Document Management Item Types and Reference

Last Modified on 06/26/2020 2:10 pm EDT

Version 20.4

What Item Type Should I Select?

Document Type	OP Item Type	Notes
Consent form to use for entire practice	Consent FRM TMPL	Available to select from the Consent Library.
Documents to be displayed on the portal such as: Vaccines Summary, School Forms	Forms *If it is a statement, it is displayed under Item Type: Statements	Any document that has the Item Type as Forms is displayed on the patient portal.
Handout to give to patients	Educational Handout	Available to select from Assess/Plan and to add to a template.
Image you would like to be able to annotate for a specific patient.	Graphic	Available to select from the Graphic tab while writing a note.
Insurance Card	Insurance	
Patient Photo	Photo ID	Displayed in the patient chart.
Documents transmitted from patient medical record	Disclosure	When documents are transmitted by printing, Direct Messaging or fax, a copy of these items is placed in the Item Type of Disclosure.

Click **here** for more information on linking a scanned item to a Diagnostic Test.

Click **here** for more information on linking a scanned item to a Referral.