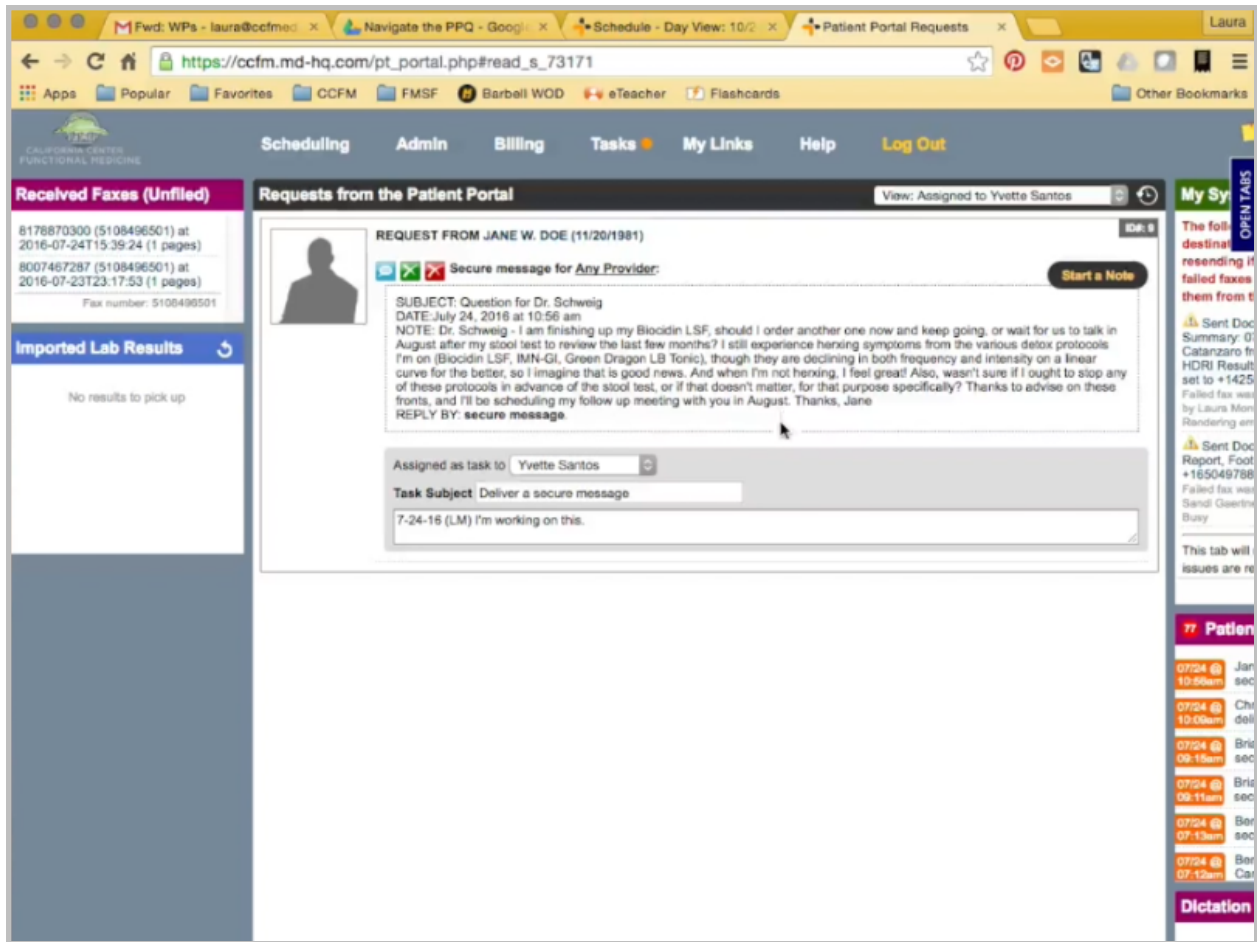
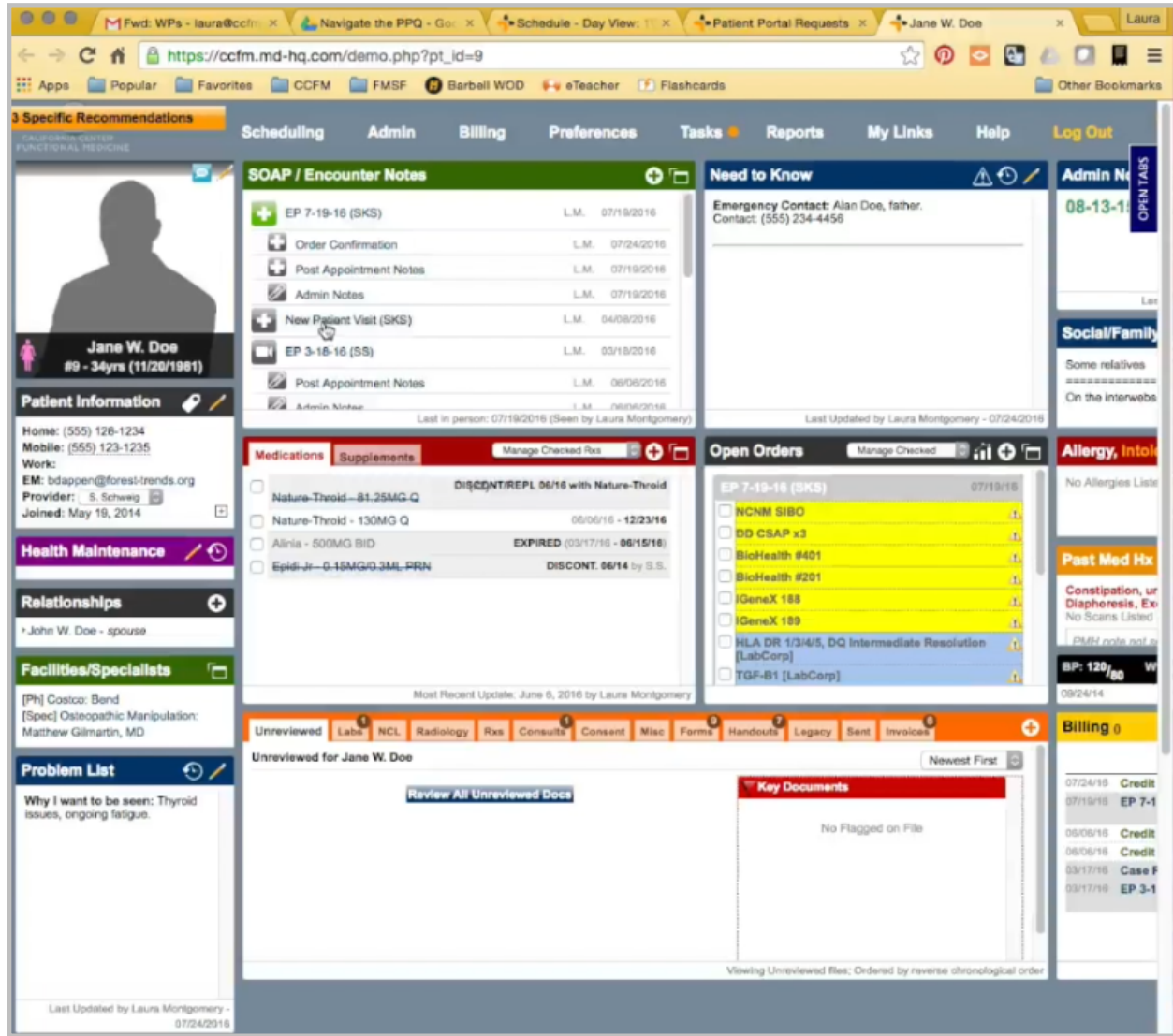


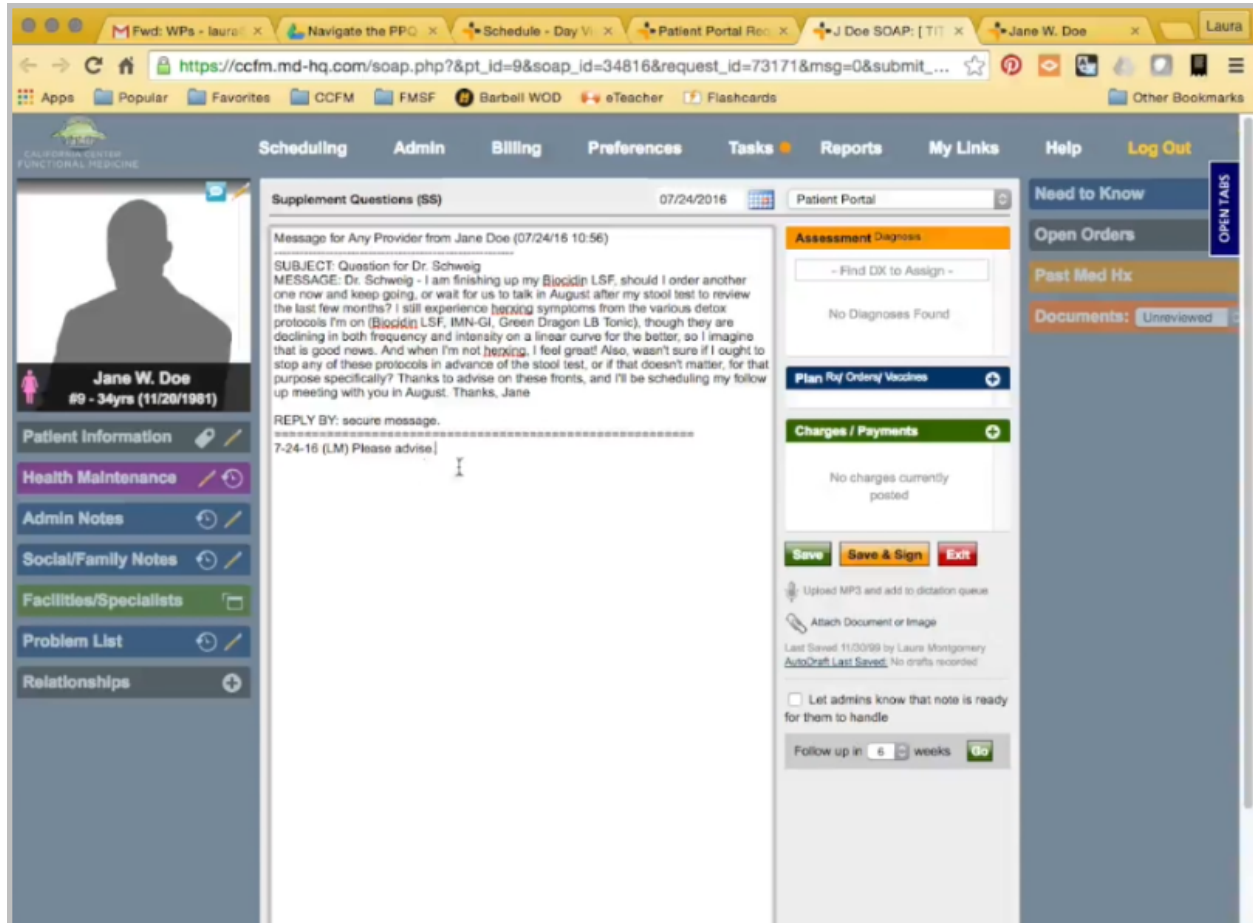
Back-end Systems: Using the EHR: Part Eight - Navigate the Patient Portal



As admin staff sorts through portal messages, any questions that cannot be answered by admin need to go to the clinician. We do not assign from the portal. Not only does that keep the clinicians out of the portal so they don't have to deal with the other incoming messages that can be handled by admin staff, it also helps document the clinical nature of these type of questions in the patient's chart so everyone has them for a better reference later.

