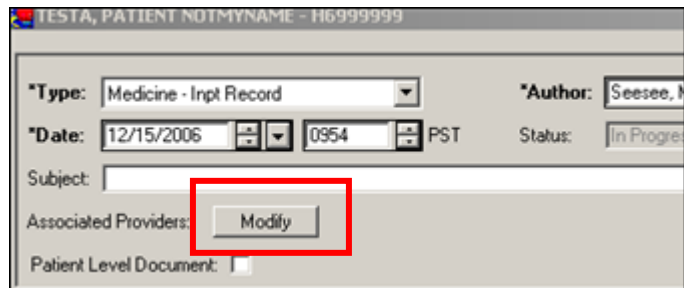


Sending a Document to an Associated Provider

Add or Change CC's or Co-signers in a Document

Clinical Note Editor

1. Add document.
2. The upper (gray) area of the screen has a **Modify** button.
3. Click **Modify** next to **Associated Providers**.
4. In the **Associated Provider** window, click the white box *under* the word **Provider**.
5. Type all, or part, of a provider's last and first name and click the **Binoculars** icon to begin a search.
6. To add a provider or staff member
 - a. Select the name from the list, or



TESTA, PATIENT NOTMYNAME - H6999999

*Type: Medicine - Inpt Record *Author: Seese, M

*Date: 12/15/2006 0954 PST Status: In Progress

Subject:

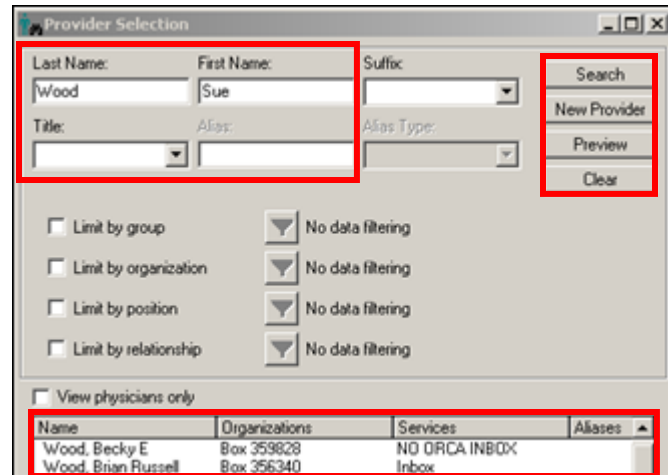
Associated Providers: **Modify**

Patient Level Document:



Associated Providers

Provider	Request Type
wood	Multiple M: [Binoculars]



Provider Selection

Last Name: Wood First Name: Sue Suffix: [Dropdown]

Title: [Dropdown] Alias: [Dropdown] Alias Type: [Dropdown]

[Search] [New Provider] [Preview] [Clear]

Limit by group [Dropdown] No data filtering

Limit by organization [Dropdown] No data filtering

Limit by position [Dropdown] No data filtering

Limit by relationship [Dropdown] No data filtering

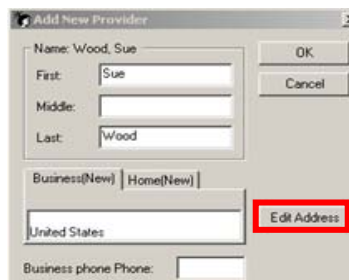
View physicians only

Name	Organizations	Services	Aliases
Wood, Becky E	Box 359828	NO ORCA INBOX	
Wood, Brian Russell	Box 356340	Inbox	

Note: Search window indicates if provider or staff has an ORCA Inbox. Providers or staff must have an ORCA Inbox listed in order to receive the document electronically. If you forward documents to any other provider or staff they will eventually receive a paper copy in the mail.

b. Add someone new by clicking the **New Provider** button.

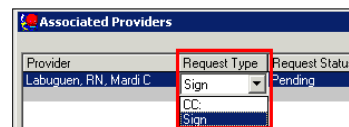
- ◆ Fill in the name.
- ◆ Click **Edit Address** to add the street address, city, state, and zip code for the provider, organization, or patient.



c. Click **OK** on each of the boxes to return to the document.

Note: The name will not be permanently added to the list. E-mail ITS Helpdesk at mcsos@u.washington.edu to permanently add a provider to the database.

