

Send a Document to Another Staff Member/Provider to Review

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About

Documents that are scanned, imported, or received into OP as Message attachments (via Direct messaging or eFax) can be routed to another staff member or Provider for review directly from within Document Management.

Send a Document for Review

1. Navigate to the **Document** that needs to be reviewed. This workflow could start in any of the following:
 - The Message Center if the Document came into OP as an attachment (such as via Direct Message or eFax Message)
 - The Document Management window when you're labeling a scanned Document or editing a scanned Document (such as a Lab Result or Referral response)
 - The Documents section of the Patient Chart
2. If not already in Edit mode, click the **Edit** button located at the top of the Document window.
3. In the Review Details section on the right side of the window, confirm the **Reviewed?** checkbox is deselected.
4. In the Administrative Details section, click in the **Addressed To** field and use the drop-down to select the user to which you want to send the Document for review.
5. Click **Save**.

The Document is routed to the user selected in the Addressed To field and is accessible by clicking **Documents** located in OP's Main Navigation Panel.



Note: If you're routing a Document that was previously scanned into the patient's chart, the Addressed To user will need to expand their Date scope to include the date the document was saved to the chart.