# Clinical Work: Documents

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Version 20.18

> 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 Clinical Work: Documents

> **Path: Main Navigation Panel > Documents (Clinical group)**

The Clinical Work window contains the Documents tab. The Documents tab displays documents that have not yet been reviewed by the assigned user. Documents are displayed based on the selections made in the Scope field. Selected documents in this window can be reviewed and edited in the Manage Documents window.
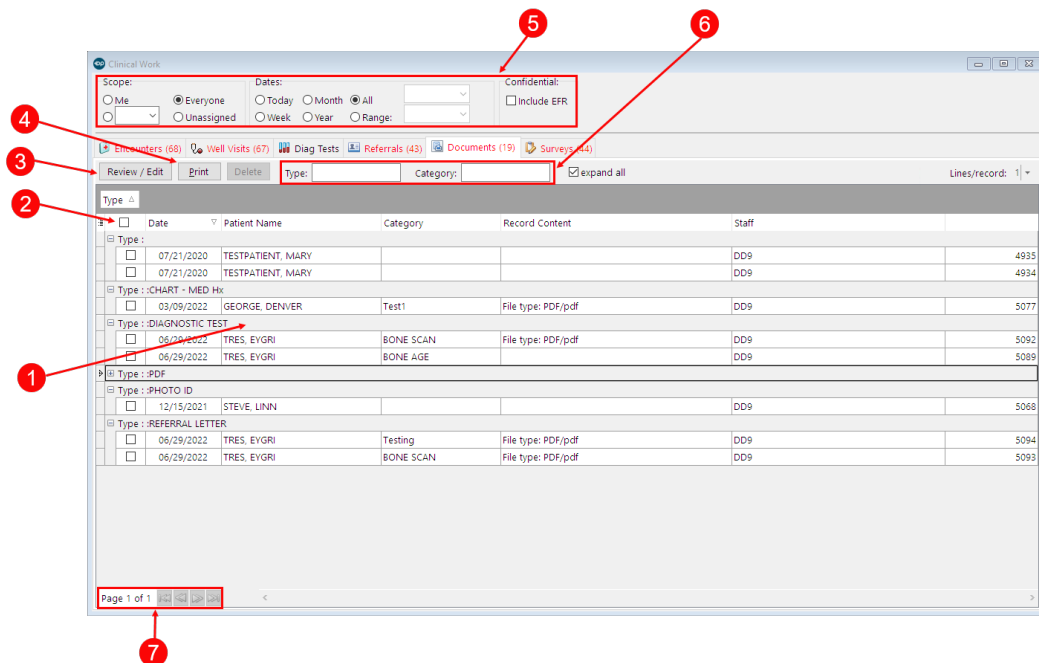


## Clinical Work: Documents Map

| Number | Section | Description |
|--------|---------|-------------|
| 1 | Document List grid | The Documents List grid displays documents based on the selections made in the Scope field. |
| 2 | Select All checkbox | The **Select All** checkbox selects the checkbox for all documents. |
| 3 | Review/Edit button | The **Review/Edit** button opens the Manage Documents window for the selected documents in the Document list grid. Doing this will allow you to review or edit a document. |
| 4 | Print button | The **Print** button prints the Document record list displayed in the Document List grid. |

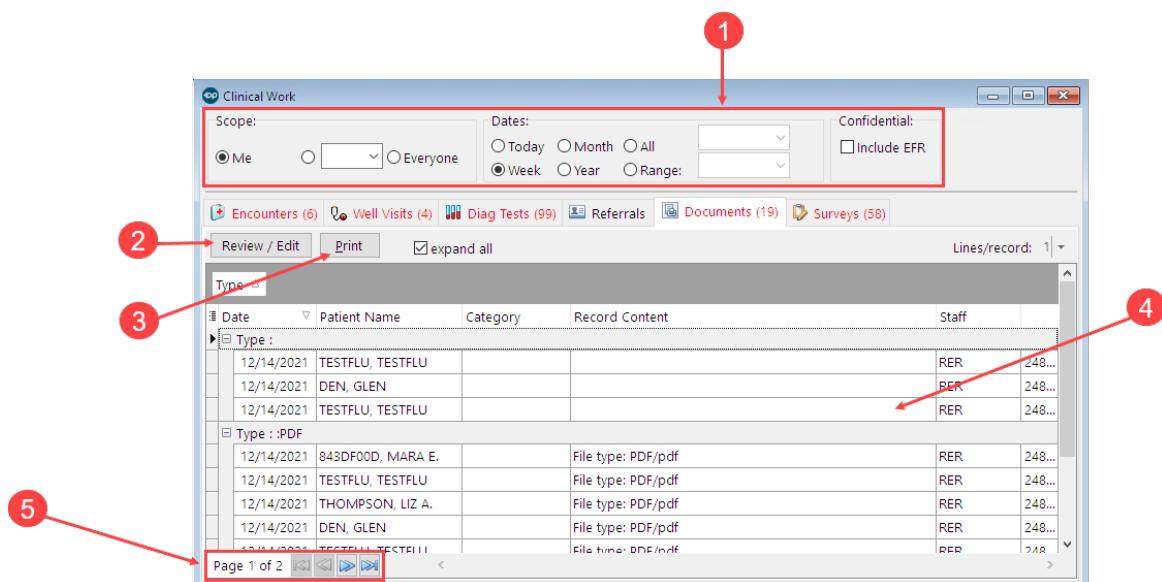| 5 | Scope | • **Scope** radio buttons are used to determine whose Documents are displayed in the grid. The selection of the **Unassigned** radio button will allow the Practice to easily search for documents with no assigned staff member. Users must have **Messaging_Allow_View_All_Messages** permission in their profile to see the Scope field.<br>• **Dates** radio buttons are used to determine the list of Documents that are displayed in the grid.<br>• The **Include EFR** checkbox can be selected to include confidential Documents in the grid. |
|---|---|---|
| 6 | Type/Category fields | The **Type** and **Category** free-type fields will help users narrow their search for specific documents.<br>Users must press Tab on their keyboard to start the search process. |
| 7 | Pagination icons | The pagination icons are used to move to pages within the selected window. |

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## About Clinical Work: Documents

**Main Navigation Panel > Documents (Clinical group)**

The Clinical Work window contains the Documents tab. The Documents tab displays documents that have not yet been reviewed by the assigned user. Documents are displayed based on the selections made in the Scope field. Selected documents in this window can be reviewed and edited in the Manage Documents window.

## Clinical Work: Documents Map

| Number | Section | Description |
|---|---|---|

| 1 | Scope | The Scope field narrows the parameters for the displayed tab. The **Dates** group will allow you to narrow the list of documents displayed in the Document List grid. Users must have **Messaging_Allow_View_All_Messages** permission in their profile to see the Scope field. |
|---|---|---|
| 2 | Review/Edit button | The Review/Edit button opens the Manage Documents window for the selected documents in the Document list grid. Doing this will allow you to review or edit a document. |
| 3 | Print button | The Print button prints the Document record list displayed in the Document List grid. |
| 4 | Document List grid | The Documents List grid displays documents based upon the selections made in the Scope field. |
| 5 | Pagination icons | The pagination icons are used to move to pages within the selected window. |