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**This Quick Reference Guide (QRG) outlines the process for reviewing recommendations.**

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### Common Buttons & Icons

	Recommendations <b>Add</b> icon
	<b>Sign</b> icon
	Magnifying Glass icon

### Add a Recommendation

➤ From the Ambulatory View, Summary workflow within the patient's chart:

**STEP 1:** Click the **Recommendations** component in the workflow menu.

**STEP 2:** Click the Recommendations component **Add** icon.

**STEP 3:** Click the **Right Arrow** icon for the recommendation to add.

**STEP 4:** Select the checkbox for the recommendation to add.

**NOTE:** **Click the Add Free text Expectations. Adding recommendations this way will need to be manually satisfied. It will not occur automatically.**

**STEP 5:** Document the **Selected Expectations** that populate in the right-side pane.

**STEP 6:** Click **Save**.

### Satisfy a Recommendation

➤ From the Ambulatory view, Summary workflow within the patient's chart:

**STEP 1:** Click the **Recommendations** component in the workflow menu.

**STEP 2:** Click the recommendation to satisfy.

**STEP 3:** Click the **Actions** dropdown arrow in the far-right pane.

**STEP 4:** Click the form associated with the recommendation.

**NOTE:** **Select one of the other actions if that is more appropriate.**

**STEP 5:** Document the recommendation's form using the arrows icons and free text fields.

**STEP 6:** Click the **Sign** icon.

**STEP 7:** Click the **Recommendations Refresh** icon.

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### **Set Communication Preference**

➤ From the Ambulatory view, Recommendations component:

**STEP 1:** Click the **Communication Preference** dropdown arrow.

**STEP 2:** Click the appropriate selection.

**STEP 3:** Click **Save**.

### **Document a Pending Recommendation**

➤ From the Ambulatory View, Recommendations component:

**STEP 1:** Click the **Pending** filter.

**STEP 2:** Click the recommendation needed.

**STEP 3:** Click the **Action** dropdown arrow in the far-left panel.

**STEP 4:** Click the appropriate selection.

**STEP 5:** Document needed information for that recommendation as needed.

**STEP 6:** Click the **Sign** icon.

**STEP 7:** Click **Sign** the recommendation.

### **Document the Joint Practice Protocol (JPP)**

This form needs to be signed by the primary provider yearly.

➤ From the Ambulatory view, Recommendations component:

**STEP 1:** Click **AMB Joint Practice Protocol**.

**STEP 2:** Click the JPP Actions dropdown arrow in the far-right pane.

**STEP 3:** Click **AMB Joint Practice Protocol** to document.

**NOTE:** **Select one of the other actions if that is more appropriate.**

**STEP 4:** Confirm the **Proposal** radio button is selected.

**STEP 5:** Click the **Physician Name** field. Then type the name of the provider.

**NOTE:** **If needed, type a few letters of the provider's name, and click the Magnifying Glass icon to search for the provider.**

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**STEP 6:** Use the up and down arrows to set the **Order Date/Time**.

**NOTE:** The dropdown arrow opens a calendar if needed.

**STEP 7:** Click **Proposal, Cosignature Required** for the Communication type.

**STEP 8:** Click **OK**.

**STEP 9:** Click the **Orders for Signature** tray.

**STEP 10:** Click **Sign** in the Orders for Signature window.

**STEP 11:** Click **Sign** in the Orders for Signature list.

**STEP 12:** Click the **Recommendations Refresh** icon.