


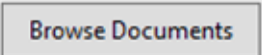


This Quick Reference Guide (QRG) demonstrates the workflow for forwarding documents for signature or review from the patient's chart.

Common Buttons & Icons

 Forward	Forward button(s)
 Provider Letter	Provider Letter button
	Binoculars icon
	Browse Documents button

Forward to In-System Provider from Documentation

➤ From the patient's chart:

STEP 1: Click **Documentation** from the Menu.

STEP 2: Click the desired document in the list.

STEP 3: Click the **Forward** button. The Forward Only window displays.

STEP 4: Click the **Additional Forward Action** dropdown arrow; then, select the appropriate action.

STEP 5: Enter the provider in the To field.

NOTE: Use the Binoculars icon to search for the provider, if needed.

STEP 6: Click **OK** to send the document.

Forward to Out-of-System Provider from Documentation

➤ From the patient's chart:

STEP 1: Click **Documentation** from the Menu.

STEP 2: Click the desired document in the list.

STEP 3: Click the **Provider Letter** button. The Provider Letter Recipients window displays.

STEP 4: Use the Search field or **Binoculars** icon to find the appropriate provider.

STEP 5: Double-click the appropriate provider from the search results.

STEP 6: Click **OK** to confirm the selection. The Create Letter window displays.

STEP 7: Click the **Browse Documents** button.

STEP 8: Click the correct document; then, select the **Attach Full Document** check box.

STEP 9: Click **OK** to add the document.

STEP 10: Enter a message as needed; then, click **OK** to send the message.

NOTE: [Preview the message using the Preview button.](#)

Forward Documentation from Notes Page:

➤ **From the patient's chart:**

STEP 1: Click **Notes** from the Menu.

STEP 2: Open the appropriate folders to open the document.

STEP 3: Click the **Forward** icon. The Forward Only window displays.

STEP 4: Click the **Additional Forward Action** dropdown arrow; then, select the appropriate action.

STEP 5: Enter the provider in the To field.

NOTE: [Use the Binoculars icon to search for the provider if needed.](#)

STEP 6: Click **OK** to send the document.