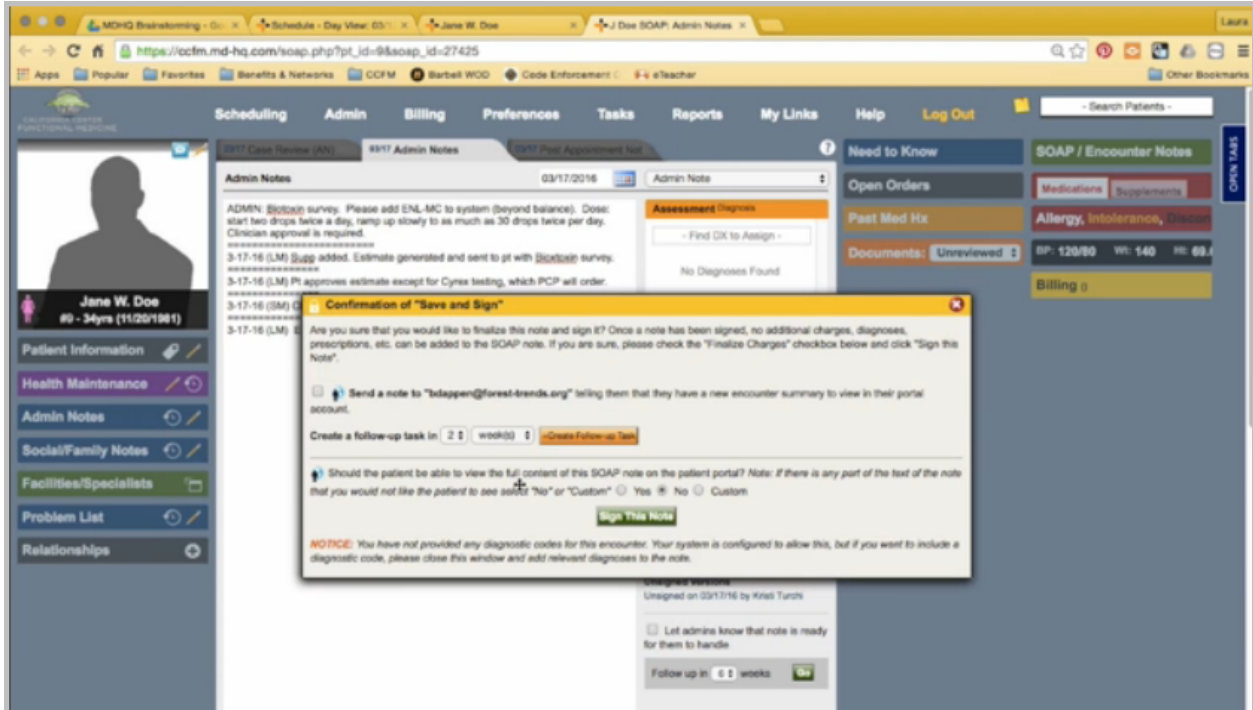
So, here all I need to do is send her an order confirmation. I'm going to go ahead and mark here that the encounter is complete. Save and sign the note. I don't need to send her the admin note, so I'll just sign it. I want to make sure I note to her that this supplement is on backorder.
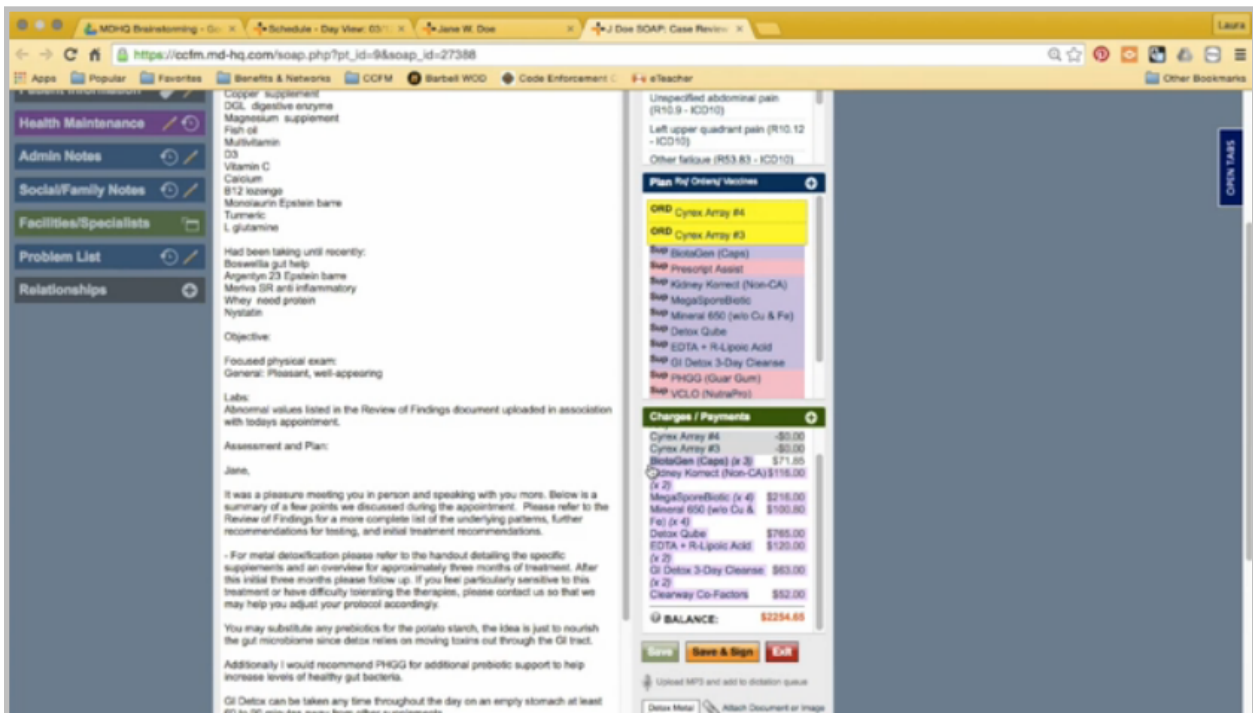
You can close this note and open the encounter. I'm going to highlight the charges here, copy them, close the encounter, right-click to create a subnote, and this will be the order confirmation.
