Manage Documents

Last Modified on 12/28/2022 8:51 am EST

Version 21.0

> This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.
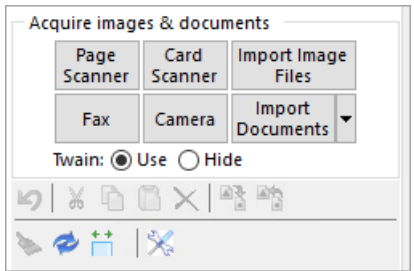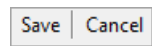
About Manage Documents

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

The Manage Documents window contains the functions to review and manage documents that were scanned or imported into OP.
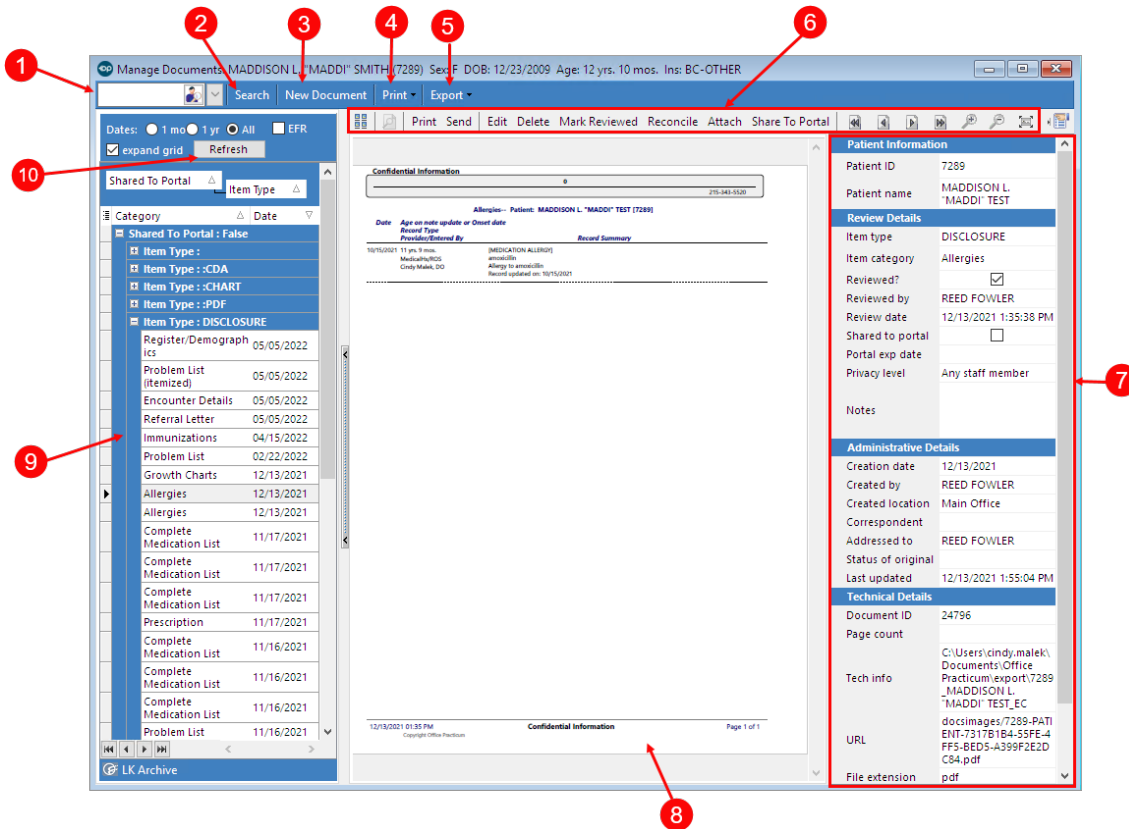
Manage Documents Map

Number	Section	Description
1	Patient Finder	The Patient Finder is used to search for and select the patient whose documents the user wants to view. This is the same Patient Finder used throughout OP. Click the drop-down to the right of the Patient Directory button to see a picklist of the last 5 charts that were closed.

