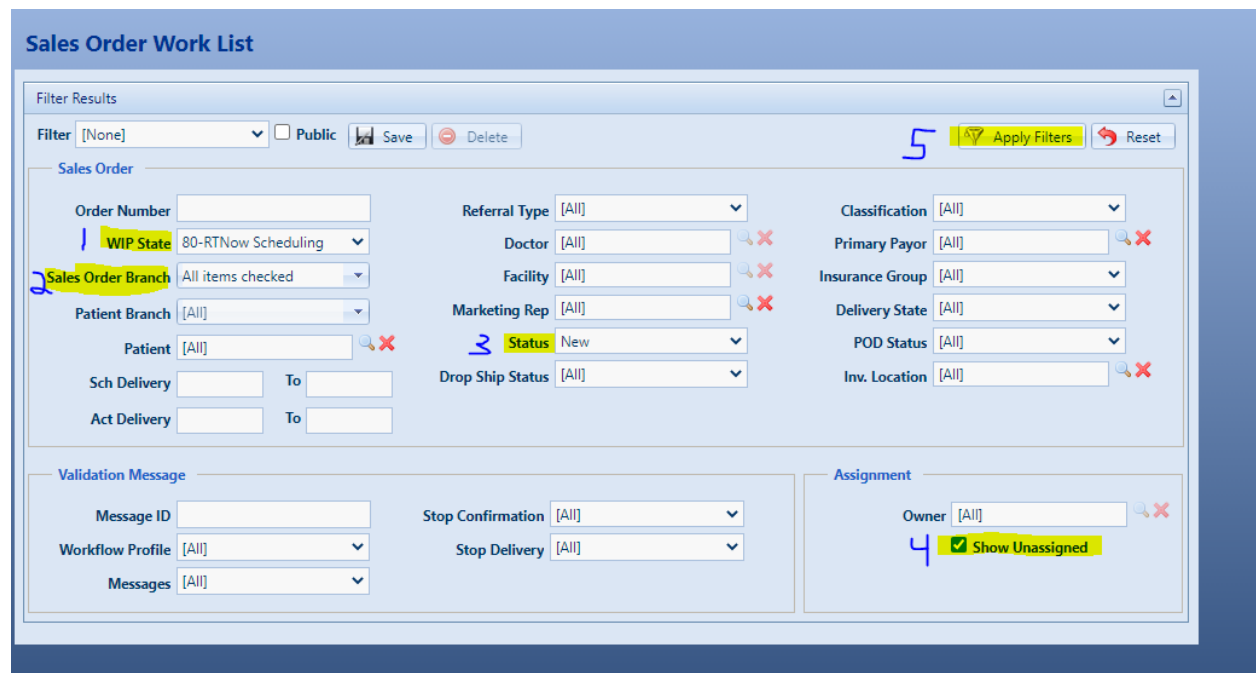
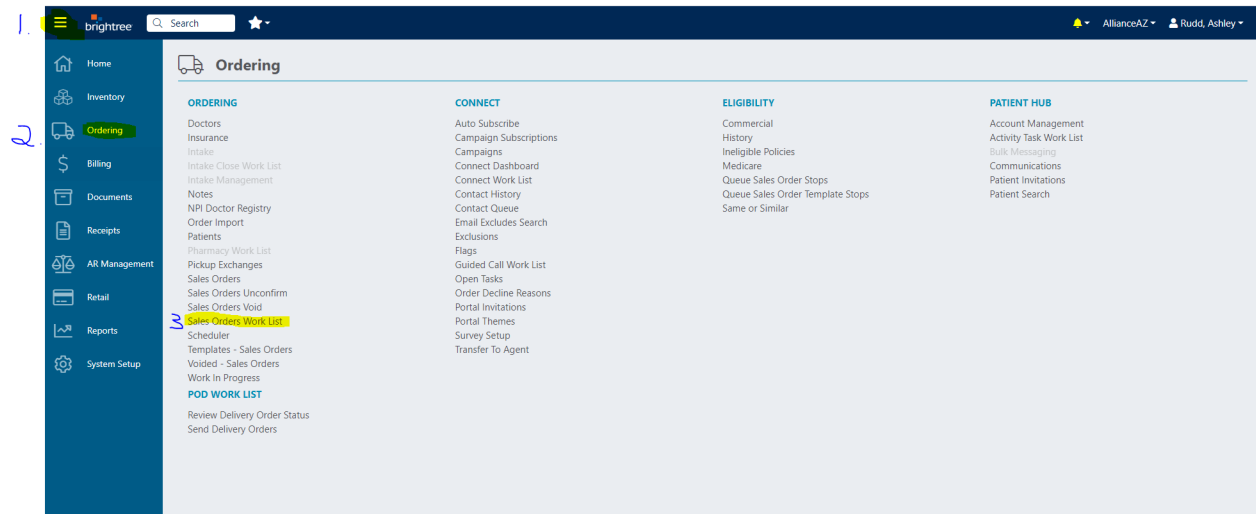