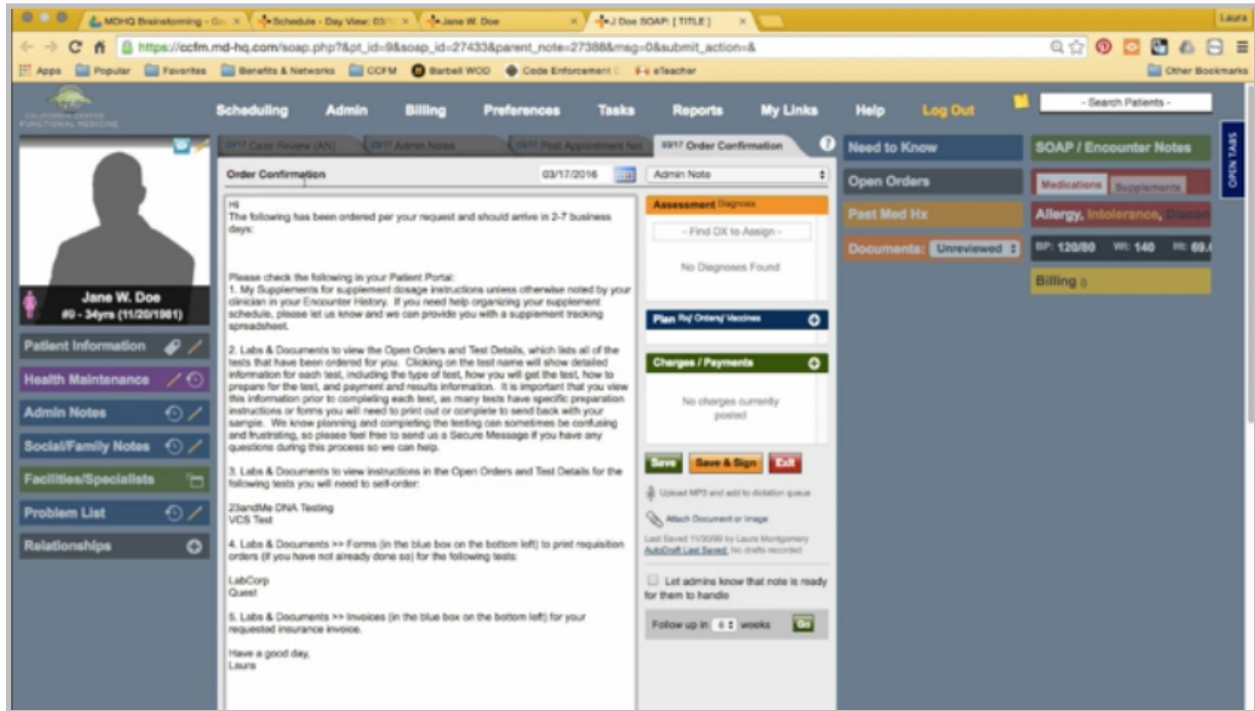

I'll address it to the patient and paste my list of charges here, taking off the dollar amounts. Then I'm going to remove this one from the list because it's not on its way and make a note that it will autoship once the backorder is fulfilled.

Then I want to go through the rest of my message and take out what doesn't apply. She did have supplements ordered. There was testing ordered. The rest does not apply, so I'll remove that.