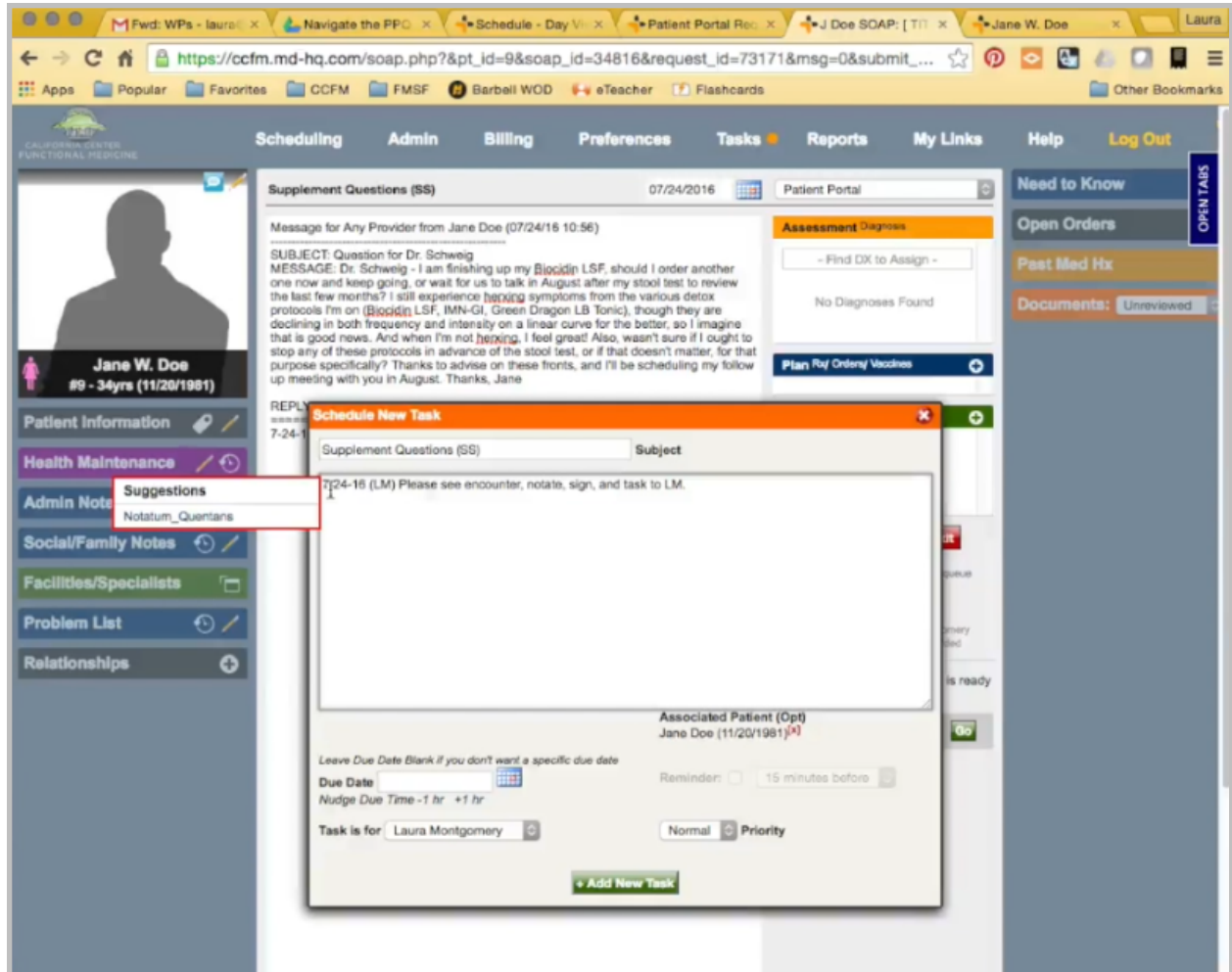


After I read this note, and I know that I cannot answer it, the first thing is I'm going to click to open the chart. I just want to look and see. Sometimes patients do send back-to-back messages, so I'm just looking to see if there is another portal message that is open and not signed, and I could just add it to that. If this is a follow-up to a previous question they sent, which in that case, I would actually create a subnote of this, but this is a new question, and this is an appointment encounter, so I wouldn't add it to that open encounter.



The screenshot shows a web browser window with multiple tabs. The active tab is the Patient Portal. The URL is https://ccfm.md-hq.com/soap.php?&pt_id=9&soap_id=34816&request_id=73171&msg=0&submit.... The page has a navigation bar with links: Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out. On the left, there's a sidebar with patient information for Jane W. Doe, #9 - 34yrs (11/20/1981), and various tabs like Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships. The main content area shows a message from Jane Doe to Dr. Schweig, dated 07/24/16. The message discusses her experience with Biocidin LSF and her intention to stop any of these protocols in advance of a stool test. Below the message, there's a 'REPLY BY: secure message.' section with a text input field containing '7-24-16 (LM) Please advise'. To the right of the message, there are several panels: 'Assessment/Diagnosis' with a '- Find DX to Assign -' button and 'No Diagnoses Found'; 'Plan Rx/ Orders/ Vaccines'; 'Charges / Payments' with 'No charges currently posted'; and a 'Save' button. At the bottom right, there's a 'Follow up in' section set to 6 weeks.

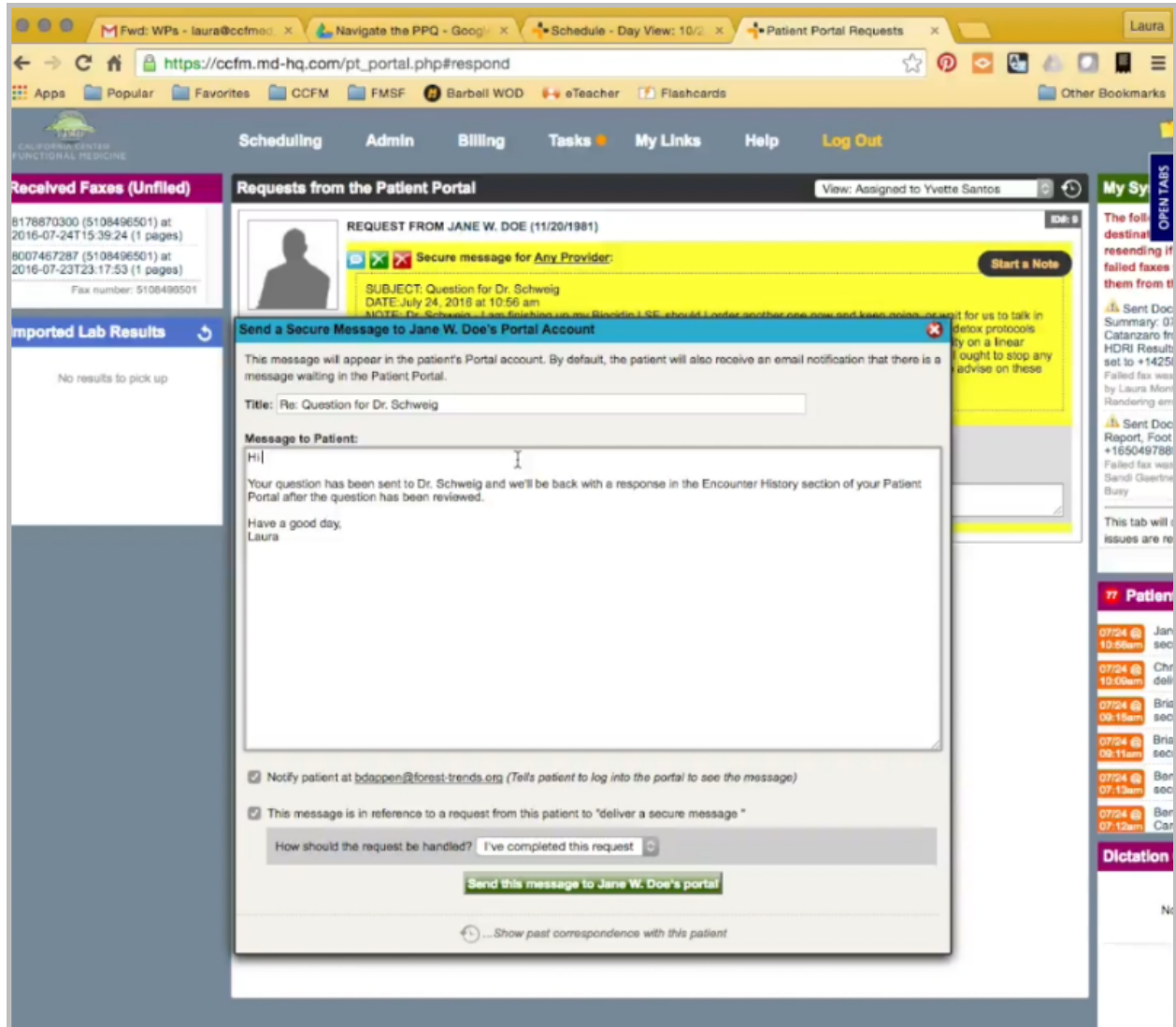
Back in the portal, I'll just click Start a Note. I'm going to give the title just kind of a brief summary. Put the clinician's initials. I remove everything above the message. I put my stamp and "please advise" note here, message to the clinician. This is a patient portal message, so I can save this.



The screenshot shows a web browser window with the URL https://ccfm.md-hq.com/soap.php?&pt_id=9&soap_id=34816&request_id=73171&msg=0&submit.... The page is titled "Supplement Questions (SS)" and shows a message from Jane W. Doe dated 07/24/2016. The message content is: "MESSAGE: Dr. Schweig - I am finishing up my Biocidin LSF, should I order another one now and keep going, or wait for us to talk in August after my stool test to review the last few months? I still experience happening symptoms from the various detox protocols I'm on (Biocidin LSF, IMN-GI, Green Dragon LB Tonic), though they are declining in both frequency and intensity on a linear curve for the better, so I imagine that is good news. And when I'm not happening, I feel great! Also, wasn't sure if I ought to stop any of these protocols in advance of the stool test, or if that doesn't matter, for that purpose specifically? Thanks to advise on these fronts, and I'll be scheduling my follow up meeting with you in August. Thanks, Jane".

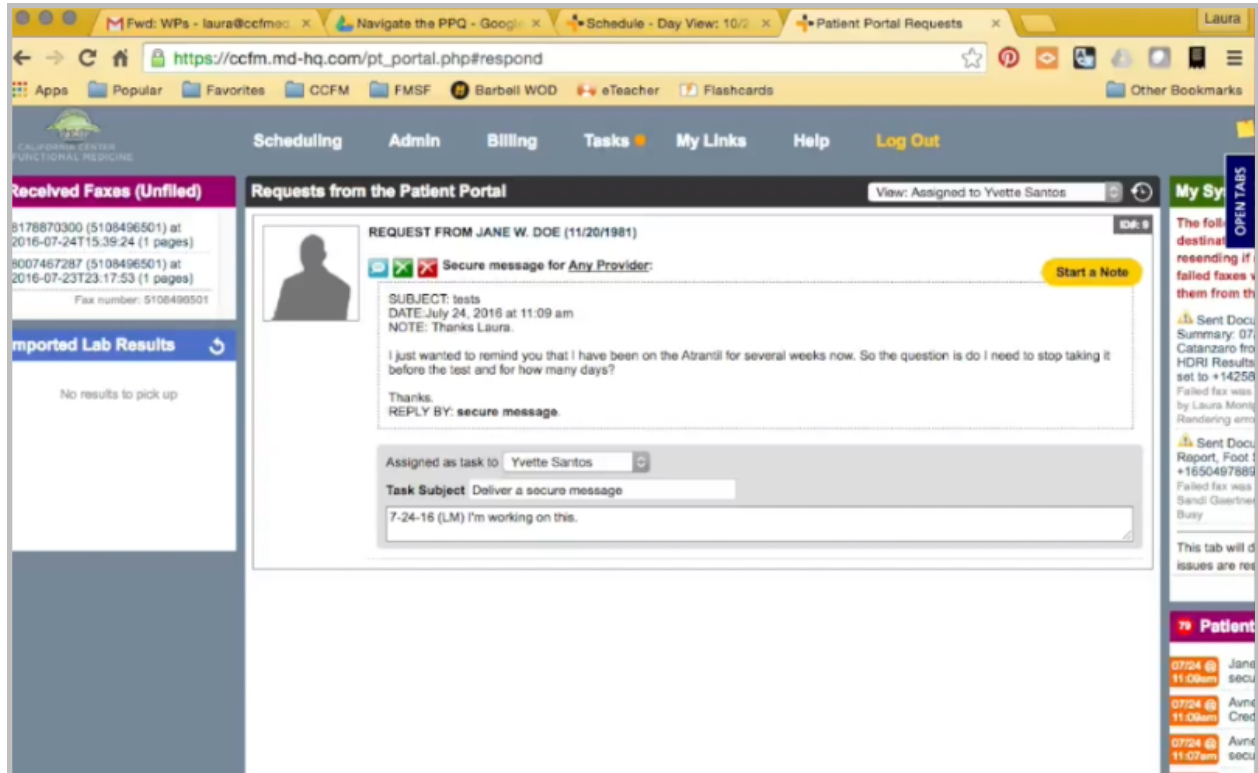
A "Schedule New Task" dialog box is open, showing the "Subject" field with the text "Supplement Questions (SS)". The "Associated Patient (Opt)" field shows "Jane Doe (11/20/1981)". The "Due Date" field is empty, and the "Reminder" field is set to "15 minutes before". The "Task is for" field is set to "Laura Montgomery". The "Priority" field is set to "Normal". The "Add New Task" button is visible at the bottom of the dialog box.

I'm just going to copy the title here, add a new task, stamp it, and ask the clinician to notate their answer, sign, and send back to me. Then, I'll send it to the clinician. You can close the note and close the chart.