BRIGHTREE NOTE

*Locate sales orders in WIP 80-RTNow Scheduling



*Click on the order number to open the sales order



Results Summary

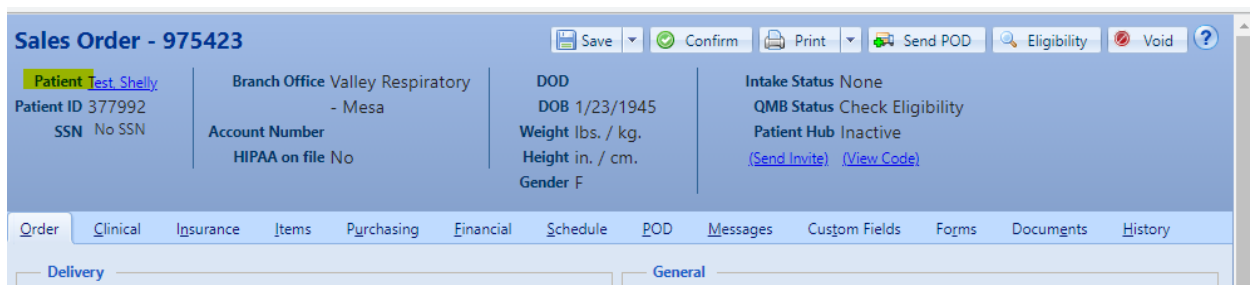
Sort Order: Order Number (Ascending) [Default]

		Order Number	Patient	WIP State	Time In WIP State	Total Charges	Order Branch	Primary Payor	Scheduled Delivery Date	Date Needed	Owner	
		975423	Test, Shelly	80-RTNow Scheduling	0d : 00h : 04m	\$0.00	Valley Respiratory - Mesa	Medicare	8/31/2021	8/31/2021		

Page size: 25 1 items in 1 pages

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*After you have the sales order open you can access the patient's account by clicking on the patient name which should be in blue....



Sales Order - 975423

Save Confirm Print Send POD Eligibility Void

Patient Test, Shelly	Branch Office Valley Respiratory - Mesa	DOD	Intake Status None
Patient ID 377992	Account Number	DOB 1/23/1945	QMB Status Check Eligibility
SSN No SSN	HIPAA on file No	Weight lbs. / kg.	Patient Hub Inactive
		Height in. / cm.	(Send Invite) (View Code)
		Gender F	

Order Clinical Insurance Items Purchasing Financial Schedule POD Messages Custom Fields Forms Documents History

Delivery General

*Once in patient account click on "Notes"

-Add New Note

-Patient Note

-Select "Schedule-DME (Patient)" note

-Update the first line with the date, time and location (will use Remote as location) for phone visit appointment

-Everything else on the note can be deleted

Note ID	Note Type Patient
Created By Rudd, Ashley	Note Reason Scheduling - DME (Patient) ▼
Date Created	Severity High ▼
Actual Date	User 1
Assigned To Rudd, Ashley 🔍 ✕	User 2
Date Needed 9/2/2021	State Unlocked ▼
Status Closed ▼	<input type="checkbox"/> Acknowledgment Required
Date Complete	<input type="checkbox"/> Deactivate Note

Details Status	Lock Status
Saved By N/A	Locked By
Date Saved N/A	Date Locked

Details
Subject Scheduling - DME
Description Patient scheduled for SERVICE on DATE at TIME in LOCATION
Collected \$XXX
Does patient have a Gate Code? If Yes, what is the code?
COVID Screening Questions
1. Are you experiencing symptoms? (fever, cough, congestion, sore throat, runny nose or shortness of breath)
2. Have you been exposed to COVID-19?
3. Have you tested positive for COVID-19?

🔍 Spell Check

*After patient is scheduled the below process is for the RT doing the visit.

*Once in patient account click on “Notes”

-Add New Note

-Practitioner Note

The screenshot shows a patient account for "Patient: Test, Shelly". The interface includes a header with patient details (ID 377992, DOB 1/23/1945, Gender F, Height in. / cm., Weight lbs. / kg., Branch Office Focus Respiratory - Wichita, HIPAA SOF No, Patient Hub Inactive, SSN No SSN) and a navigation bar with tabs for Summary, Personal, Contacts, Clinical, Insurance, Notes, Financial, Orders, Custom Fields, Connect, Documents, and History. The "Notes" tab is active, showing a "Notes" section with a filter bar and a table. A dropdown menu is open over the "Add New Note" button, listing "Patient Note", "Practitioner Note" (highlighted in yellow), and "Financial Note".

