

Cosign a Note (Mid-Level and Provider Workflows)

Last Modified on 11/21/2022 8:48 am EST

Version 20.18

About

The workflow below describes the steps that a Mid-Level and Provider will take to finalize a Visit Note when a cosignature is required. It is important to note that for any Well Visit or Encounter which requires a cosignature, the Mid-Level provider must select the Provider in the **Supervised by** field on the Visit Info tab. This will streamline the workflow and place the note to be signed by the Provider in the proper tab.

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Note: If the Mid-Level provider requires notes to be cosigned, the **Need cosigner** checkbox must be selected in the Mid-Level's profile in the **Staff/Provider Directory**.

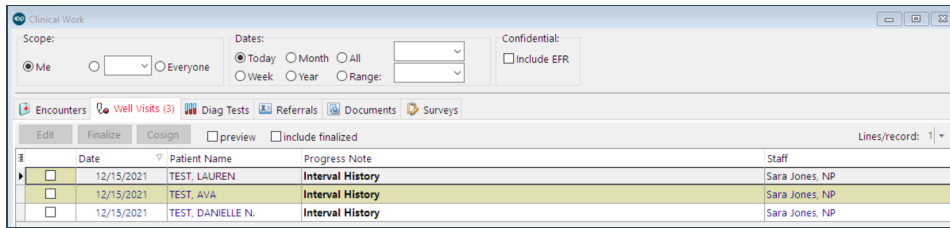
Mid-Level Provider: Cosign Workflow

1. Click **Visit Info** in the Encounter or Well Visit's navigation panel.
2. Use the **Supervised by** drop-down to select the signing Provider.

Visit Information			
Visit date/time:	10/20/2020	08:47 AM	<input type="checkbox"/> 24h
Date written:	10/20/2020 08:47 AM		
Place of service:	Office		
Practice location:	CA Physicians Practice 1		
Appointment type:	...		
Accompanied by:	...		
Entered by:	373 ...		
Nurse/assistant:	...		
Rendering provider:	Cindy Malek, MD		
Supervised by:	...		
Staff chaperone:	Level 6 Providers	Init...	ID
Telehealth:	Albert Davis, MD	ALD	353
Provider location:	Anna Bates, MD	AB	327
Provider location:	Cindy Malek, MD	CM	373
Patient location:	Wayne Best	WB	430

3. When the note is complete, navigate to the **Summary** tab and click the **Finalize** button.
4. Review notes from the Encounters or Well Visits tab of the Clinical Work window.

- Notes cosigned are removed from the Encounters or Well Visits tab
- Notes that are finalized and waiting for cosigning will appear in the Encounters or Well Visits tab with a shaded background
- Notes that are not finalized, by the mid-level provider, appear in the Encounters or Well Visits tabs with a white background



