




Document Management (Scanning)




Input a New Paper Document

1. Click the  button.
2. Click on .
3. Click on the  button.
4. Perform the scan.
5. Move the item from the Sketch panel to the Thumbnail pane (2nd column).
6. If the patient wasn't selected from the calendar, search for the patient.

Patient Information	
Patient ID	<input type="text"/>
Patient name	<input type="text"/>


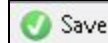
7. Fill in the proper fields and click .

Input an Insurance Card


1. Click the  button.
2. Click on .
3. Click on the  button.
4. Perform the scan.
5. Move the item from the Sketch panel to the Thumbnail panel (second column).
6. If the patient wasn't selected from the calendar, search for the patient.

Patient Information	
Patient ID	<input type="text"/>
Patient name	<input type="text"/>

7. Type of Item:





Item type	:INSURANCE
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8. Click  for Item Category and select the proper Document Category if applicable.
9. Mark as reviewed.
10. Click .

View Existing Patient Documents

1. Use the Patient Finder  to search for the patient.
2. OP 14 displays patient documents in the Document List panel on the left side of the window.



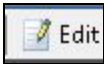
Item Type △ expand grid		
Category	Date	Notes
Item Type : :CHART - MED Hx		
PAST MEDICAL HISTORY	12/29/201 4	
Item Type : :DIAGNOSTIC TEST		
CBC	07/18/201 7	
STREPTOCOCCUS, GROUP A CU	07/18/201 7	
Item Type : :INSURANCE		
ID CARD	01/29/201 5	

Print Documents

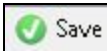
1. Click on the  button.
2. Use the Patient Finder  to search for the patient.
3. From the Document List panel on the left, select the document you want to print.
4. Click  to print the selected scanned document.
5. Click  if you need to print the selected record with info.



Moving a Document to Another Patient




1. Click the  button.
2. Use the Patient Finder  to search for the patient.
3. From the Document List panel on the left, select the document that needs to be moved.
4. Click the  button.
5. Search for the patient to move the document to.



Patient Information	
Patient ID	<input type="text"/>
Patient name	<input type="text"/>


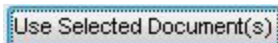
6. Click on .
7. Click OK to confirm that it is OK to drop existing attachments from the current patient.



Attach a Document through a Message




1. Click the  button.
2. Use the Patient Finder  to search for the patient.
3. From the Document List panel on the left, select the document you want to send and click .
4. A new message opens. The attached document will be located under Attachments.

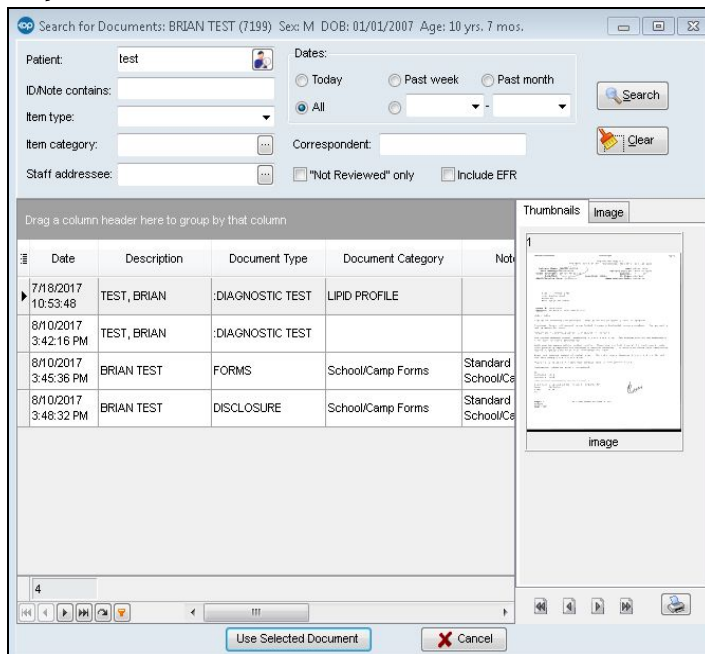
Attachments:	Date	Item Type	Item Category	Item Note	Drop
	08/10/2017	FORMS	School/Camp Forms	Standard	

5. To add more documents, click on the .
6. Here you will highlight the document and click on .



Note: To add more than one document, you can hold down the Ctrl button and click on the additional documents.

