

The following must be completed within 10 days of the appointment date.

Initials	Required Task	Template(s)	
	Select the Template Set & Visit Type	Intake – OV	INTAKE
	Select New or Established Patient	Intake - OV	
	Check alerts	Intake - OV	
	Enter Vitals including height, weight, temp, BP, heart rate, position, side, & cuff size	Intake – OV	
	Ensure BMI has been calculated	Intake – OV	
	Reconcile & Verify Medications	Intake – OV Med Module	
	Review Allergies	Intake – OV Allergy Module	
	Add at least one Reason for Visit with comments for provider	Intake – OV	
	Add, review or change Medical History	Histories - OV	
	Add, review or change Family History	Histories - OV	
	Add, review or change Social History	Histories - OV	
	Add, review or change Confidential Info	Histories - OV	
	Enter or review School Info	Histories - OV	
	Add or address chronic problems	Summary - OV	
	Add any additional Reasons for Visit based on exam	SOAP - OV	
	Go over HPI Details for each reason for visit	SOAP - OV	
	Review of Systems	SOAP - OV	
	Physical Exam details (if applicable)	SOAP - OV	
	Add or update Diagnoses/Assessments	My Plan - Home	CHART CODING
	Add Instructions for each Diagnosis	My Plan - Home	
	Add My/Common Phrases	My Plan – Plan Details	
	Select Labs & Office Procedures for each Diagnosis and Task appropriate clinic staff to complete	My Plan – Labs My Plan – Office Procedures	
	Place Lab Order	My Plan - Labs	
	Request Referral(s) (if applicable)	My Plan - Referrals	
	Prescribe Medication(s)	Med Module	
	Calculate Visit Coding & Submit Code(s)	Finalize - OV	
	Review Chart Note	Finalize - OV	
	Complete Provider Sign-off boxes (if applicable)	Finalize – OV	
	Run necessary documents (Patient Plan, Referral Request, Consult Thank You, Work/School Excuse)	Finalize - OV	
	Complete Checkout boxes	Checkout	
	Ensure proper office visit coding is assigned	Superbill	
	Add additional appropriate CPT visit codes	Superbill	
	Close Patient Chart		

Initials	Required Task	Template(s)	LABS & ORDERS
	Add Obtained/Performed/Placed information to all labs and procedures for this encounter including lot # & expiration date.	My Plan – Review/Cosign Orders	
	Review and add billing information	My Plan – Review/Cosign Orders	
	Submit to Superbill	My Plan – Review/Cosign Orders	
	Add Additional Information	My Plan – Review/Cosign Orders	
	Review Superbill and add any additional coding	Superbill	
	Close Patient Chart		
	Complete Tasks	Work Flow Manager	