

Scan and Label a New Document

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OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 20.16

About

Below, you'll learn how to scan a new Document into OP, label the Document to save it to a patient's chart, and send a Document to a patient's active portal account. Documents can only be sent to the portal by Practice staff who have an associated user account on the IntelliChart Practice Portal.

Scan a New Document

1. Navigate to the Manage Documents window:
 - **Clinical or Practice Management tab > Document Mgmt button**
 - **Clinical, Practice Management, or Billing tab > Patient Chart button > Documents**
2. Click the **New Document** button.

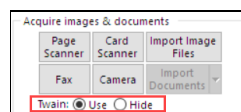


Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click **None**, **Details**, or **All**. Any information you choose to retain can be edited, as appropriate, before saving. Clicking **Cancel** will close the confirmation and take you back to the previous record with no changes made to the current record.

3. Place the document onto the document scanner.
4. Click the **Page Scanner** button. The scanner activates and the Scan Options window is displayed.



Note: The Twain interface must be enabled by selecting the **Use** radio button in the Twain Use/Hide field below the device icon buttons.





5. Click the **Scan** button. The document is scanned.
6. Repeat these steps with the reverse side of the page, if needed. This is only necessary if your scanner doesn't have a duplex scan option. The image(s) are displayed as thumbnails in the Sketch Panel.
7. Select the **Image(s)** in the Sketch panel.
8. Drag and drop the **Page(s)** to the Document Panel.
9. Proceed to the next section to **Label the Document** and save it to the patient's chart.

Label the Document

1. Click into the **Patient ID** field, and click the **Patient Search** button  to search for and select the patient.

Patient Information	
Patient ID	
Patient name	

2. Select the Item Type and Item Category.
 - a. Click into the **Item Type** field and select the Item Type.
 - b. Click into the **Item Category** field and use the Category button to select the appropriate category.

Review Details	
Item type	
Item category	 



Note: Item Category is required when sharing a document to the Patient Portal. If it is left blank, you'll be prevented from sharing the Document to the portal.

3. Select the **Reviewed?** checkbox if the item does not need to be reviewed by anyone else. If you want to send the Document to another user to review, leave the Reviewed checkbox blank and select a user in the **Addressed to** field.
4. *(If needed)* Complete the following steps to send the Document to the patient's active portal account:
 - a. Select the **Shared to Portal** checkbox.
 - b. Click in the **Portal Exp Date** field and enter or edit the default date, as needed.
 - c. Proceed with the remaining steps.
5. Select the appropriate **Privacy level** for the document.
6. *(Optional)* Enter notes in the **Notes** field. Notes entered here are not sent to the portal.
7. *(Optional)* Select the appropriate **Status of original** option.
8. Click the **Save** button.



Note: If the steps to share the document to the portal (step 5) were completed, once the **Save** button is clicked, the document is sent to the portal as a PDF and is available until the expiration date. If the portal user attempts to view the document after it has expired, they receive a message advising them to contact the Practice.

Version 20.15

Overview

This article teaches you how to scan a new document into OP, label the document to save it to a patient's chart, and send a document to a patient's active portal account. Documents can only be sent to the portal by practice staff who have an associated user account on the IntelliChart Practice Portal.

Scanning a New Document

1. Navigate to the Manage Documents window:
 - **Clinical or Practice Management tab > Document Mgmt button**
 - **Clinical, Practice Management, or Billing tab > Patient Chart button > Documents**
2. Click the **New Document** button.
3. Place the document onto the document scanner.
4. Click the **Page Scanner** button. **Note:** The Twain interface must be enabled by selecting the **Use** radio button in the Twain Use/Hide field below the device icon buttons. The scanner activates and the Scan Options window is displayed.
5. Click the **Scan** button. The document is scanned.
6. Repeat these steps with reverse side of the page (if needed, some scanners have a duplex scan option). The image(s) are displayed in the Sketch panel.

7. Select the **Image(s)** in the Sketch panel.
8. Drag the **Page(s)** to the Thumbnail panel.

Labeling the Document

1. In the Document Details Panel, under Patient Information, search for and select the **Patient** in the Patient ID field.
2. Under Review Details, select the appropriate **Item Type**.
3. Select the appropriate **Item Category**.
4. Select the **Reviewed** checkbox if the item does not need to be reviewed by anyone else, or leave it blank, and ensure that the **Addressed To** field is populated with the intended reviewers name.
5. (*If needed*) Complete the following steps to send the document to the patient's active portal account:
 - a. Select the **Shared to Portal** checkbox.
 - b. Click in the **Portal Exp Date** field and enter or edit the default date, as needed.
 - c. Proceed with the remaining steps.
6. Select the appropriate **Privacy level** for the document.
7. (Optional) Enter notes in the **Notes** field. Notes entered here are not sent to the portal.
8. Select the appropriate **Status (optional)** of Original option.
9. Click the **Save** button.

Note: If the steps to share the document to the portal (step 5) were completed, once the Save button is clicked, the document is sent to the portal as a PDF and is available until the expiration date. If the portal user attempts to view the document after it has expired, they receive a message advising them to contact the practice.