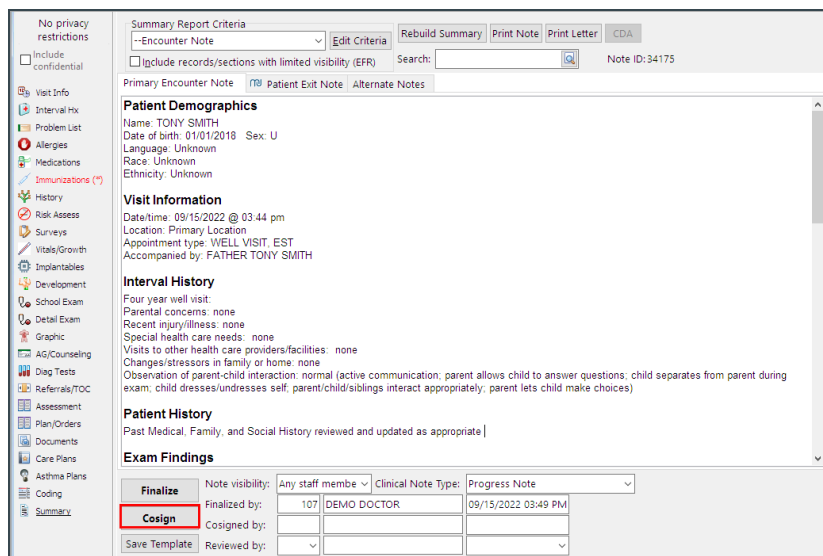
Provider: Cosign Workflow

1. Click **Well Visits** or **Encounters** in the Main Navigation Panel, to open the Clinical Work window.
 - Notes finalized by the Mid-Level Provider and waiting to be cosigned are displayed with a shaded background.
 - Notes not finalized by the Mid-Level Provider are displayed with a white background.

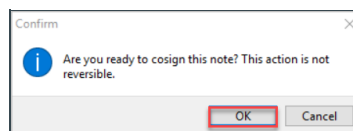


Note: If you are a Provider cosigning notes, the Staff column will display the Mid-Level provider who charted the note.

2. Select the note, and click the **Edit** button and review the visit documentation. See the **Note** box below for information on how to bulk cosign Visit Notes.
3. Click **Summary** in the Window Navigation panel.
4. Click the **Cosign** button.



5. Click **OK** in the confirmation window to complete the cosign workflow.



Note: To bulk cosign Visit Notes, select the **checkbox** next to each Note that should be cosigned before clicking the Cosign button at the top of the Clinical Work window. A confirmation window is displayed asking if you're ready to cosign all of the selected notes. Click **OK**. The notes are finalized and each Note Summary includes an entry in the Providers section indicating the Note was part of a bulk cosigning.

This functionality is not intended to be a daily best practice or a replacement for cosigning Visit Notes individually.

About

The workflow below describes the steps that a Mid-Level and Provider will take to finalize a Visit Note when a cosignature is required. It is important to note that for any Well Visit or Encounter which requires a cosignature, the Mid-Level provider must select the Provider in the **Supervised by** field on the Visit Info tab. This will streamline the workflow and place the note to be signed by the Provider in the proper tab.



Note: If the Mid-Level provider requires notes to be cosigned, the **Need cosigner** checkbox must be selected in the Mid-Level's profile in the Staff/Provider directory.

Mid-Level Provider: Cosign Workflow

1. Click **Visit Info** in the Encounter or Well Visit's Window Navigation panel.
2. Use the **Supervised by** drop-down to select the signing Provider.

Visit Information			
Visit date/time:	10/20/2020	08:47 AM	24h
Date written:	10/20/2020 08:47 AM		
Place of service:	Office		
Practice location:	CA Physicians Practice 1		
Appointment type:	...		
Accompanied by:	...		
Entered by:	373		
Nurse/assistant:	...		
Rendering provider:	Cindy Malek, MD		
Supervised by:	...		
Staff chaperone:	Level 6 Providers	Init...	ID
Telehealth:	Albert Davis, MD	ALD	353
Provider location:	Anna Bates, MD	AB	327
	Cindy Malek, MD	CM	373
Patient location:	Wayne Best	WB	430

3. When the note is complete, click the **Finalize** button on the **Summary** tab.
4. Review notes from the Encounters or Well Visits tab of the Clinical Work window.

- Notes cosigned are removed from the Encounters or Well Visits tab
- Notes that are finalized and waiting for cosigning will appear in the Encounters or Well Visits tab with a shaded background
- Notes that are not finalized, by the mid-level provider, appear in the Encounters or Well Visits tabs with a white background

