Tag Questionnaires to Patients

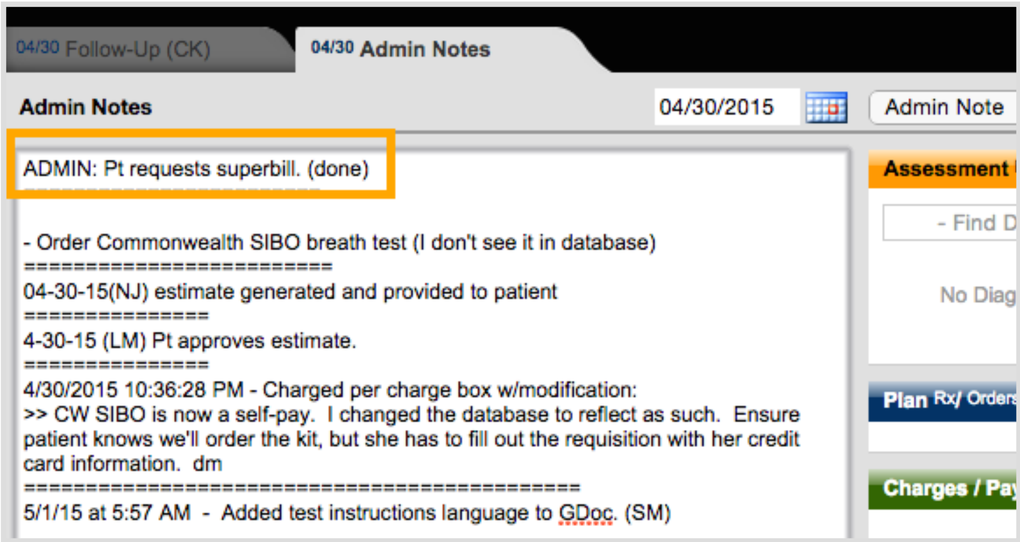
PURPOSE

1. Move requests quickly and efficiently through the flow of the practice.
2. Provide all needed forms to patients on time.

PROCEDURE

Expected time frame: As needed

1. Open the patient's chart.
2. Click the tags in the black Patient Information box.
3. Checkmark the appropriate form name to be sent.
4. Click "save and close."
5. If you are sending a form based on an encounter note: go to the Admin Note of the encounter. Next to the note where it states to provide the form, add: (done). Example below for a superbill outlined in orange:



6. Save and close the note.