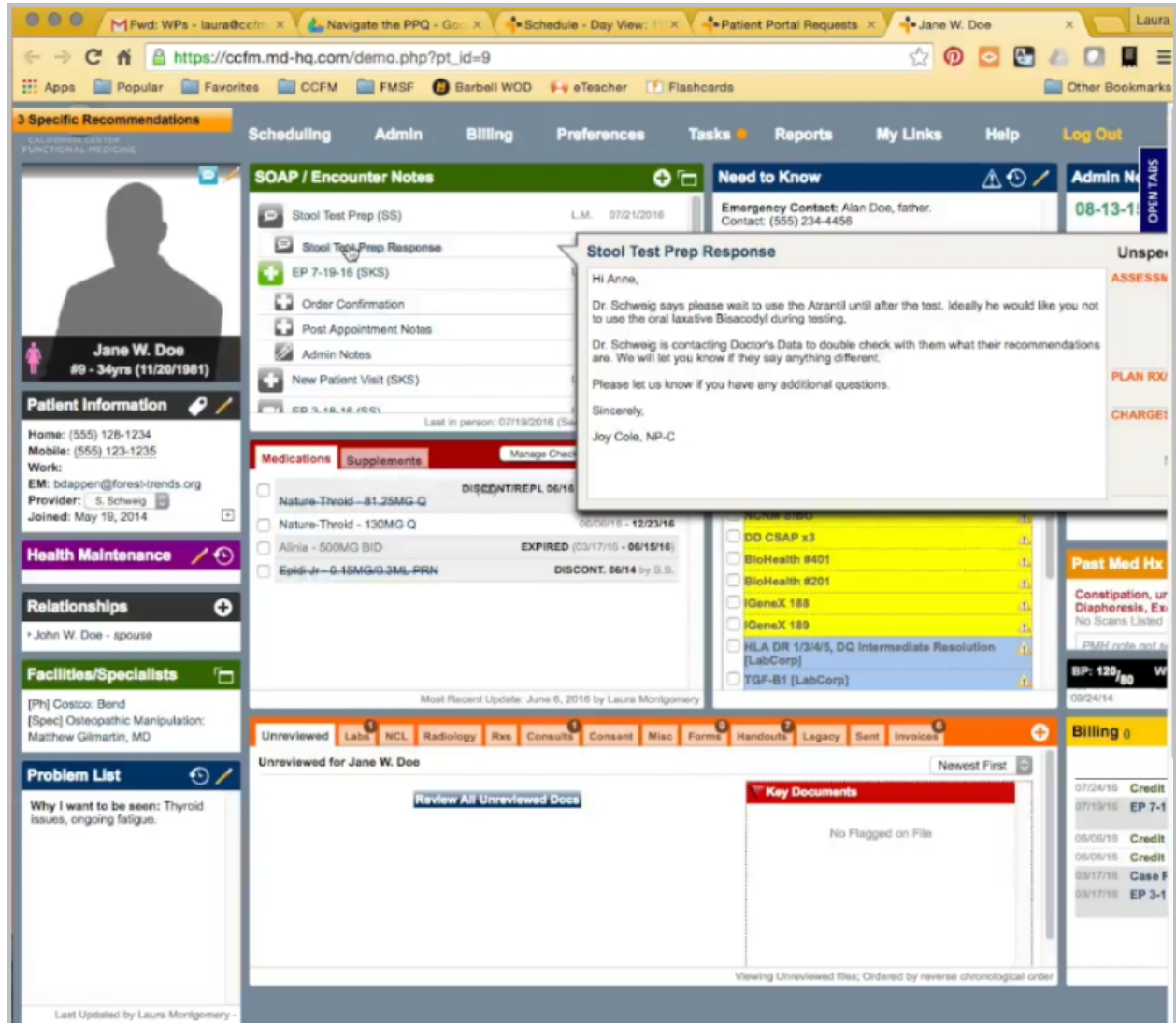


The screenshot shows a web browser window with multiple tabs. The active tab is titled "Patient Portal Requests" and shows a URL: https://ccfm.md-hq.com/pt_portal.php#respond. The page has a navigation bar with links: Scheduling, Admin, Billing, Tasks, My Links, Help, and Log Out. On the left, there are sections for "Received Faxes (Unfiled)" and "Imported Lab Results". The main content area is titled "Requests from the Patient Portal" and shows a request from Jane W. Doe (11/20/1981). The request details include a subject "Question for Dr. Schweig" and a date "July 24, 2016 at 10:56 am". A yellow box contains a "Secure message for Any Provider" with a "Start a Note" button. Below this, there is a form to "Send a Secure Message to Jane W. Doe's Portal Account". The form includes a title field with "Re: Question for Dr. Schweig", a message body with "Hi! Your question has been sent to Dr. Schweig and we'll be back with a response in the Encounter History section of your Patient Portal after the question has been reviewed. Have a good day, Laura", and checkboxes for "Notify patient at bdsappen@forest-trends.org" and "This message is in reference to a request from this patient to 'deliver a secure message'". A dropdown menu for "How should the request be handled?" is set to "I've completed this request". A green button "Send this message to Jane W. Doe's portal" is at the bottom. On the right, there is a "My Sy" sidebar with a list of recent messages and a "Dictation" section.

Now, here, I'm going to respond to the message and let the patient know that we're going to send the message to Dr. Schweig. They need to look for the response in their encounter history, and that's everything.



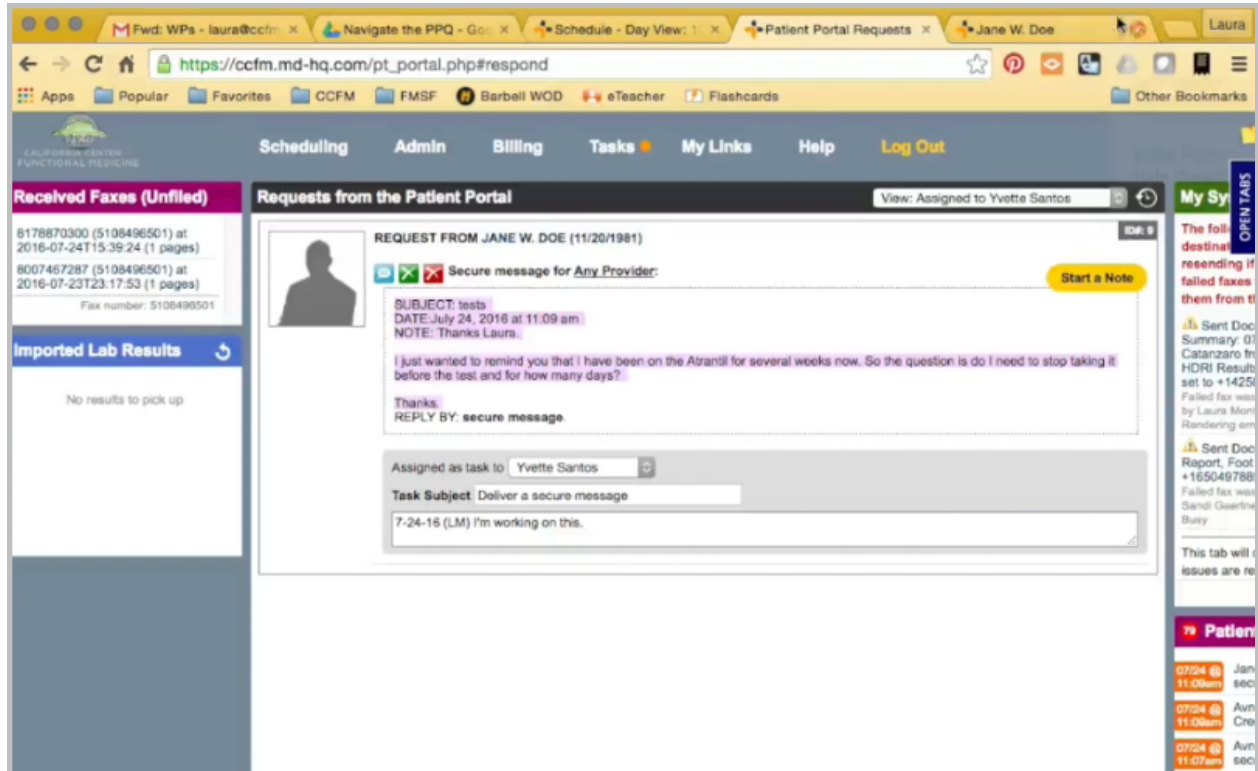
Here, we have a second example of a clinician question. Again, this is something that I can't answer. I mentioned the first thing I want to do is click on the patient's chart to see if there is already an open encounter or if this is related to a previous question.



The screenshot displays the Kresser Institute Patient Portal interface. The top navigation bar includes links for Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out. The main content area is divided into several sections:

- Patient Information:** Jane W. Doe, #9 - 34yrs (11/20/1981). Home: (555) 126-1234, Mobile: (555) 123-1235, Work: EM: bdappen@forest-trends.org, Provider: S. Schweig, Joined: May 19, 2014.
- Health Maintenance:** Relationships (John W. Doe - spouse), Facilities/Specialists (Ph: Costco: Bend, Spec: Osteopathic Manipulation: Matthew Gilmartin, MD), Problem List (Why I want to be seen: Thyroid issues, ongoing fatigue).
- SOAP / Encounter Notes:** Stool Test Prep (SS), L.M. 07/21/2016. A pop-up window titled "Stool Test Prep Response" shows a message from Joy Cole, NP-C to Hi Anne, stating that Dr. Schweig is contacting Doctor's Data to double check with them what their recommendations are. We will let you know if they say anything different. Please let us know if you have any additional questions. Sincerely, Joy Cole, NP-C.
- Medications:** Nature-Throid - 81.25MG Q, Nature-Throid - 130MG Q, Alinia - 500MG BID, Epis-Jr - 0.15MG Q 3ML-PRN. A "DISCONTREPL 06/16" notice is visible.
- Unreviewed:** A section for Jane W. Doe with a "Review All Unreviewed Docs" button. A "Key Documents" section shows "No Flagged on File".
- Billing:** A section showing a list of bills with dates and amounts.

In this case, she is sending a response after Dr. Schweig sent this answer to her previous question.



The screenshot shows a web browser window with multiple tabs open. The active tab is titled "Patient Portal Requests" and shows a URL: https://ccfm.md-hq.com/pt_portal.php#respond. The browser's address bar and bookmarks are visible at the top. The page header includes navigation links: "Scheduling", "Admin", "Billing", "Tasks", "My Links", "Help", and "Log Out".

The main content area is titled "Requests from the Patient Portal" and shows a request from "JANE W. DOE (11/20/1981)". The request details include:

- Subject:** tests
- Date:** July 24, 2016 at 11:09 am
- Note:** Thanks Laura.
- Message:** I just wanted to remind you that I have been on the Atrantil for several weeks now. So the question is do I need to stop taking it before the test and for how many days?
- Thanks:**
- Reply By:** secure message

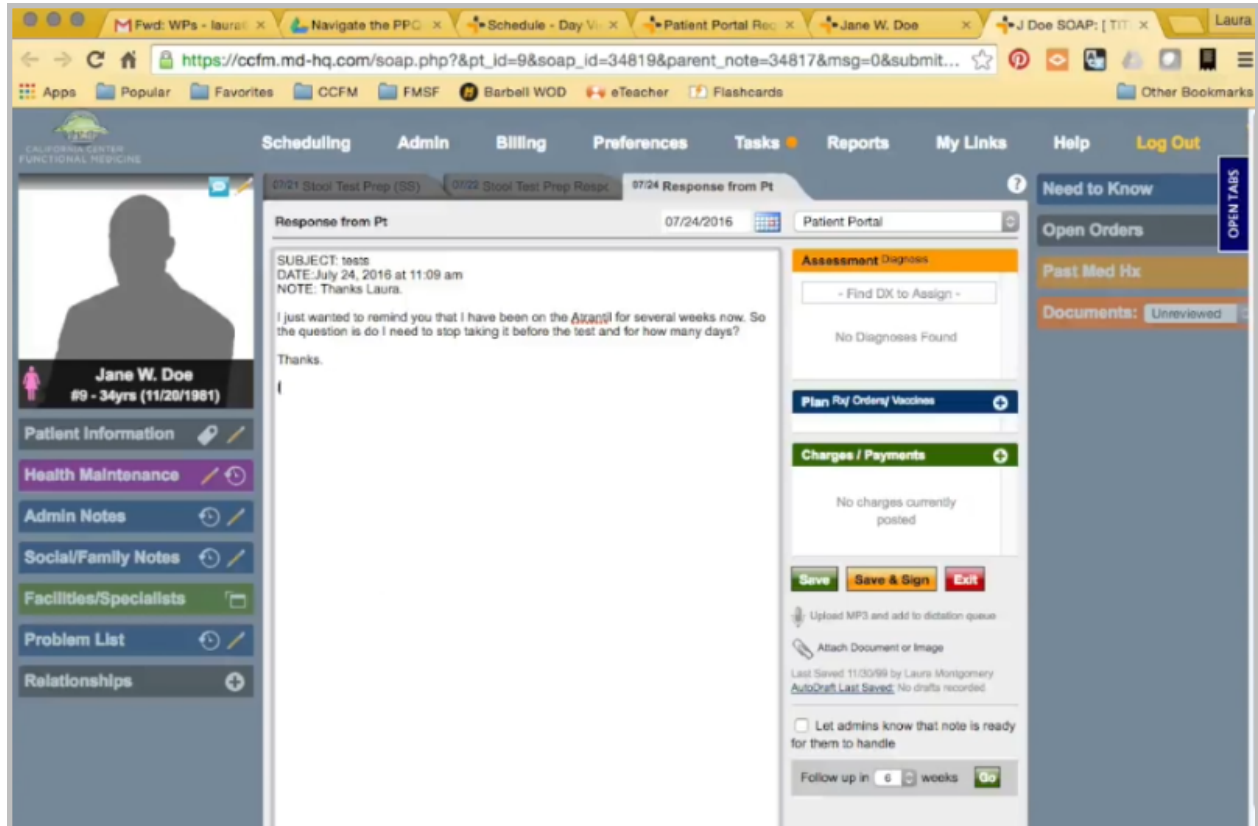
Below the message, there is a section for "Assigned as task to" with a dropdown menu showing "Yvette Santos". The "Task Subject" is "Deliver a secure message" and the "Task Date" is "7-24-16 (LM) I'm working on this".

