

Review Documents Received for Review

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Path: Main Navigation Panel > Documents

About

Documents that need to be reviewed are received in the Documents tab of the Clinical Work window. Here are a few scenarios where a Document might be received for review, depending on your Practice's workflows:

- A Lab result, Referral response, or transition of care was received and needs to be reviewed by a Provider
- A patient's Medical Records were received from another physician, school, etc. either by Direct Message or eFax Message
- A request for patient information was received and needs to be reviewed by the Practice's Care Coordinator

Review Documents

1. Navigate to the **Documents** tab of the Clinical Work window by following the path above.
2. Update the filters located at the top of the window:
 - **Scope:** Select the **Me** radio button to see Documents addressed to you. To view Documents addressed to another user, select the radio button next to the blank field and select that user from the drop-down. If you're reviewing Documents for a Staff Member of Provider who is no longer with the Practice (and has been marked Inactive in the Staff Directory), see the [Review Documents for an Inactive Staff Member/Provider](#) section below.
 - **Dates:** Select the **All** radio button. This ensures that previously scanned Documents are included in the Document list.
3. In the Document list, click to select the **Document** to review.
4. Click the **Review/Edit** button. The Document is displayed in the Manage Documents window.
5. Review the Document.
6. Click the **Edit** button.
7. *(If applicable)* [Sign or annotate the Document](#)
8. In the Review Details section on the right side of the window, select the **Reviewed?** checkbox.
9. Click the **Save** button.



Note: If you're reviewing a Document as part of Medical Decision Making (MDM) for a visit's documentation and coding, click the **Mark Reviewed** button located at the top of the window and click **OK + Close** or **OK** to consider the review for MDM.

Review Documents for an Inactive Staff Member/Provider

If a Provider has been marked Inactive in the Staff Directory, their name is no longer displayed for selection in the Scope of the Clinical Work window. A review of these Documents starts with a Document search following the steps below.

1. In the Clinical or Practice Management tab, click the **Document Mgmt** button.
2. Click the **Search** button. The Search for Documents window is displayed.
3. In the Dates section of the window, select the **All** radio button.
4. Select the **"Not Reviewed" only** checkbox.
5. Click the **Search** button.
6. Hover over the **Staff Address** column header to display the filter icon.
7. Click the **filter** icon and select the checkbox for the Staff Member or Provider to which the Document was assigned.
8. Click to select the **Document** to review and click the **Use Selected Document** button. The Document is displayed in the

Manage Documents window.

9. Click the **Edit** button.
10. *(If applicable)* **Sign or annotate the Document**
11. In the Review Details section on the right side of the window, select the **Reviewed?** checkbox.
12. Click the **Save** button.



Note: If you're reviewing a Document as part of Medical Decision Making (MDM) for a visit's documentation and coding, click the **Mark Reviewed** button located at the top of the window and click **OK + Close** or **OK** to consider the review for MDM.