Search for Documents

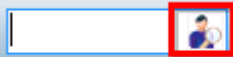Last Modified on 04/21/2020 2:35 pm EDT

Version 14.19

> **Path: Clinical or Practice Management tab > Document Management button > Search button**

Overview

The Manage Documents window contains document search functionality. When the user clicks the **Search** button, the Search for Documents window is displayed. This window allows the user to search for documents using one or more search criteria options.

Search for Documents

1. Navigate to the Search for Documents window by following the path above.
2. Enter search criteria. The following are options for searching for scanned documents:

   - **Patient**: Enter a patient name or click the Patient search to view all documents saved to the patient record.

     a. Click on the Patient search icon [ ] at the top of the window. The Patient Directory will open.
     b. Enter your search criteria.
     c. Once you have found the patient you are looking for, click on the patient name.

   - **ID/Note Contains**: Enter a search term to find documents with a specific Note entered.
   - **Item Type**: Click on the down arrow button [ ] to the right of the field to select the type of item, e.g . *CHART* or *DIAGNOSTIC TEST*, from the *drop-down* menu.
   - **Item category**: Click on the **ellipses** button [···] to open the Document Types and Categories window. Locate the Document Type in the list on the left and click once to select. The Document Categories available for that item type will appear in the box on the right. Click to select a category, then click the **OK** button.
   - **Staff Addressee**: To search for a document using the staff name/ID of the staff member who entered the item:

      a. Click on the **ellipses** button next to the Staff Addressee field. The Staff Name Lookup window opens.

      b. Click on the desired name in the grid and click OK, or follow the instructions for searching for a specific staff member.

- **Dates**: Click to search for a document using the date the document was scanned in:
  - Select either All (Dates), Today, Past Week, Past Month
  - Select a set date range by setting the start date and end date
- **Correspondent**: Type the name of a correspondent to search and view all documents saved with the selection.
- **Not reviewed only**: Select the checkbox to view documents that have not been marked as reviewed.
- **Include EFR**: Select the checkbox to view documents that have a privacy level higher than Any staff member.

3. Once you have entered the desired criteria, click the **Search** button. A list of documents are displayed in the grid. The thumbnail button located in the preview panel of the window can be used to view a thumbnail of the selected scanned item.

4. To open a document:

      a. Highlight the document you want to open.

      b. Click the **Use Selected Document** button located at the bottom of the window.

Version 14.10

The Manage Documents window contains document search functionality.

When the user clicks the **Search** button the OP software displays the Search for Documents window.
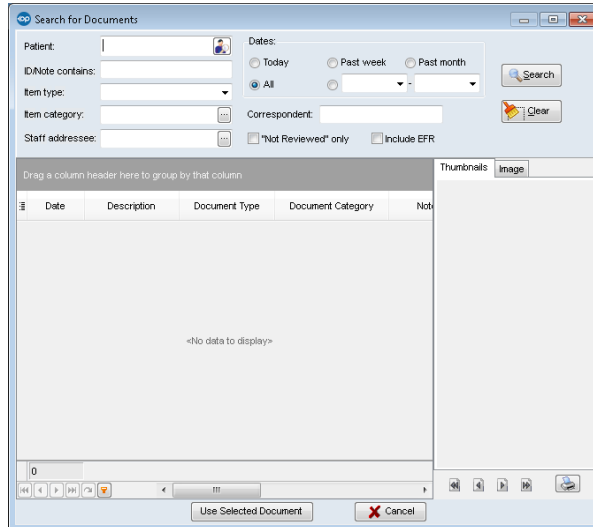
The Search for Documents window allows the end user to search by:

- Patient
- Contents of ID/Note
- Item Type
- Item Category
- Staff Addressee
- Date range
- Correspondent
- Not reviewed items only
- EFR included

The OP software displays the thumbnails and images associated with each search result in a panel to the right of the Search Results grid. **Thumbnail** and **Image** tabs allow the end user to click back and forth between them.

The end user can also select a document in the Search Results grid and print it from the search window by clicking the **Print** button. These enhancements also allow the end user to search for and select a document to edit.