7. Click on the gray line *under* the words **Request Type**. Select **Sign** to forward for signing or **CC** for review.



Provider	Request Type	Request Status
Labuquen, RN, Mardi C	Sign	Pending
	CC	
	Sign	

8. Click next gray line *under* **Provider** to add more names.

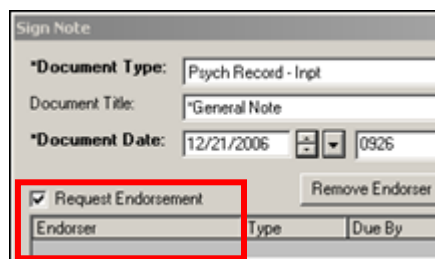
9. Click **OK** when done entering **Associated Providers**.

10. Complete any other modifications to the note.

11. Click **Sign or Submit** if you are ready to complete the document, or **Save & Close** to save to your Inbox to complete later.

PowerNote

1. Open PowerNote.
2. Complete PowerNote.
3. Click **Sign Icon** or go to **File**, then **Sign Note**.
4. **Sign Note** dialog box will open.
5. Select **Request Endorsement** in the upper (gray) area of the box.
6. Click the gray area *under* the word **Endorser**.
7. In the white box type all or part of a provider's last and first names and click the **Binoculars** icon to begin a search.



Sign Note

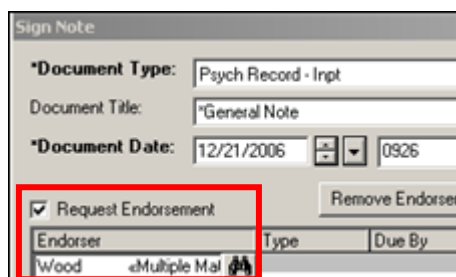
*Document Type: Psych Record - Inpt

Document Title: *General Note

*Document Date: 12/21/2006 0926

Request Endorsement Remove Endorser

Endorser	Type	Due By



Sign Note

*Document Type: Psych Record - Inpt

Document Title: *General Note

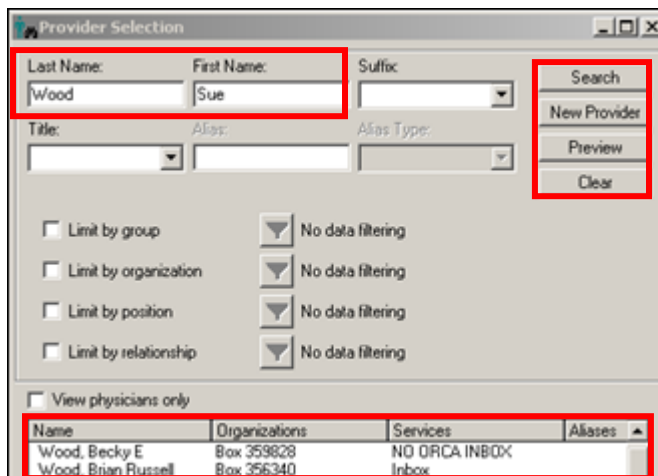
*Document Date: 12/21/2006 0926

Request Endorsement Remove Endorser

Endorser	Type	Due By
Wood	Multiple Mail	

8. To associate a provider or staff member

- a. Select the name from the list, or



Name	Organizations	Services	Aliases
Wood, Becky E	Box 359828	NO ORCA INBOX	
Wood, Brian Russell	Box 356340	Inbox	

Note: Search window indicates if provider or staff has an ORCA Inbox. Providers or staff must have an ORCA Inbox listed in order to receive the document electronically. If you forward documents to any other provider or staff they will eventually receive a paper copy in the mail.

- b. Add someone new by clicking the **New Provider** button.

- ◆ Fill in the name.
- ◆ Click **Edit Address** to add the street address, city, state, and zip code for the provider, organization, or patient.

- c. Click **OK** on each of the boxes to return to the document.



Note: The name will not be permanently added to the list. E-mail ITS Helpdesk at mcsos@u.washington.edu to permanently add a provider to the database.

9. Click on the gray line *under* the word **Type**. Select **Sign** to forward for signing or **Review** to CC.

10. Click next gray line *under* **Endorser** to add more names.

11. Click **OK** when done entering Endorsers to complete and sign the document.

Endorser	Type	Due By	Comment
Wood, Sue	sign	not defined	