

Importing PDF Files

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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 or Practice Management tab > Document Management button

1. From the **Manage Documents** window, 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**, **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. In the top left corner of the window, click the **Import Documents** drop-down and select **Import PDF**.
3. Search for the PDF file you want to import, select it, and click the **Open** button. The imported file will be displayed in the Thumbnails panel.
4. Proceed with selecting the patient and **labeling the Document** as you normally would.
5. Click the **Save** button.

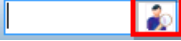


Note: Only one PDF image may be imported at a time. When importing a PDF you will get a message at the top of the database image panel stating the page limit has been reached.

Version 20.15

Path: Clinical or Practice Management tab > Document Management button

1. From the **Manage Documents** window, click the **New Document** button.
2. In the Acquire image & documents section in the top left corner of the window, click the **Import Documents** drop-down menu and select **Import PDF**.
3. Search for the PDF file you want to import, select it, and click the **Open** button. The imported file will be displayed in the thumbnails panel.
4. Enter the following information into the document details panel:

- **Patient Name or ID:** Search: Click the **Search** button  , the Patient Directory is displayed. Select the **Patient** that will have the PDF attached.
- **Item Type:** Identify what part of the medical record the document belongs in (ex: chart, insurance, referral letter, etc).
- **Item Category:** Specifies where PDF this document belongs in the database.
- **Created by:** Initials of the staff member that scanned in the document.
- **Reviewed?:** Determines whether the document is displayed in the addresses scanned inbox to review at a later date.
- **Privacy Level:** Limits access to those staff members with the corresponding **visibility privileges**.
- **Status of Original:** The location or status of the original document.

5. Click the **Save** button.



Note: Only one PDF image may be imported at a time. When importing a PDF you will get a message at the top of the database image panel stating the page limit has been reached.