On the left side of the page, there are sections for "Received Faxes (Unfiled)" and "Imported Lab Results". The "Received Faxes" section lists two faxes with their respective dates and page counts. The "Imported Lab Results" section shows "No results to pick up".

On the right side of the page, there is a "My Sy" section with a list of "OPEN TABS". The tabs include:

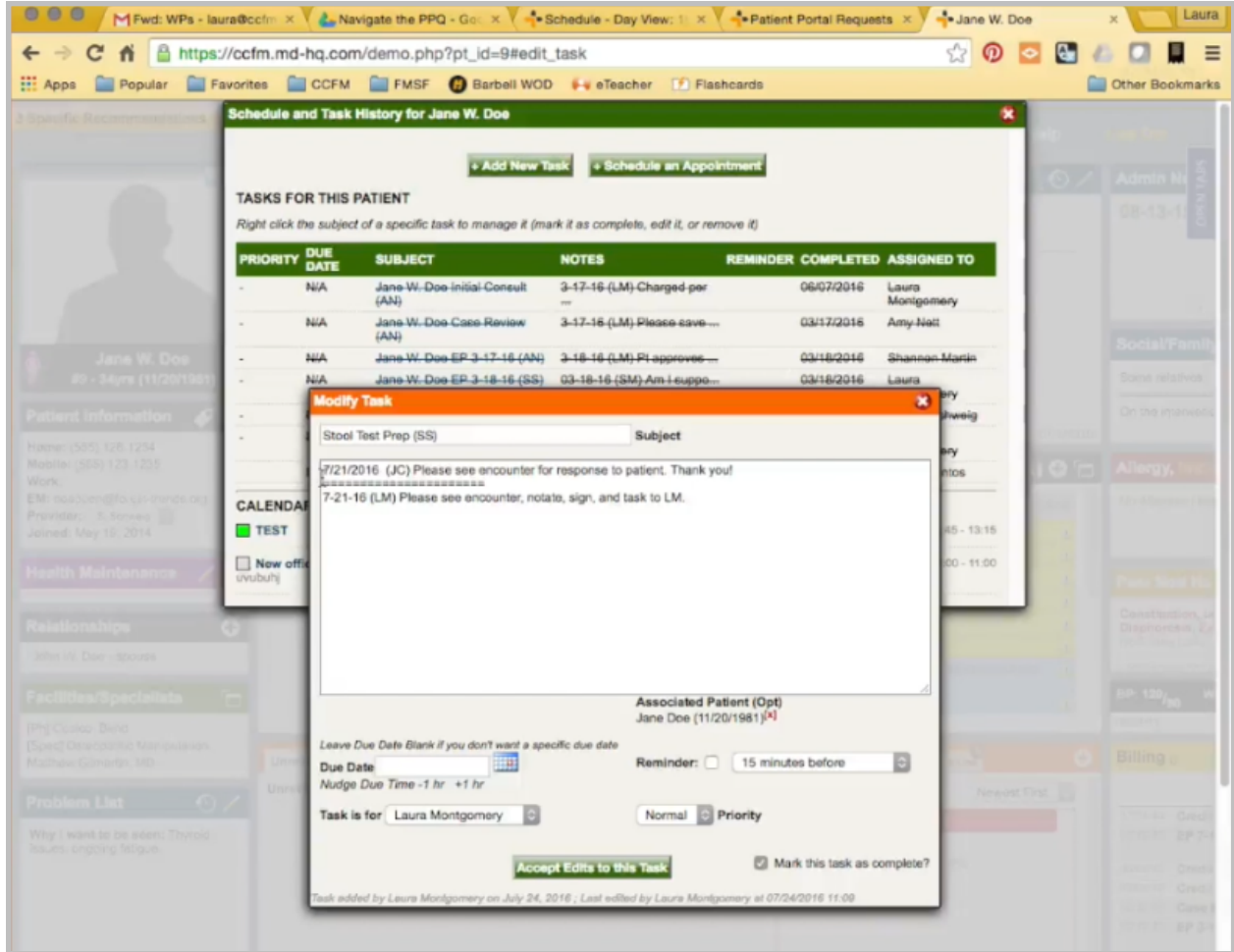
- The foll...
- destinat...
- reending if...
- failed faxes...
- them from ti...
- Sent Doc...
- Summary: 01...
- Catanzaro fr...
- HDRI Result...
- set to +14251...
- Failed fax was...
- by Laura Mori...
- Rendering am...
- Sent Doc...
- Report, Foot...
- +165046788...
- Failed fax was...
- Sandi Guertne...
- Busy
- This tab will...
- issues are re...

Instead of starting a new note, what I want to do here is copy this note, go to her chart, create a subnote of this original question encounter.



The screenshot shows a web browser window with multiple tabs. The active tab is titled "J Doe SOAP: [TIT...". The address bar shows a URL from "ccfm.md-hq.com". The page header includes navigation links: "Scheduling", "Admin", "Billing", "Preferences", "Tasks", "Reports", "My Links", "Help", and "Log Out". On the left, a sidebar displays patient information for "Jane W. Doe" (age 34, DOB 11/20/1981) and various tabs like "Patient Information", "Health Maintenance", "Admin Notes", "Social/Family Notes", "Facilities/Specialists", "Problem List", and "Relationships". The main content area shows a "Response from Pt" dated 07/24/2016. The message text is: "SUBJECT: tests DATE: July 24, 2016 at 11:09 am NOTE: Thanks Laura. I just wanted to remind you that I have been on the Atazidil for several weeks now. So the question is do I need to stop taking it before the test and for how many days? Thanks." To the right of the message is a sidebar with sections: "Assessment/Diagnosis" (with a "Find DX to Assign" button and "No Diagnoses Found" message), "Plan Rx/ Orders/ Vaccines", "Charges / Payments" (with "No charges currently posted" message), and buttons for "Save", "Save & Sign", and "Exit". At the bottom of this sidebar are options to "Upload MP3 and add to dictation queue", "Attach Document or Image", a checkbox for "Let admins know that note is ready for them to handle", and a "Follow up in" field set to "6 weeks" with a "Go" button. On the far right, a vertical sidebar contains links for "Need to Know", "Open Orders", "Past Med Hx", and "Documents: Unreviewed".

It's a portal message. I'll just paste her message. I still want to copy the subnote title. I don't need to put the clinician's initials because it is already in the main encounter.



Schedule and Task History for Jane W. Doe

[Add New Task](#) [Schedule an Appointment](#)

TASKS FOR THIS PATIENT
Right click the subject of a specific task to manage it (mark it as complete, edit it, or remove it)

PRIORITY	DUE DATE	SUBJECT	NOTES	REMINDER	COMPLETED	ASSIGNED TO
-	N/A	Jane W. Doe Initial Consult (AN)	3-17-16 (LM) Charged per ...		06/07/2016	Laura Montgomery
-	N/A	Jane W. Doe Case Review (AN)	3-17-16 (LM) Please save ...		03/17/2016	Amy Natt
-	N/A	Jane W. Doe EP 3-17-16 (AN)	3-18-16 (LM) PI approves ...		03/18/2016	Shannon Martin
-	N/A	Jane W. Doe EP 3-18-16 (SS)	03-18-16 (SM) Am I suppo ...		03/18/2016	Laura

Modify Task

Stool Test Prep (SS) Subject

7/21/2016 (JC) Please see encounter for response to patient. Thank you!
7-21-16 (LM) Please see encounter, notate, sign, and task to LM.

Associated Patient (Opt)
Jane Doe (11/20/1981)

Leave Due Date Blank if you don't want a specific due date

Due Date:

Nudge Due Time: -1 hr +1 hr

Reminder: ☐ 15 minutes before

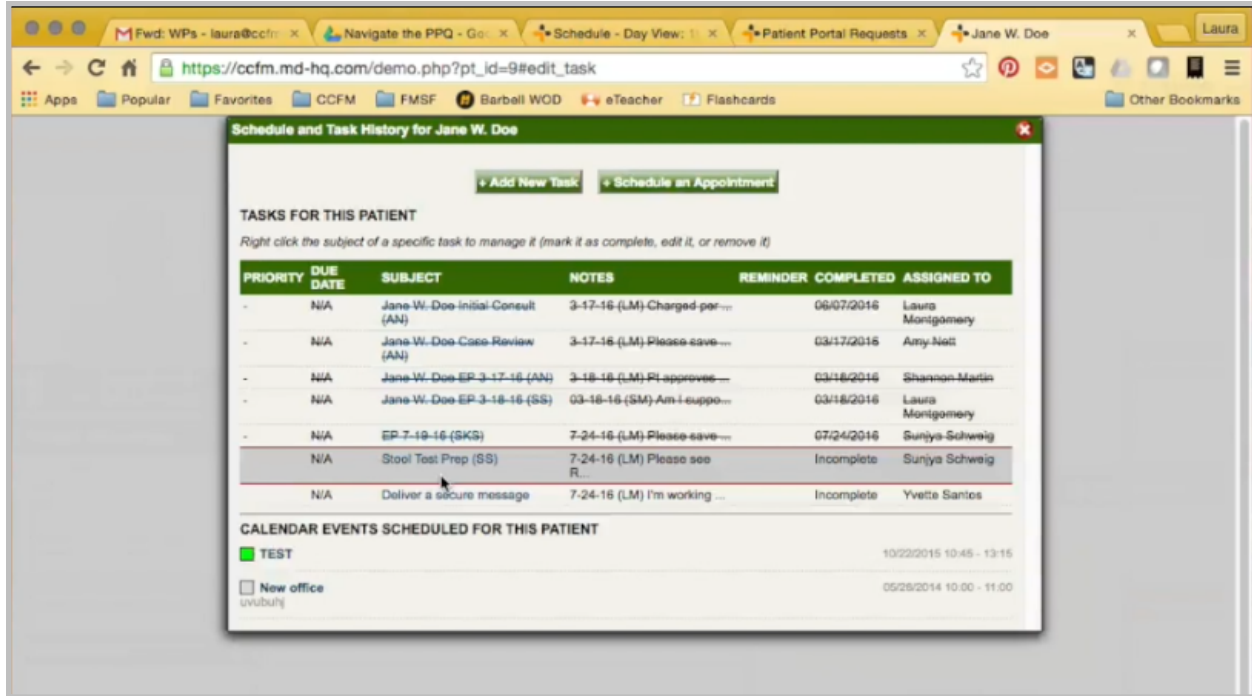
Task is for: Laura Montgomery

Normal Priority

[Accept Edits to this Task](#) ☒ Mark this task as complete?

Task edited by Laura Montgomery on July 24, 2016 ; Last edited by Laura Montgomery at 07/24/2016 11:09

I'm going to go to the Task History. Pull up the original task and put kind of a modified message here. I want to make sure I ask them to look at the specific subnote, notate, sign, and task back. Send it to the clinician.



Schedule and Task History for Jane W. Doe

[Add New Task](#) [Schedule an Appointment](#)

TASKS FOR THIS PATIENT
Right click the subject of a specific task to manage it (mark it as complete, edit it, or remove it)

