

Linking a Scan to Referrals

Last Modified on 05/19/2022 3:08 pm EDT



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 or Practice Management tab > Document Management button

About

Below, you'll learn how to link a scanned item to a Referral. Once the scanned item has been linked to the Referral, the Referral should be reviewed and marked Complete.

Scanning a Document and Attach to a Referral

1. Navigate to the **Manage Documents** window using the path above.
2. Click the **New Document** button in the Manage Documents window.



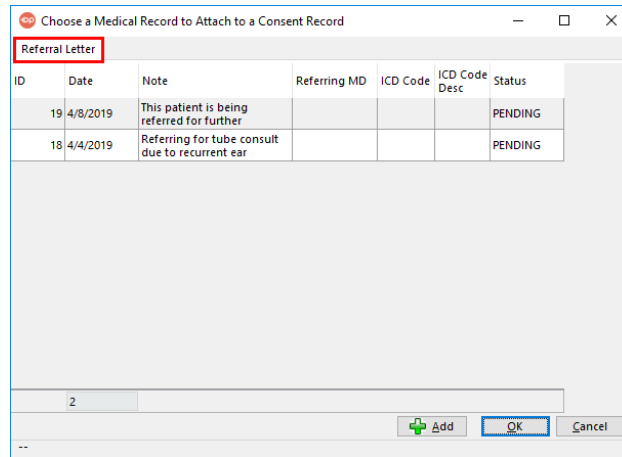
Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click **None**, **Details**, or **All**.

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.

3. Scan or import the **Document**. The image(s) are displayed in the sketch panel.
4. Move the **Referral Letter** from the Sketch Panel to the Thumbnail panel.
5. Click into the Patient ID field and use the Patient Search button to search for and select the patient.
6. Click into the Item Type field, and select **Referral Letter**.

Patient Information	
Patient ID	436
Patient name	TESTPATIENT, ALEXANDRA
Review Details	
Item type	:REFERRAL LETTER
Item category	<input type="text"/>
Reviewed?	<input type="checkbox"/>
Reviewed by	
Review date	
Privacy level	Any staff member
Notes	

7. Click into the **Item Category** field.
8. Click the **paper clip** to attach the document. The **Choose a Medical Record to Attach to a Consent Record** window is displayed.
9. In the Referral Letter tab, select the **Referral** to attach the scanned document and click the **OK** button.



Note: If the Referral does not exist, click the **Add** button on the Choose a Medical Record to Attach to a Consent Record window and complete the Referral/Care Transitions Details window. Click [here](#) for detailed information on writing a Referral.

10. (Optional) If the scanned document is confidential, select a **Privacy Level** from the drop-down menu.
11. Click the Addressed to drop-down and select the person who will review the referral.
12. Click the **Status of original** drop-down and make a selection.
13. Click the **Save** button.

Version 20.15

Path: Clinical or Practice Management tab > Document Management button

Overview

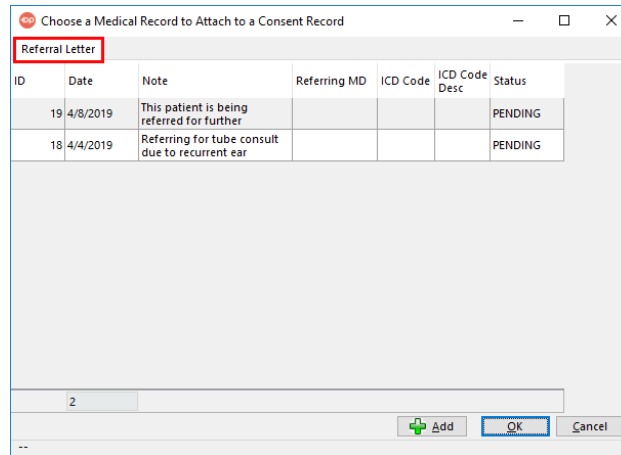
You will learn how to link a scanned item to a referral and complete the referral.


Scanning a Document and Attach to a Referral

1. Navigate to the **Manage Documents** window using the path above.
2. Click the **New Document** button in the Manage Documents window.
3. Scan or import the **Document**. The image(s) are displayed in the sketch panel.
4. Move the **Referral Letter** from the Sketch Panel to the Thumbnail panel.
5. Search for the patient using the Patient ID or Patient Name field in the document details panel.
6. Select **Referral Letter** from the **Item Type** drop-down menu.

Patient Information	
Patient ID	436
Patient name	TESTPATIENT, ALEXANDRA
Review Details	
Item type	REFERRAL LETTER
Item category	<input type="text"/>
Reviewed?	<input type="checkbox"/>
Reviewed by	<input type="text"/>
Review date	<input type="text"/>
Privacy level	Any staff member
Notes	<input type="text"/>

7. Click the **Item Category** field.
8. Click the **paper clip** to attach the document. The **Choose a Medical Record to Attach to a Consent Record** window is displayed.
9. In the Referral Letter tab, select the **Referral** to attach the scanned document and click the **OK** button.



 **Note:** If the Referral does not exist, click the **Add** button on the Choose a Medical Record to Attach to a Consent Record window and complete the Referral/Care Transitions Details window. Click [here](#) for detailed information on writing a Referral.

10. (Optional) If the scanned document is confidential, select a **Privacy Level** from the drop-down menu.
11. Select the name of the person who will review the referral from **Addressed to** drop-down menu.
12. Select **Status of original** from the drop-down menu.
13. Click the **Save** button.

Review a Scanned Referral Document

1. Click **Documents** on the Main Navigation Panel.
2. Click to highlight a patient in the Referral Letter type.
3. Click the **Patient Chart** button and select **Referrals/TOC**.
4. Click the scanner icon to the left of the referral to be reviewed.
5. The scanned document appears in the **Manage Documents** window.
6. Once the scanned document is reviewed, click the **Mark Reviewed** button then the **OK + Close** button. You are returned to the Referral / Care Transition List.
7. Click to highlight the referral you reviewed the scanned document, then click the **Edit** button.
8. Select the **Complete** radio button in the **Status** panel.
9. Click the **Save** button.