Link a Scan to Labs

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> ⚠️ OP sets **all defaults to share all information** Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 20.16

> **Path: Clinical, Practice Management tab > Document Management button**

About

Below, you'll learn how to scan paper Diagnostic Test results into OP and attach them to a Lab Requisition.
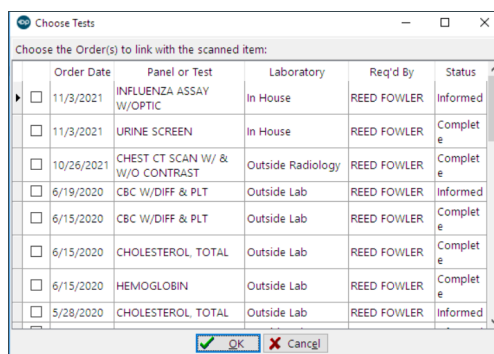
Scan and Attach the Lab Results

Open document management by following the path above.

1. Click the **New Document** button in the Manage Documents window.

> 📌 **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.

2. Scan or import the Diagnostic Test.
3. Select the image in the Sketch Panel and move to the Thumbnails panel.
4. Click into the Patient ID field and use the **Patient Search** button to search for and select the patient.
5. Click into the Item Type field and use the drop-down to select **Diagnostic Test**.
6. Click into the Item Category field and click the paperclip icon. The Choose Tests window is displayed with a list of Pending Labs.

7. Select the checkbox for the Test or Tests to match to the Document and click **OK**. If no Test matches, close the Choose Tests window and select Diagnostic Test in the Item Type and an appropriate Item Category.
8. Select the Reviewed checkbox if the ordering Physician already reviewed this scan, or leave the Reviewed checkbox deselected and select the name of the person who needs to review the Document in the Addressed to field.
9. Select the appropriate **Visibility Level** in the Privacy Level field.
10. (*If applicable*) Select the appropriate Status of Original Item in the Status of Original field.
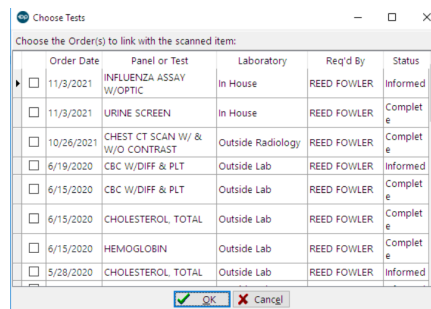
11. Click **Save**.

Version 20.15

> **Path: Clinical, Practice Management tab > Document Management button**

Overview

This page will instruct you on how to link a scan to lab orders.

Scan and Label a Diagnostic Test

1. Open document management by following the path above.
2. Click the **New Document** button in the Manage Documents window.
3. Scan or import the Diagnostic Test. The images should appear in the sketch panel.
4. Select image in the sketch panel and move to the thumbnails panel.
5. Search for the Patient in the Patient ID or Patient Name field.
6. Select Diagnostic Test in the Item Type dropdown list.
7. Click on the paperclip icon in the Item Category. If there are matching tests listed in the patient's chart, these tests will be displays in the Choose Tests pop-up window.

8. Select the test or tests to match to the lab requisition by clicking the checkbox to the left of the order date.
9. Click the **OK** button.
10. If no order matches the scanned results, select the Item Category field to open the Document Types and Categories field.
11. Select Diagnostic Test in the Document Type.
12. Select the appropriate Document Category.
13. Click the **OK** button.
14. Select the Reviewed checkbox if the ordering Physician already reviewed this scan, OR
15. Leave the Reviewed checkbox blank and select the name of the person who needs to review the diagnostic test in the Addressed to field.
16. Select the appropriate **Visibility Level** in the Privacy Level field.
17. Select the appropriate Status of Original Item in the Status of Original field (if applicable).
18. Click **Save**.