Filters: Patient Note = Yes, Practitioner Note = Yes, Financial Note = Yes, Justification Note = No, Progress Note = No, CMN Tasks = Yes, PAR T
= No

ID	Created By	Date Created	Actual Date	Note Type	Reason	Date Needed	Status
Medicare Supply Reorder							

*After Practitioner note has been selected

-Select the drop down box for Note Reason

-Select the note reason "Patient note (Practitioner Note)"

The screenshot shows a web-based form titled "Practitioner Note". At the top, there is a toolbar with buttons for "Cancel", "Save", "New", "Print", "ElectronicFax", and "History". The form is divided into several sections:

- General:** Contains fields for "Note ID", "Created By" (Rudd, Ashley), "Date Created", "Actual Date", "Assigned To" ([All]), "Date Needed", "Status" (Closed), and "Date Complete". On the right side of this section, "Note Type" is set to "Practitioner Note", and "Note Reason" is a dropdown menu with "Patient note (Practitioner Note)" selected. Other fields include "Severity" (Medium), "User 1", "User 2", "State" (Locked), and checkboxes for "Acknowledgment Required" and "Deactivate Note".
- Details Status:** Shows "Saved By" and "Date Saved", both set to "N/A".
- Lock Status:** Features a yellow warning box that says "This Note will be Locked when Saved". Below it are fields for "Locked By" and "Date Locked".
- Details:** Includes a "Subject" text box and a large "Description" text area.

A "Spell Check" button is located at the bottom left of the form.

*Ensure all highlighted areas are completed.

Summary Personal Contacts Clinical Insurance **Notes** Financial Orders Custom Fields Connect Documents History

Practitioner Note

Cancel Save New Print ElectronicFax History

General

Note ID
Created By Rudd, Ashley
Date Created
Actual Date 8/31/2021
Assigned To [All]

Date Needed
Status Closed
Date Complete 8/31/2021

Note Type Practitioner Note
Note Reason Patient note (Practitioner Note)
Severity Medium
User 1
User 2
State Locked
 Acknowledgment Required
 Deactivate Note

Details Status

Saved By N/A
Date Saved N/A

Lock Status

This Note will be Locked when Saved

Locked By
Date Locked

Details

Subject TELEPHONE INSTRUCT
Description THIS IS WHERE THE RT WILL NEED TO DOCUMENT THE DETAILS OF THEIR CALL WITH THE PATIENT. THEY SHOULD BE INSTRUCTING ON USAGE, COMPLIANCE REQUIREMENTS, CLEANING, SUPPLIES AND WHEN TO CHANGE OUT SUPPLIES AS WELL AS ANY TROUBLESHOOTING.
IF THERE ARE ANY CONCERNS THE RT SHOULD DOCUMENT HERE AND THEN SEND THE FOLLOW UP TO ASHLEY RUDD FOR THE INTERIM.

ABC Spell Check

Comments New Comment

Actual Date	Date Created	Created By	Comment
No Records Found			

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*After the instruct is completed

-RT will put in the Acutal date on the sales order

-RT will change status to "Delivered"

-RT will change WIP State to WIP 65 – Pending POD

Sales Order - 975412

Save Confirm Print Send POD Eligibility Void

Patient [Test, Shelly](#)
Patient ID 377992
SSN No SSN

Branch Office Valley Respiratory
- Mesa
Account Number
HIPAA on file No

DOD
DOB 1/23/1945
Weight lbs. / kg.
Height in. / cm.
Gender F

Intake Status None
QMB Status Check Eligibility
Patient Hub Inactive
[\(Send Invite\)](#) [\(View Code\)](#)

Order Clinical Insurance Items Purchasing Financial Schedule POD Messages Custom Fields Forms Documents History

Delivery

Scheduled Date

Scheduled Time

Actual Date

Actual Time

Address 901 SE CARAVAN AVE
PORT SAINT LUCIE FL 34983-4005 USA

Deliverable [Edit/Validate](#)

Phone

Mobile

Facility

Tax Zone

Tax Rate 7.5000

Order Note

Delivery Note

Setup Method

Delivery Technician

Drop Ship Status None
 Signature Required

Fulfillment Vendor

Account Number

Ship By

Status
Status Date

General

Manual Hold

Hold Reason

Stop Date

Stop Reason

Branch

Inv. Location

Status

Classification

Place of Service

Date of Admission

Date of Discharge

Discount Pct

P.O. Number

Reference

User 1

User 2

User 3

User 4

Prior System Key

Work In Progress

Days In State

WIP State

Assigned To

Date Needed

Completed

Audit Trail

Order Number 975412
Type Standard