2	Search Records Button	This button is used to launch the **Search for Documents** window where a user can enter search criteria to locate a document that had been scanned or imported into OP.
3	New Document Button	This button is used to input a new document into OP.
4	Print Button	This button displays a drop-down menu with several print options.
5	Export Button	This button displays a drop-down menu with several export options.
6	Document Controls Toolbar	This toolbar provides viewing and navigation functionality for the selected document as well as operational buttons.
7	Document Details Panel	This panel displays the details for the selected document. **Save** and **Cancel** buttons are available in this panel when the user is in edit mode.
8	Preview Panel	This panel displays a preview of the document selected in the Document List panel.
9	Document List Panel	This panel lists all documents that have been scanned or imported into OP and associated with the selected patient. Here, you can also find the Dates, EFR, and expand grid options.
10	Refresh Button	The **Refresh** button allows users to refresh the screen after entering their Emergency Override credentials.
Other Window Functions	*(Not included in Map above)*	When the user clicks the **New Document** button, the Document List Panel is replaced with options for acquiring and saving a new document into OP. Other options are also made available in the window: **Image acquisition options and toolbar.** Displays buttons used for scanning and importing documents into OP and other image management functions such as copy, paste, delete, etc.

Editing Tools (also available when Edit button is used): Displays an editing toolbar that includes buttons used to resize, rotate, zoom, crop, highlight, annotate, sign, etc.

Function buttons: The Save and Cancel buttons are used to save a new or edited document or Cancel and close the window without saving.


Version 20.18

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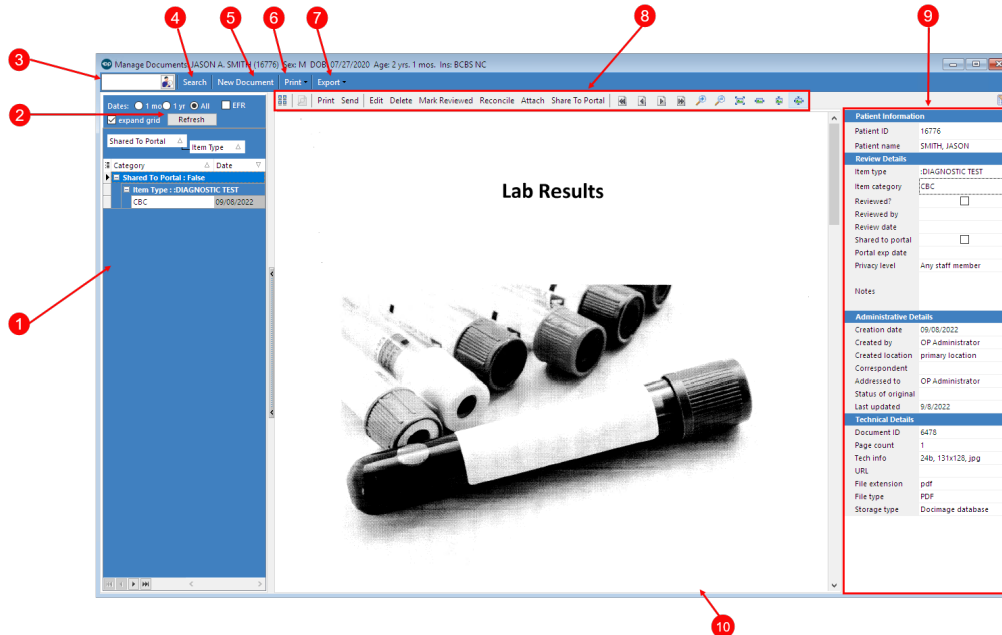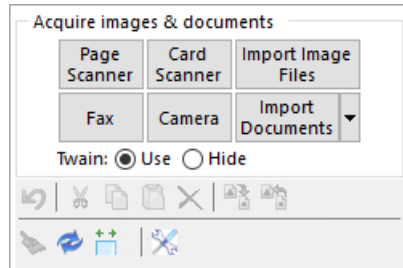

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- **Function buttons**: The Save and Cancel buttons are used to save a new or edited document or Cancel and close the window without saving.