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

Common Buttons & Icons

+	Recommendations **Add** icon
✔	**Sign** 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 you want to add.

STEP 4: Select the check box for the recommendation you want to add.

NOTE: You can also 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 you want to satisfy.

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

STEP 4: Click the form associated with the recommendation.

NOTE: You can also 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.

Set Communication Preference

➢ **From the Ambulatory view, Recommendations component:**

STEP 1: Click the **Communication Preference** drop-down 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** drop-down 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 drop-down arrow in the far-right pane.

STEP 3: Click AMB Joint Practice Protocol to document.

NOTE: You can also 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 name, and click the Magnifying Glass icon to search for the provider.

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

NOTE: The drop-down 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 component Refresh icon.