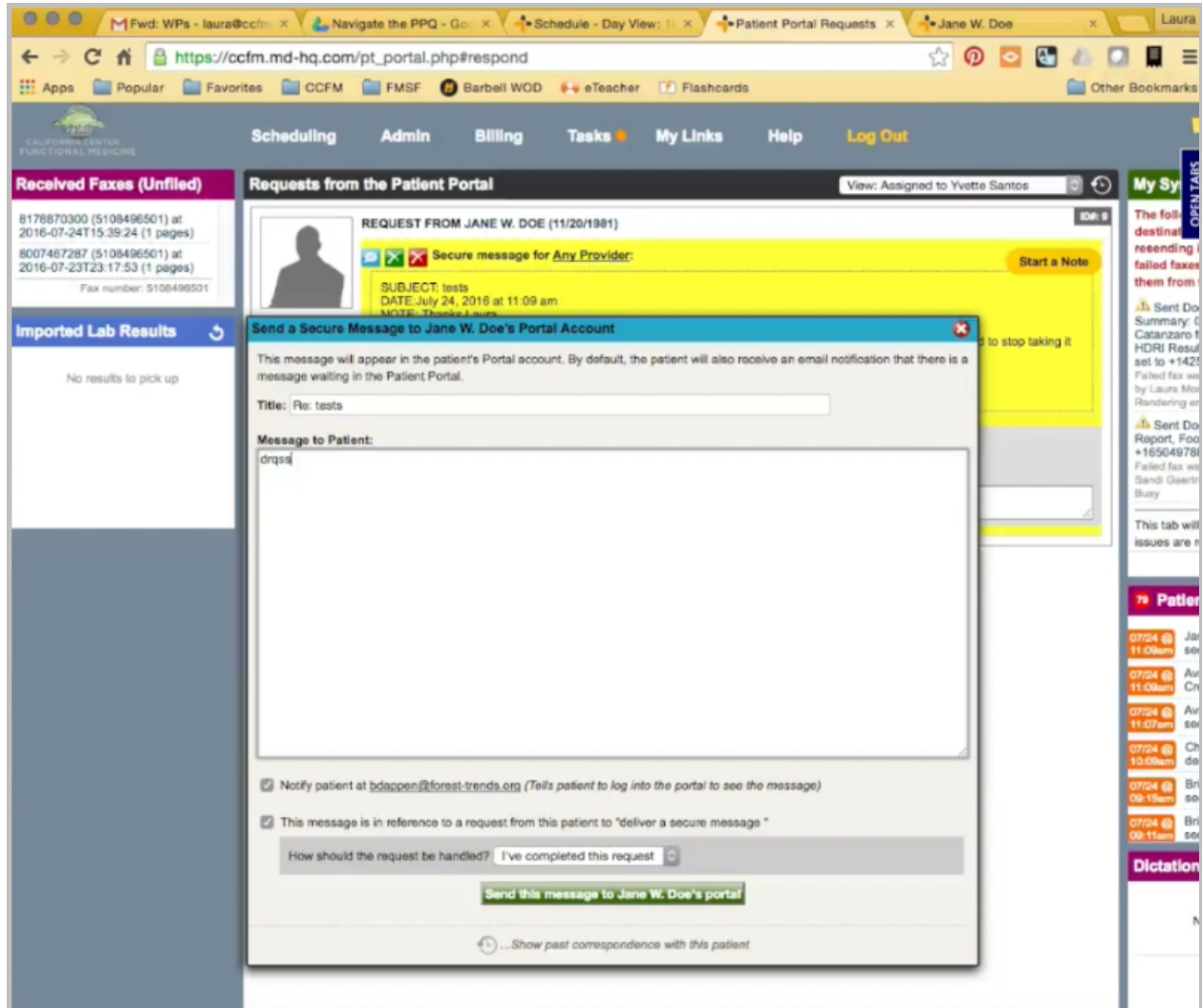
PRIORITY	DUE DATE	SUBJECT	NOTES	REMINDER	COMPLETED	ASSIGNED TO
-	N/A	Jane W. Doe Initial Consult (AN)	3-17-16 (LM) Charged per...	06/07/2016		Laura Montgomery
-	N/A	Jane W. Doe Case Review (AN)	3-17-16 (LM) Please save...	03/17/2016		Amy Nott
-	N/A	Jane W. Doe EP 3-17-16 (AN)	3-18-16 (LM) PI approve...	03/18/2016		Shannon Martin
-	N/A	Jane W. Doe EP 3-18-16 (SS)	03-18-16 (SM) Am i suppo...	03/18/2016		Laura Montgomery
-	N/A	EP 7-19-16 (SKS)	7-24-16 (LM) Please save...	07/24/2016		Sunja Schwaig
-	N/A	Stool Test Prep (SS)	7-24-16 (LM) Please see R...	Incomplete		Sunja Schwaig
-	N/A	Deliver a secure message	7-24-16 (LM) I'm working ...	Incomplete		Yvette Santos

CALENDAR EVENTS SCHEDULED FOR THIS PATIENT

☒ TEST 10/22/2015 10:45 - 13:15

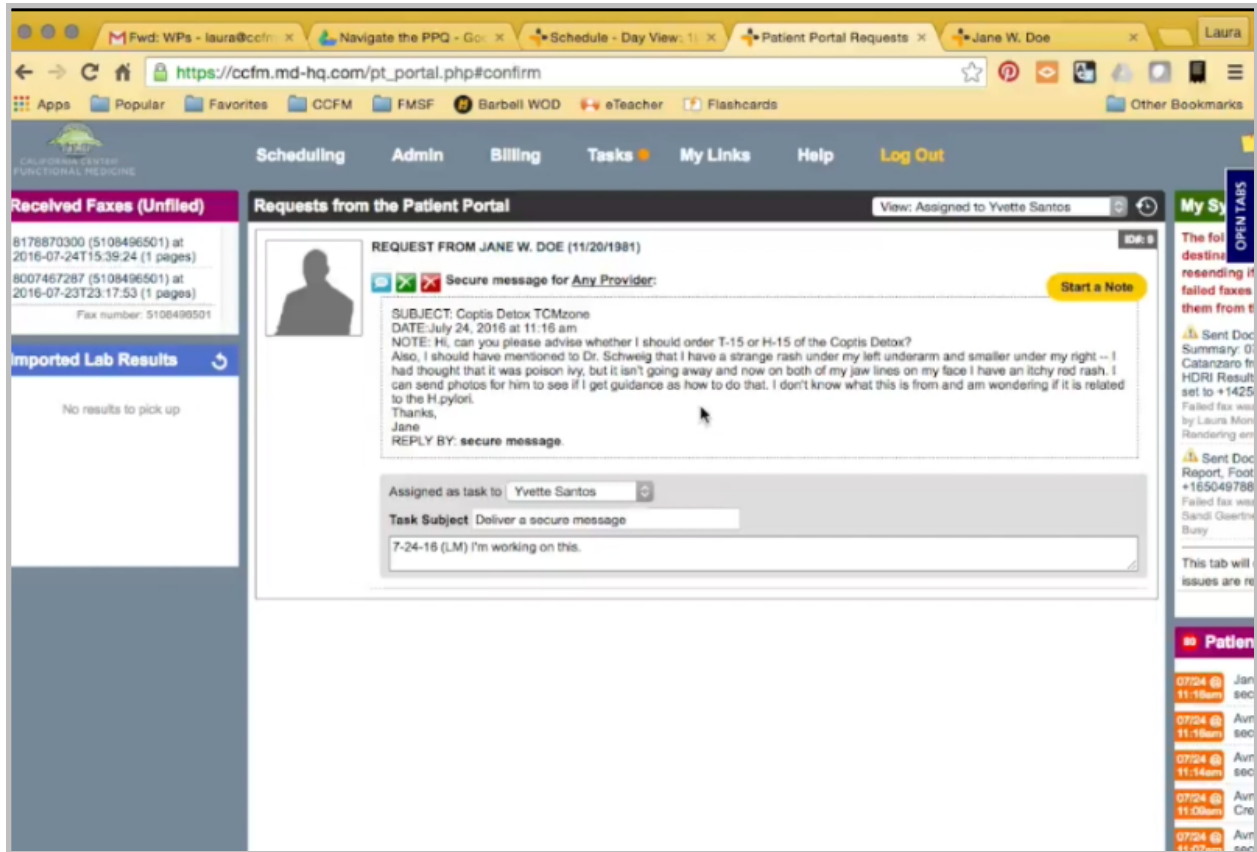
☐ New office 05/28/2014 10:00 - 11:00

Make sure to un-checkmark this as complete, so you want to make sure that line is not still crossed out. Otherwise, the clinician will not get the task.

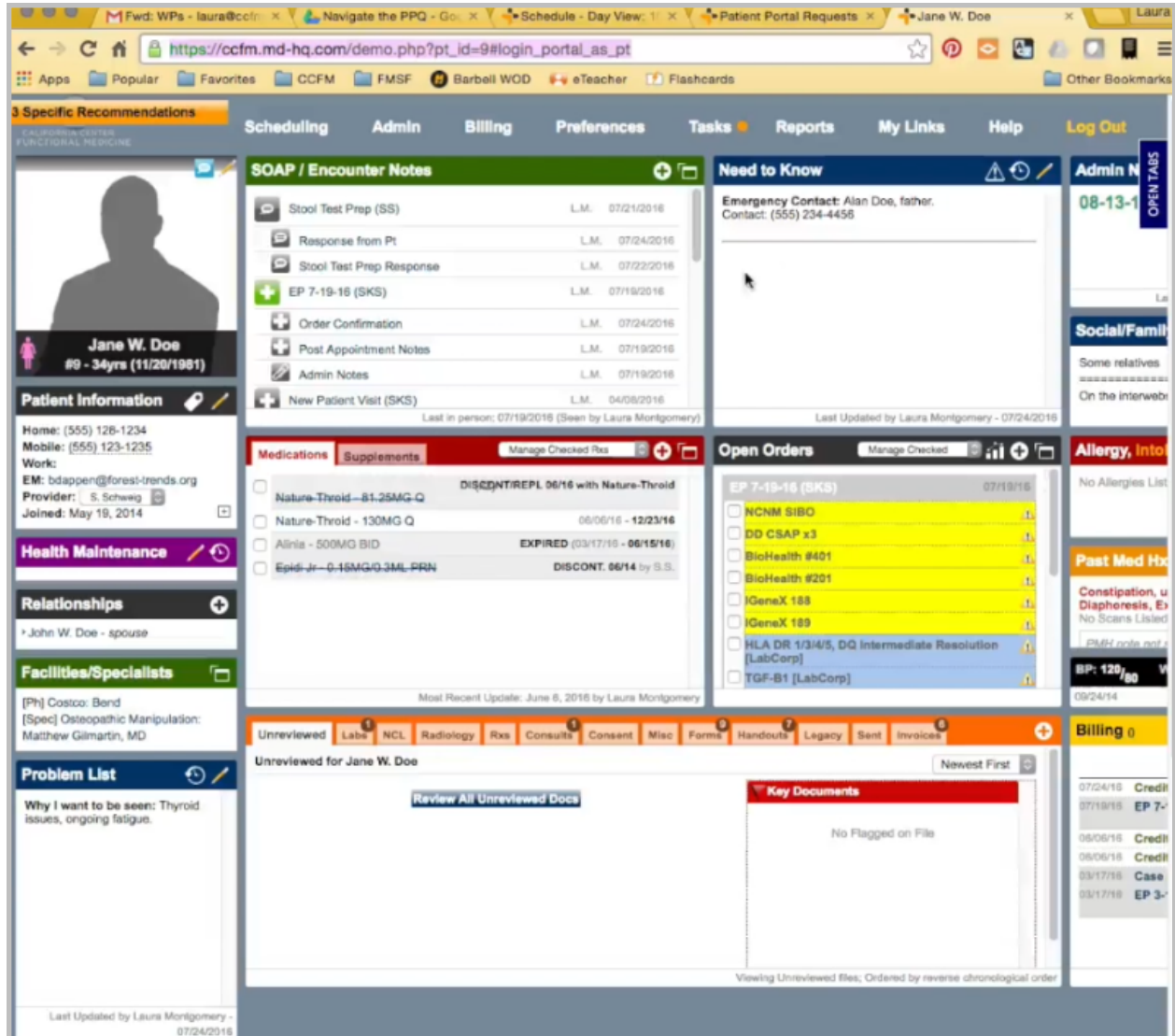


The screenshot shows a web browser window with multiple tabs. The active tab is titled "Patient Portal Requests" and shows a URL: https://ccfm.md-hq.com/pt_portal.php#respond. The page header includes navigation links: **Scheduling**, **Admin**, **Billing**, **Tasks**, **My Links**, **Help**, and **Log Out**. On the left sidebar, there are sections for "Received Faxes (Unfiled)" and "Imported Lab Results". The main content area is titled "Requests from the Patient Portal" and shows a request from Jane W. Doe (11/20/1981) with the subject "tests". A yellow banner indicates a "Secure message for Any Provider". A modal window titled "Send a Secure Message to Jane W. Doe's Portal Account" is open, containing a text area for the message, a "Title" field, and checkboxes for notification and reference. The "Title" field contains "Re: tests" and the "Message to Patient" field contains "drqs". At the bottom of the modal, there is a dropdown menu for "How should the request be handled?" set to "I've completed this request" and a green button labeled "Send this message to Jane W. Doe's portal".

Same thing. I would just go here. Respond to the patient, and that's it.



Sometimes questions will also come into the portal that have parts that admin staff can answer and parts that the clinician can answer. This is one of those messages.

