

Guide – Pending Status Workflows

Incomplete Note Workflow

If the clinician would like to prevent a Service/Note from being processed so they can finish it follow these steps:

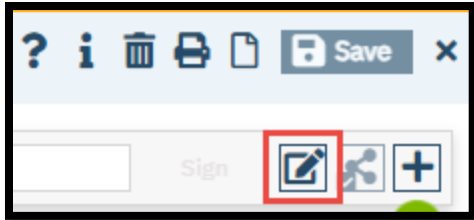
1. Open New or Scheduled service.
2. Ensure that status of service is Show so that the Note tab appears to allow documentation.
3. When it is determined that the note will not be finished that day, change the status to Pending.
4. Click Save.
5. Return to the note when ready to continue and finish it.
6. Change status to Show.
7. Click Sign.
8. The Note will now be in Signed status and the service will be processed.

Note To Be Reviewed By Another Staff

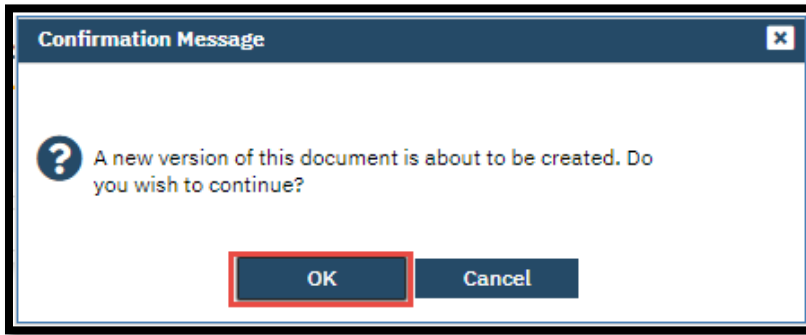
1. Open New or Scheduled service.
2. Ensure that status of service is Show so that the Note tab appears to allow documentation.
3. When it is determined that the note needs to be reviewed by another staff, change the status to Pending.
4. Click Save.
5. Notify the other staff that the note is ready for review.
6. When the review is complete and the note is considered finished, the original author should be notified.
7. The original author should return to the note and change status to Show.
8. Click Sign.
9. The Note will now be in Signed status and the service will be processed.

If Note was Accidentally Signed in Pending Status

1. Navigate to the note and open it. The PDF of the note will open.
2. Click the Edit icon. This will only be available for the original author of the note.



3. When the pop up appears, click OK.



4. Change the Service status to Show.
5. Click Sign.
6. The Note will now be in Signed status and the service will be processed.

Other Considerations

1. To ensure correct Billing Diagnosis is included, verify that a Diagnosis has been entered for this Program which is dated on or before the Date of Service.