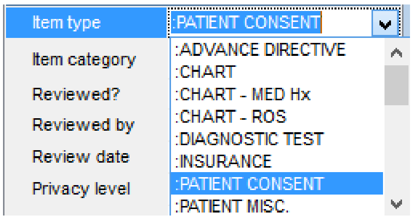
Scanning Signed Consents

Last Modified on 07/21/2023 11:16 am EDT

Version 14.19

To scan a consent form that has already been signed into OP 14, follow these steps:

1. Click on the **Clinical Tab**.
2. Select the **Document Mgmt** button.
3. Click the **New Document** button.
4. Place the signed consent form on the scanner.
5. Click the **Scanner** icon in the Acquisition panel. The Consent form image will appear in the Sketch Panel.
6. Drag the image from the sketch panel to the thumbnails panel.
7. Search for and select your patient using the patient search field.
8. On the document properties pane, look for the Review Details field group. Click in the dropdown in the Item Type field and select **Patient Consent**.

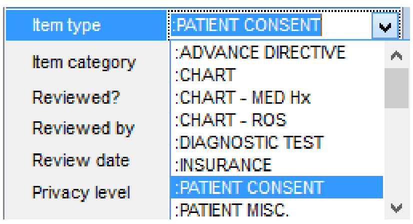


9. Click the Category field. Two buttons appear.
10. Click the **Document** ( ) button. The Document Types and Categories window appears.
11. Select a Document Category.
12. Click the **OK** button to close the Document Types and Categories window.
13. Click the **Reviewed** checkbox if the item was reviewed.
14. Set the appropriate privacy level. In the case of scanning a consent form, all staff should be able to view it, so you would want to select Any staff member. See **Privacy Constraints (Visibility Settings)** for more information.
15. Click the **Save** button.

Version 14.10

To scan a consent form that has already been signed into OP 14, follow these steps:

1. Click the **Docs** button on the Smart Toolbar. The Manage Documents window opens.
2. Click the **New Document** button.
3. Place the signed consent form on the scanner.
4. Click the **Scanner** icon in the Acquisition panel. The Consent form image will appear in the Sketch Panel.
5. Drag the image from the sketch panel to the thumbnails panel.
6. Search for and select your patient using the patient search field.
7. On the document properties pane, look for the Review Details field group. Click in the dropdown in the Item Type field and select **Patient Consent**.



8. Click the Category field. Two buttons appear.

9. Click the **Document** ( ) button. The Document Types and Categories window appears.
10. Select a Document Category.
11. Click the **OK** button to close the Document Types and Categories window.
12. Click the **Reviewed** checkbox if the item was reviewed.
13. Set the appropriate privacy level. In the case of scanning a consent form, all staff should be able to view it, so you would want to select Any staff member. See **Privacy Constraints (Visibility Settings)** for more information.
14. Click the **Save** button.