



Audience/ Users: CA, MA, RN, PCP, CIS

Care Model Considerations: [Details to consider which impact or influence how we provide care to our patients. Caroline can help with this if needed.]

This Guide Will Cover:

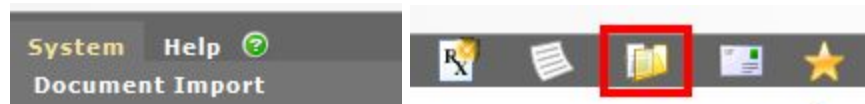
[Importing Documents](#)


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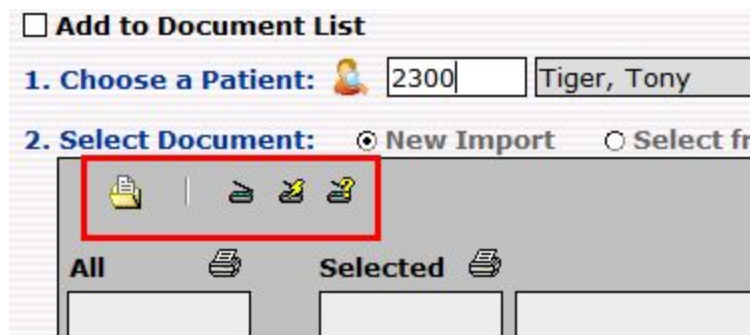
[Deleting a Document](#)

Importing Documents

1. To get into the document import module, select **Document Import** from the **System** tab at the top or select the folder picture from the icons on the right.



2. Select a patient by clicking the  to search or typing in the patient ID number in the provided field.
3. Upload a document using the provided icons.



- a. To upload a document from the file system, use the  icon.

- b. To upload a document from a scanning device use



- If the document is associated with an order, select an order from the list provided. If not, check the box for **No Orders Selected**

3. Select Order(s):

No Orders Selected

Order Name ▾	Ordering Provider	Status	Create Date
Chest X-ray, PA and lateral	Myers, Griffin MD	Returned	11/17/2013
Comprehensive metabolic panel	Myers, Griffin MD	Returned	11/17/2013
Glucose, Finger Stick	Myers, Griffin MD	Returned	11/17/2013
Hemoglobin A1c	Myers, Griffin MD	Returned	11/17/2013
Lipid panel (total cholesterol, lipoproteins, HDL, triglycerides)	Myers, Griffin MD	Returned	11/17/2013
Care Menu: Functional Support	Myers, Griffin MD	Returned	11/19/2013

- Enter the date that corresponds with the document

4. Select Date:

- If you wish to rename the document, select the checkbox next to the **Document Name** field.

5. Document Name: **Override**

- Use the drop down menu to select a **Document Type**.

6. Select Document Type:

7. Is this document authenticated/signed? Yes No

Assign document to:

8. Priority: Normal

- If the document has not been reviewed and signed by the Provider, select the **No** option next to number 7. Then, use the drop down to assign the document to a provider.

7. Is this document authenticated/signed? Yes No

Assign document to:

8. Priority: Normal

- If the Provider has reviewed the document, select **Yes** and the choose the Provider from the drop down list.

7. Is this document authenticated/signed? Yes No

By whom?

10. Select the Priority : **Normal** or **High**

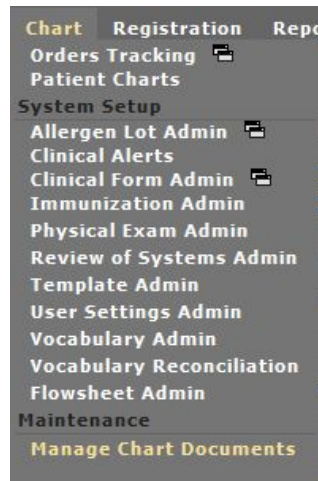
8. Priority: Normal High

Save

11. Once finished, click

Moving a Document Between Patients

1. Go to the **Chart** menu and select **Manage Documents**.

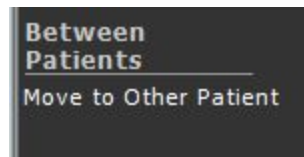


2. Choose a patient



3. Click the document you wish to move.

4. Click **Move to Other Patient** on the left side. (Not available if the document is a report from a Burdick clinical device.)



5. Select a patient from the new dialogue box



6. Choose a folder from the drop-down list

In Folder: Daily Visit Summary

- Click **Yes**.
- Select a reason for the move:

Reason for Move:

Wrong patient

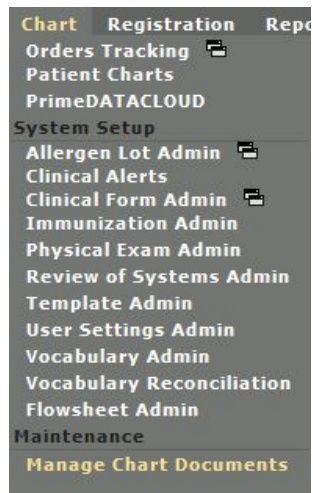
Duplicate Patients

Other

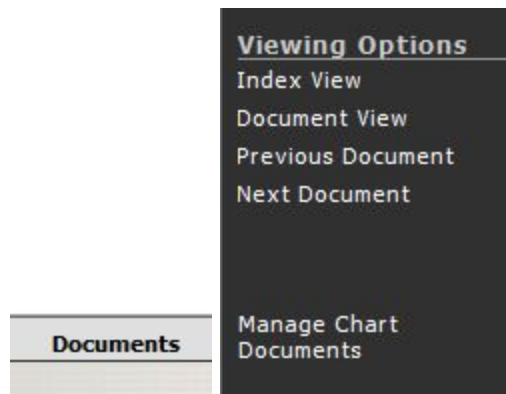
- Click **OK**.

Deleting a Document

- Once you are in the patient's **Chart**, select **Manage Chart Documents**



- You can also locate this function from the **Documents** tab, and then under **Viewing Options**



4. Under **Within Patient**, you will now have the option to **Delete** the selected document.



5. You will receive a caution message. Select **Yes** and the reason why you are deleting the document.

Are you sure you want to delete this document?

Yes No

Reason for Delete will be visible only in the Audit Log report.

Reason for Delete:

Duplicate document

Misinformation

Expired/Obsolete document

Other

6. Select **OK** and the document is now removed from the patient chart.

