



TriMed Complete Feature Brief

Assigning Notifications to Users

Overview

Sending notifications is an integral part of practice workflow. Previously, notifications were assigned to specific teams. In the latest TriMed Complete version, the ability to assign notifications to users rather than teams has been added. This capability has also been added to a Quick Note so that Quick Notes can either be sent to a team or an individual.

Admin

No setup is necessary to begin using this feature. The option to send a notification or a Quick Note to an individual will be available next to the *Team* option.

In order to Default a User when selecting a Notification Quick Pick go to Admin > Decision Support > Notification Quick Pick. Use the Default User dropdown to allow the system to default to a user when the Quick Pick is selected. This option might be helpful in practices that have one user who always reviews certain chart items or does certain tasks. For example, if the practice has one front desk staff member, they may always want a notification like "Excuse for Physical Activity" to be sent to that user.

Notification Msg Quick Pick

▼ Front Desk

Excuse for Physical Activity

Return to school or daycare

School or work excuse

Superbill Edit: Remove draw fee

Referral Follow Up

▼ Nurse

Need Patient Forms

Contact Parent

Review Portal Message

Verify Newborn Screening

Verify Immunizations

Need Help in Room

Send to Lab After Shots

Phone Note

Phone Note Urgent

▼ Provider

Shot Only for Providers

Shots not given

Lab Only for Providers

Urgent Patient Contact for Provic

Phone Note Provider

Please review Lab Results

Portal message for provider

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+

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Quick Pick Name:

Excuse for Physical Activity

Default Dept:

-Same Dept as Item-

Default Provider:

-Same Provider as Item-

Default Team:

Front Desk

Default User:

-None-

Priority:

Normal

Message:

Please provide a note for excuse from physical activity

Auto Actions:

☐ Signoff on Send

☐ Return to Home on Send

Assistant:

Unmark Assistant

Auto Assign Item to Team on Send:

None/No auto-assign

Features

New Notifications

On the New Notification popup, next to the 'Team' dropdown a new 'User' dropdown is available. Either a *Team* can be selected, or a *User* but not both.

NEW NOTIFICATION TASK

On Send Also:

☐ Sign Item

☐ To Home

☒ Assistant

-Assign Item to Team-

Team:

-None-

User:

Whitney Beck

Message:

Front Desk

Please provide a note for excuse from physical activity

Please provide a note to allow return to school or daycare

Please provide a note to excuse from school or work

Superbill Edit: Remove draw fee.

Please follow up on this referral to see if the consult report can be faxed to us?

Nurse

Patient Needs Patient Forms

Please verify Newborn Screening status.

Please verify the patient's immunization record.

Provider Needs Help in Room.

Send patient to lab after shots

Please complete Phone Note

Provider

Please address this urgent patient note.

Please address this phone note

Please review Lab Results

Please review this portal inquiry.

Please complete this Rx refill request.

The phone note is complete. Please review and sign off on the note.

TriMed

See Comments

Call PARENTS and advise that labs are normal

Call to schedule annual well visit

Rx refill complete as requested.

Rx refill denied. See note.

More

On the Notification page, users can receive messages sent to both specific *Teams* and *Users*. The logged in user's name will default to checked and cannot be unchecked.

TriMed Complete

SCHEDULEMY DESKOTHERDM WEBCHECK INREVIEWCHART FINDNOTIFICATION xTEST, PATIENT

NOTIFICATION (10)

Department:Assigned Provider(s):Notification Team:Notification User:Status: To DoDates: Open

	Date/Time	For	From	Message	Patient	USER	Description
<input type="checkbox"/>	Thu Dec 10, 20 03:36 PM			This fax has failed.	KEENE, J	<input checked="" type="checkbox"/> admin1 admin1	Chart Print
<input type="checkbox"/>	Thu Dec 10, 20 03:02 PM	Failed Fax		Additional details have been added to the TEST, AD original note		<input type="checkbox"/> Ahren Bersch	Phone Call
<input type="checkbox"/>	Thu Dec 10, 20 02:56 PM	DOCTOR, MISC TriMed		This fax has failed.	KEENE, J	<input type="checkbox"/> admin1 admin1	Chart Print
<input type="checkbox"/>	Thu Dec 10, 20 02:53 PM	Failed Fax		This fax has failed.		<input type="checkbox"/> Ahren Bersch	Chart Print
<input type="checkbox"/>		Failed Fax				<input type="checkbox"/> admin1 admin1	Chart Print

Quick Notes

On a Quick Note, notifications can now be sent to Users rather than a Team when necessary. The same logic that exists on a New Notification also applies here. Either a team can be selected or a user, but not both.

New Quick Note ✕

Info **Note**

Template: None

Description:

Note:

Assign to Team: [dropdown] **Send**

Assign to User: -None- **Send**

Communication between teams/users will collapse neatly below the initial message and display the *To* and *From* user as well as the date stamp of each notification that was sent.

Info **Note**

Created: tmartin 12/10/2020 05:50 PM

Description: Phone Call

Phone Call : Mom called. Pt needs refill on Albuterol.

Last Appt: Aug -03-2020

Phone Call

Tim Martin to Molly McCutcheon 12/10/2020 05:50 PM

Molly McCutcheon to Tim Martin 12/10/2020 05:54 PM

When did we see her last?

Tim Martin to Molly McCutcheon 12/10/2020 06:02 PM

Looks like we saw them on Aug-03-2020 for a regular Asthma Recheck and gave them a 3 month supply.

Assign to Team: [dropdown] **Send**

Assign to User: -None- **Send**