


Table of Contents - Jump to a section below

[Manage Document Types and Categories](#)[Search, View and Print Documents](#)[Scanning and Labeling a New Document/Insurance Card](#)[Move a Document to Another Patient](#)[Capturing Photo IDs](#)[Attach a Document through a Message](#)[Importing Documents, Fax, Image, or PDF Files](#)[Link a Document to a Diagnostic Test or Referral](#)[Scan/Import Document to the Non-Patient Directory](#)[Deleting Documents](#)

Manage Document Types and Categories

Add/Edit a Document Type or Category

1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button.**
2. Click the **New Document** button.

3. Click in the **Item Category** field and click the  button. The Document Types and Categories window is displayed with the Document Type pane on the left and the Document Category pane on the right.
4. Click the **+** button below the respective Document Type or Document category pane to create a new entry.

Warning: Document Types may be added, but it is strongly advised not to delete Document Types as deletion may affect some functionality in OP. If duplicates are created and must be deleted, caution must be taken to delete only the one created in error.

5. Enter the new Document Type or Category.
6. Click the **✓** to save your changes.
7. If edits need to be made to the Document Type or Document Category, select the appropriate Document Type or Document category and click the **Edit** button.

Warning: It is important to ensure when editing a Document Category that a Document Category is selected prior to clicking Edit.

- For Document Type, select the checkbox in the **Include?** column and click **Save**.

Note: Check Include? If you want to include document images in Event Chronology. Uncheck if you want to exclude document images from Event Chronology reports.

- For Document Category, make the necessary edits and click **Save**.

8. Click **OK** to exit the window.

Delete a Document Category

1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button.**
2. Click the **New Document** button.
3. Click in the **Item Category** field and click the **page** icon. The Document Types and Categories window is displayed with the Document Type pane on the left and the Document Category pane on the right.
4. Select the Document Type that contains the Category that needs to be deleted.
5. Select the Document Category to delete and click the **Delete** button.

Warning: It is important to ensure when deleting a Document Category that a Document Category is selected prior to clicking Delete. If a Document Category is not selected, the deletion will be made to the Document Type and could potentially cause functionality issues in your system.

6. Confirm the deletion by clicking **OK** in the pop-up confirm box.
7. Click **OK** to exit the window.

[Back to top](#)

Scanning and Labeling a New Document/Insurance Card



1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button.**
2. Click the **New Document** button.

Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click:

- **None:** Retains none of the information from the Document Details panel.
- **Details:** Retains Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
- **All:** Retains Patient ID, Patient Name, Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
- **Cancel:** Closes the confirmation and takes you back to the previous record with no changes made to the current record.

Any information you choose to retain can be edited, as appropriate, before saving.

3. Place the document or insurance card in the scanner.
4. Click the **Page Scanner** button for a new document or **Card Scanner** for an insurance card in the **Acquire images & documents** bar to perform the scan.
5. The scanner will become active and the Scan Options window will appear, click the **Scan** button.
6. Click and drag the document from the **Sketch** panel to the **Thumbnail** panel (second column).

7. If the patient isn't already selected, assign the document to the patient.
 - a. Click in the **Patient ID** field and use the **Patient Finder** button  to search for and select the patient.
8. In the **Review Details** section on the right panel:
 - a. Click in the **Item Type** field and select the appropriate Item Type.
 - b. Click in the **Item Category** field, and click the **Document Types and Categories** button .
 - c. Select the **Document Type** and, if applicable, the **Document Category**.
 - d. Change **Privacy level** as necessary.
 - e. *(Optional)*: Select the **Status of original** from the drop-down.
 - f. *(Optional)*: Select the **Shared to Portal** checkbox and enter or edit the **Portal Exp Date**.
 - g. *(Optional)*: Enter notes in the **Notes** field.

Note: Notes entered here are not sent to the portal.

9. Click the **Reviewed** checkbox to mark as reviewed.

Note: The **Addressed to** field defaults to the person scanning, but if the item requires review, select that staff member using the drop-down to route the document to that user.

10. Click **Save**.

[Back to top](#)

Capturing Photo IDs


1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button**.
2. Click the **New Document** button.

Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click:

- **None:** Retains none of the information from the Document Details panel.
- **Details:** Retains Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
- **All:** Retains Patient ID, Patient Name, Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
- **Cancel:** Closes the confirmation and takes you back to the previous record with no changes made to the current record.

Any information you choose to retain can be edited, as appropriate, before saving.

3. Click the **Camera** button in the **Acquire images & documents** bar to activate the digital camera. Your camera's own picture capture interface opens.