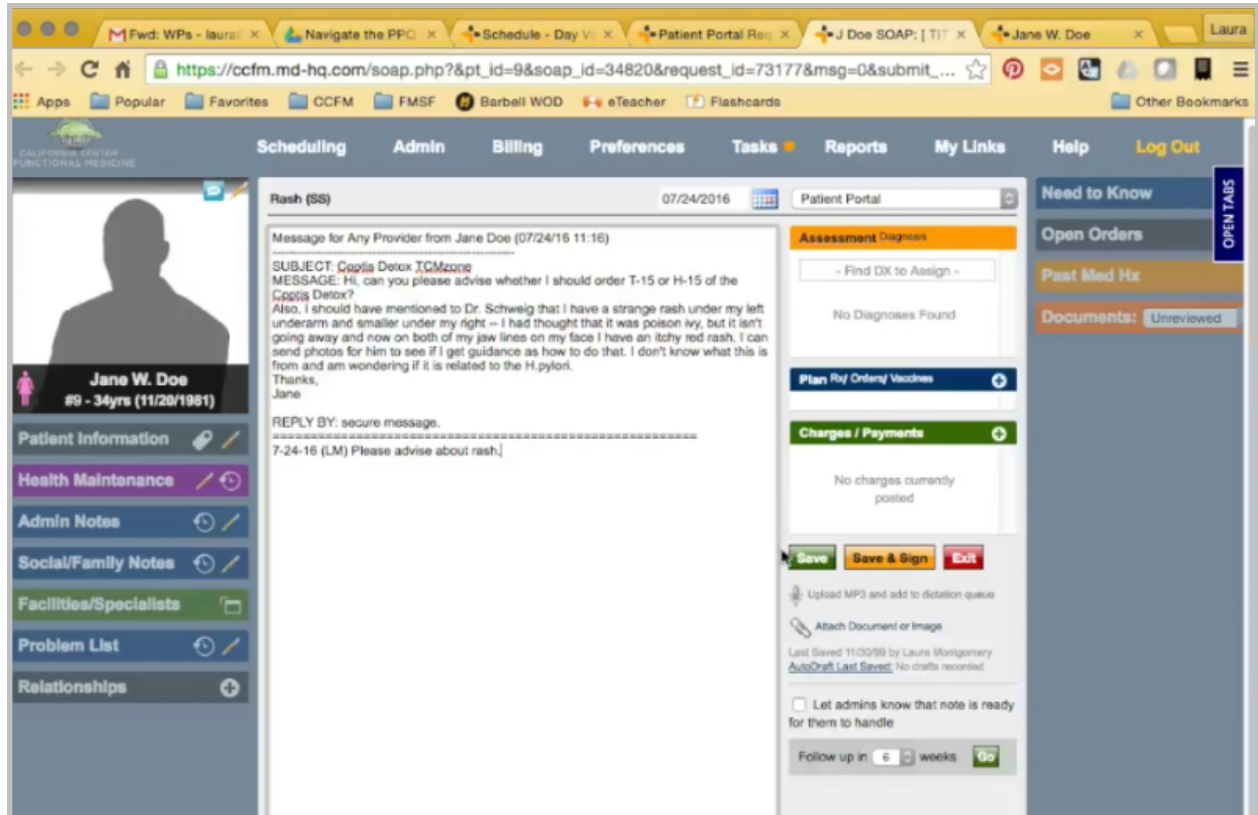


The screenshot shows a web browser window displaying the Kresser Institute Patient Portal. The URL is https://ccfm.md-hq.com/demo.php?pt_id=9#login_portal_as_pt. The interface is divided into several sections:

- Top Navigation:** Includes tabs for Apps, Popular, Favorites, CCFM, FMSF, Barbell WOD, eTeacher, Flashcards, and Other Bookmarks. Below this is a menu with options: 3 Specific Recommendations, Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out.
- Patient Information:** Displays a silhouette of Jane W. Doe, #9 - 34yrs (11/20/1981). It lists contact information: Home: (555) 126-1234, Mobile: (555) 123-1235, Work: (555) 123-1235, and email: bdappen@forest-trends.org. It also lists the provider: S. Schwag, joined May 19, 2014.
- Health Maintenance:** A section for tracking health maintenance tasks.
- Relationships:** Lists John W. Doe as the spouse.
- Facilities/Specialists:** Lists [Ph] Costco: Bend and [Spec] Osteopathic Manipulation: Matthew Gilmartin, MD.
- Problem List:** Lists "Why I want to be seen: Thyroid issues, ongoing fatigue."
- SOAP / Encounter Notes:** A list of notes including Stool Test Prep (SS), Response from Pt, Stool Test Prep Response, EP 7-19-16 (SKS), Order Confirmation, Post Appointment Notes, Admin Notes, and New Patient Visit (SKS). The last note is dated 04/08/2016.
- Medications:** A list of medications including Nature-Throid - 81.25MG Q, Nature-Throid - 130MG Q, Alinia - 500MG BID, and Epil-Jr - 0.15MG Q 3ML PRN. It also shows expiration dates and discontinuation status.
- Open Orders:** A list of orders including EP 7-19-16 (SKS), NCNM SIBO, DD CSAP x3, BioHealth #401, BioHealth #201, iGeneX 188, iGeneX 189, HLA DR 1/3/4/5, DQ Intermediate Resolution [LabCorp], and TGF-B1 [LabCorp].
- Need to Know:** Displays emergency contact information: Alan Doe, father, Contact: (555) 234-4456.
- Admin:** Displays the date 08-13-16 and a link to OPEN TABS.
- Social/Family:** A section for social and family information.
- Past Med Hx:** A section for past medical history, including Constipation, u, Diaphoresis, E, and No Scans Listed.
- Billing:** A section for billing information, including a list of bills and a link to Review All Unreviewed Docs.

Again, I still go to her chart. Make sure there is no previous open encounter that I could add this to, or it's not related to something else.

I'll go back to the portal. Start a new note. Because I'm going to answer parts of this message, I'm going to do the title based on what I'm sending to the clinician. It's a portal message. I remove this.



The screenshot shows a web browser window with multiple tabs. The active tab is titled "Patient Portal Req" and displays a URL from "ccfm.md-hq.com". The browser's address bar shows the URL: `https://ccfm.md-hq.com/soap.php?&pt_id=9&soap_id=34820&request_id=73177&msg=0&submit_...`. The browser's toolbar includes buttons for "Apps", "Popular", "Favorites", "CCFM", "FMSF", "Barbell WOD", "eTeacher", "Flashcards", and "Other Bookmarks".

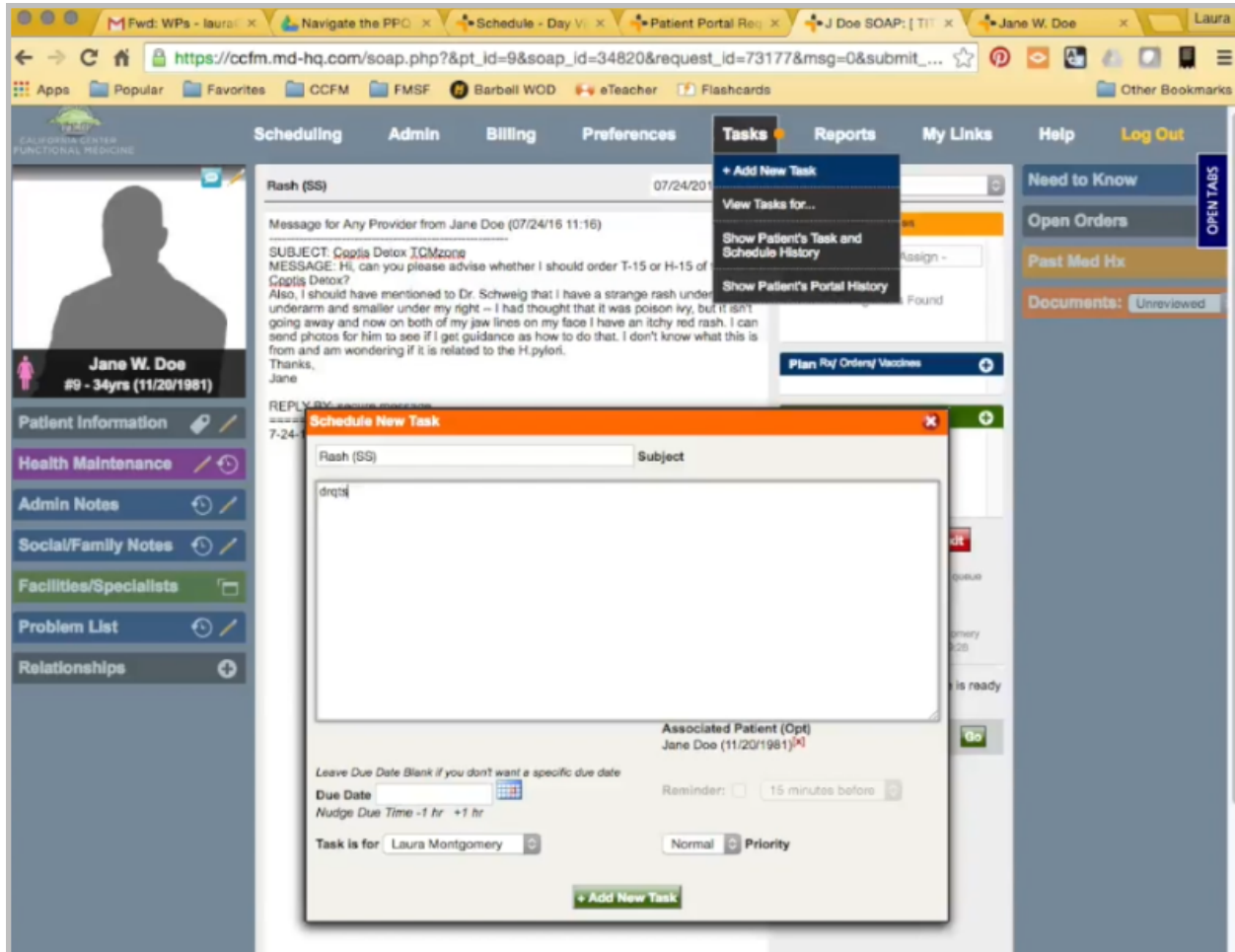
The patient portal interface has a top navigation bar with links: "Scheduling", "Admin", "Billing", "Preferences", "Tasks", "Reports", "My Links", "Help", and "Log Out". On the left side, there is a patient profile for "Jane W. Doe" (age 34, DOB 11/29/1981) with a silhouette icon. Below the profile are links for "Patient Information", "Health Maintenance", "Admin Notes", "Social/Family Notes", "Facilities/Specialists", "Problem List", and "Relationships".

The main content area displays a message titled "Rash (SS)" dated 07/24/2016. The message is from Jane Doe to a provider. The subject is "Coggis Detox ICMzone". The message text reads: "MESSAGE: Hi, can you please advise whether I should order T-15 or H-15 of the Coggis Detox? Also, I should have mentioned to Dr. Schweig that I have a strange rash under my left underarm and smaller under my right - I had thought that it was poison ivy, but it isn't going away and now on both of my jaw lines on my face I have an itchy red rash. I can send photos for him to see if I get guidance as how to do that. I don't know what this is from and am wondering if it is related to the H. pylori. Thanks, Jane". Below the message, it says "REPLY BY: secure message." and "7-24-16 (LM) Please advise about rash.".

On the right side of the message, there are several sections: "Assessment/Diagnosis" with a button "- Find DX to Assign -" and "No Diagnoses Found"; "Plan Ref/Orders/Vaccines" with a plus icon; "Charges / Payments" with a plus icon and "No charges currently posted"; and a "Save" button. Below these are options to "Upload MP3 and add to dictation queue" and "Attach Document or Image". At the bottom, there is a checkbox "Let admins know that note is ready for them to handle" and a "Follow up in 6 weeks" button.

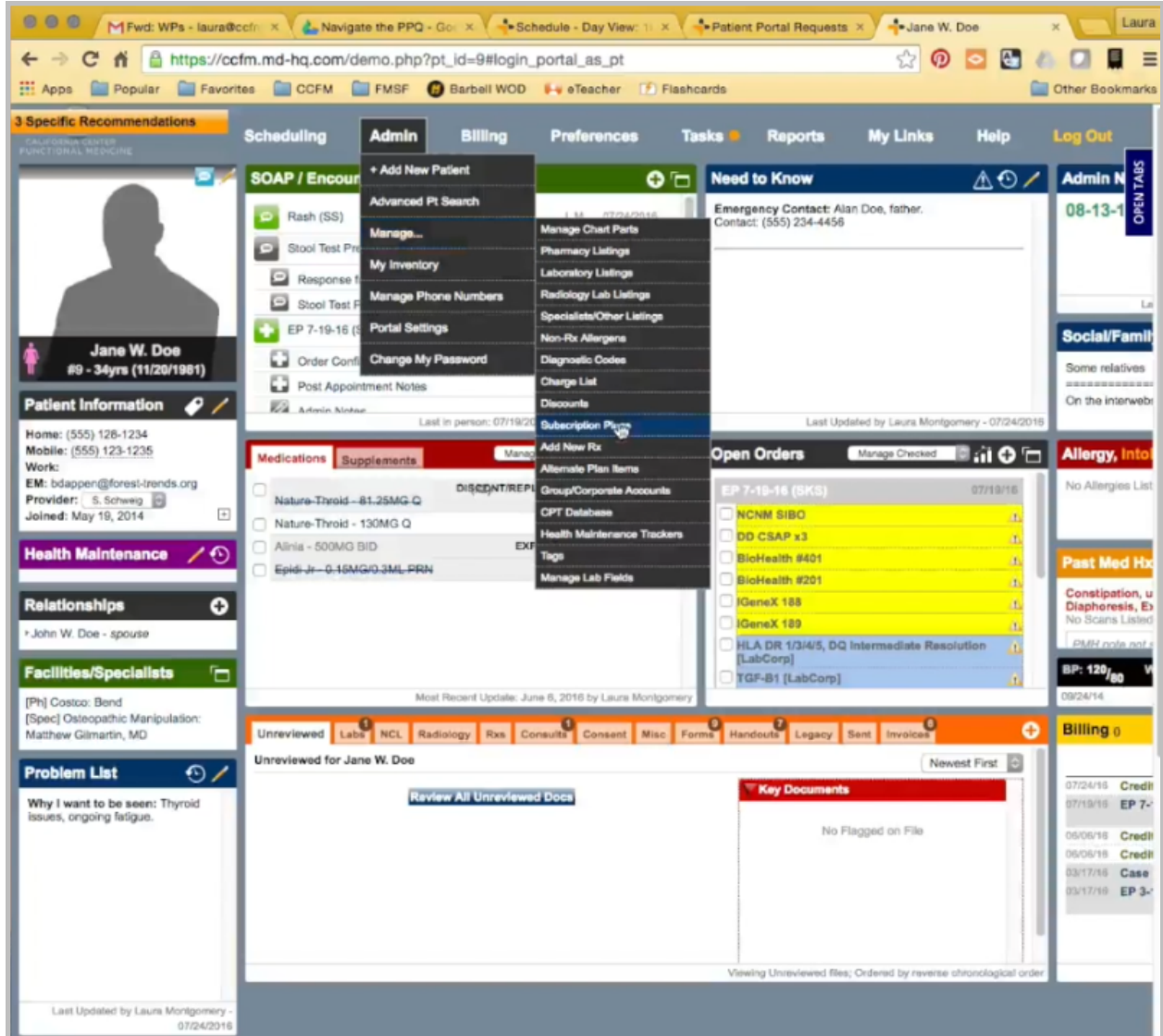
On the far right, there is a vertical sidebar with links: "Need to Know", "Open Orders", "Past Med Hx", and "Documents: Unreviewed". A vertical label "OPEN TABS" is also visible.

