

# Review a Patient's Documents

Last Modified on 12/14/2021 10:12 am EST

Version 20.15

## Overview

A patient's scanned documents can be viewed from several areas of OP.

### View Documents from the Patient Chart

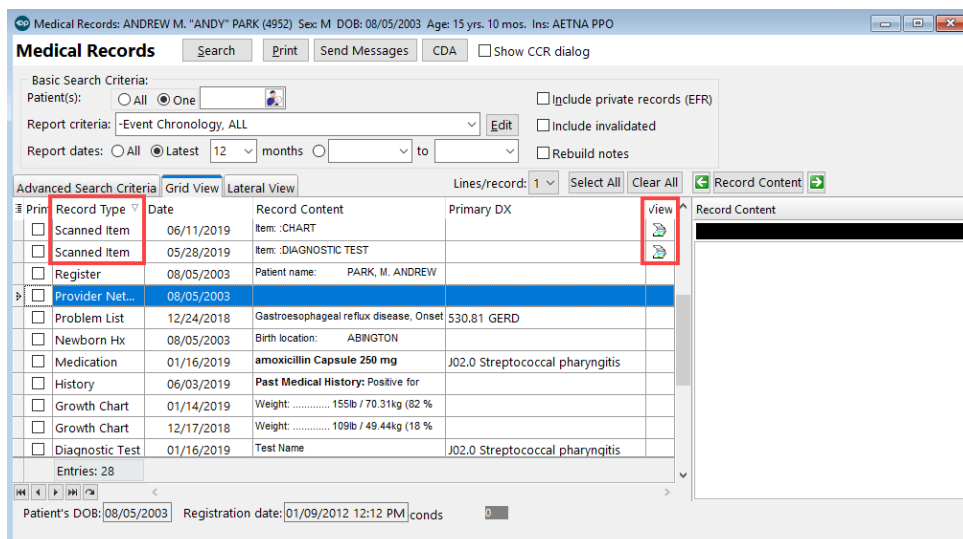
1. Navigate to the patient chart: **Clinical, Practice Management, or Billing tab > Patient Chart button.**
2. Search for and select the patient.
3. Click **Documents** in the Window Navigation Panel. The patient's scanned items are displayed.
4. (Optional) Use the **Dates** radio button options to view 1 month, 1 year, or All scans. All is selected, by default.

### View Documents from the Search for Documents Window

1. Navigate to the Search for Documents window: **Clinical or Practice Management tab > Document Management button > Search button.**
2. Search for and select the patient.
3. (Optional) Use the **Dates** radio button options to view scans dated today, for the past week, for the past month, All, or for a custom date range. All is selected, by default.
4. Click the **Search** button. The patient's scanned items are displayed.
5. Click to select the item to view. A thumbnail can be viewed by clicking the **Thumbnails** tab located in the Preview panel.

### View Documents From the Medical Records

1. Navigate to Medical Records: **Clinical tab > Medical Records button.**
2. Click **OK.**
3. If not already selected, search for and select the patient.
4. Select a **Report Criteria** option.
5. (Optional) Use the **Report Dates** radio button options to view All records, the latest specific number of months' records, or records for a custom date range. **Latest 12 months** is selected, by default.
6. Click the **Search** button. Scanned items are displayed with a scanner icon in the View column.
7. To view only scanned items, hover over the Record Type column header, click the Filter icon, and select Scanned items from the drop-down menu.



Medical Records: ANDREW M. "ANDY" PARK (4952) Sex: M DOB: 08/05/2003 Age: 15 yrs. 10 mos. Ins: AETNA PPO

**Medical Records** Search Print Send Messages CDA Show CCR dialog

Basic Search Criteria:  
 Patient(s):  All  One   
 Report criteria: -Event Chronology, ALL   Include private records (EFR)  
 include invalidated  
 Report dates:  All  Latest 12 months  to   Rebuild notes



Advanced Search Criteria Grid View Lateral View Lines/record: 1 Select All Clear All Record Content

Print	Record Type	Date	Record Content	Primary DX	View
<input type="checkbox"/>	Scanned Item	06/11/2019	Item: CHART		<input type="button" value="view"/>
<input type="checkbox"/>	Scanned Item	05/28/2019	Item: DIAGNOSTIC TEST		<input type="button" value="view"/>
<input type="checkbox"/>	Register	08/05/2003	Patient name: PARK, M. ANDREW		
<input type="checkbox"/>	Provider Net...	08/05/2003			
<input type="checkbox"/>	Problem List	12/24/2018	Gastroesophageal reflux disease, Onset	530.81 GERD	
<input type="checkbox"/>	Newborn Hx	08/05/2003	Birth location: ABINGTON		
<input type="checkbox"/>	Medication	01/16/2019	amoxicillin Capsule 250 mg	J02.0 Streptococcal pharyngitis	
<input type="checkbox"/>	History	06/03/2019	Past Medical History: Positive for		
<input type="checkbox"/>	Growth Chart	01/14/2019	Weight: ..... 155lb / 70.31kg (82 %		
<input type="checkbox"/>	Growth Chart	12/17/2018	Weight: ..... 109lb / 49.44kg (18 %		
<input type="checkbox"/>	Diagnostic Test	01/16/2019	Test Name	J02.0 Streptococcal pharyngitis	

Entries: 28

Patient's DOB: 08/05/2003 Registration date: 01/09/2012 12:12 PMconds

## View Documents from an Unfinalized Well or Encounter Visit Note

1. Navigate to the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button**
2. Search for and select the patient.
3. Click **Encounters** or **Well Visits**, select the **Note** and click the **Open Note** button.
4. Click **Documents** to view all documents saved to the patient record.
5. To view documents attached to a referral.
  - a. Click **Referrals/TOC**.
  - b. Select the scanner icon  to view the document attached to the referral.
6. To view documents attached to a diagnostic test.
  - a. Click **Diag Tests**.
  - b. Select the scanner icon , in the Orders/Results panel, to view the document attached to the diagnostic test.

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

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