4. Click the **Snapshot** button.
 - Right-click the **Thumbnail** and select **Show Full Screen** to expand a photo to full view.
 - Right-click the **Thumbnail** and select **Delete** to delete a photo from the Sketch Panel.
5. Click the **Exit** button.
6. Click and drag the document from the **Sketch** panel to the **Thumbnail** panel (second column).
7. Click the **Edit** button and use the Cropping Tool  to crop the image.
8. Follow steps 7-10 in [Scanning and Labeling a New Document/Insurance Card](#) to complete the **Review Details** section.

[Back to top](#)

Importing Documents, Fax, Image, or PDF Files

1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button.**
2. Click the **New Document** button.

Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click:

 - **None:** Retains none of the information from the Document Details panel.
 - **Details:** Retains Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
 - **All:** Retains Patient ID, Patient Name, Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
 - **Cancel:** Closes the confirmation and takes you back to the previous record with no changes made to the current record.

Any information you choose to retain can be edited, as appropriate, before saving.
3. Click **Import Image Files, Fax, Import Documents**, or the arrow next to Import Documents and choose **Import PDF**, depending on what you would like to import.
4. Choose the folder where the item is saved.
5. Highlight the item you would like to import.
6. Click the **Open** button or double-click on the item to import.
7. The item imported is now displayed in the sketch folder.

Note: If the import is a PDF, the PDF will display in the thumbnail panel.
8. Click and drag the document from the **Sketch** panel to the **Thumbnail** panel (second column).

9. Follow steps 7-10 in [Scanning and Labeling a New Document/Insurance Card](#) to complete the **Review Details** section.

[Back to top](#)

Scan/Import Documents to the Non-Patient Directory


The Non-Patient Directory is a secure document repository where documents unrelated to one specific patient are stored. These documents may include any type of correspondence to the practice, such as letters or EOBs.


1. Scan or Import the document into OP following the steps listed above in this QRG.
2. Click in the **Patient ID** field.
3. Click the **red X** located to the right of the Patient Finder.
4. Click **OK** in the confirmation window.
5. Click in the **Item Type** field and select **:Non-Patient Directory**.
6. Leave the Item Category field blank.
7. Follow steps 7-10 in [Scanning and Labeling a New Document/Insurance Card](#) to complete the **Review Details** section.

Tip: To be able to easily search for documents saved to the Non-Patient Directory, enter a note in the **Notes** field.

[Back to top](#)

Search, View and Print Documents

1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button**.
2. Use one of the following two methods to search:
 - a. Use the **Patient Finder**  on the top left of the **Manage Documents** window to search for the patient.
 - i. Select a different date radio button if necessary.
 - b. Click **Search** and the Search for Documents window will display.
 - i. Click the **Clear** button if you need to remove previously entered criteria.
 - ii. Specify your search criteria for any of the following:
 - **Patient:** Enter a patient name or click the Patient Finder.
 - **ID/Note contains:** Enter a search term to find documents with a specific Note entered.
 - **Item Type:** Click the drop-down arrow and select from the list.

- **Item Category:** Click the ellipsis, locate the Document Type on the left, and click once. The Document Categories are displayed on the right. Click to select a category and click **OK**.
 - **Staff addressee:** Click the ellipsis and select the staff member from the Staff Lookup window.
 - **Dates:** Choose Today, All, Past week, Past Month, or enter a specific date range.
 - **“Not Reviewed” Only:** Select the checkbox to view documents that have not been marked as reviewed.
 - **Include EFR:** Select the checkbox to view documents that have a privacy level higher than Any Staff member.
 - **Correspondent:** Type the name of a correspondent to view all documents saved with the selection.
- iii. Click the **Search** button. A list of documents are displayed in the grid.
 - iv. Highlight the document you want to open.
 - v. Double-click on the document, or click **Use Selected Document** to open it. The document(s) appear in the **Document List** panel on the left side of the window.
3. Select the document to print and click **Print**.
- Note:** If you need to print the document with information, click the drop-down next to Print, , and choose Print Selected Record (with info).
4. Complete the **Medical Record Disclosure Tracking** window as appropriate.

[Back to top](#)

Move a Document to Another Patient

The method for moving a Document from one patient to another depends on whether or not the Document was shared to the Intelichart Portal.

Move Document Not Shared to the Patient Portal

1. Access Documents in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart > Documents button**.
2. Select the document and click the **Edit** button.
3. Use the **Patient Finder** in the **Patient ID** field to search for and select the patient to move the document to.
5. Click **Save**.
6. Click the **OK** button to confirm that it is OK to drop existing attachments from the current patient.
7. In the Audit Trail window, select or enter a reason for the change.
8. Click **OK**.