Scope:		Dates:		Confidential:	
<input checked="" type="radio"/> Me	<input type="radio"/> Everyone	<input checked="" type="radio"/> Today	<input type="radio"/> Week	<input type="radio"/> Month	<input type="radio"/> All
		<input type="checkbox"/> Include EFR			
Encounters Well Visits (2) Diag Tests Referrals Documents Surveys					
Edit Finalize Cosign		<input type="checkbox"/> preview		<input type="checkbox"/> include finalized	
Lines/record: 1					
Date	Patient Name	Progress Note	Staff		
10/20/2020	BELL, GRACE J.	Interval History	Sara Jones, NP		
10/20/2020	GRANT, OLIVIA R.	Interval History	Sara Jones, NP		

Provider: Cosign Workflow

1. Click **Well Visits** or **Encounters** in the Main Navigation Panel, to open the Clinical Work window.

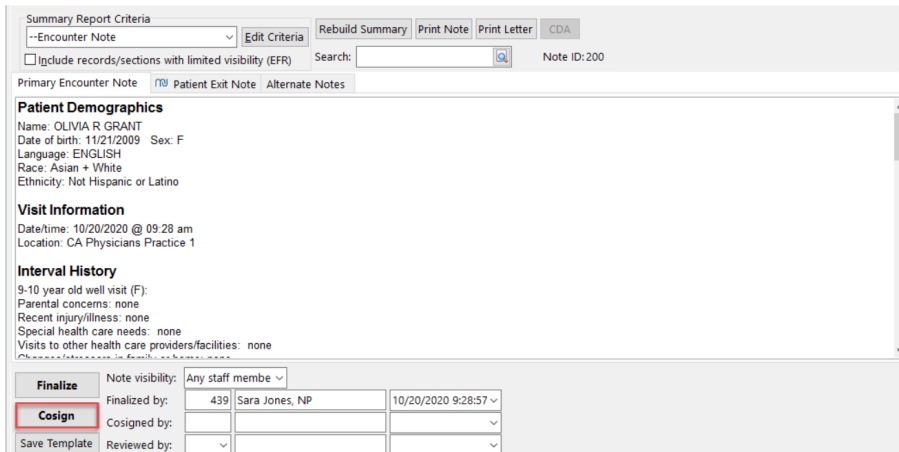
- Notes finalized by the mid-level provider and waiting to be cosigned appear with a shaded background
- Notes not finalized by the mid-level provider appear with a white background



Note: If you are a Provider cosigning notes, the Staff column will display the Mid-Level provider who charted the note.

2. Select the note, and click the **Edit** button and review the visit documentation. See the **Note** box below for information on how to bulk cosign Visit Notes.

3. Click **Summary** in the Window Navigation panel.
4. Click the **Cosign** button.



Summary Report Criteria

--Encounter Note

Include records/sections with limited visibility (EFR) Search: Note ID: 200

Primary Encounter Note Patient Exit Note Alternate Notes

Patient Demographics

Name: OLIVIA R GRANT
Date of birth: 11/21/2009 Sex: F
Language: ENGLISH
Race: Asian + White
Ethnicity: Not Hispanic or Latino

Visit Information

Date/time: 10/20/2020 @ 09:28 am
Location: CA Physicians Practice 1

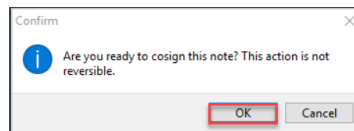
Interval History

9-10 year old well visit (F):
Parental concerns: none
Recent injury/illness: none
Special health care needs: none
Visits to other health care providers/facilities: none

Note visibility: Any staff member

Finalized by:	439	Sara Jones, NP	10/20/2020 9:28:57
Cosigned by:			
Reviewed by:			

5. Click **OK** in the confirmation window to complete the cosign workflow.



Confirm

i Are you ready to cosign this note? This action is not reversible.



Note: To bulk cosign Visit Notes, select the **checkbox** next to each Note that should be cosigned before clicking the Cosign button at the top of the Clinical Work window. A confirmation window is displayed asking if you're ready to cosign all of the selected notes. Click **OK**. The notes are finalized and each Note Summary includes an entry in the Providers section indicating the Note was part of a bulk cosigning.

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