Here, I want to specify to the clinician that they only need to address one piece. Save.



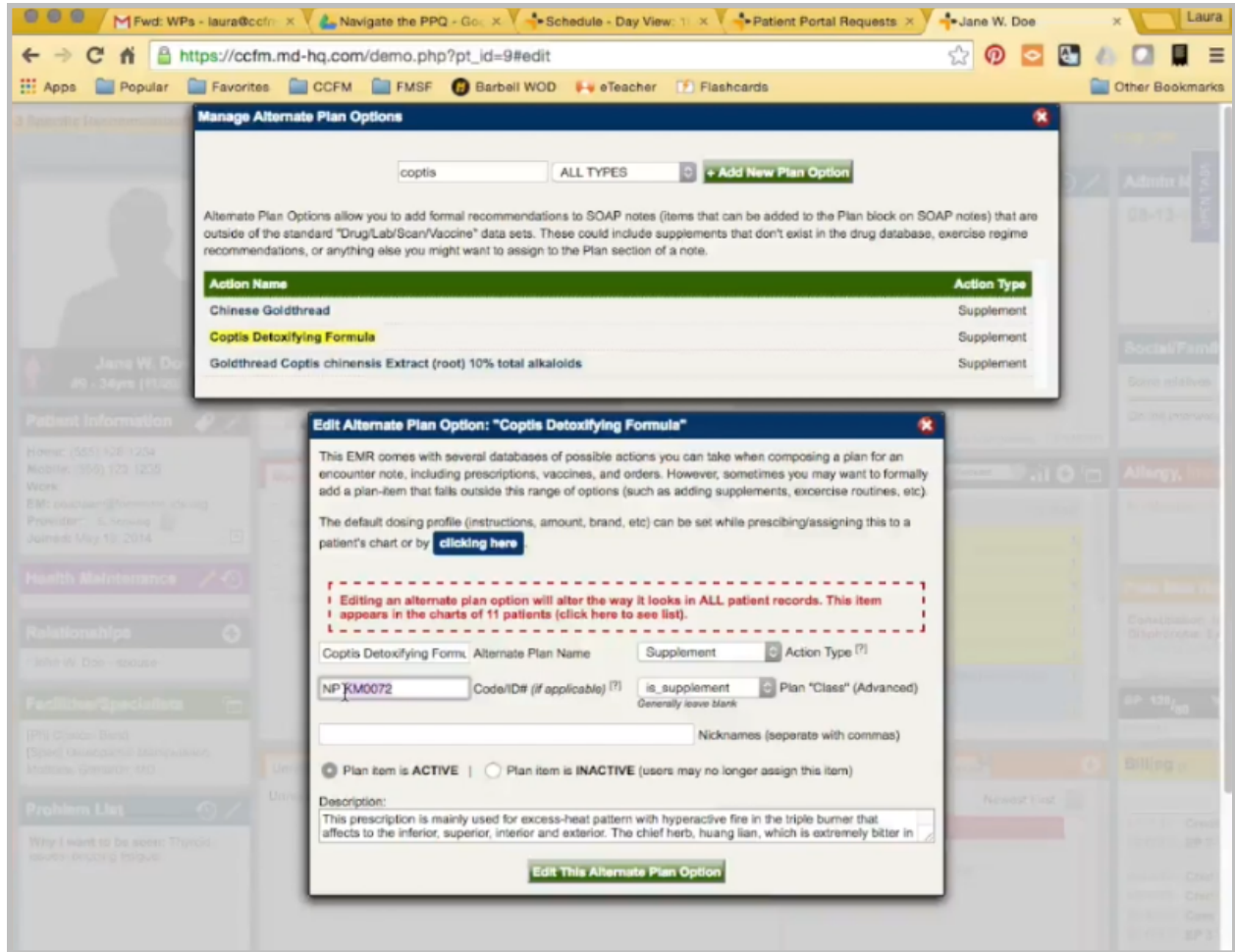
Copy the title. Make a task, and send to the clinician. In this case, it's sent at high priority because it's about a symptom.

Now, when I respond to her here, I'll still put the same message, but then I also want to answer this part of her question that I can about the Coptis Detox Formula. She is just asking for the product code.



The screenshot displays the Kresser Institute Patient Portal interface. The top navigation bar includes links for Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out. The left sidebar contains sections for Patient Information, Health Maintenance, Relationships, Facilities/Specialists, and Problem List. The main content area shows a patient profile for Jane W. Doe, with a list of medications and a menu open under the Admin tab. The Admin menu includes options like Add New Patient, Advanced Pt Search, Manage Chart Parts, Pharmacy Listings, Laboratory Listings, Radiology Lab Listings, Specialists/Other Listings, Non-Rx Allergies, Diagnostic Codes, Charge List, Discounts, and Subscription Plans. The bottom section shows a list of unreviewed documents and a key documents section.

To see the product code, I can go here to Admin, Manage, Alternate Plan Items.



The screenshot displays a web browser window with the URL https://ccfm.md-hq.com/demo.php?pt_id=9#edit. The browser's address bar and tabs are visible at the top. The main content area shows a patient's profile for Jane W. Doe, with various tabs like 'Patient Information', 'Health Maintenance', 'Relationships', 'Facilities/Specimens', and 'Problem List' on the left sidebar. Two modal windows are open:

Manage Alternate Plan Options

This window has a search bar with 'coptis' and a dropdown for 'ALL TYPES'. It includes a table of alternate plan options:

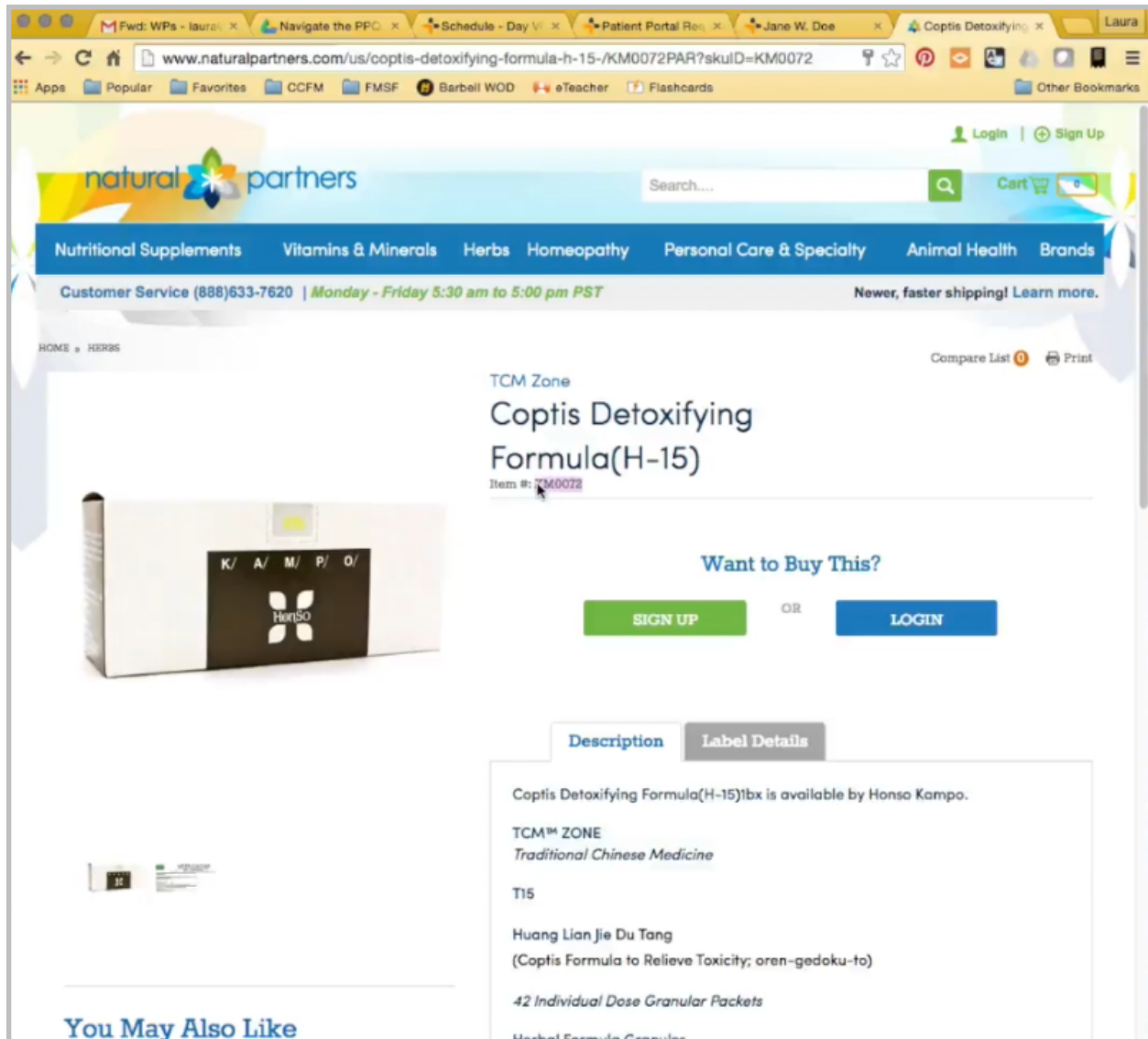
Action Name	Action Type
Chinese Goldthread	Supplement
Coptis Detoxifying Formula	Supplement
Goldthread Coptis chinensis Extract (root) 10% total alkaloids	Supplement

Edit Alternate Plan Option: "Coptis Detoxifying Formula"

This window provides details for editing the 'Coptis Detoxifying Formula' option. It includes a warning: 'Editing an alternate plan option will alter the way it looks in ALL patient records. This item appears in the charts of 11 patients (click here to see list)'. The form contains the following fields:

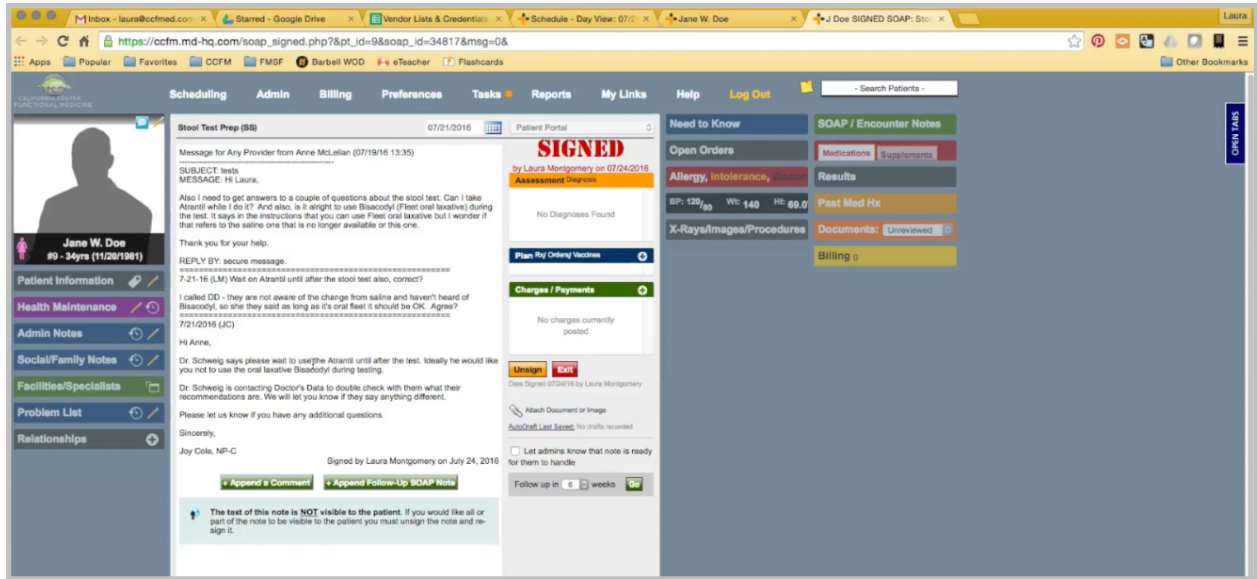
- Alternate Plan Name:** Coptis Detoxifying Form.
- Action Type:** Supplement
- Code/ID# (if applicable):** NP KM0072
- is_supplement:** (checked)
- Plan "Class" (Advanced):** (empty)
- Nicknames (separate with commas):** (empty)
- Plan item is ACTIVE:** (checked)
- Description:** This prescription is mainly used for excess-heat pattern with hyperactive fire in the triple burner that affects to the inferior, superior, interior and exterior. The chief herb, huang lian, which is extremely bitter in

Type this in. Get the code.

