

# Adding Handouts Saved on Computer

Last Modified on 05/19/2022 3:09 pm EDT

Version 20.6

## About

Below, you'll learn how to scan or import Patient Education Handouts into OP.



**Note:** If you have a Patient Portal and will be ordering handouts/weblinks/PDFs for your patients to view online, you *must* follow the steps found in [Adding Resources using the OP Patient Portal](#). Adding handouts using the steps listed below will *not* make it possible for your patients to view them on the portal.

## Scanning a Patient Handout

The following steps will help you scan in handouts that you may already have in paper format in your office. As this handout will be referred to in the system for individual patients, be sure to scan in a blank copy.

1. Navigate to Manage Documents: **Clinical or Practice Management tab > Document Mgmt**
2. Click on 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**, **Details**, or **All**. Any information you choose to retain can be edited, as appropriate, before saving. Clicking **Cancel** will close the confirmation and take you back to the previous record with no changes made to the current record.

3. Click the **Page Scanner** button to open up your scanner module.
4. Place the Document in the scanner and scan it using the scanning module.
5. Select the image from the Sketch Folder and drag it to the Thumbnail panel on the right.
6. Label the document:
  - **Patient Name:** This should be the name of the handout.
  - **Item Type:** Select EDUCATIONAL HANDOUT.
  - **Item Category:** Choose a category to further classify the type of handout you are saving.
  - **Reviewed:** Place a checkmark in this box.
  - **Created by:** This will display the logged-in user's initials.
7. Click the **Save** button.

## Scanning a Patient Handout that is Saved as a PDF

1. Open the **Documents** module with the **Docs** button.
2. Click on 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**, **Details**, or **All**. Any information you choose to retain can be edited, as appropriate, before saving. Clicking **Cancel** will close the confirmation and take you back to the previous record with no changes made to the current record.

3. Click the drop-down located next to the Import Documents button.

4. Select **Import PDF**.
5. Locate and select the handout that you would like to import.
6. Label the document:
  - **Patient Name:** This should be the name of the handout.
  - **Item Type:** Select EDUCATIONAL HANDOUT.
  - **Item Category:** Choose a category to further classify the type of handout you are saving.
  - **Reviewed:** Place a checkmark in this box.
  - **Created by:** This will display the logged-in user's initials.
7. Click **Save** to save your entry. Your handout PDF is now saved in OP as an Educational Handout. To learn how to add this or other handouts to a Visit or Encounter template, click [here](#).


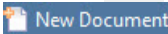
Version 20.5



**Note:** If you have a **Patient Portal** and will be ordering handouts/weblinks/PDF's for your patients to view online, you **MUST** follow the steps found in [Adding Resources using the OP Patient Portal](#). Adding handouts using the steps listed below **will not** make it possible for your patients to view them on the portal.

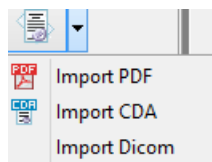
## Scanning a Patient Handout

The following steps will help you scan in handouts that you may already have in paper format in your office. As this handout will be referred to in the system for individual patients, be sure to scan in a blank copy.

1. Open the **Documents** module with the  button.
2. Click on the **New Document**  button.
3. Click the **Scanner** icon to open up your scanner module.
4. Place the document in the scanner and scan it through using the scanning module.
5. Select the image from the Sketch Folder and drag it to the **Image Thumbnail** section on the right.
6. Label the document:
  - **Patient Name:** This should be the name of the handout that you will want to look up.
  - **Item type:** Select EDUCATIONAL HANDOUT.
  - **Item Category:** Choose a category to further classify the type of handout you are saving.
  - **Reviewed:** Place a checkmark in this box.
  - **Created by:** This will display the logged-in user's initials.
7. Click **Save** to save the document.

## Scanning a Patient Handout that is Saved as a PDF

1. Open the **Documents** module with the **Docs** button.
2. Click on the **New Document** button.
3. Click the dropdown located next to the Import PDF, CDA, Dicom button.



4. Select **Import PDF**.
5. Locate and select the handout that you would like to import.
6. Label the document:
  - **Patient Name:** This should be the name of the handout that you will want to look up.

- **Item type:** Select EDUCATIONAL HANDOUT.
- **Item Category:** Choose a category to further classify the type of handout you are saving.
- **Reviewed:** Place a checkmark in this box.
- **Created by:** This will display the logged-in user's initials.

7. Click **Save** to save your entry. Your handout PDF is now saved in OP as an Educational Handout. To learn how to add this or other handouts to a visit or encounter template, click [here](#).

---