Search for Documents




1. Click the  button.
2. Click the  button.
3. Click  if a patient name shows on the top panel.
4. Specify your search criteria from the following:
 - Item Type
 - Item Category
 - Staff addressee
 - Dates: Today, All, Past week, Past Month, enter specific date range
 - May choose to include "Not Reviewed" only
 - May choose to include EFR






Date	Description	Document Type	Document Category	Notes
7/18/2017 10:53:48	TEST, BRIAN	DIAGNOSTIC TEST	LIPID PROFILE	
8/10/2017 3:42:16 PM	TEST, BRIAN	DIAGNOSTIC TEST		
8/10/2017 3:45:36 PM	BRIAN TEST	FORMS	School/Camp Forms	Standard School/Camp
8/10/2017 3:48:32 PM	BRIAN TEST	DISCLOSURE	School/Camp Forms	Standard School/Camp

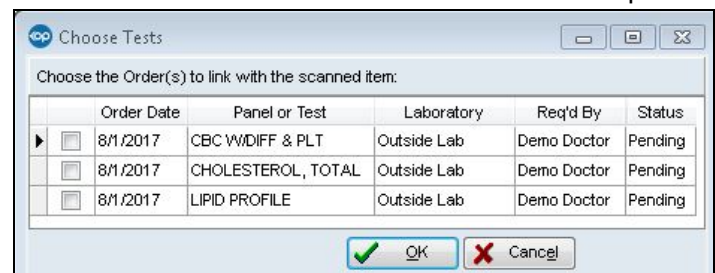
5. Select the document you want from the results, and double-click on it, or click on  to open it.
6. To print the highlighted document, click .

Link Document to a Diagnostic Test

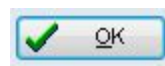
1. Click the  button.
2. Click on .
3. Click on the  button.
4. Perform the scan.
5. Move the item from the Sketch panel to the Thumbnail panel.
6. If the patient wasn't selected from the calendar, search for the patient. If a patient name appears you may click on the red X to clear the current patient.

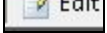


7. Select Diagnostic Test in the Item Type field.
8. Click  to attach to an order.
9. Fill in the *Addressed to* field specifying the Provider who will review the result or place a checkmark in the Reviewed box.
10. Fill in the proper fields and click .
11. To attach the results to an order after saving, click . The Choose Tests window opens.




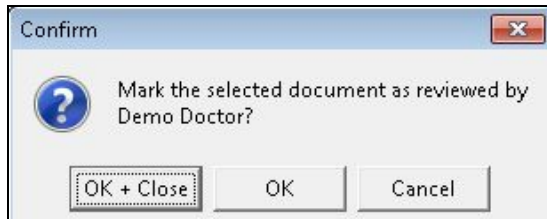
Order	Order Date	Panel or Test	Laboratory	Req'd By	Status
<input checked="" type="checkbox"/>	8/1/2017	CBC W/DIFF & PLT	Outside Lab	Demo Doctor	Pending
<input type="checkbox"/>	8/1/2017	CHOLESTEROL, TOTAL	Outside Lab	Demo Doctor	Pending
<input type="checkbox"/>	8/1/2017	LIPID PROFILE	Outside Lab	Demo Doctor	Pending

12. Select a test and click .




Note: If changes need to be made, click on  and make your changes.

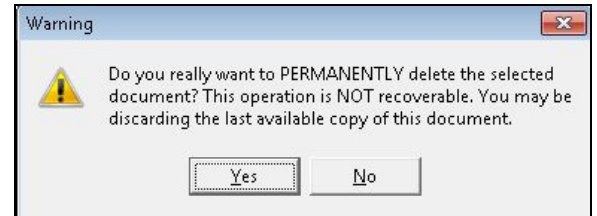
Mark Document as Reviewed

1. After opening the document, click .
2. Click one of the three options.




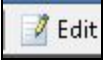


Delete an Entire Document

1. Click the  button.
2. Ensure that the correct patient is selected. If you haven't selected a patient, use the Patient Finder  to search for and select the correct patient.
3. On the Document List panel, select the document you want to delete and click .
4. To permanently delete the selected document, click Yes.



Delete One Page from a Document



1. Click the Docs button.
2. Ensure that the correct patient is selected. If you haven't selected a patient, use the Patient Finder  to search for and select the correct patient.
3. On the Document List panel, select the document you want to edit and click  Edit.
4. Select the page you want to delete, right click on the page, and select .
5. Click .