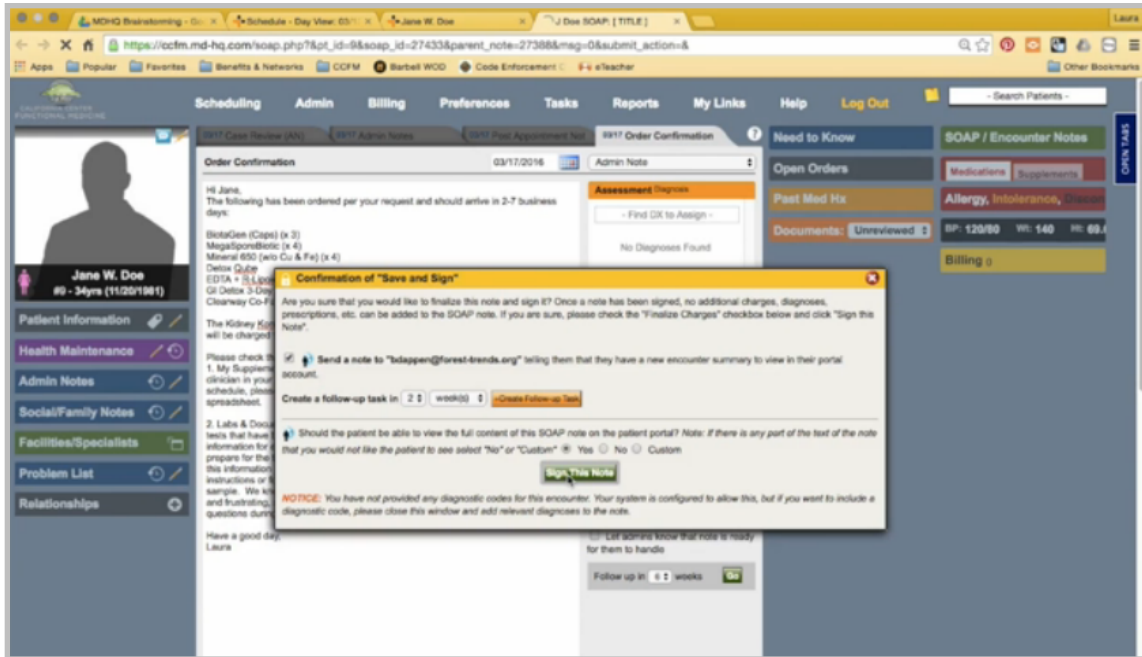
Then I can save and sign the note. I do want to send her a message to let her know that this is ready and make sure it is visible to the portal.
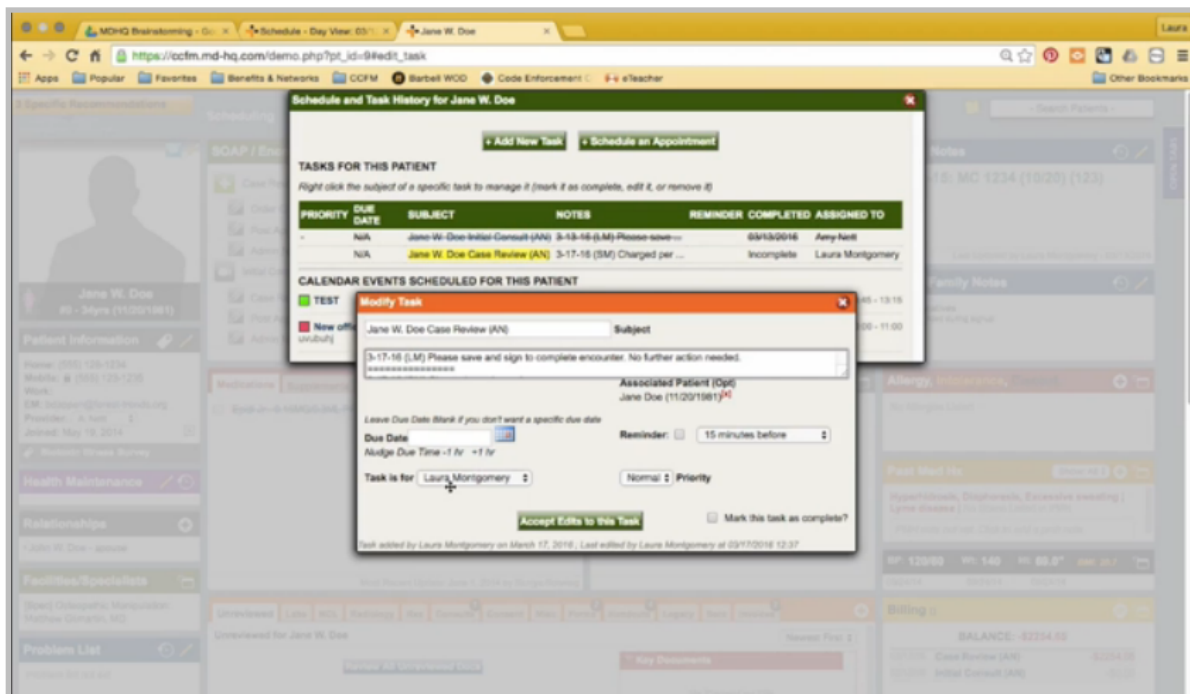
Sign the note, close it, bring up the task, and now I can send it back to the clinician to let her know that everything in the encounter is done, and she just needs to sign it to complete.