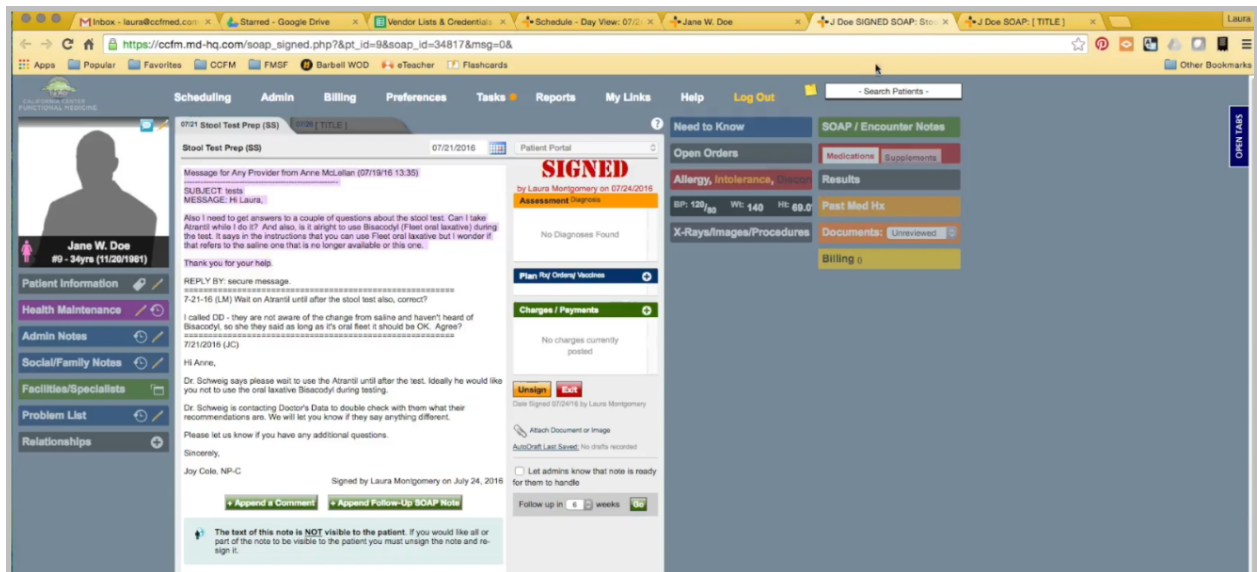


Because she is trying to order this on their website, and she is asking for this, I want to just double-check and see if this will bring it up, and it will. Okay, and send.

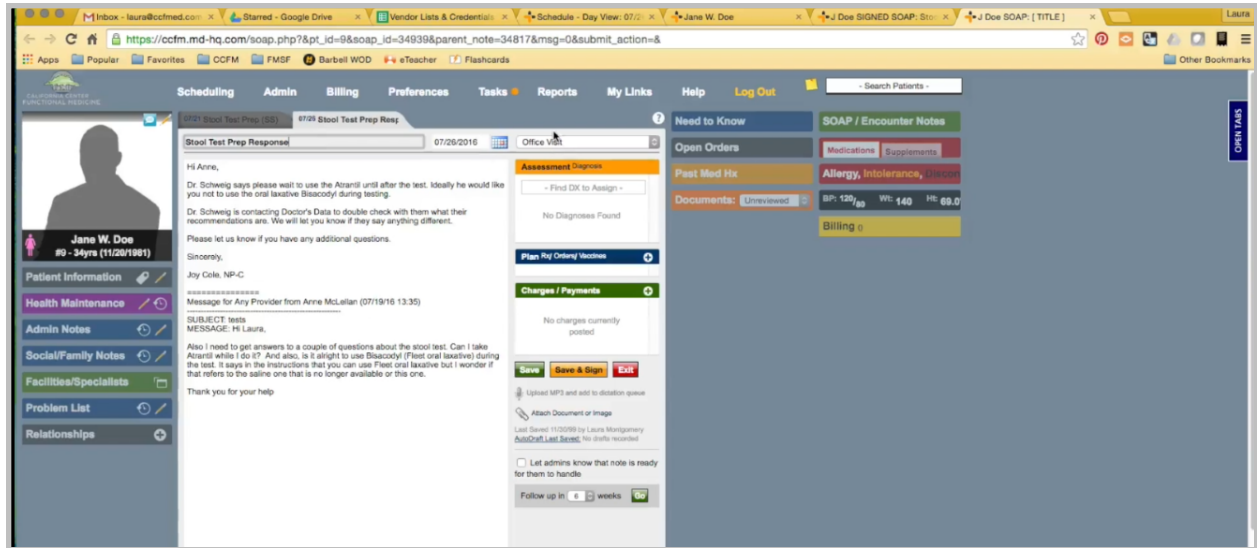
Once admin staff receives a task back from the clinician letting them know the question has been responded to, click to open the patient's chart, and click to open the encounter.



Review the clinician's message to make sure that everything has been addressed. Then, highlight to copy, Append to Follow-up SOAP. Paste the clinician's answer.

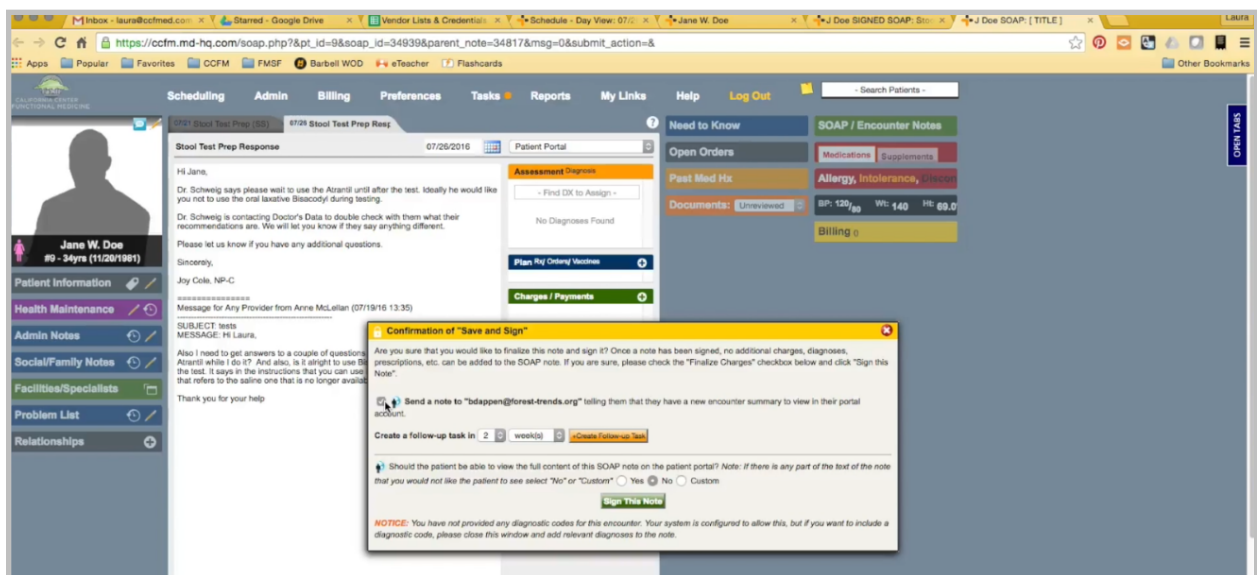


Also copy the patient's original message, and paste that below the clinician's answer.



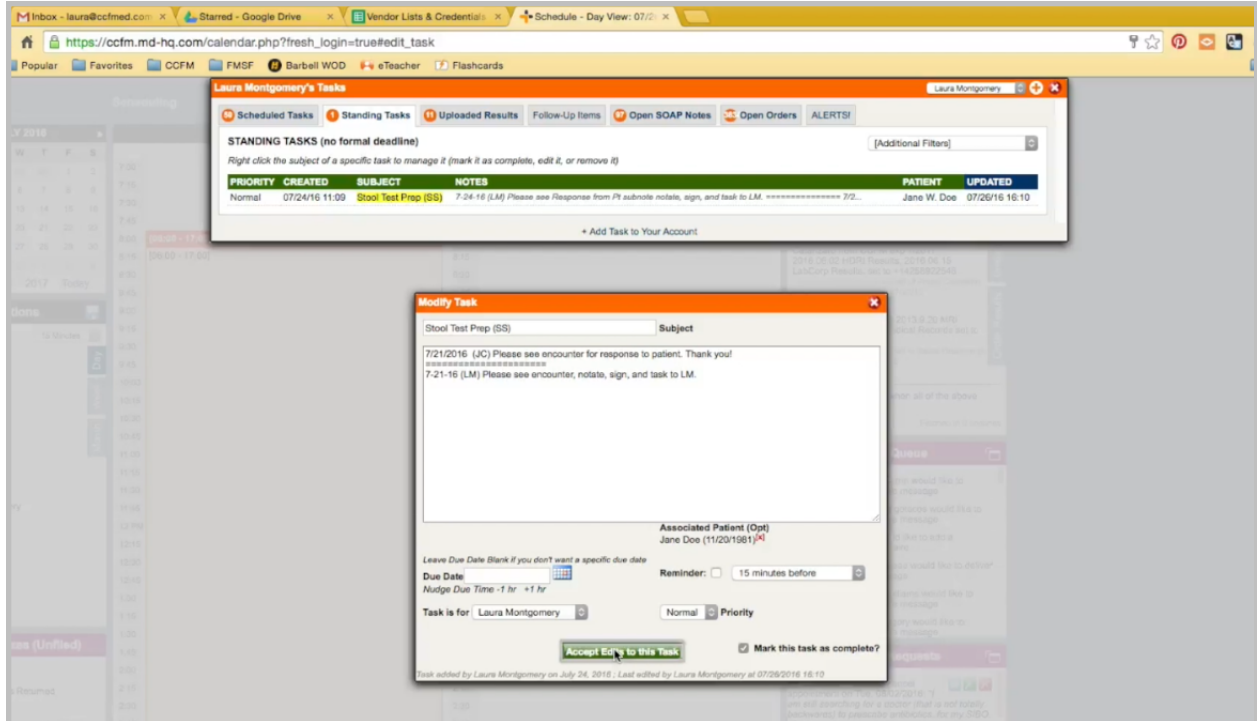
The screenshot shows a web-based EHR interface. On the left, a sidebar contains patient information for Jane W. Doe, #9 - 34yrs (11/26/1961), including tabs for Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships. The main area displays a 'Stool Test Prep Response' dated 07/26/2016. The note content includes a greeting, a response to a question about the stool test, and a signature. On the right, there are buttons for 'Need to Know', 'Open Orders', 'Past Med Hx', 'Documents', 'SOAP / Encounter Notes', 'Medications', 'Supplements', 'Allergy, Intolerance, Reaction', and 'Billing'. A 'Save & Sign' button is highlighted in the bottom right of the note area.

Copy the summarization title of the encounter, and put Response. It should be patient portal, and it should have the patient's name here. Save and Sign.



This screenshot shows the same EHR interface as the previous one, but with a 'Confirmation of Save and Sign' dialog box open. The dialog box asks if the user is sure they want to finalize the note and sign it. It also offers to send a note to the patient's email (laura@cfm.md) and to create a follow-up task. The 'Sign This Note' button is highlighted.

Send a note to their email to let them know the answer is here. Yes, make it available to the patient in their portal, and sign the note.



The screenshot shows a web application interface for task management. The main window displays a list of tasks under the 'STANDING TASKS' tab. A 'Modify Task' dialog box is open, showing details for a task titled 'Stool Test Prep (SS)'.

STANDING TASKS (no formal deadline)

Right click the subject of a specific task to manage it (mark it as complete, edit it, or remove it)

PRIORITY	CREATED	SUBJECT	NOTES	PATIENT	UPDATED
Normal	07/24/16 11:59	Stool Test Prep (SS)	7-24-16 (LM) Please see Response from PT subnote isolate, sign, and task to LM. ***** 3/2...	Jane W Doe	07/26/16 16:10

+ Add Task to Your Account

Modify Task

Stool Test Prep (SS) Subject

7/21/2016 (JC) Please see encounter for response to patient. Thank you!

7-21-16 (LM) Please see encounter, notate, sign, and task to LM.

Associated Patient (Opt)
Jane Doe (11/20/1981) ☒

Leave Due Date Blank if you don't want a specific due date
Due Date:
Nudge Due Time: -1 hr +1 hr

Reminder: ☐ 15 minutes before

Task is for: Laura Montgomery

☒ Mark this task as complete?

Task edited by Laura Montgomery on July 24, 2016. Last edited by Laura Montgomery at 07/26/2016 16:10

Then, the task can be marked as complete.