Move Document Shared to the Patient Portal

Warning: This workflow involves the deletion of the Document. It is recommended to make sure you have either the original Document or a saved copy that you can import into the correct patient's chart before deleting it. Use the **Save a Copy** or **Print** button displayed when hovering over the Document to ensure you have a copy of the original.

1. Access Documents in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart > Documents button.**
2. Select the document and click the **Delete** button.
3. Click **Yes** to confirm you want to proceed with deleting the document.
4. In the Audit Trail window, select or enter a reason for the deletion.
5. Click in the **Patient ID** field to search for and select the patient to which the document should be moved.
6. Click the **Save** button.
7. Click the **OK** button to confirm that it is OK to drop existing attachments from the current patient.

[Back to top](#)

Attach a Document through a Message

1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button.**
2. Use the **Patient Finder**  on the top left of the **Manage Documents** window to search for and select the patient.
3. Select the document that you want to send from the Document List and click the **Send** button. A new message opens with the attached document listed in the **Attachments** section of the window.
4. Select the recipient and click the **Send** button.
5. To add more documents, click on the **Attach Documents** paperclip button. This will open the **Search for Documents** window.
6. Highlight the document and click **Use Selected Documents**.

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

[Back to top](#)

Link a Document to a Diagnostic Test or Referral

Link a Document to a Diagnostic Test




1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button.**

2. Click **New Document**.

Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click:

- **None:** Retains none of the information from the Document Details panel.
- **Details:** Retains Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
- **All:** Retains Patient ID, Patient Name, Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
- **Cancel:** Closes the confirmation and takes you back to the previous record with no changes made to the current record.

Any information you choose to retain can be edited, as appropriate, before saving.

3. Click the **Page Scanner** button or the **Import Image Files** button to import the document.
4. Move the item from the **Sketch** panel to the **Thumbnail** panel, if applicable.
5. In the **Patient ID** field, use the **Patient Finder**  to search for and select the patient.
6. Select **Diagnostic Test** in the **Item Type** field.
7. Click the **Attach** button  in the **Item Category** field.
8. Select the diagnostic test and click **OK**.
9. Fill in the **Addressed to** field specifying the Provider who will review the result or if they've been reviewed, place a checkmark in the **Reviewed** box.
10. Fill in the appropriate fields and click **Save**.
11. To attach the results to an order after saving, search for and select the document.
12. Click the **Attach** button . The **Choose Tests** window opens.
13. Select a test and click **OK**.

Link a Document to a Referral



1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button**.
2. Click **New Document**.

Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click:

- **None:** Retains none of the information from the Document Details panel.
- **Details:** Retains Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.
- **All:** Retains Patient ID, Patient Name, Item Type, Item Category, Privacy level, Correspondent, Addressed to, and Status of original.

- **Cancel:** Closes the confirmation and takes you back to the previous record with no changes made to the current record.


Any information you choose to retain can be edited, as appropriate, before saving.

3. Click the **Page Scanner** button or the **Import Image Files** button to import the document.
4. Move the item from the **Sketch** panel to the **Thumbnail** panel if applicable.
5. In the **Patient ID** field, use the **Patient Finder**  to search for and select the patient.
6. Select **Referral Letter** in the **Item Type** field.
7. Click the **Attach** button  in the **Item Category** field. The Choose a Medical Record to Attach to a Consent Record window is displayed.
8. Select the Referral in the Referral Letter tab, to attach the scanned document and click **OK**.
Note: If the Referral does not exist, click the **Add** button and complete the Referral/Care Transitions Details window.
9. Fill in the **Addressed to** field specifying the Provider who will review the referral or if it has been reviewed, place a checkmark in the **Reviewed** box.
10. Fill in the appropriate fields and click **Save**.

[Back to top](#)

Deleting Documents

Delete an Entire Document

1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button**.
2. Using the Patient Finder  in the top left corner, search for and select the patient.
3. On the **Document List** panel, select the document you want to delete and click **Delete**.
4. To permanently delete the selected document, click **Yes**.

Note: If the document is attached to medical records such as a lab requisition, the attachment will be disassociated from the lab requisition.

Delete One Page from a Document

1. Access the Manage Documents window: **Clinical or Practice Management tab > Document Mgmt button**.
2. Using the patient finder in the top left corner, search for and select the patient.
3. On the **Document List** panel, select the document you want to edit and click **Edit**.

4. In the **Thumbnail** panel, select the page you want to delete, right-click on the page, and select **Delete Page**. This immediately deletes the page.
5. Click **Save**.

[Back to top](#)