

How does a supervising provider sign off on a rendering provider's clinical note?

07/08/2024 7:58 pm EDT

Supervising Providers and Rendering Providers in DrChrono.

The ability to have a supervising provider sign off on a rendering provider's clinical notes must be turned on by the DrChrono team. If you are interested in having this feature turned on, please submit a [support ticket](#) and one of our agents will switch on the feature for you.

The supervising provider can be assigned in the scheduling appointment window.

Appointment on Jan 30, 2020 for Alex Trebek

The screenshot shows the DrChrono appointment scheduling interface. At the top, there are tabs for 'Appointment', 'Billing', 'Eligibility', 'Vitals', 'Growthcharts', 'Flags', 'Log Comm.', 'Revisions', 'Custom Data', and 'MU Helper'. Below these are filters for 'Type' (Walk-in, Transition of Care, Referral) and status indicators: 'Missing Patient Address', 'Patient Statement Balance: \$22083.00', 'Generate Statement', 'Balance: \$20360.00', '17 past appointments', 'Loud', and 'Hard of hearing:'. The main form contains fields for 'Provider' (Dr. Nick Simpsons), 'Patient' (Alex Trebek - 01/02/1949), 'Reason' (Laser hair removal consultation), 'Scheduled' (01/30/2020 at 12:00PM), 'Duration' (60 minutes), 'Notes', and 'Consent Forms'. On the right side, there are dropdown menus for 'Supervising' (Kareem Davies), 'Office' (Primary Office (HQ)), 'Profile' (Laser consultation), 'Eligibility Profile', 'Exam' (Exam Room 1), 'Color', and 'Status'. A green button 'View Clinical Note' and a grey button 'View All Appointments' are also visible. At the bottom, there are checkboxes for 'Recurring Appointment', 'Arrange a Follow-up Reminder', and 'View Active Reminders', along with a 'Choose a Reminder Profile' dropdown.

The provider who needs supervision will sign and lock their note as usual. There will be a message that says '**Locked by Rendering Provider waiting for Supervising Provider Sign Off**'.

Schedule Clinical Patients Reports Billing Account Help

H&P SOAP ADDITIONAL

View Appointment Quick History Copy Previous Note

Michelle Harris (Female | 21 years | 10/14/1999 | HAM000005) James Smith 12/17/2020

Chief Complaint

Include In Note *Add to note* must be checked for this to render.

Location medial x	Location Comments
Quality aching x	Quality Comments
Severity Please select one option	Severity Comments
Duration Please select at least one option	Duration Comments
Onset / Timing Please select at least one option	Onset Comments
Context Please select at least one option	Context Comments

onpatient / Check-In

CC / History of Present Illness

Med / Fam / Social History

Medications & Allergies

Review of Systems

Physical Exam

Assessment

Plan

Billing

Growthcharts Vitals Print section Fax section

A supervising provider may sign off on clinical notes by accessing their clinical notes report found in the **Clinical Notes** option in the **Clinical** tab.

Clinical Patients Reports

FORM TOOLS

- Form Builder
- Library
- Archive
- Form Reorder
- Complete Note Format
- onpatient Forms
- Macro Buttons
- Document Management

CLINICAL

Clinical Notes

- Audit Log
- CDS Rules
- Inventory Management
- Patient Education Management

In your SOAP Notes Clinical Report, you may search for clinical notes that require a supervising signature. Select the **Need Supervising** checkbox and any patient name, username, text, and/or date range parameters you would like to search for.

SOAP Notes Clinical Report

Offices Check all Uncheck all
 Mountain View Office Primary Office

Doctors Check all Uncheck all
 Remington Woo2 Remington Woo

Locked Status Need supervising Need rendering View Last: Day **Week** Month Year

Patient's Name User's Name Contains Text 01/02/2017 01/09/2017 Refresh

Export Report To Excel Print non-blank Clinical Notes in Report PAGE 1 OF 1

Patient	Date ↓	Rendering Provider	Locked (Rendering Signed)	Supervising Signed Off	
Bugs Bunny	01/09/2017 02:00 PM	Remington Woo2	No	No	Start Note
Dafty Duck	01/09/2017 10:00 AM	Remington Woo	No	Not Needed	Start Note
Bugs Bunny	01/06/2017 01:00 PM	Remington Woo	Signed by Remington Woo2	Signed by Remington Woo	View Note
Bugs Bunny	01/05/2017 01:00 PM	Remington Woo	No	Not Needed	Start Note
Bugs Bunny	01/04/2017 04:00 PM	Remington Woo2	Signed by Remington Woo2	Signed by Remington Woo	View Note
Dafty Duck	01/04/2017 10:00 AM	Remington Woo	No	Not Needed	Start Note
Bugs Bunny	01/03/2017 03:00 PM	Remington Woo	No	Not Needed	Start Note

In the **Supervising Signed Off** section, click on the note you would like to sign off on.

Supervising Signed Off

No

Not Needed

Signed by Remington Woo

Not Needed

Signed by Remington Woo

Not Needed

Not Needed

The clinical note will load for you to view. Here, like all clinical notes, click on the **Sign & Lock** button.

+ Amendments View Fax Sign & lock Edit Sections Print sections

Now, when you click **Sign & Lock**, the status bar will indicate that you (the supervising provider) have signed the clinical note.

Status: Locked By Rendering Provider and Supervising Provider

At the bottom of the clinical note, you will notice that your e-signature is now present.

The screenshot displays a medical scheduling application interface. At the top, there are navigation tabs: Schedule, Clinical, Patients, Reports, Billing, Account, and Help. A search bar is located on the right. Below the navigation, there are buttons for 'Refresh' and 'Print Appts'. The main calendar view shows the week of December 13, 2020, to December 19, 2020. The 'Weekly' view is selected. A 'FORM TOOLS' dropdown menu is open, listing various tools under categories like 'FORM TOOLS', 'CLINICAL', and 'MU REPORTING'. The calendar shows appointments for Jenny (Jeri) Harris and Michelle Harris on Thursday, December 17th.

Day	Mon 12/13	Tue 12/14	Wed 12/15	Thu 12/16	Fri 12/17	Sat 12/18	Sun 12/19
10:00am					Jenny (Jeri) Harris: Primary		
					Jenny (Jeri) Harris: Primary		
					Michelle Harris: Primary Office		

Click the resource help article link to learn more about [How Can I Set Up a Supervising Physician?](#)