

Finalize Open Visit Notes from the Navigation Panel (Clinical Work)

Last Modified on 11/05/2021 3:38 pm EDT

Version 20.14

Path: Main Navigation Panel > Encounters or Well Visits

About

Worklists of open Encounters and Wells Visits are accessible via the Encounters and Well Visits options in the Main Navigation Panel. When there are open or unfinalized Notes that require attention by the logged-in Rendering Provider, a badge count is displayed. From the Clinical Work window, Providers can finalize and/or cosign open Notes. Once Visit Notes are finalized, they are removed from the Clinical Worklist.

Finalize Visits

1. Navigate to the Encounters or Well Visits tab of the Clinical Work window by following the path above.
2. *(Optional)* Change the Scope, Date Range, and Confidential Inclusion settings at the top of the window.
3. Select the **checkbox** of the **Visit Note** that needs to be finalized. See the **Note box** below for information on how to bulk finalize Visit Notes.
4. Proceed with one of the following options depending on the status of the Visit Note:
 - **Edit:** When you click **Edit**, the Visit Note is displayed. Changes can be made throughout the Visit Note if needed. When ready, navigate to the Summary section of the Note to finalize it.
 - **Preview and Finalize:** To preview the Visit Note before finalizing, select the **preview** checkbox, and click the **Finalize** button. The Visit Note is displayed with a confirmation window asking if you would like to proceed. Click **OK** to finalize the Note or **Cancel** to perform a further review before navigating to the Summary section of the Note to finalize it.
 - **Finalize:** To finalize the Note without review, click the **Finalize** button.

Note: To bulk finalize Visit Notes, select the **checkbox** next to each Note that should be finalized before clicking the

Finalize button. A confirmation window is displayed asking if you're ready to finalize 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 finalization.

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

Version 20.13

Overview

Worklists of open Encounters and Wells Visits are accessible via the Main Navigation Panel. A number displayed next to either indicates that there is/are open/unfinalized Notes that require attention by the logged-in Rendering Provider. Once Visit Notes are finalized, they are removed from the Clinical Work list. To display finalized Notes in the grid, select the **include finalized** checkbox.

Path: Main Navigation Panel > Encounters or Well Visits

Finalize Visits

1. Navigate to the **Clinical Work** window by following the path above. Once in the Clinical Work window, you can easily get to

other Clinical areas that may require attention by using the tabs listed at the top of the window.

2. If needed, change the Scope, Date Range, and Confidential Inclusion at the top of the window.
 3. Select the **Visit Note** that needs to be finalized.
 4. Proceed with one of the following options depending on the status of the Visit Note:
 - **Edit:** When you click **Edit**, the Visit Note is displayed. Changes can be made throughout the Visit Note, if needed. When ready, navigate to the Summary section of the Note to finalize it.
 - **Preview and Finalize:** To preview the Visit Note before finalizing, select the **preview** checkbox, and click the **Finalize** button. The Visit Note is displayed with a confirmation window asking if you would like to proceed. Click **OK** to finalize the Note or **Cancel** to perform a further review before navigating to the Summary section of the Note to finalize it.
 - **Finalize:** To finalize the Note without review, click the **Finalize** button.
-